

Configuring a Cloudfax Account

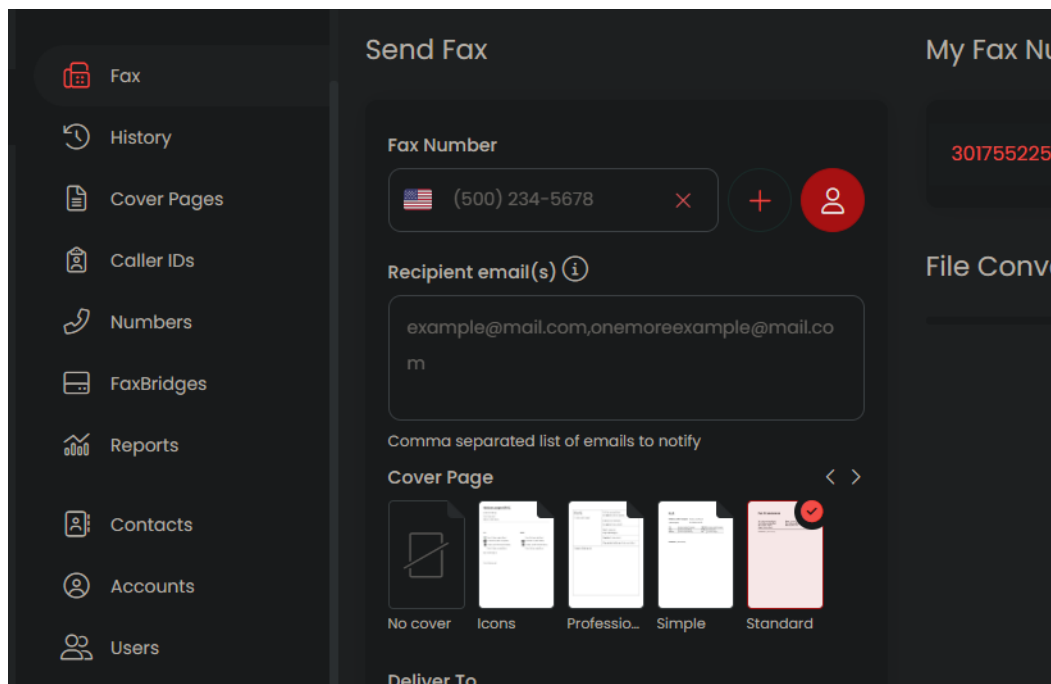
Curtis Hunter - 2025-07-28 - [Comments \(0\)](#) - [CloudFax](#)

Configuring a CloudFax Account

This guide will show the entire process for creating a company's account in the CloudFax interface at <https://atlantech.documo.com/signin>.

Also, <https://efax.atlantech.net> can be used.

Once you're signed in (check the file named **CloudFax (eFax) Account Credentials** within the **Technical Support Team -> General -> Files** for the Support login credentials), you'll want to scroll down the left-hand menu and select **Accounts**:



Next, at the top-right of the next screen, select **Create**:

Atlantech

Search for subaccount...

Search...

Create

Export

Shows: 1 - 50 of 51 by 50 <

Name ^	Type	Details	Created At
1345 - Oxford House, Inc. 3202003311	subaccount	0 subaccounts 1 user(s)	12/14/2020, 5:45 AM

Next, you'll want to enter the account name, which should be the customer CID, followed by the company name. Leave everything else in the form as the default:

CREATE SUBACCOUNT

SUBACCOUNT NAME

8011 - Crawford Test

Ex. "Winterfell Armory"

Account Type

SUBACCOUNT

Products access

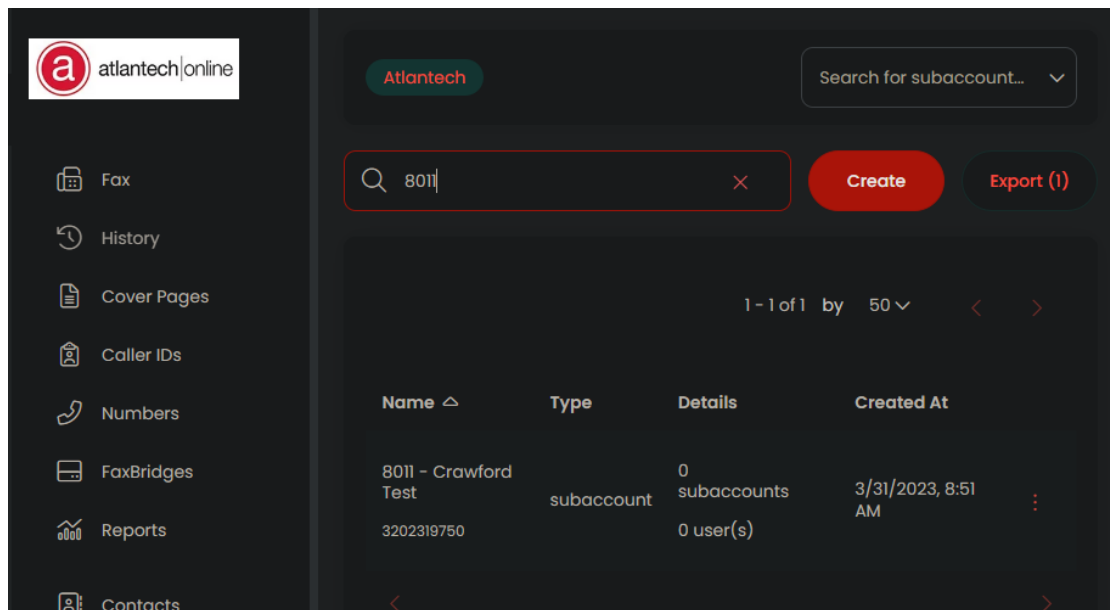
Fax

Drive

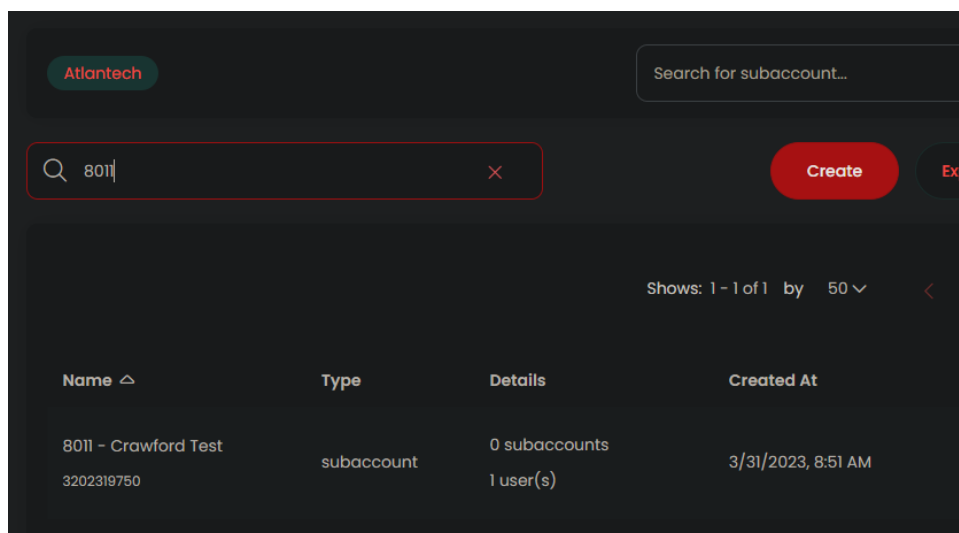
Create

3202237852

After you select **Create**, select **Continue**. Next, you'll want to search for the new customer in the search box:



At the top of the screen, select **Go Back** to head back to the **Accounts** screen, then search for the new account again:



Next, select the dots on the right-hand side, then select **Manage**:

The screenshot shows the Atlantech online dashboard. On the left is a sidebar with navigation links: Fax, History, Cover Pages, Caller IDs, Numbers, FaxBridges, Reports, Contacts, Accounts, Users, and API Keys. The main area displays the 'Atlantech' header and a search bar. Below the search bar, there's a table with one entry: '8011 - Crawford Test' (subaccount) with 0 subaccounts and 0 user(s). A dropdown menu is open for this entry, showing options: View Events, Settings, Manage (highlighted), Branding, and Delete.

Next, we'll need to add the user(s) for the company that will be using the account. You will need the user(s)'s email address which will count as their username for their individual login credentials. At the Team (basic) service level, customers can have up to 5 email addresses. Higher levels provide more email addresses of course:

Atlantech Cloud Fax Plans



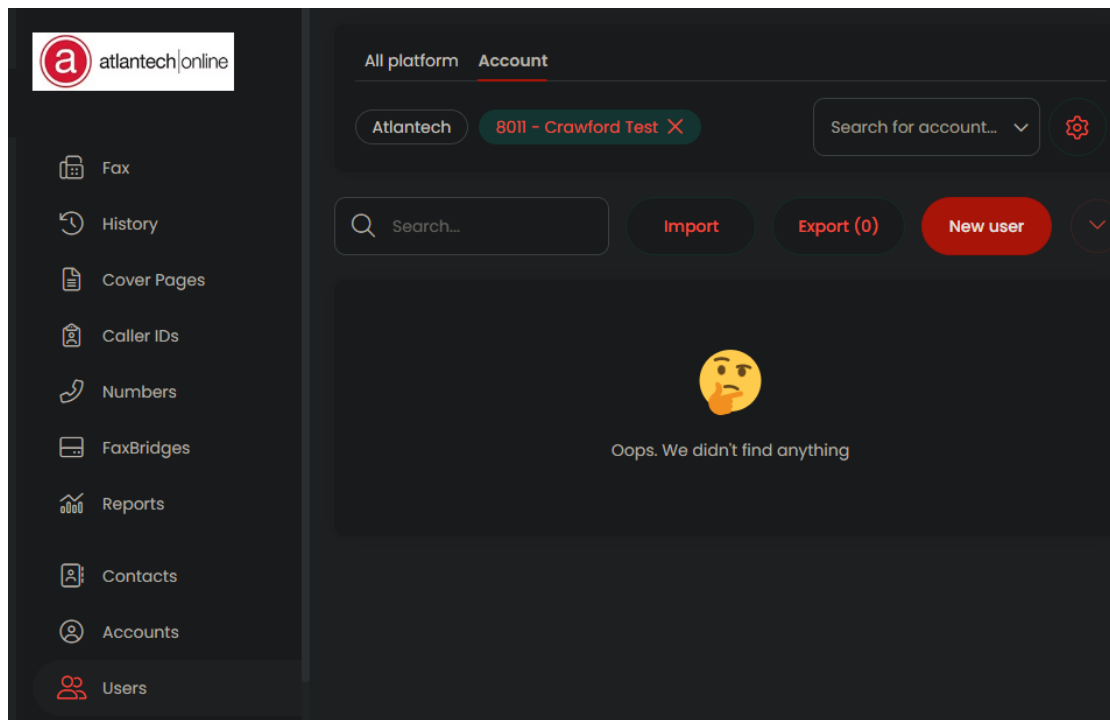
	Cost	Addtl Fax #	Page Count Information			End User Information		
			Includes	Avg. / Bus Day*	Add'l / Page	Includes	Each Addtl EU	API Access
Team	\$25 (MRC)	\$4 (MRC)	500	~ 22	\$0.08	5	\$5 (MRC)	N/A
Business	\$50 (MRC)	\$3 (MRC)	1,000	~ 45	\$0.06	15	\$4 (MRC)	Y
Infinity	\$99 (MRC)	\$2 (MRC)	2,500	~ 113	\$0.04	50	\$2 (MRC)	Y

All service plans include: \$0 setup fee, (1) Toll Free Fax Number, Email to Fax Service and Admin Interface

Note: Email to Fax Service count towards the page count

*Calculated by dividing included # of pages by average number of 22 Business Days / Month.

On the next page, you'll want to select the **New user** button:



On the **New user** page, you have two tabs that provide different routes to user creation:

Create User - Create the user and create a password for the account. You would then manually send the user their credentials once the account was created

The screenshot shows a modal window titled 'New 8011 - Crawford Test's user'. It has two tabs: 'Create User' (selected) and 'Invite User'. The 'Create User' tab contains four input fields: 'First Name', 'Last Name', 'Email', and 'Phone'. The 'Phone' field includes a country code dropdown (currently showing the US flag) and a text input with '(201) 555-0123'. To the right of the 'Phone' field is a 'User Role' dropdown menu currently set to 'User'. There is a close button (X) in the top right corner of the modal.

Invite User - Enter the user's email address and role (user or admin), then select **Send**. The user will get an email that will allow them to set their own password

New 8011 - Crawford Test's user

Create User Invite User

Email

Email

User Role

User

Products access

Fax Drive

Cancel Send

The account is not fully configured at this point in the process, so it is better to use the **Create User** feature. However, when adding users to an already existing and configured company account, the **Invite User** feature may be the better option. This can be left to the admin's preference.

On the **Create User** page, you'll need to fill in the following info:

- **First Name**
- **Last Name**
- **Email**
- **User Role** (User - standard user with access to only their account, Admm - advanced user with access to all accounts within the company account)

Phone number is optional and is generally not used.

New 8011 - Crawford Test's user

Create User Invite User

First Name

FAQ

Last Name

Test

Email

knh1634@gmail.com

Phone

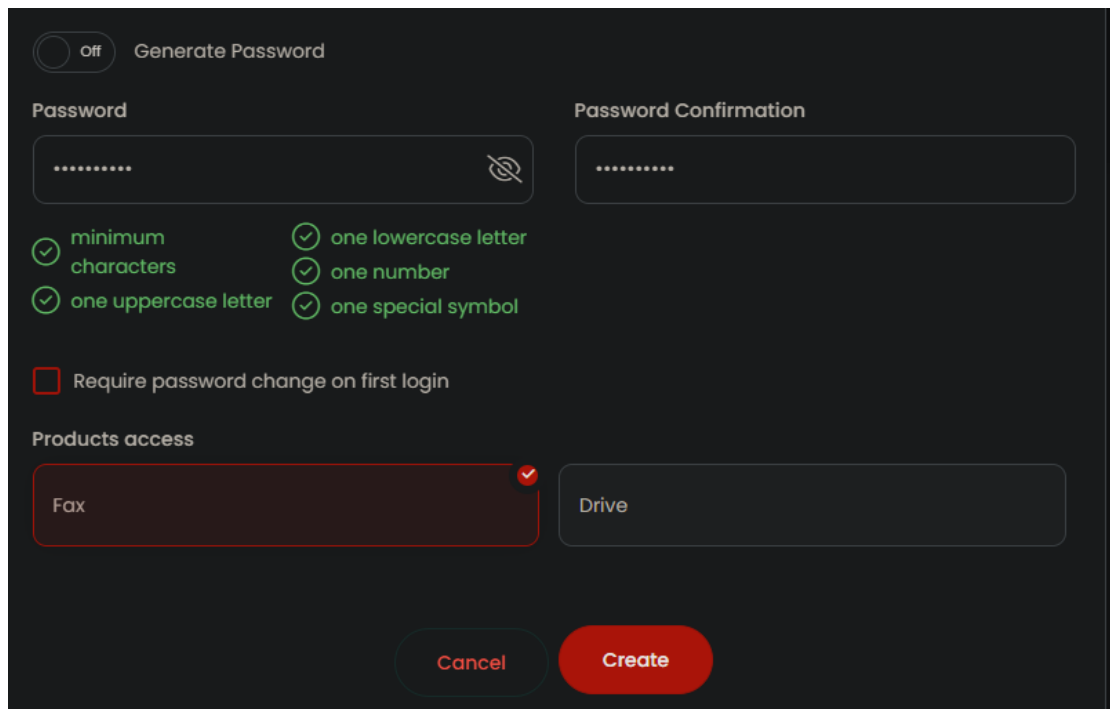
User Role

(201) 555-0123 User

Next, you can either have the system generate a password or create one on your own. If you create your own,

you'll need to observe the following guidelines:

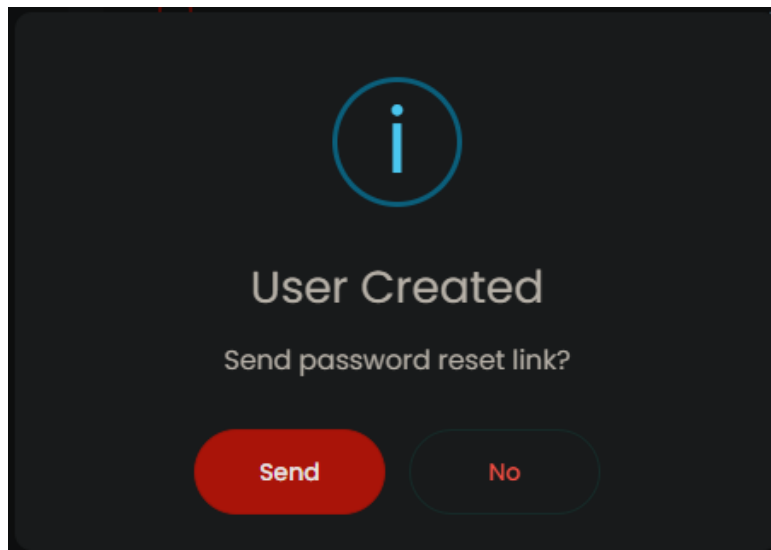
- **8 characters minimum**
- **1 uppercase letter**
- **1 lowercase letter**
- **1 number**
- **1 special symbol**



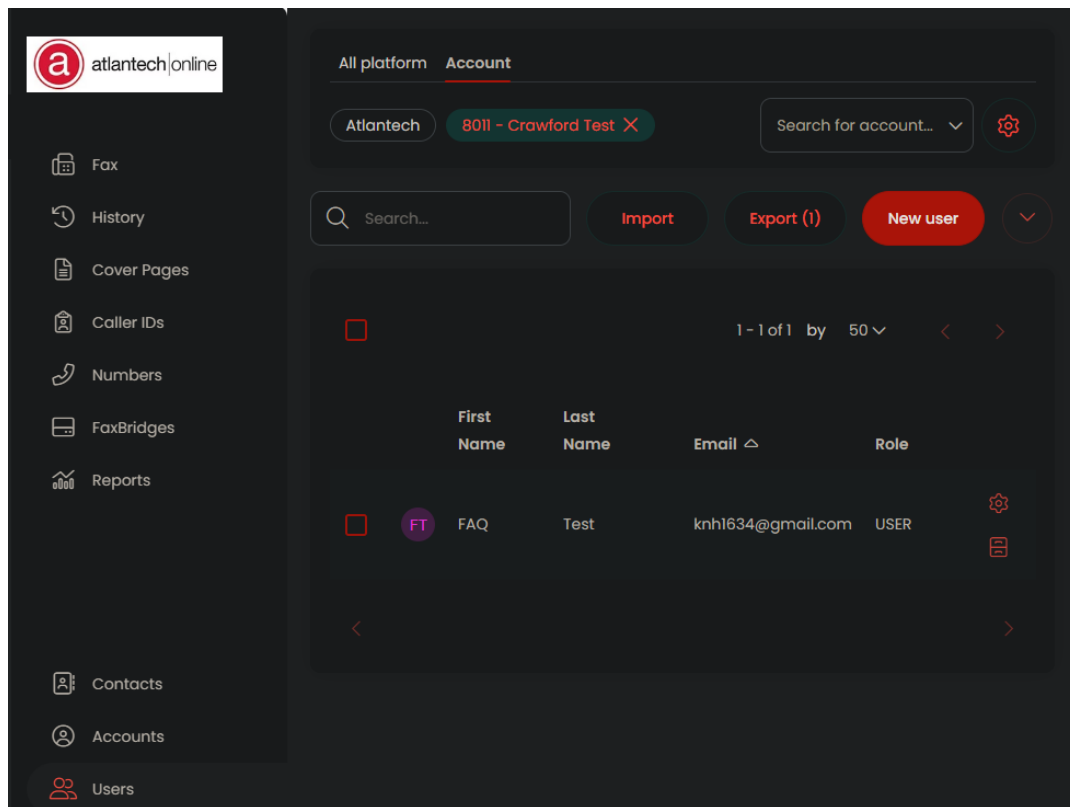
The screenshot shows a user creation form with a dark background. At the top, there is a toggle switch labeled "Off" and the text "Generate Password". Below this are two input fields: "Password" and "Password Confirmation", both containing masked text (dots). To the right of the "Password" field is an eye icon. Below the input fields are five green checkmarks indicating password requirements: "minimum characters", "one lowercase letter", "one uppercase letter", "one number", and "one special symbol". Below these is a checkbox labeled "Require password change on first login" which is currently unchecked. Under the heading "Products access", there are two dropdown menus. The first dropdown is open, showing "Fax" as the selected option, with a red checkmark icon to its right. The second dropdown shows "Drive". At the bottom of the form are two buttons: "Cancel" and "Create".

You can also require the user to change their password when they first log in. **Products Access** can be left at its default value. With everything filled in, select **Create**.

A pop-up will appear. If you wish to allow the user to set their own password, select **Send**. Otherwise, select **No**.

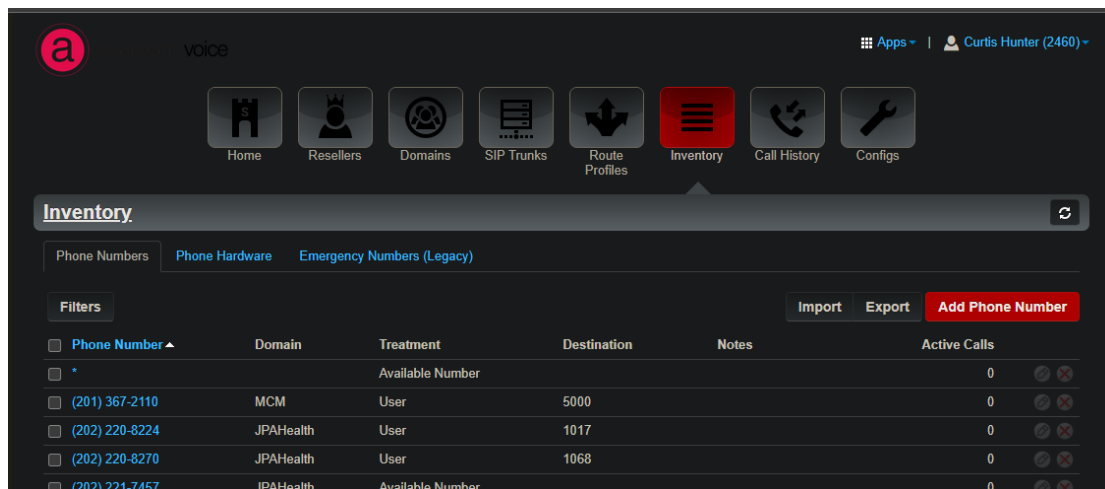


The user will be added to the account:



Next, we'll need to add the fax number to the company account for the users. First, we'll need to remove the number from Netsapiens:

Log into the Netsapiens portal at <https://core1-rkv.uc.atlantech.net/portal> then go to the **Inventory** screen for all domains:



In this example, the user has requested to use (240) 641-6812 as their fax number. As such, you'll want to select **Filters** to search for it:

Phone Numbers Filters

Phone number

Domain

Treatment

Destination

Status

[Clear Filters](#)

 voice

Apps | Curtis Hunter (2450)

Home

Resellers

Domains

SIP Trunks

Route Profiles

Inventory

Call History

Configs

Inventory

Phone Numbers

Phone Hardware

Emergency Numbers (Legacy)

Filters

Number: 2406416812

Import

Export

Add Phone Number

☐ Phone Number	Domain	Treatment	Destination	Notes	Active Calls
☐ (240) 641-6812	Crawford-Test	Available Number		formerly in 2418_TS_Testing group in Broadcloud	0

Next, select the red 'X' button on the right-hand side, then select **Yes** to delete the number:

 voice

Apps | Curtis Hunter (2450)

Home

Resellers

Domains

SIP Trunks

Route Profiles

Inventory

Call History

Configs

Inventory

Phone Numbers

Phone Hardware

Emergency Numbers (Legacy)

Filters

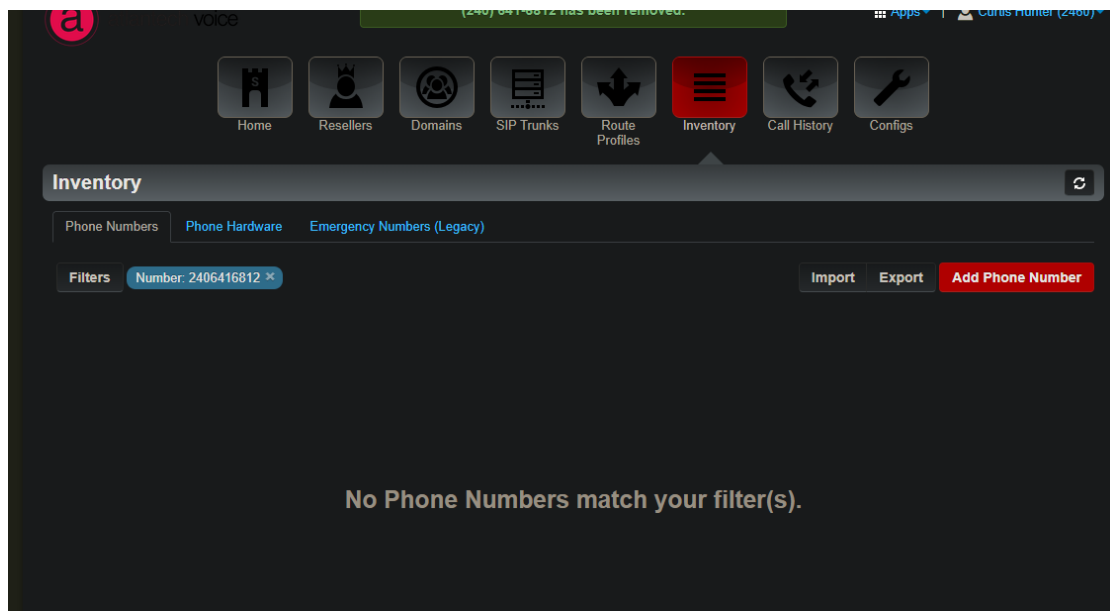
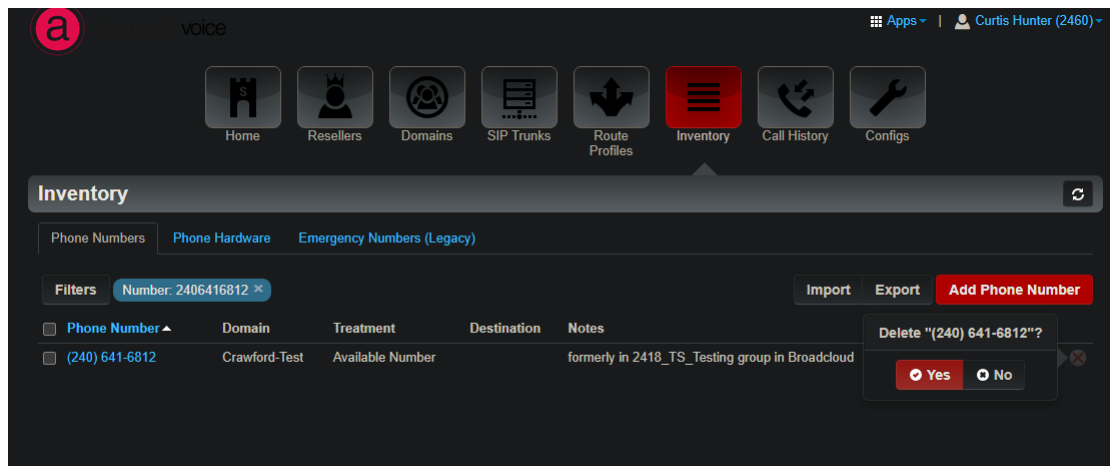
Number: 2406416812

Import

Export

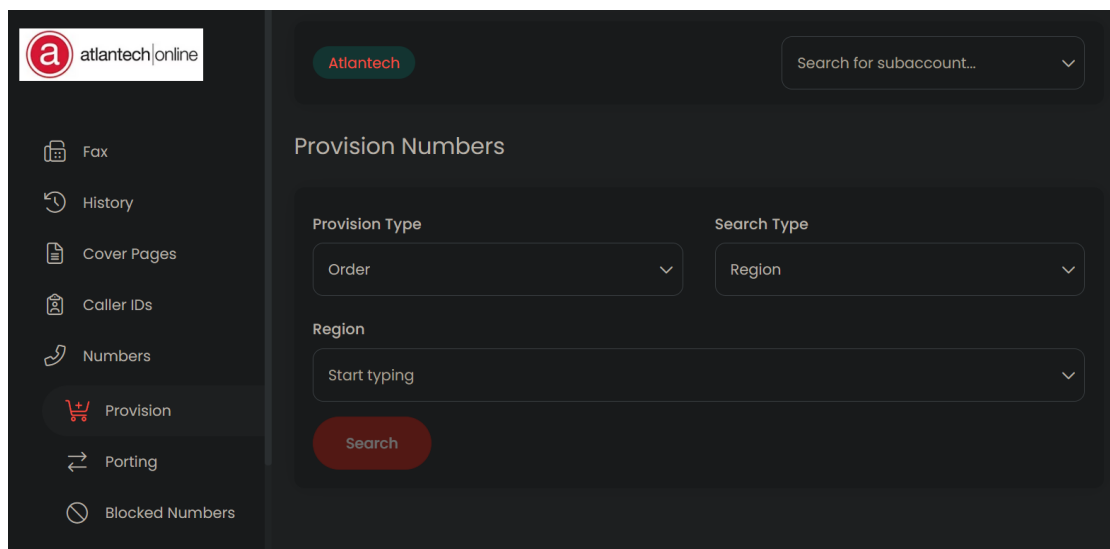
Add Phone Number

☐ Phone Number	Domain	Treatment	Destination	Notes	Active Calls	Delete
☐ (240) 641-6812	Crawford-Test	Available Number		formerly in 2418_TS_Testing group in Broadcloud	0	



With this done, you next will need to ask Voice/certain TS technicians to move the number to Documo (our CloudFax provider). You will know this is completed when you call the number from a cell phone and you don't see it in the **Call History** for the domain in Netsapiens.

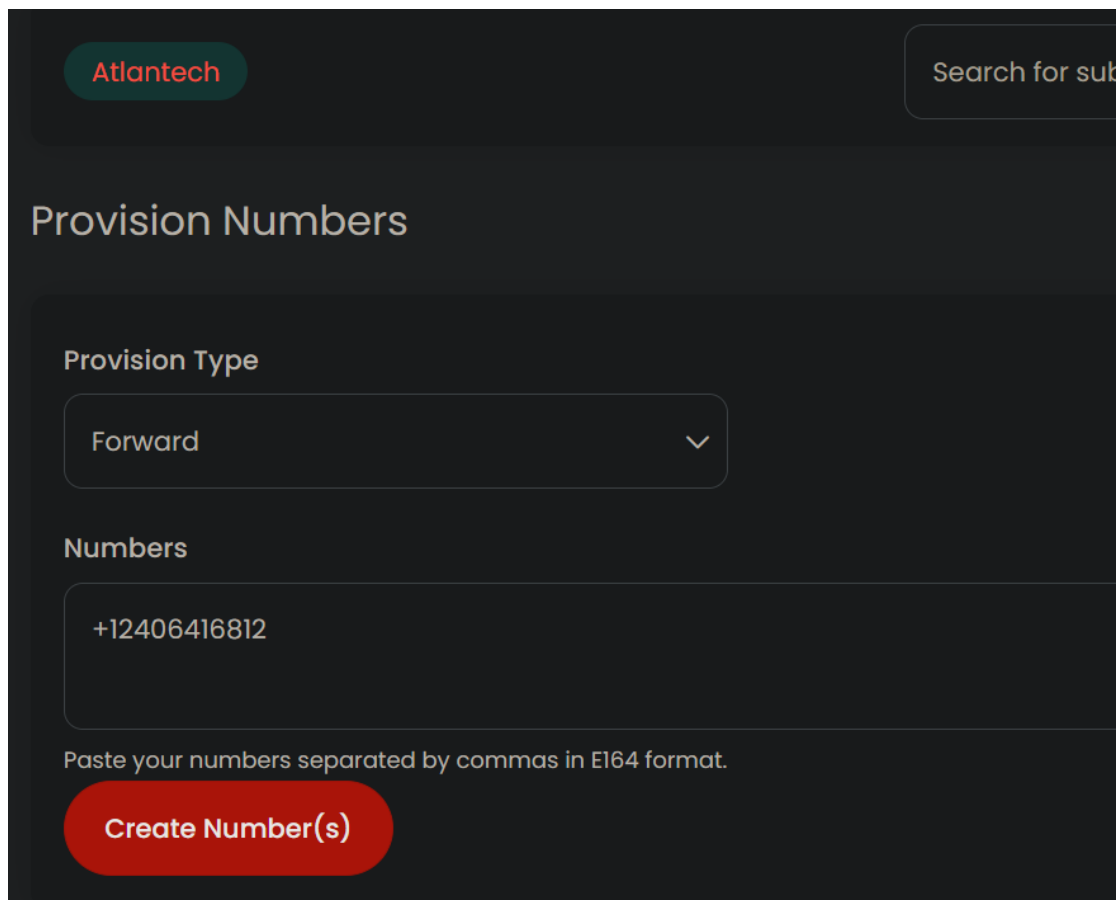
Next, back in the CloudFax interface, you'll want to go to the **Numbers** area, then select **Provision**:



Next, set the **Provision Type** to **Forward**, then enter the number you want to add to CloudFax with "+1" in front with no dashes (aka E164 format).

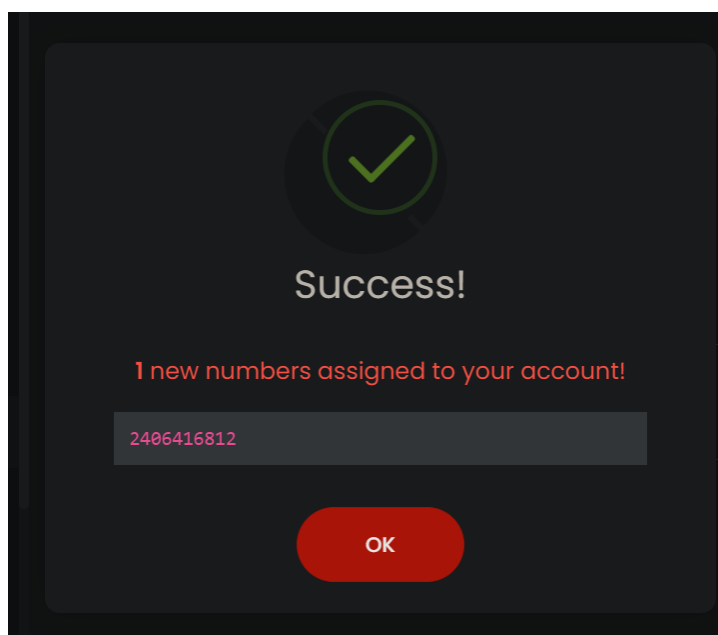
Note: if you wish to add multiple numbers, list them separated by commas.

Once that's done, select **Create Numbers**:



The screenshot shows the 'Provision Numbers' interface in the Atlantech dashboard. At the top left is the 'Atlantech' logo, and at the top right is a search bar labeled 'Search for sub...'. The main heading is 'Provision Numbers'. Below this, there is a 'Provision Type' section with a dropdown menu currently set to 'Forward'. Underneath is a 'Numbers' section with a text input field containing '+12406416812'. Below the input field is a hint: 'Paste your numbers separated by commas in E164 format.' At the bottom of the form is a large red button labeled 'Create Number(s)'.

If the number is in the correct format, you'll get this message:



Select **OK**, then go back to the **Numbers** screen. Search for the number that was just added, then select the gear icon on the right:

 atlantech|online

Fax

History

Cover Pages

Caller IDs

Numbers

Provision

Porting

Blocked Numbers

All platformAccount

Atlantech

Search for subaccount...

2406416812

1 - 1 of 1 by 30

	Number	Users	Account	
	2406416812	Atlantech 2201931731	+	Export

On the next page, next to the **Manager** field, select **Change**, then select **Continue** on the pop-up:

← Number settings

Users

Number

2406416812

Release

Manager

Atlantech

Change

Tags

Search tag...

+

Webhooks

Max of webhook configurations per number

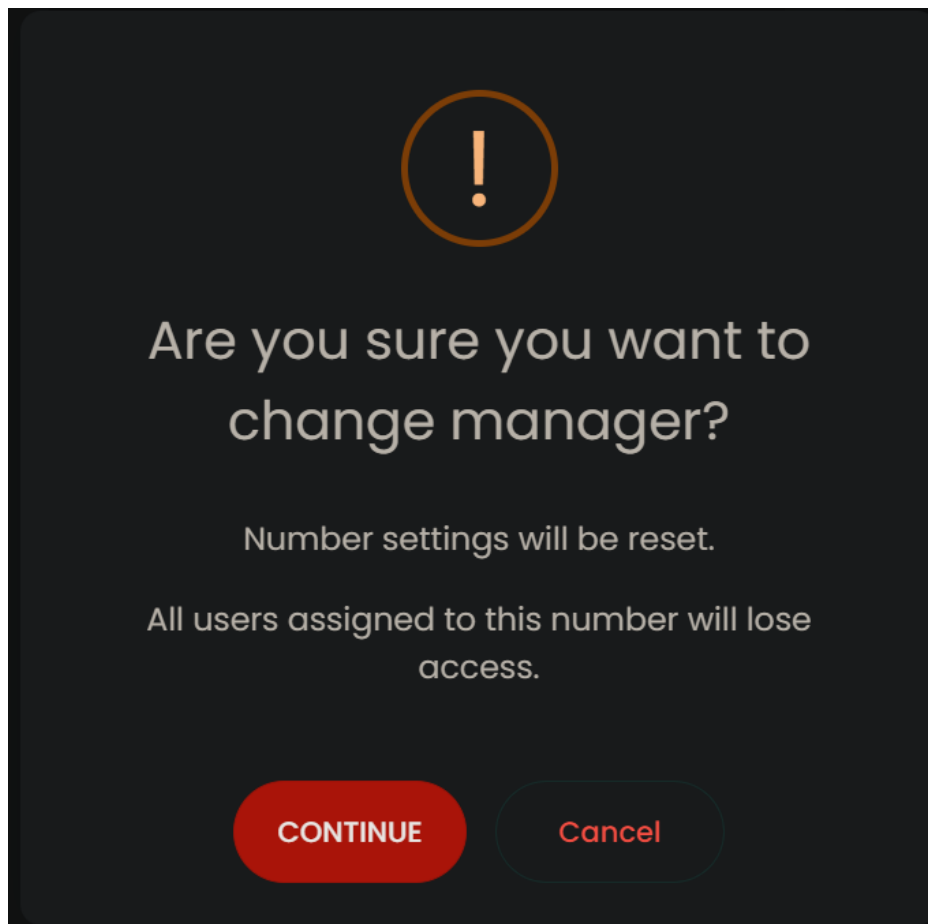
Add New Webhook

Name	URL
Oops. We didn't find anything	

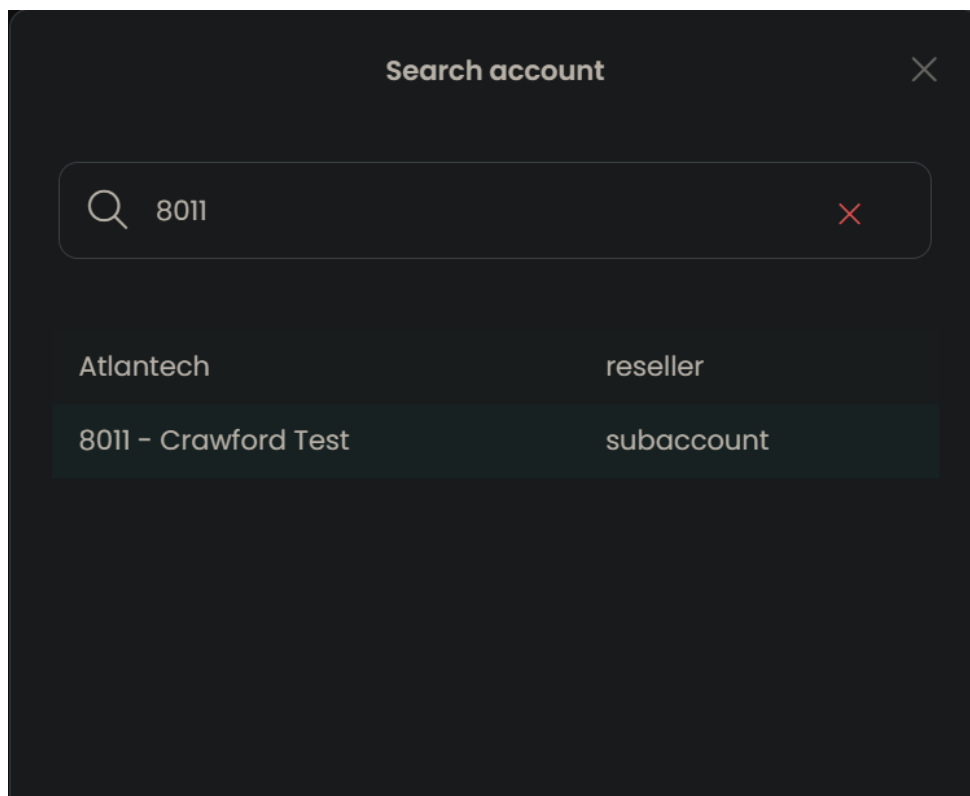
by 15

FTP/SFTP Sync

DISABLED



Search for the customer account, then select it from the list:



The **Manager** field will update to list the customer account. Next, under **Users**, select **Add**:

←

Number settings

Number

2406416812

Release

Manager

8011 – Crawford Test

Change

Tags

Search tag...

+

Users

+ ADD

Webhooks

Max of webhook configurations per number

Add New Webhook

Name	URL
------	-----

Select the checkbox next to the user that was created previously, then select **Add 1 users**:

Search Users

Search...

☒

FT

knh1634@gmail.com

FAQ Test

1 – 1 of 1

by

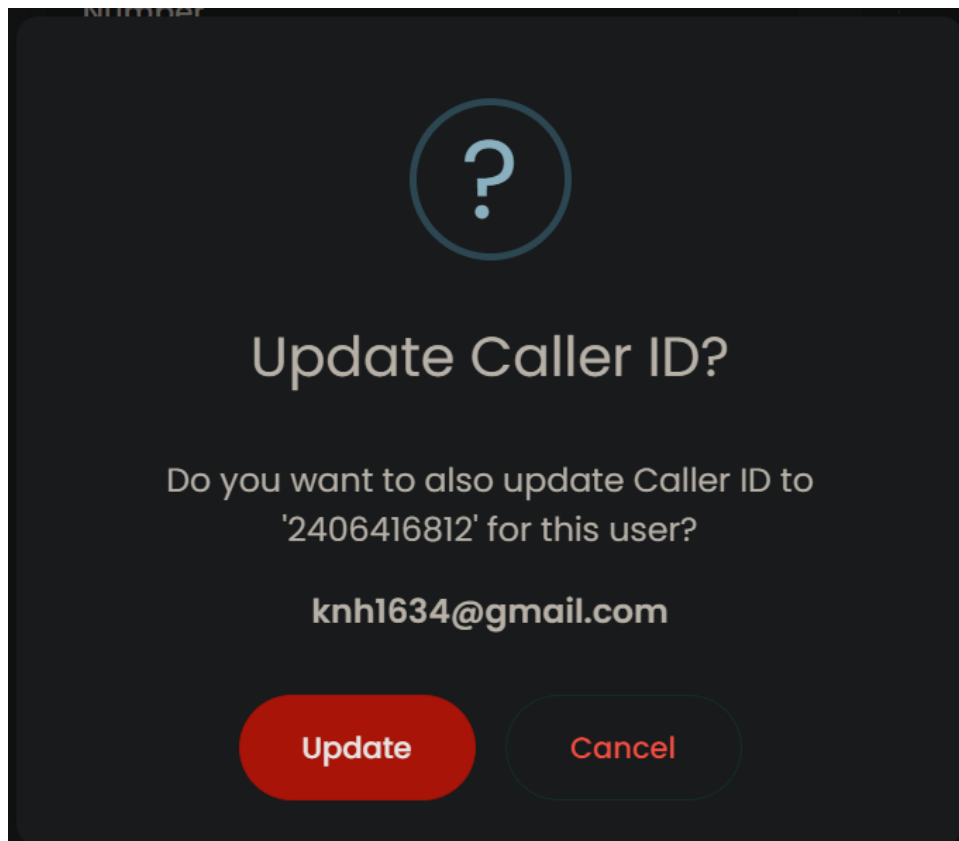
10

<

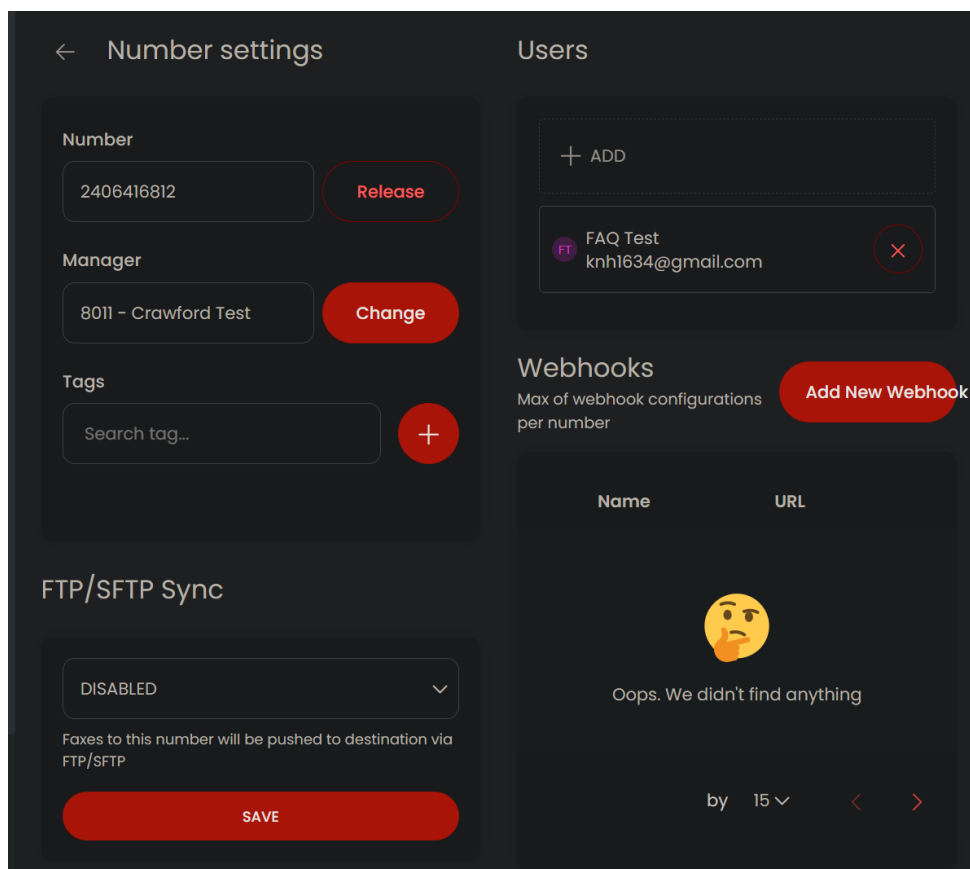
>

Add 1 users

Select **Update** on the **Update Caller ID?** prompt:



With everything done, make sure you select Save to confirm the changes:



FTP/SFTP Sync

DISABLED

Faxes to this number will be pushed to destination via FTP/SFTP

SAVE

Name

URL



Oops. We didn't find anything

by 15

✓ Saved

Next, you'll want to make sure that the Caller ID has been updated for the customer's account (this will allow subsequent users to inherit the Caller ID by default):

Go back to the **Accounts** page, search for the customer's account, then select **Settings**:

atlantech|online

Fax

History

Cover Pages

Caller IDs

Numbers

FaxBridges

Reports

Contacts

Accounts

Users

API Keys

Atlantech

Search for subaccount...

8011

Create

Export (1)

1 - 1 of 1 by 50

Name	Type	Details	Created At
8011 - Crawford Test 3202319750	subaccount	0 subaccounts 1 user(s)	3/31/2023, 8:51 AM

View Events

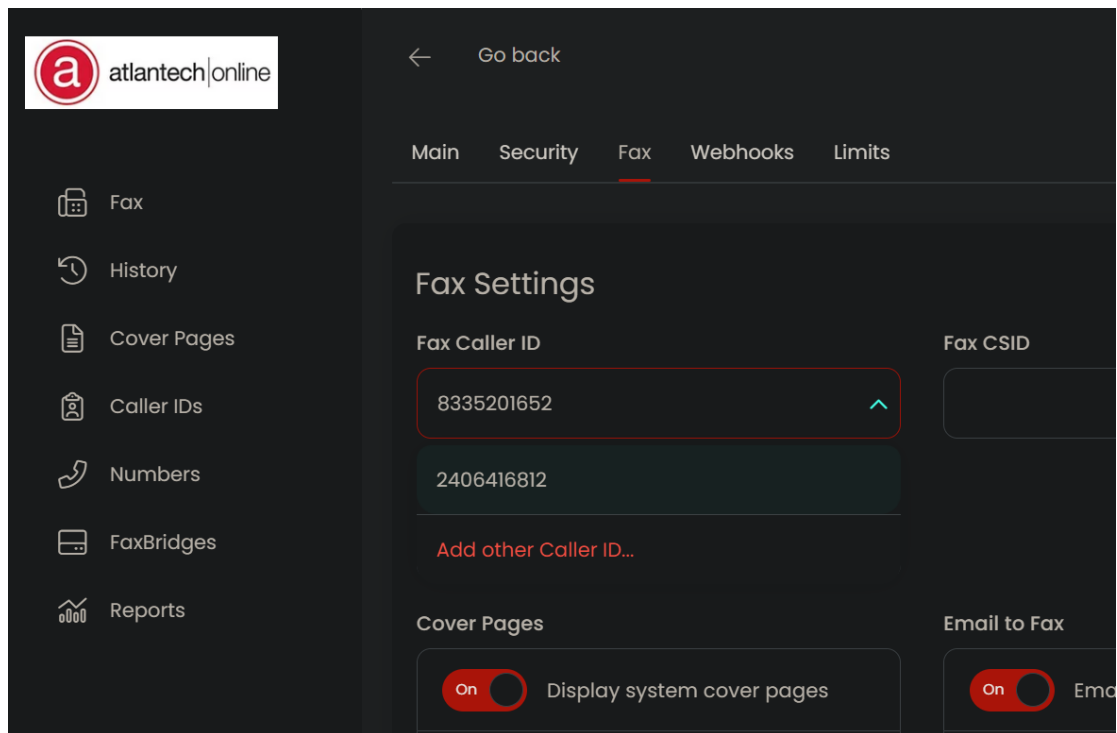
Settings

Manage

Branding

Delete

Next, go to the **Fax** tab, then select the **Fax Caller ID** dropdown. Select the added number:



atlantech|online

Go back

Main Security **Fax** Webhooks Limits

Fax Settings

Fax Caller ID

8335201652

Fax CSID

2406416812

Add other Caller ID...

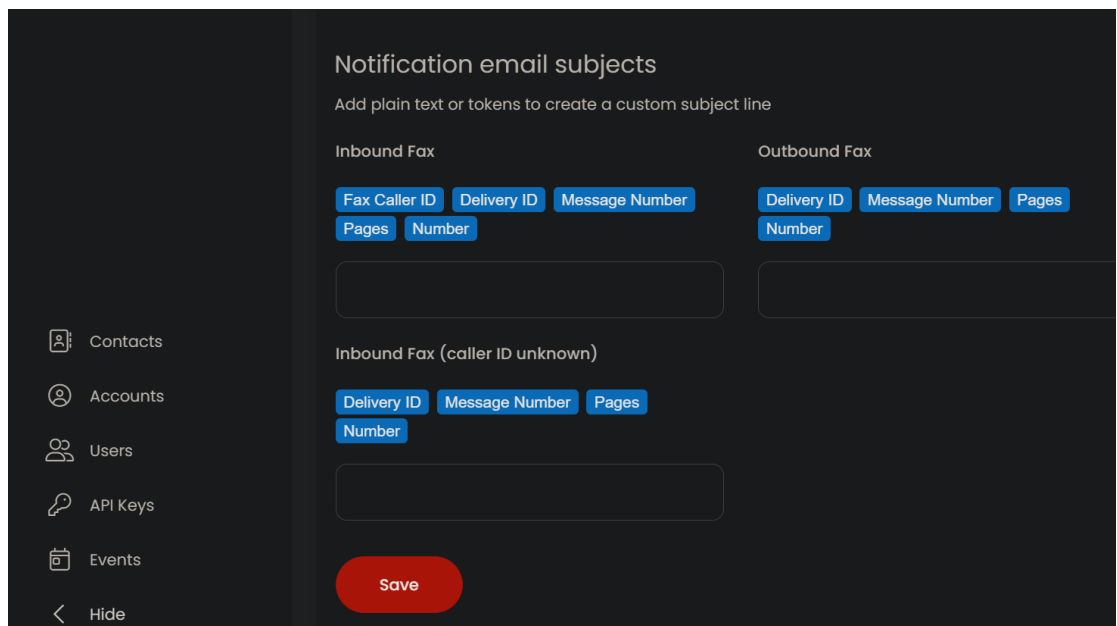
Cover Pages

On Display system cover pages

Email to Fax

On

Then, way down at the bottom of the screen, select **Save**:



Notification email subjects

Add plain text or tokens to create a custom subject line

Inbound Fax

Fax Caller ID Delivery ID Message Number Pages Number

Outbound Fax

Delivery ID Message Number Pages Number

Inbound Fax (caller ID unknown)

Delivery ID Message Number Pages Number

Save

Finally, you'll want to add the metadata to the customer account. On the **Main** tab, scroll down until you see the Metadata area on the right-hand side:

Subaccount Name

8011 - Crawford Test

This is what will display on invoices

Timezone

America/New_York

Storage Region

USA

Email(s) to receive notifications about suppression requests

Metadata

No custom fields yet

Add Metadata Field

Select the **Add Metadata Field** button. In the **Key** field, enter "ServiceID" and in the **Value** field, enter the actual service ID for the Cloudfax service in Rev.io for the customer. Once this is completed, select the **Save** button at the bottom of the screen to save the change:

Storage Region

USA

Email(s) to receive notifications about suppression requests

example@mail.com,onemoreexample@mail.com

Paste email separated by commas

Products access

Fax Drive

Metadata

Key	Value
ServiceID	00000

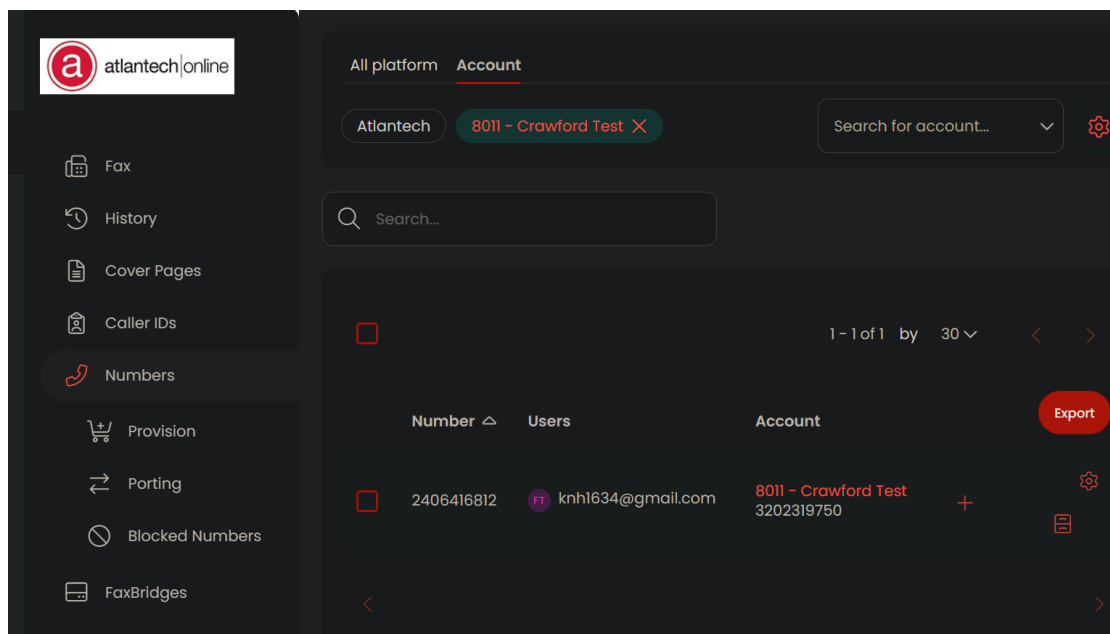
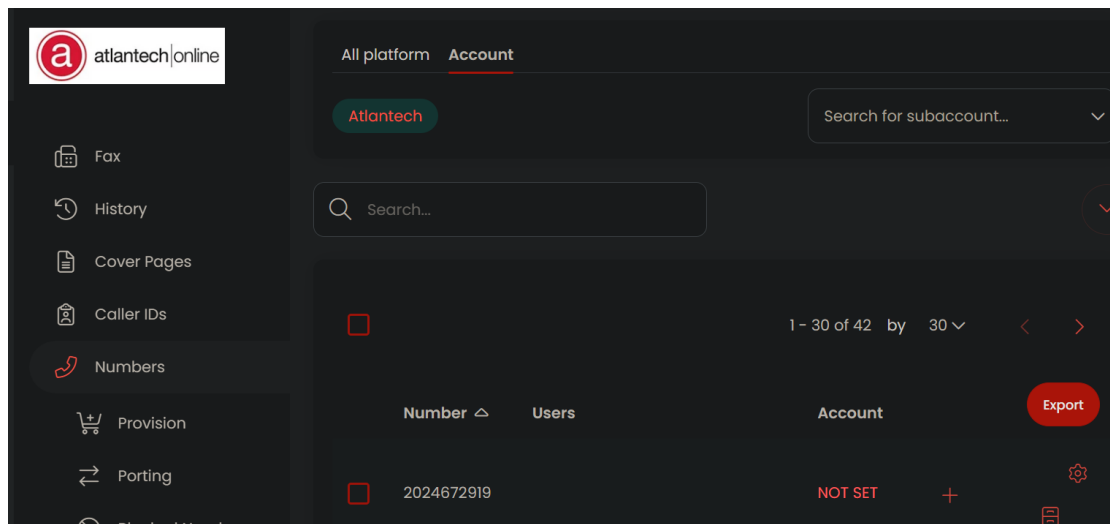
Add Metadata Field

Save

Note: As this is a test account, the value was entered as "00000".

Note: This procedure will be changing in the near future; please check this article periodically for updates.

This completes the configuration of the CloudFax account for the customer. You can confirm the configuration has been completed by selecting the **Numbers** area from this screen, then searching for the customer account in the **Search for subaccount...** drop-down:



The number and assigned user should be listed there. If either is not present, you skipped a step somewhere.

Now, you're ready to send the email out to the customer with the details. Here's the email that would be sent for this test customer account:

Your Cloudfax service has been configured; please see the details below:

Cloudfax Interface URL:

<https://atlantech.documo.com/signin>

Email address/username and password:

Email/Username: knh1634@gmail.com

Password: FspHE5-VK7

Here are a series of links to help articles on Documo's (our Cloudfax provider) site:

Receiving inbound faxes -

<https://help.documo.com/hc/en-us/articles/7786213754011-Receiving-Inbound-Faxes>

How to send a fax -

<https://help.documo.com/hc/en-us/articles/7789548941083-How-To-Send-a-Fax>

How to send a fax from email -

<https://help.documo.com/hc/en-us/articles/7786239702299-How-to-Send-a-Fax-from-Email>

Viewing fax history -

<https://help.documo.com/hc/en-us/articles/7786928170651-Viewing-Fax-History>

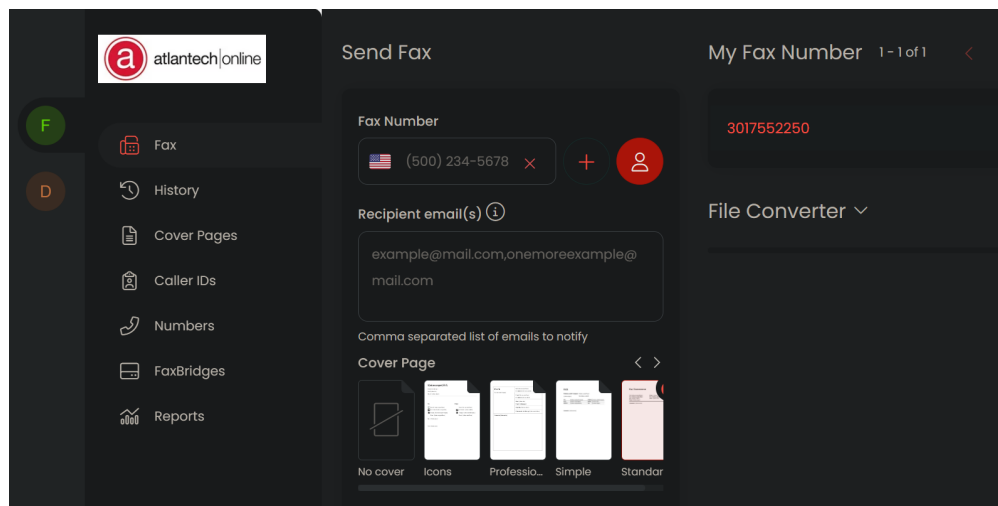
How to download/print a fax -

<https://help.documo.com/hc/en-us/articles/7789485980059-How-to-Download-Print-a-Fax>

Please note that while the screenshots on these articles will look different than the Cloudfax interface, the instructions will work exactly. In a few minutes, I'll be sending a test fax from the Technical Support account (it will appear to come from 833-520-1652; this is a default Caller ID number and can be ignored. You'll want to respond to 301-755-2250). Please check the history for either email address and if you see the fax listed, please respond at your convenience.

Here is how you send that test fax:

At the top of the menu on the left-hand side, select **Fax**:



Enter the customer's CloudFax number in the **Fax Number** field:



Send Fax

 Fax

 History

 Cover Pages

 Caller IDs

 Numbers

Fax Number

 (240) 641-6812 
 

Recipient email(s) 

example@mail.com, onemoreexample@mail.com

Comma separated list of emails to notify

Select one of the items under **Cover Page**:

 Numbers

 FaxBridges

 Reports

Comma separated list of emails to notify

Cover Page  

 No cover
  Icons
  Professional
  Simple 
 Standard

This step can be skipped if you have your own cover page saved as a file that you would like to use.

If you selected one of the built-in cover pages, you'll need to fill in the **Deliver To**, **Subject**, and **Notes** fields to fill in the information:

 History

 Cover Pages

 Caller IDs

 Numbers

 FaxBridges

 Reports

Deliver To

Fax Test

Subject

Test Fax

Notes

Test Fax for KB article



23 / 4000

Tags

Once everything is in place, select **Send**:

 FaxBridges

 Reports

 Contacts

 Accounts

 Users

 API Keys

 Events

 Hide

Notes

Test Fax for KB article

23 / 4000

Tags

Search tag...

☐ Mark as urgent

Urgent token must be included in cover letter

Attachments

Click here or drag & drop your files in this area

Or insert file URL

Send

Send later

You'll get a status prompt where you'll be told if the fax was successful:

Result

Success:

 +12406416812 processing...

OK

Check Status

Select **Check Status** and you'll be taken directly to the history, where you should be able to see the fax in there:

Fax	1 - 8 of 8 by 30 < >					
History						
Cover Pages						
Caller IDs						
Numbers						
	Date ▾	Direction	From	To	Pages	Tags
☐	✓ 4/10/2023, 12:39 PM PDT	outbound	SA support@atlantech.net	+1 240- 641- 6812	1 / 1	+ ⋮

Select the three dots on the right and select **View/Print** to see what was sent:

	Date ▾	Direction	From	To	Pages	Tags
☐	✓ 4/10/2023, 12:39 PM PDT	outbound	SA support@atlantech.net	+1 240- 641- 6812	1 / 1	+ ⋮
						Mark as unread
☐	✓ 4/6/2023, 8:44 AM PDT	outbound	SA support@atlantech.net	+1 240- 528- 1881		View/Print Download

View fax ×

Fax Transmission

To: Fax Test
 Fax: +12406416812
 RE: Test Fax
 Pages: 1

From: support.AOI
 Fax: 8335201652
 Date: Monday, April 10, 2023 12:39 PM, PDT

Comments:
 Test Fax for KB article

Additionally, since this was sent from the support account, a ticket will also be generated in Care that looks like this:

ID: 402100
Fax delivered to +12406416812

Atlantech Online EFAX Service (noreply@notify.atlantech.net)

Add CC

Technical Support

Awaiting Agent

3

PROPERTIES
TASKS (0)
FOLLOW UPS (0)
SLAS
BILLING & TIME LOG
APPROVALS (0)
ORG TICKETS

Please correct the following errors:

- Select a category

Agent · Assign to Me

Team · Unassign

Followers

Unassigned

Technical Support - Level I

Add a fo

Labels:
Add a label

Problem:
None

#1 Atlantech Online EFAX Service <noreply@notify.atlantech.net>
4 minutes ago

Success!
Your fax was delivered.

To: +1 240-641-6812

Total Pages: 1

Receive time: 4.10.2023 12:39:49 pm PDT

You can view additional information about this fax online

Login to web portal

Delivered securely by Atlantech Online EFAX Service

outbound_202304101939300_32a5c.pdf (32.61 KB)

You can also open the attachment to see what was sent.

With this step, the CloudFax configuration process is now fully completed.

- [Tags](#)
- [CloudFax](#)
- [Documo](#)
- [efax](#)
- [fax](#)
- [faxing](#)