Configuring a Cloudfax Account

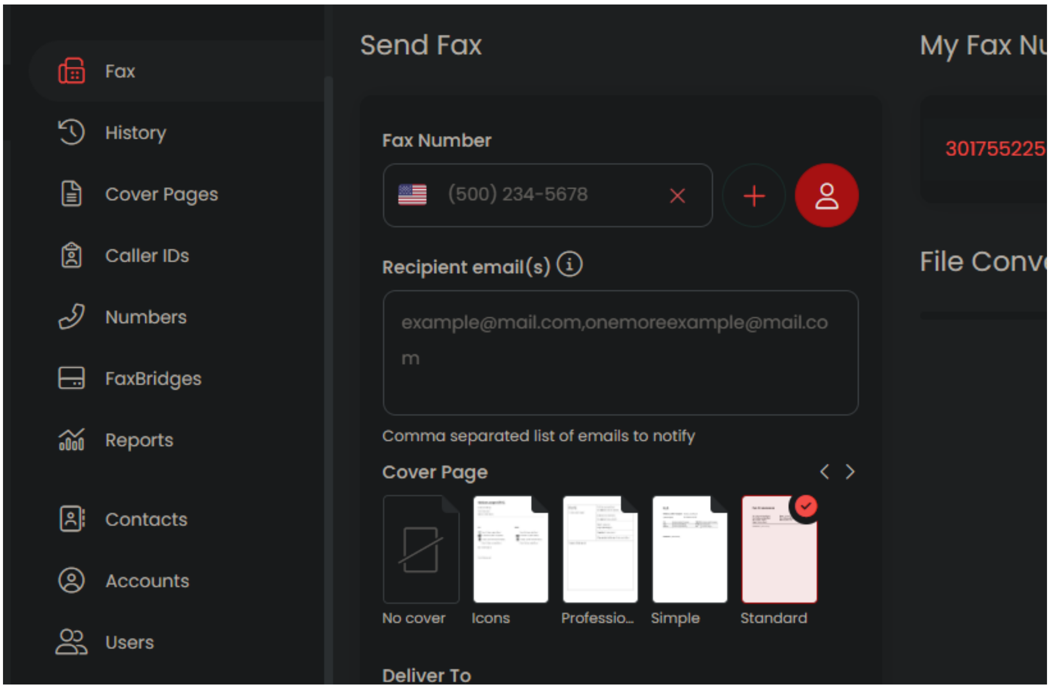
Curtis Hunter - 2025-07-28 - Comments (0) - CloudFax

Configuring a CloudFax Account

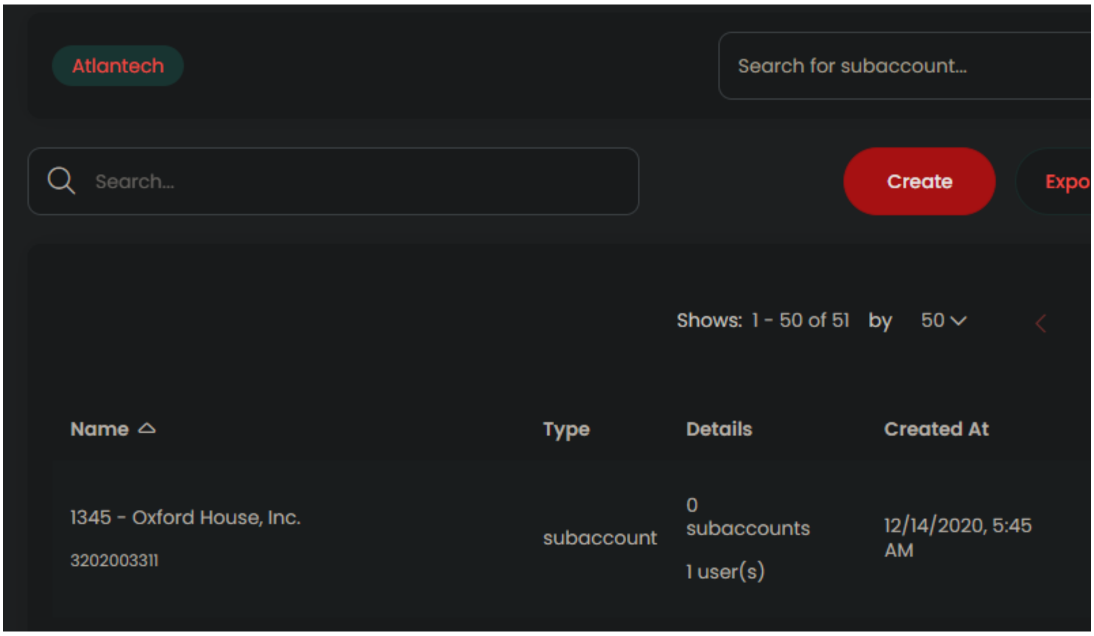
This guide will show the entire process for creating a company's account in the CloudFax interface at https://atlantech.documo.com/signin.

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

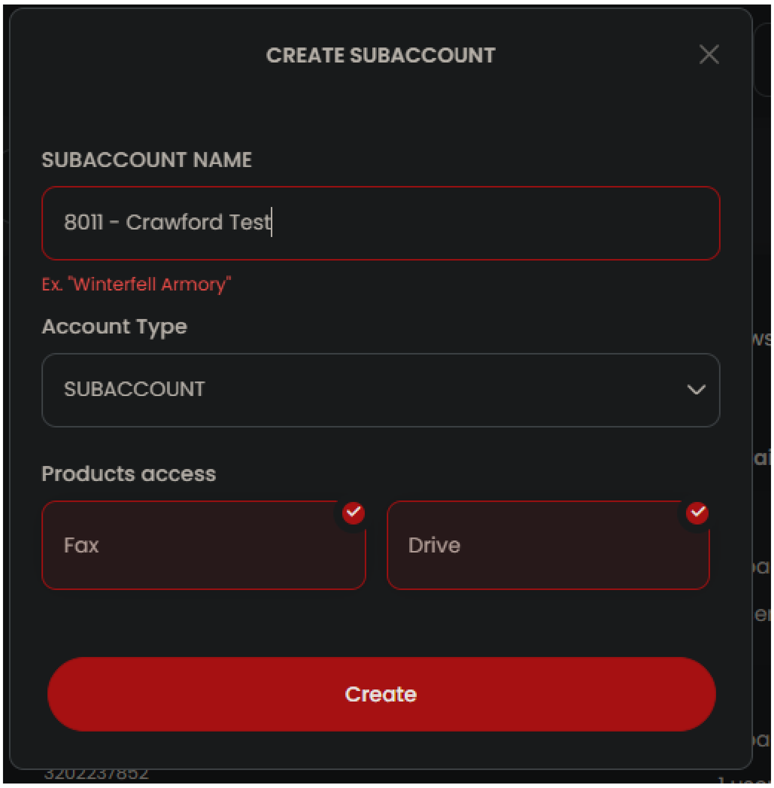
Once you're signed in (check the file named **CloudFax (eFax) Account Credentials** within the **Technical Support Team -> General -> Files** for the Support login credentials), you'll want to scroll down the left-hand menu and select **Accounts**:



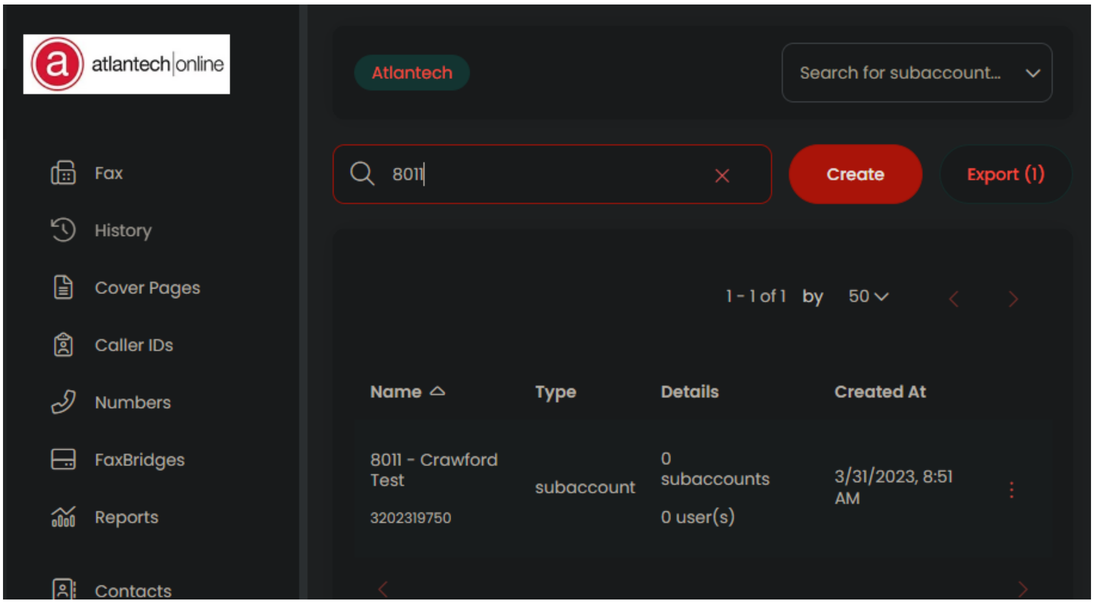
Next, at the top-right of the next screen, select **Create**:



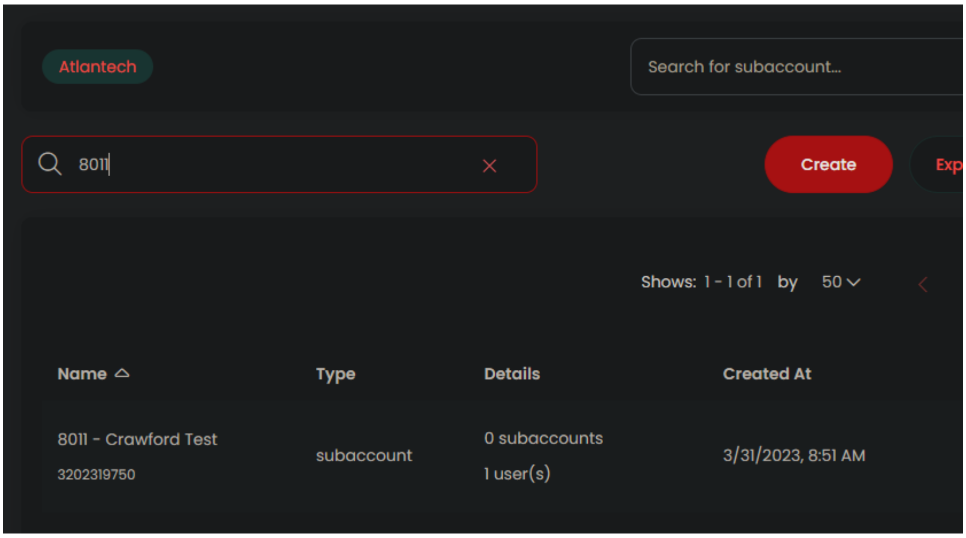
Next, you'll want to enter the account name, which should be the customer CID, followed by the company name. Leave everything else in the form as the default:



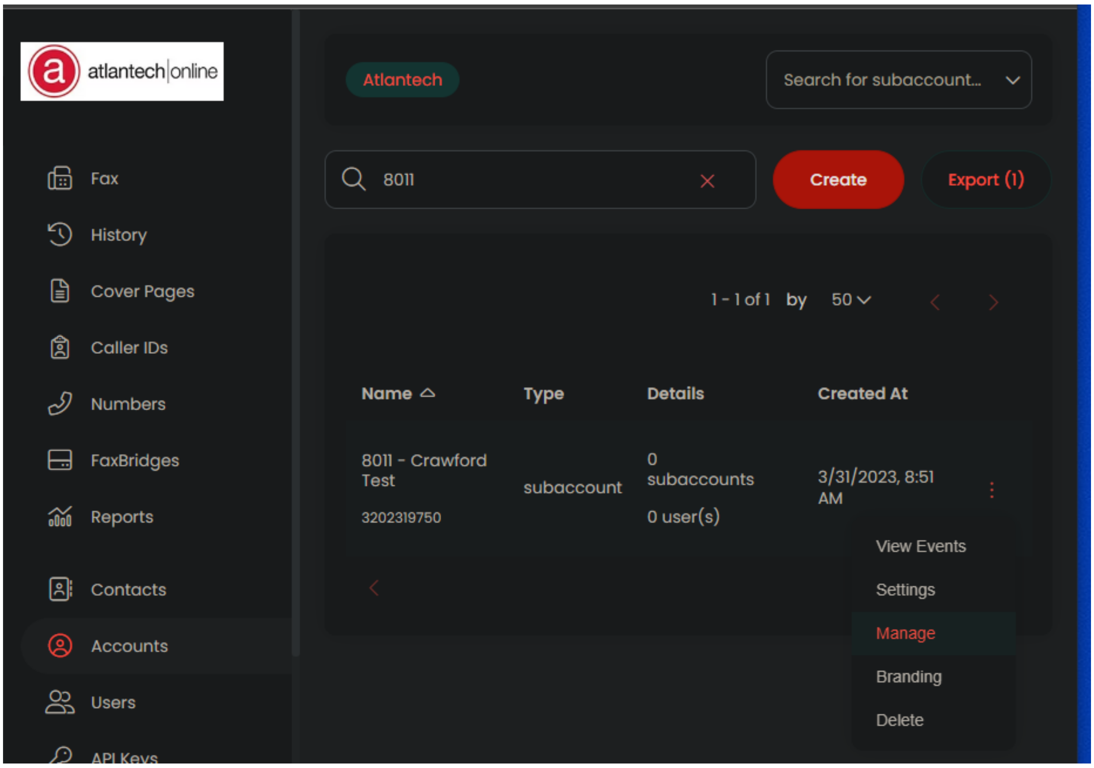
After you select **Create**, select **Continue**. Next, you'll want to search for the new customer in the search box:



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**:



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:

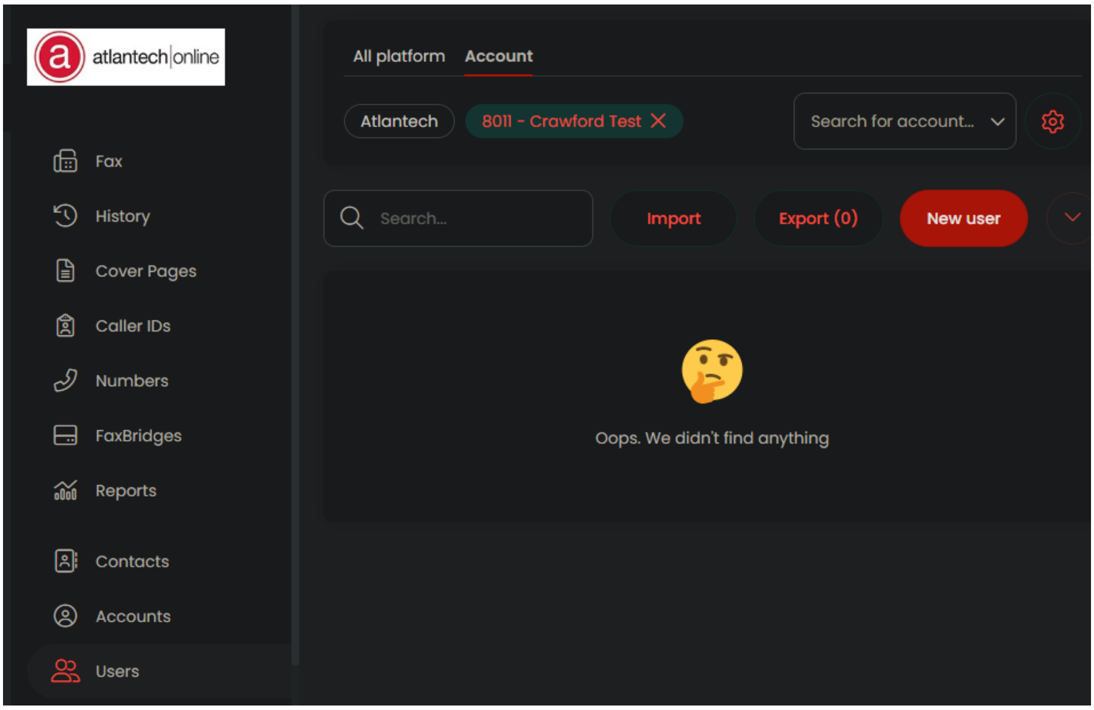
Atlantech Cloud Fax Plans

atlantech|online

	Cost	Addt'l Fax #	Page Count Information			End User Information		
			Includes	Avg. / Bus Day*	Addt'l / Page	Includes	Each Addt'l 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

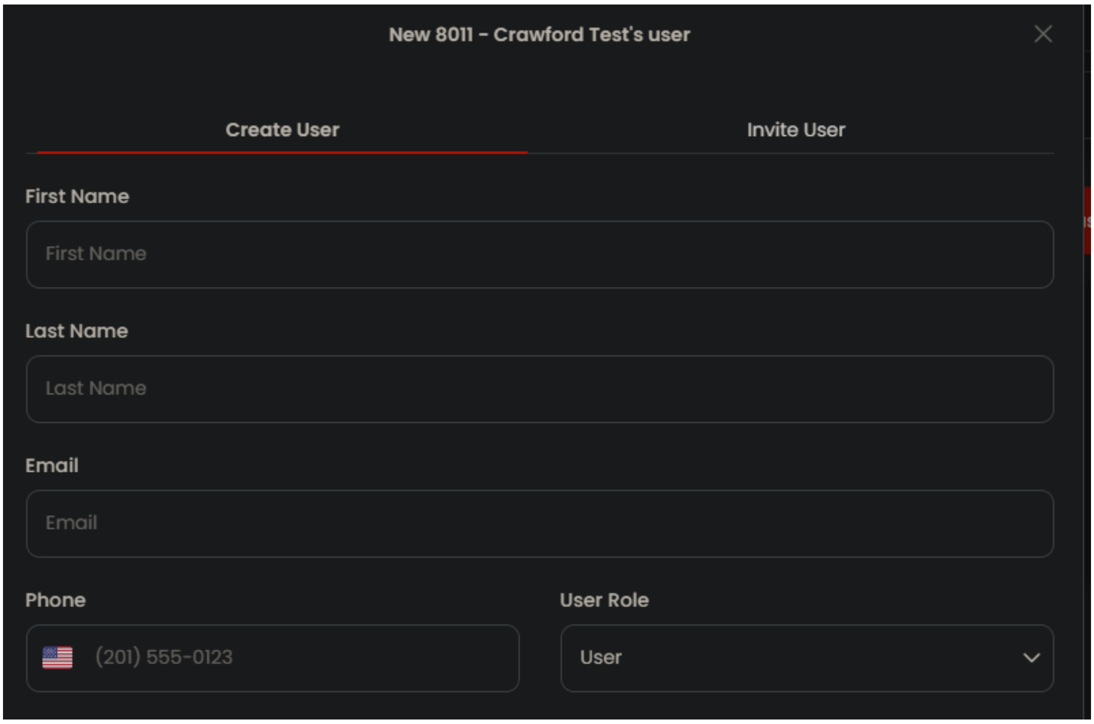
All service plans include: $0 setup fee, (1) Toll Free Fax Number, Email to Fax Service and Admin Interface
Note: Email to Fax Service count towards the page count
*Calculated by dividing included # of pages by average number of 22 Business Days / Month.

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

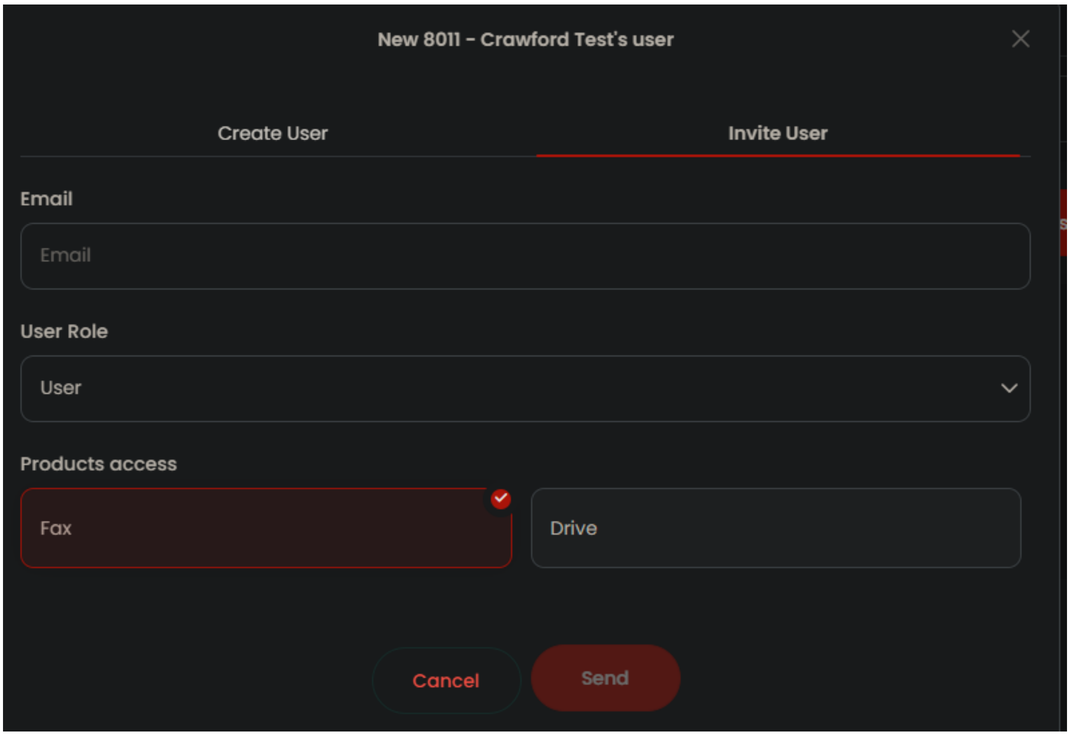


On the **New user** page, you have two tabs that provide different routes to user creation:

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



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

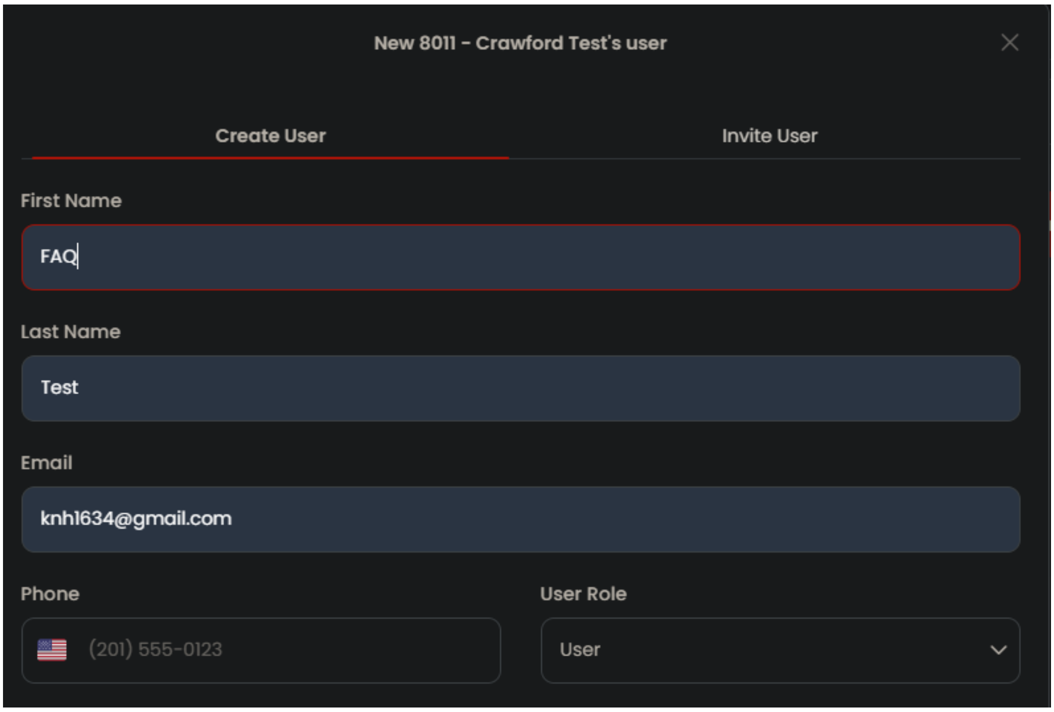


The account is not fully configured at this point in the process, so it is better to use the **Create User** feature**.** However, when adding users to an already existing and configured company account, the **Invite User** feature may be the better option. This can be left to the admin's preference.

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

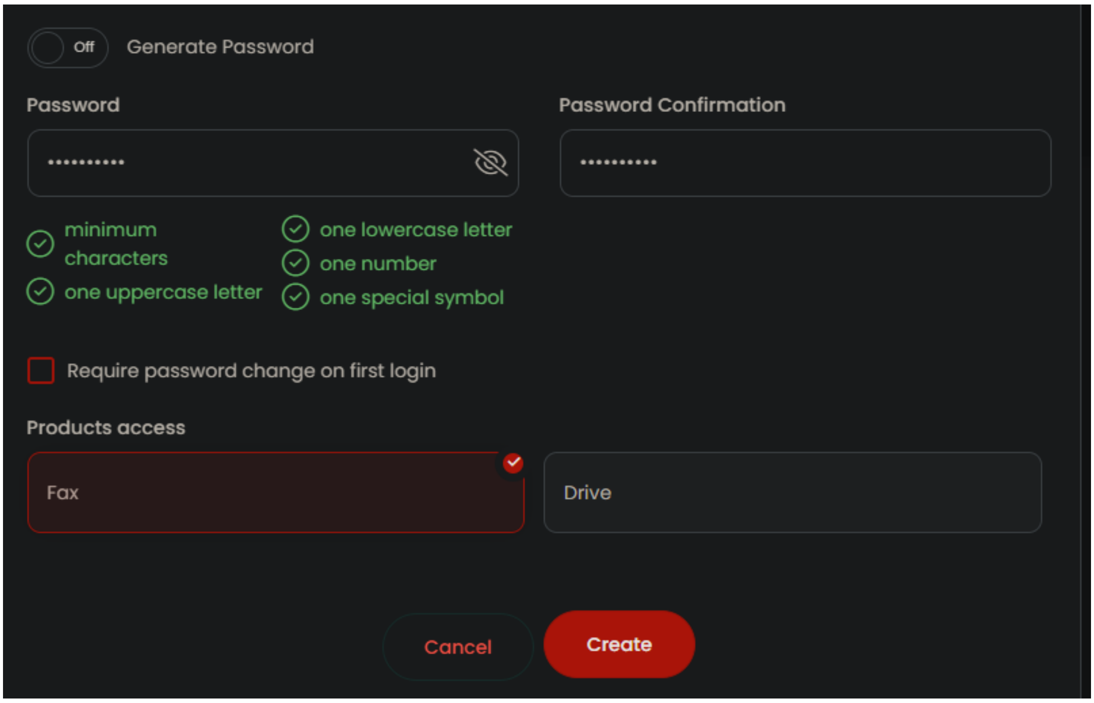
- **First Name**
- **Last Name**
- **Email**
- **User Role (User - standard user with access to only their account, Admm - advanced user with access to all accounts within the company account)**

*Phone number is optional and is generally not used***.**



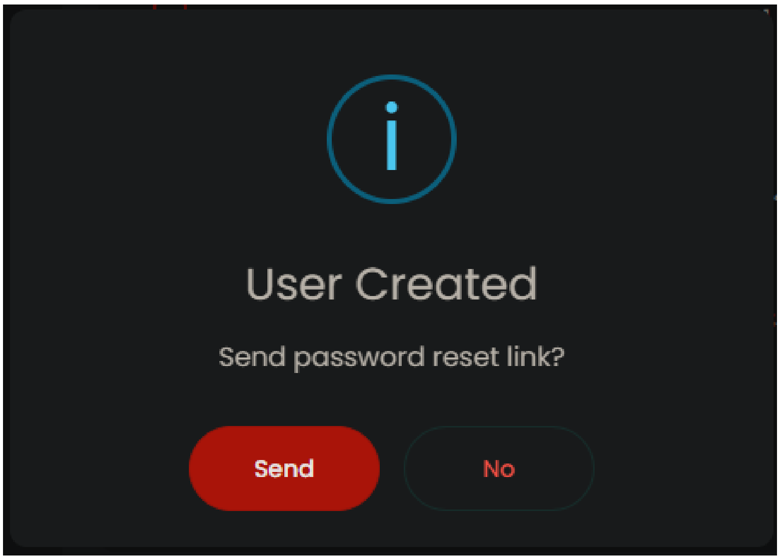
Next, you can either have the system generate a password or create one on your own. If you create your own, you'll need to observe the following guidelines:

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

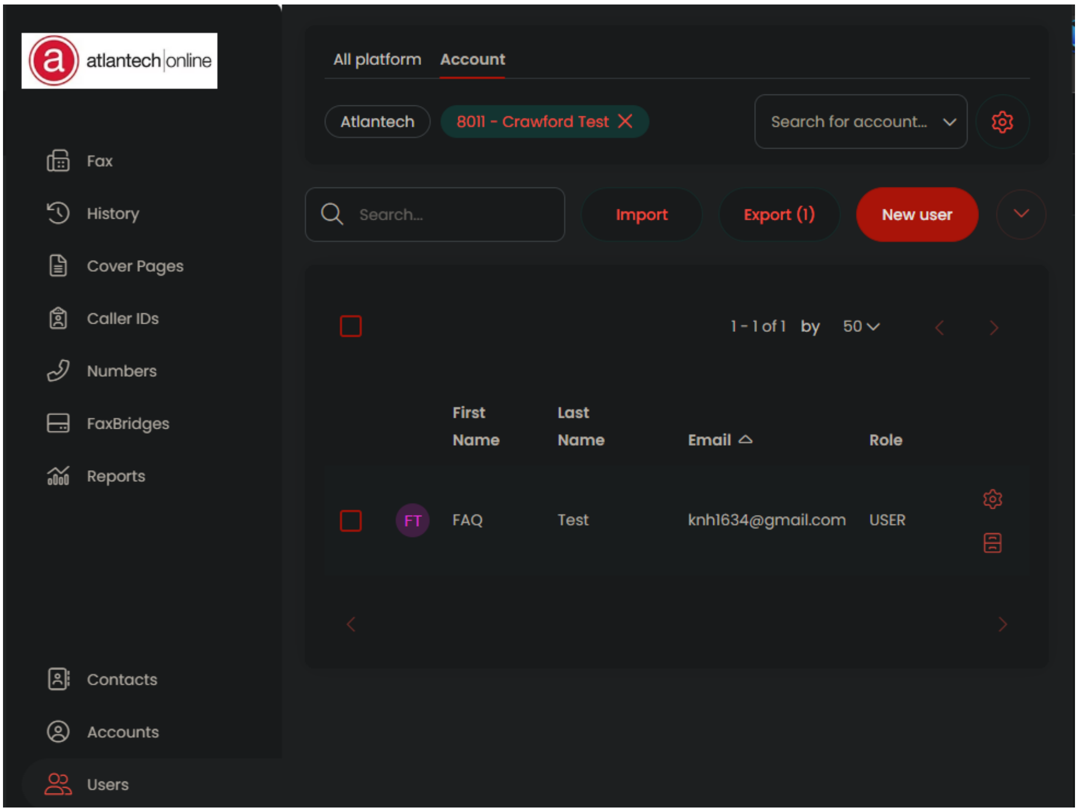


You can also require the user to change their password when they first log in. **Products Access** can be left at its default value. With everything filled in, select **Create**.

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

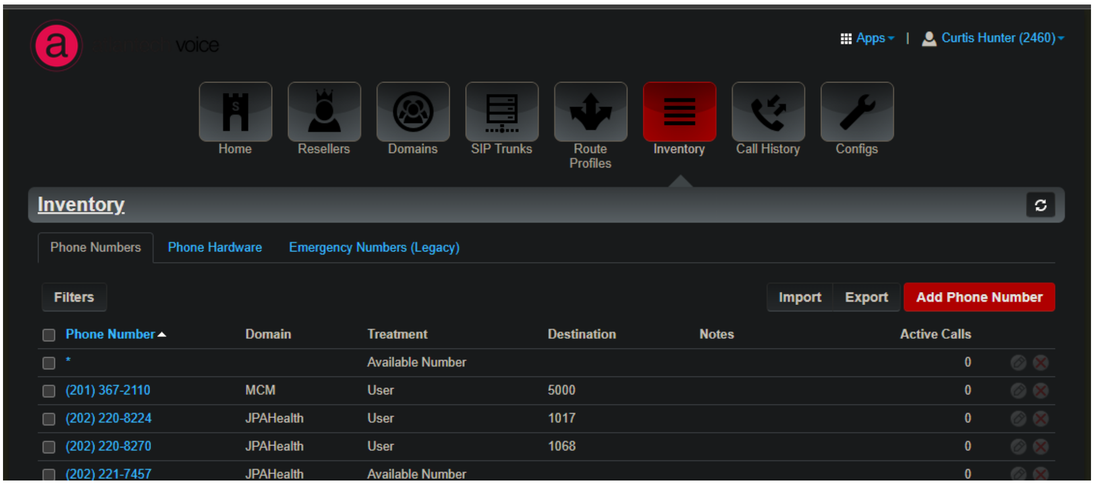


The user will be added to the account:

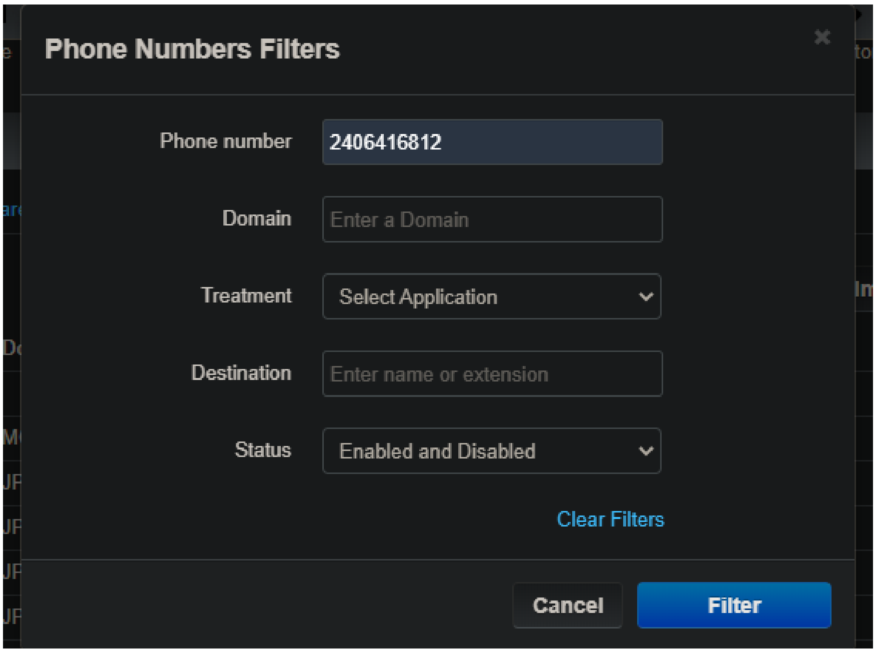


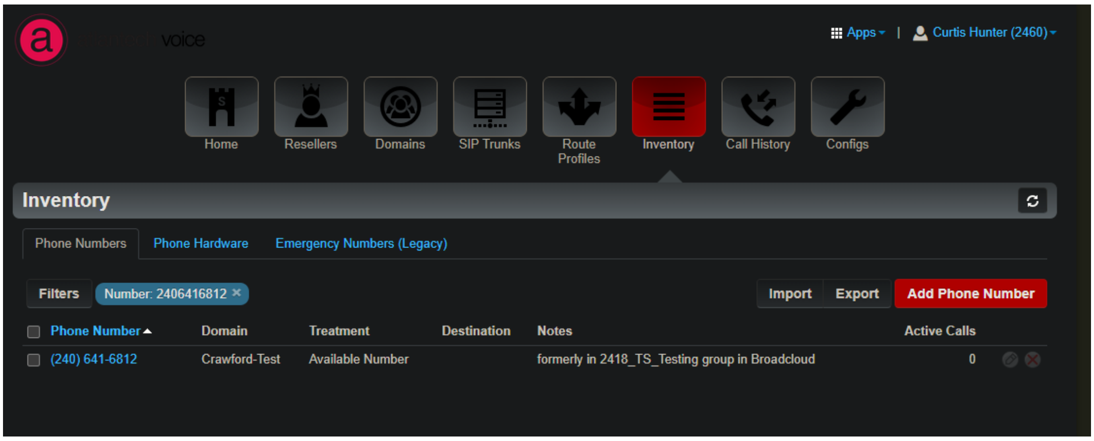
Next, we'll need to add the fax number to the company account for the users. First, we'll need to remove the number from Netsapiens:

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

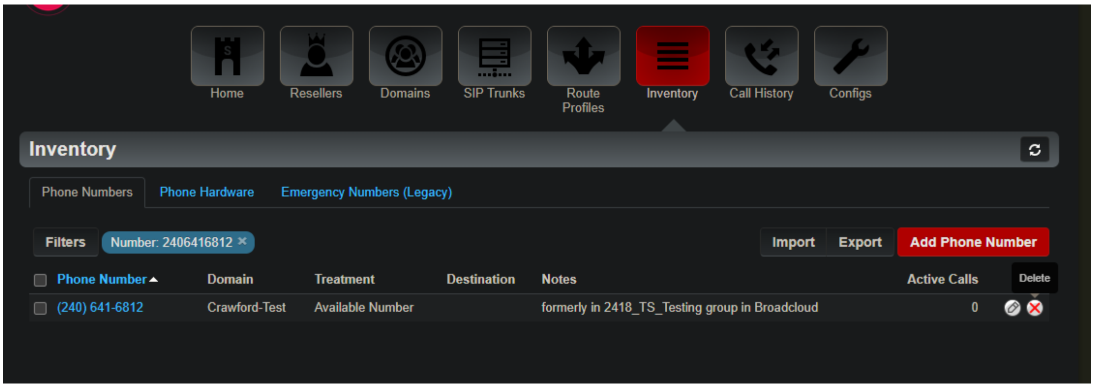


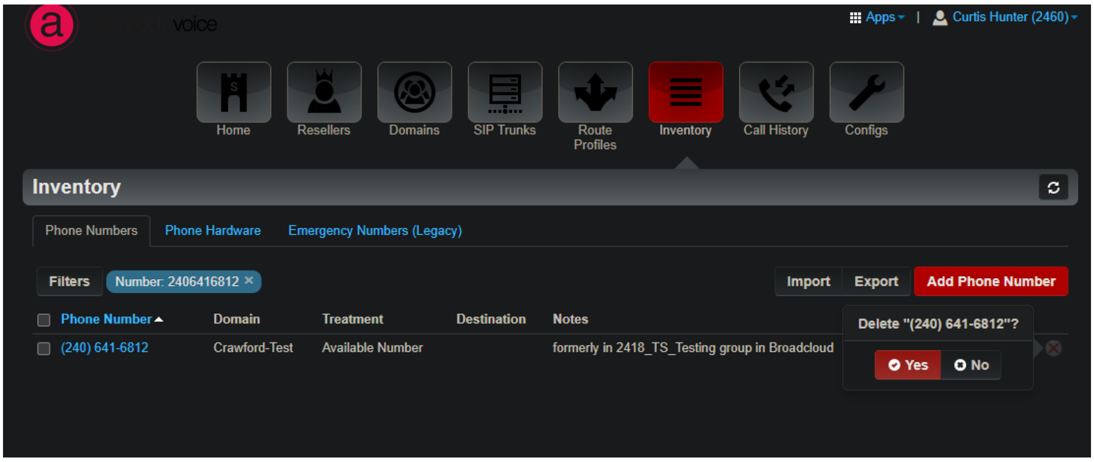
In this example, the user has requested to use (240) 641-6812 as their fax number. As such, you'll want to select **Filters** to search for it:

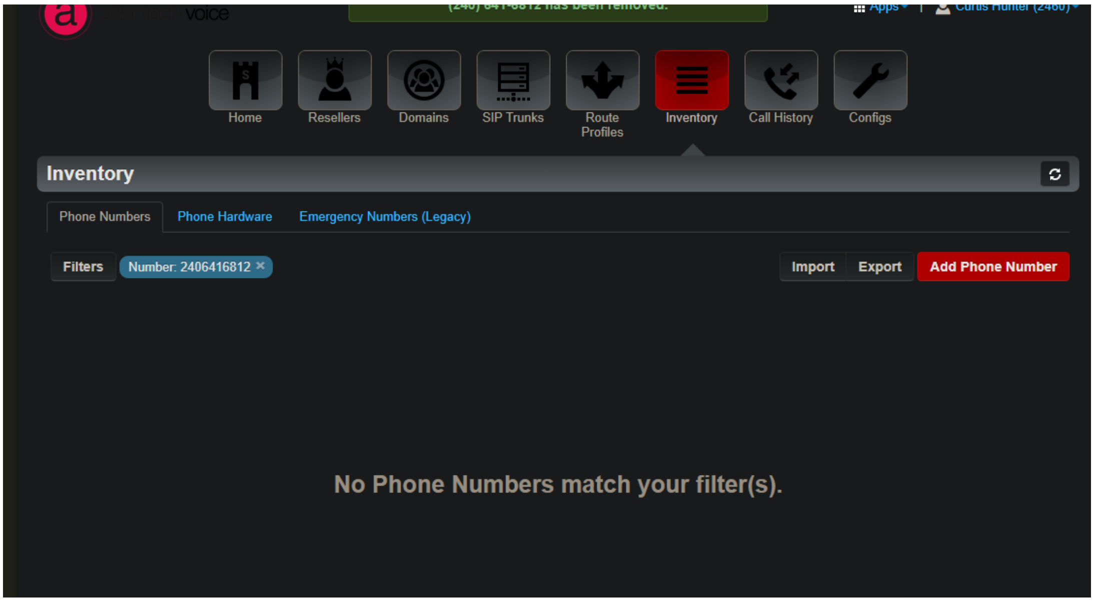




Next, select the red 'X' button on the right-hand side, then select **Yes** to delete the number:

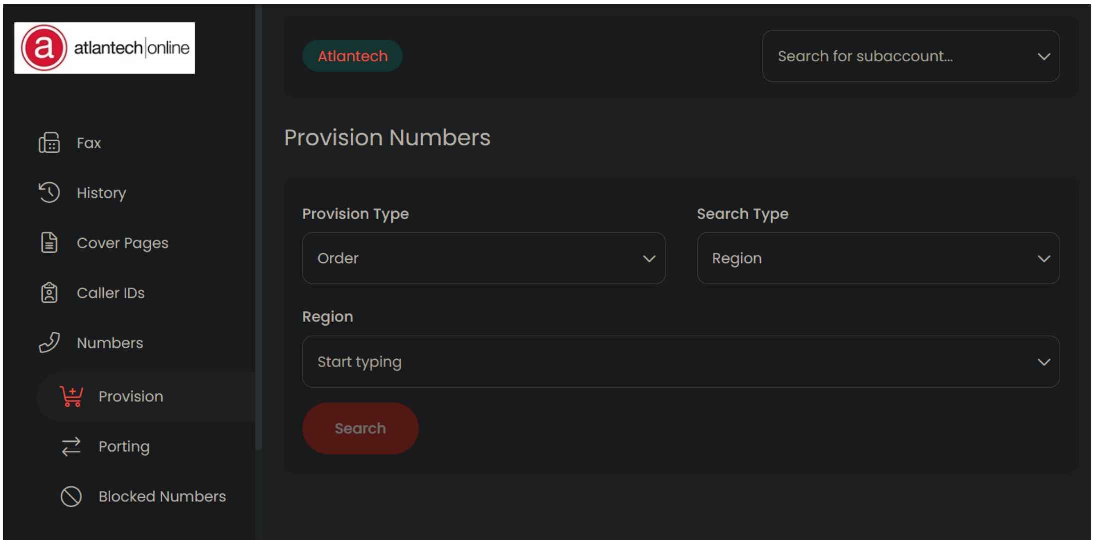






With this done, you next will need to ask Voice/certain TS technicians to move the number to Documo (our CloudFax provider). You will know this is completed when you call the number from a cell phone and you don't see it in the **Call History** for the domain in Netsapiens.

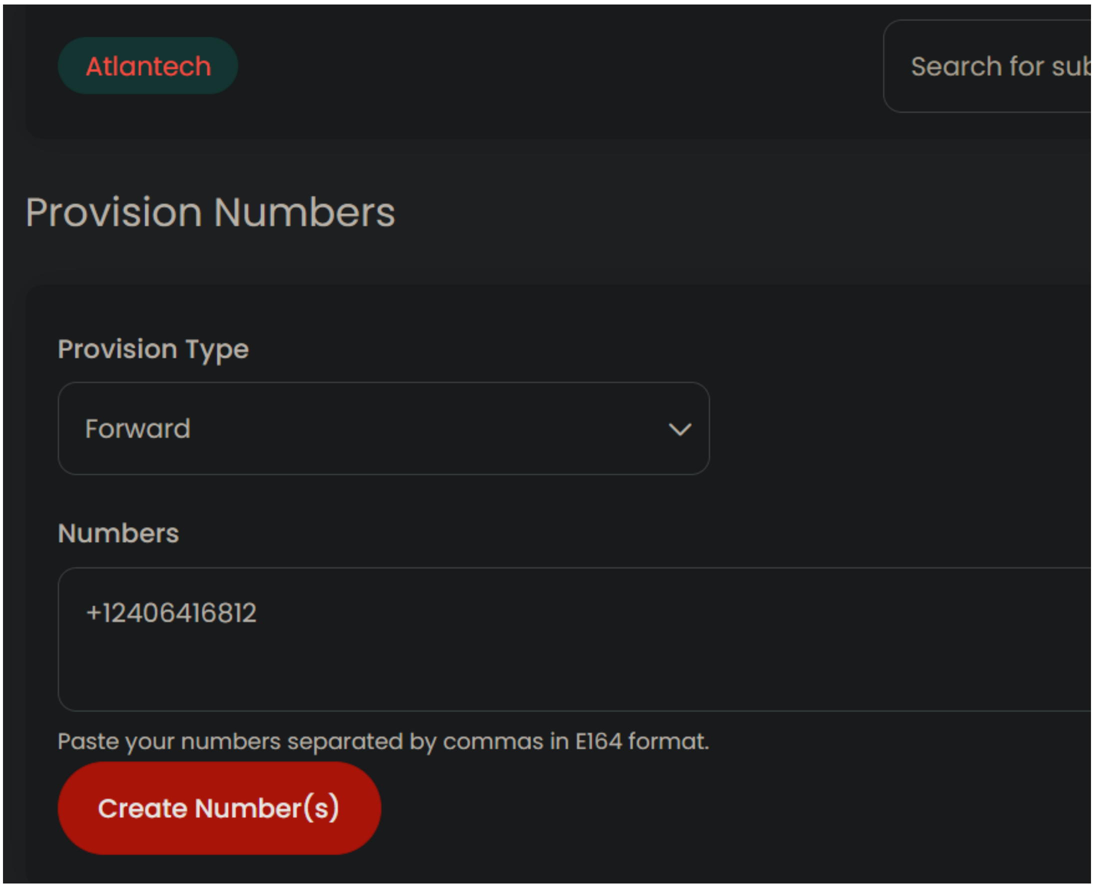
Next, back in the CloudFax interface, you'll want to go to the **Numbers** area, then select **Provision**:



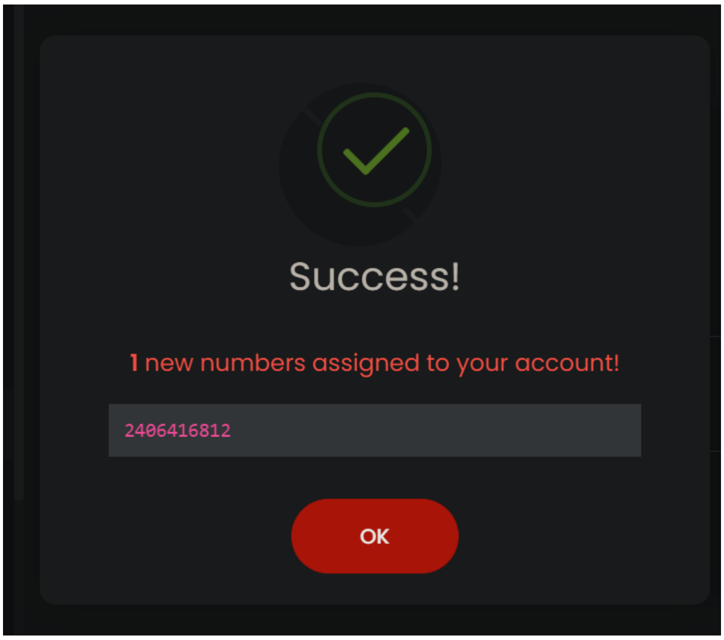
Next, set the **Provision Typ**e to **Forward**, then enter the number you want to add to CloudFax with "+1" in front with no dashes (aka E164 format).

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

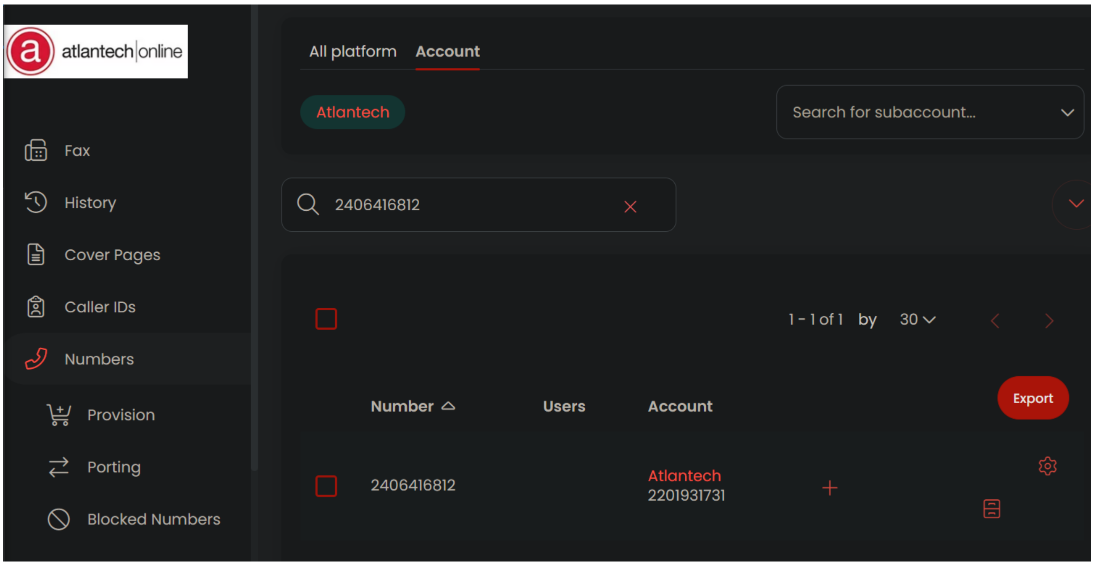
Once that's done, select **Create Numbers**:



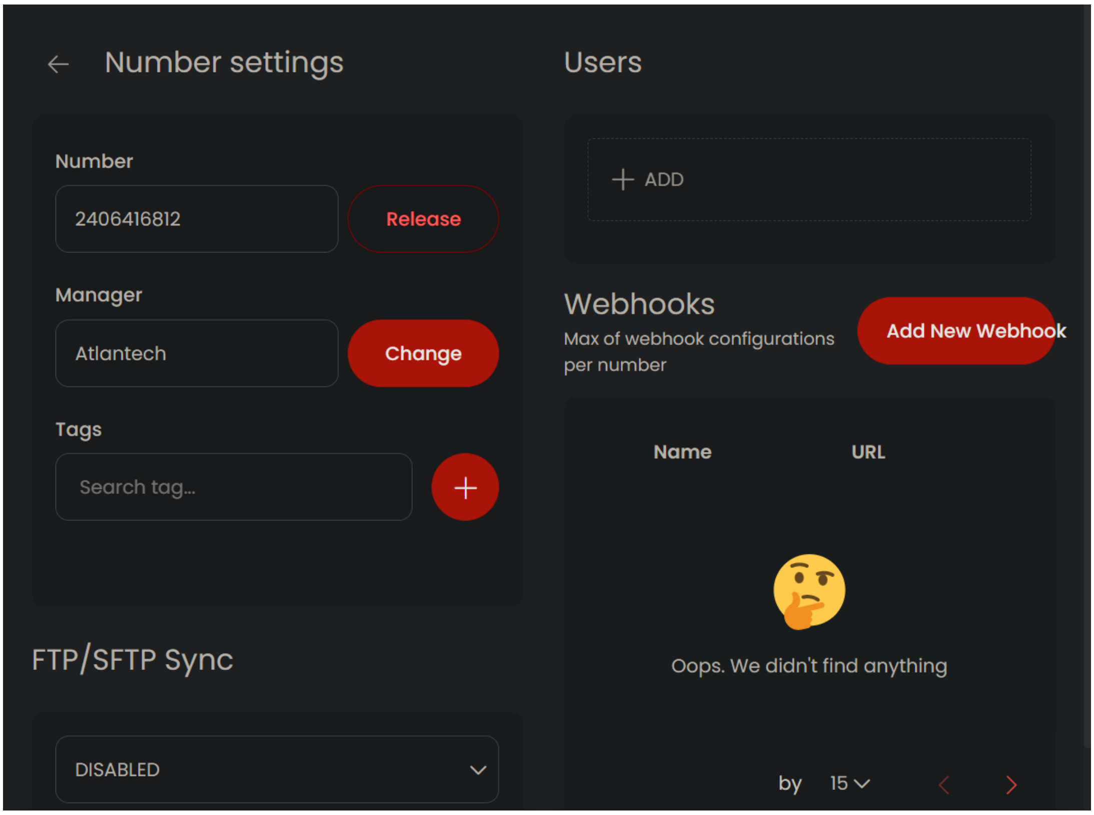
If the number is in the correct format, you'll get this message:

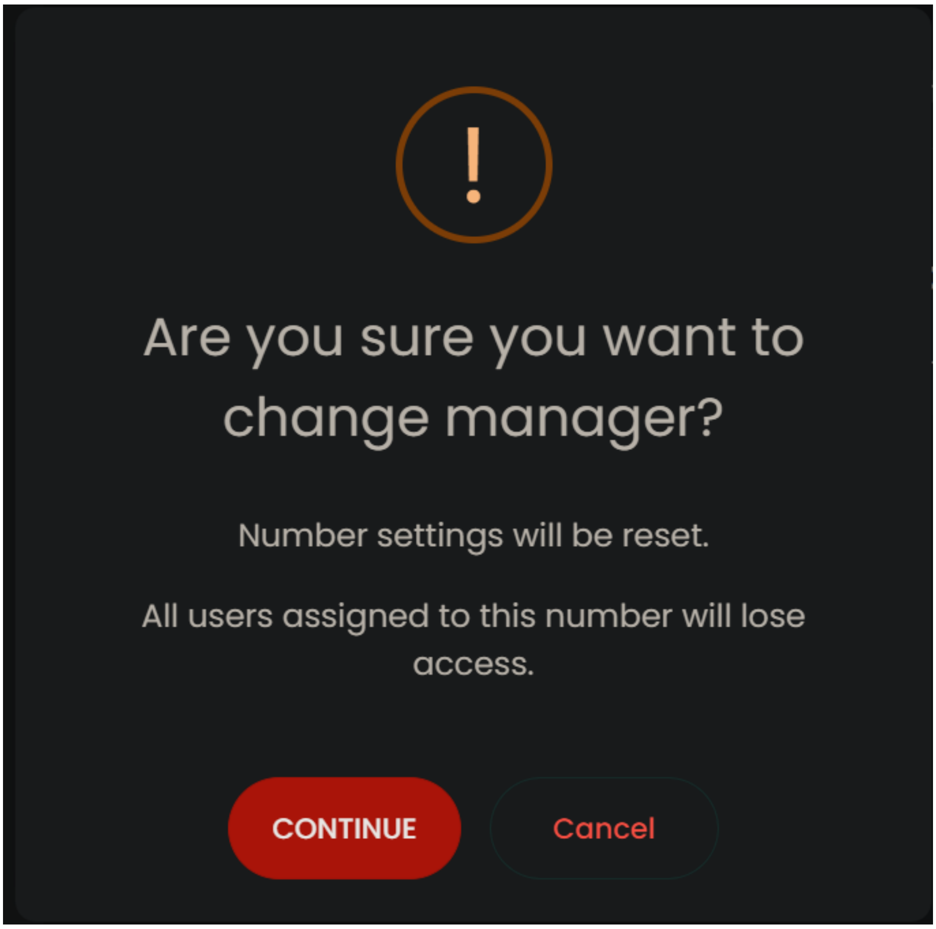


Select **OK**, then go back to the **Numbers** screen. Search for the number that was just added, then select the gear icon on the right:

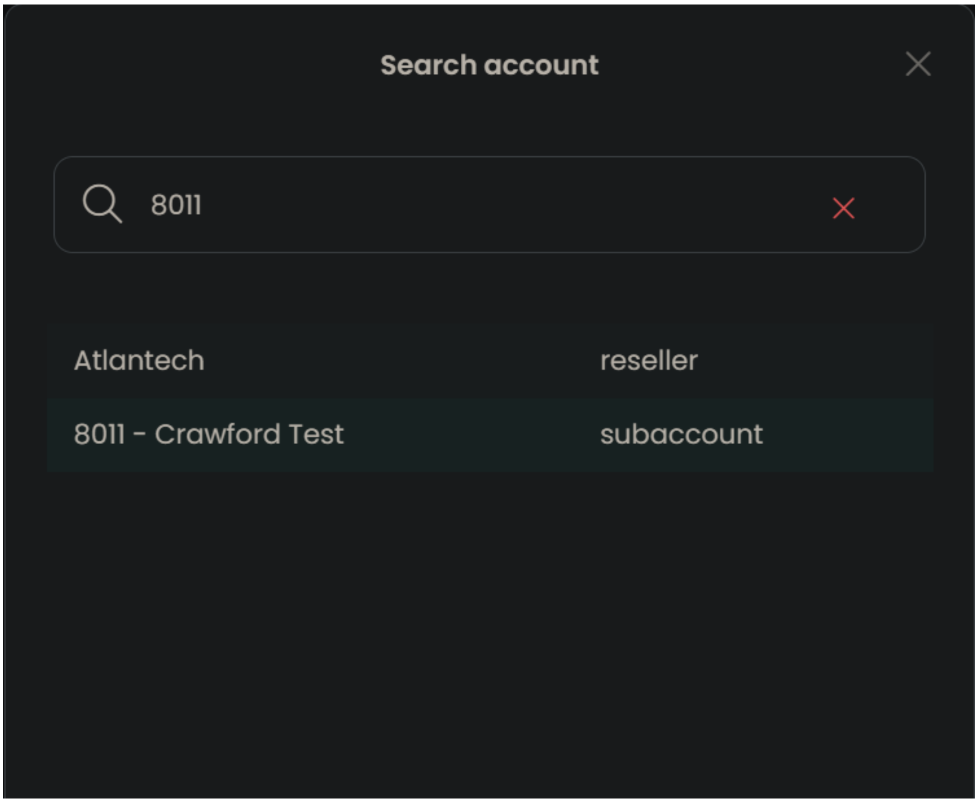


On the next page, next to the **Manager** field, select **Change**, then select **Continue** on the pop-up:

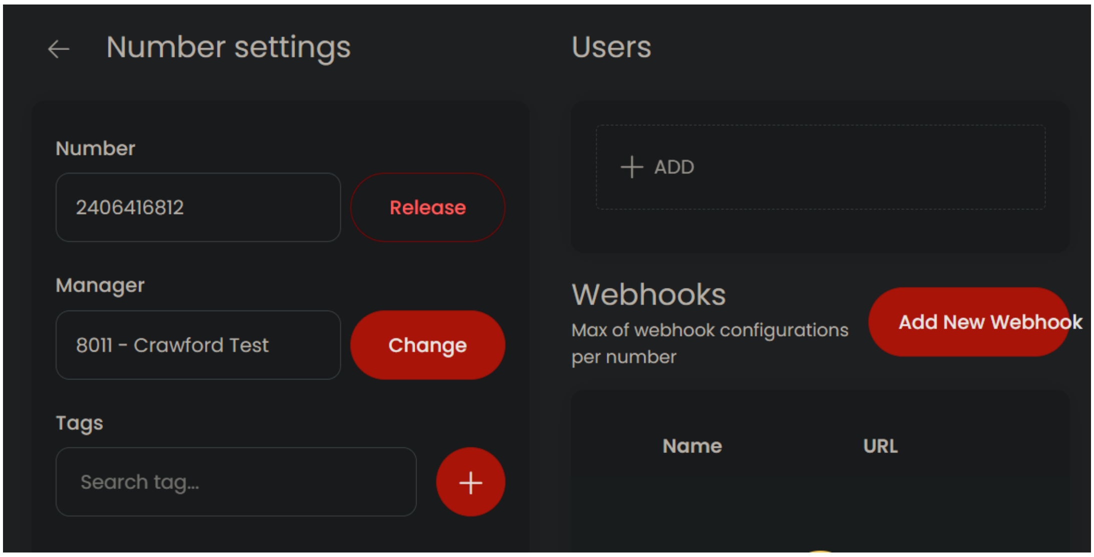




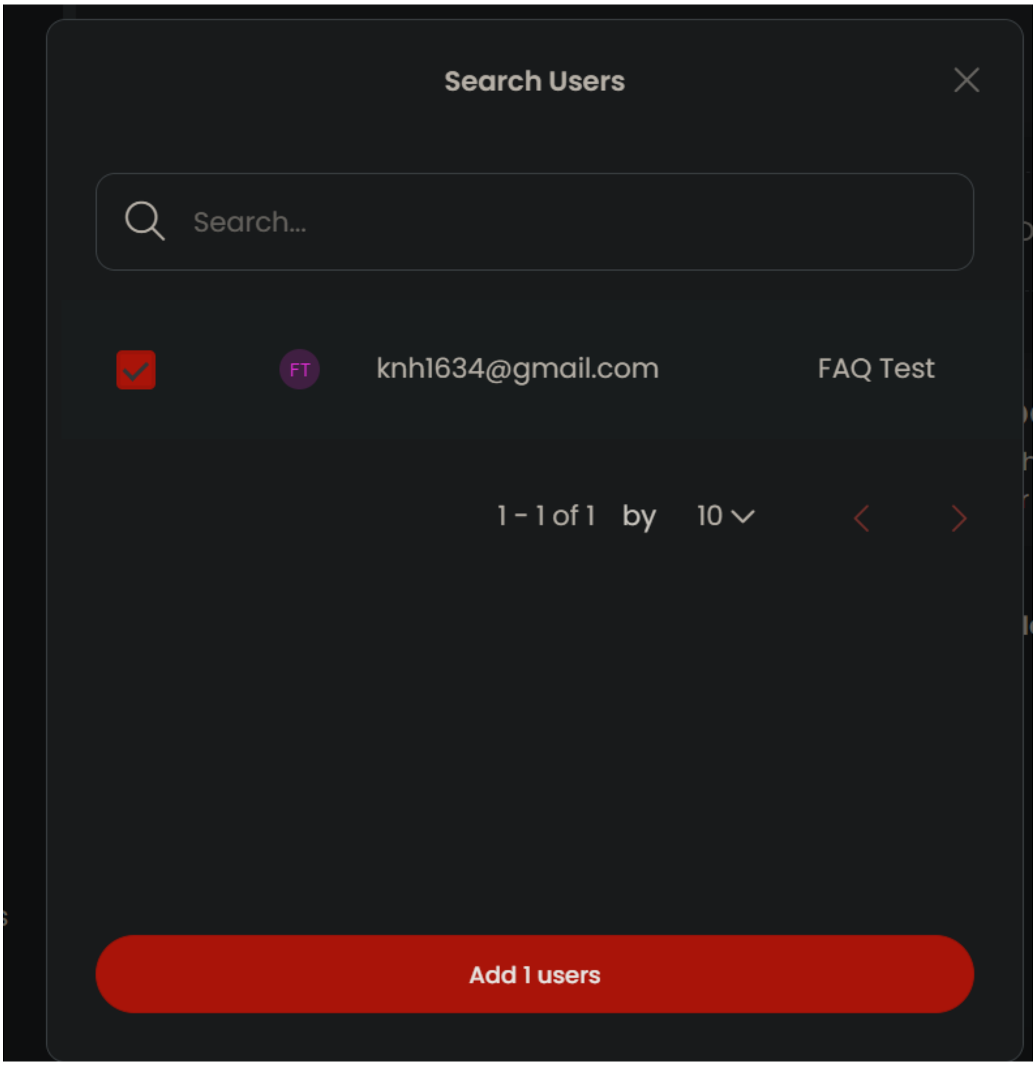
Search for the customer account, then select it from the list:



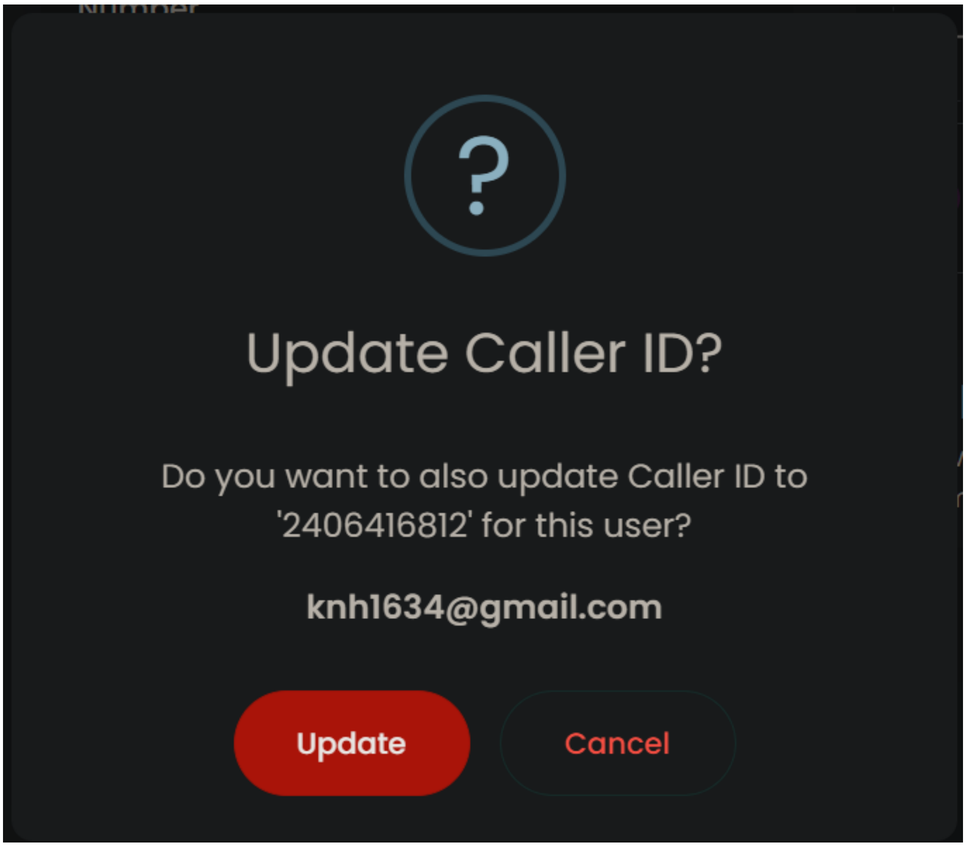
The **Manager** field will update to list the customer account. Next, under **Users**, select **Add**:



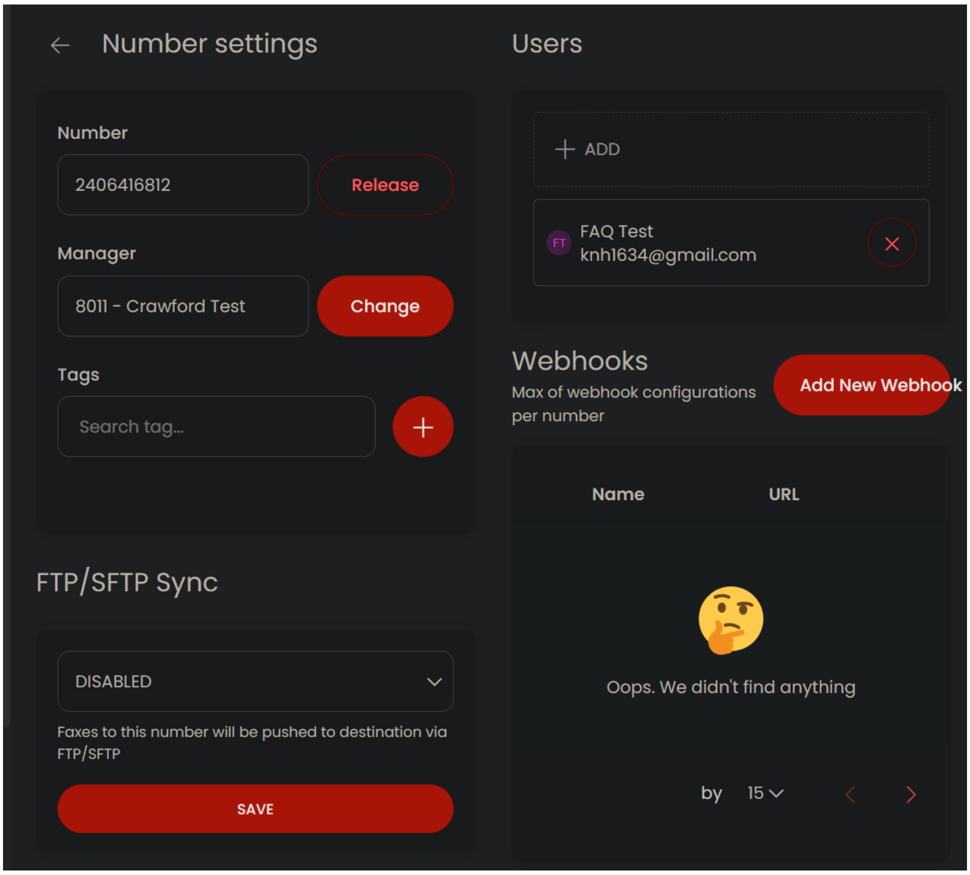
Select the checkbox next to the user that was created previously, then select **Add 1 users**:

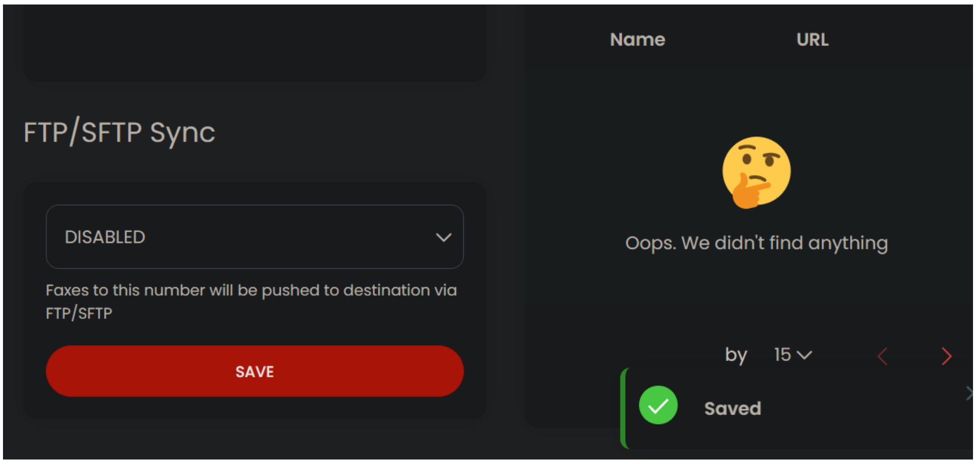


Select **Update** on the **Update Caller ID?** prompt:



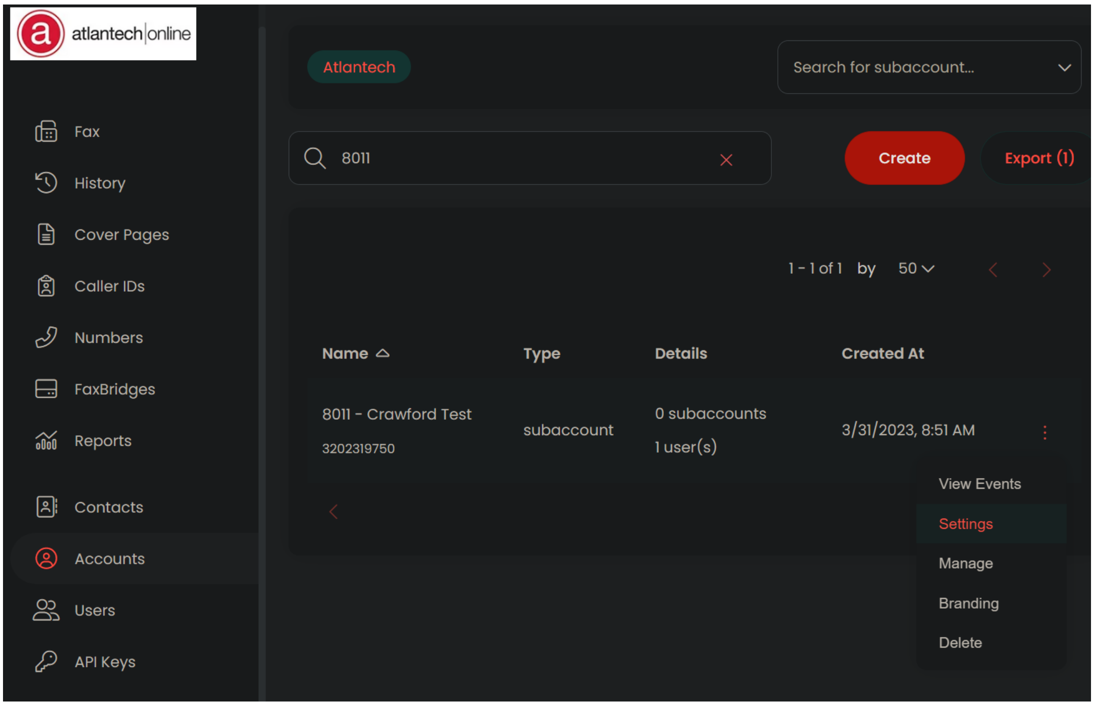
With everything done, make sure you select Save to confirm the changes:



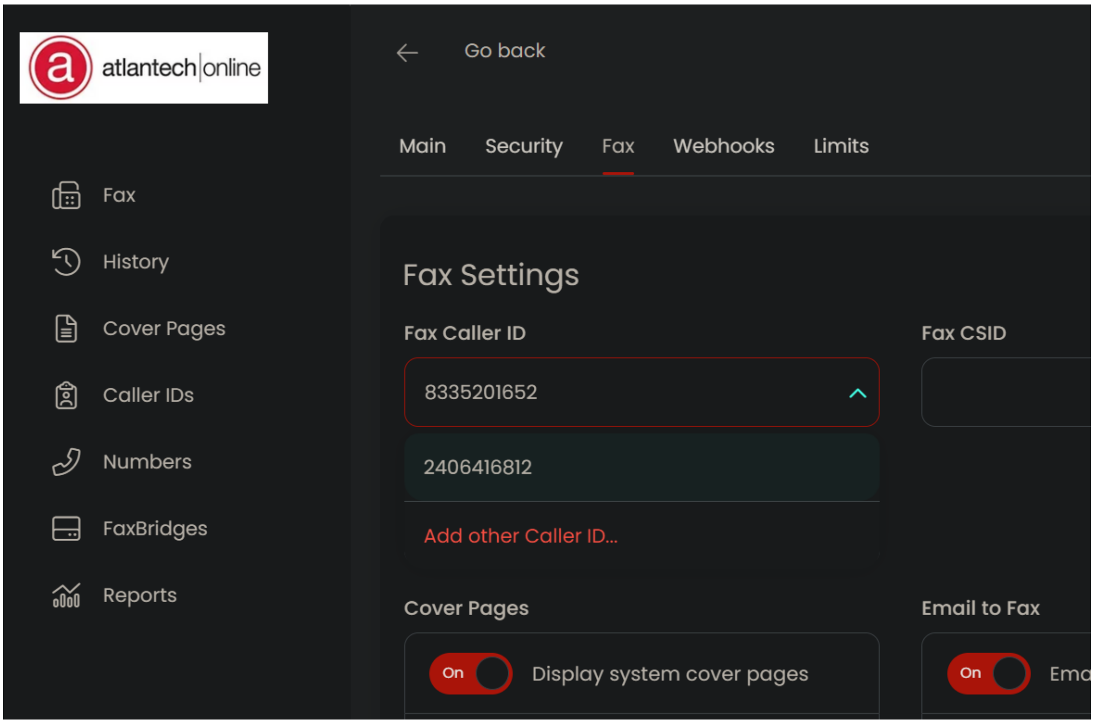


Next, you'll want to make sure that the Caller ID has been updated for the customer's account (this will allow subsequent users to inherit the Caller ID by default):

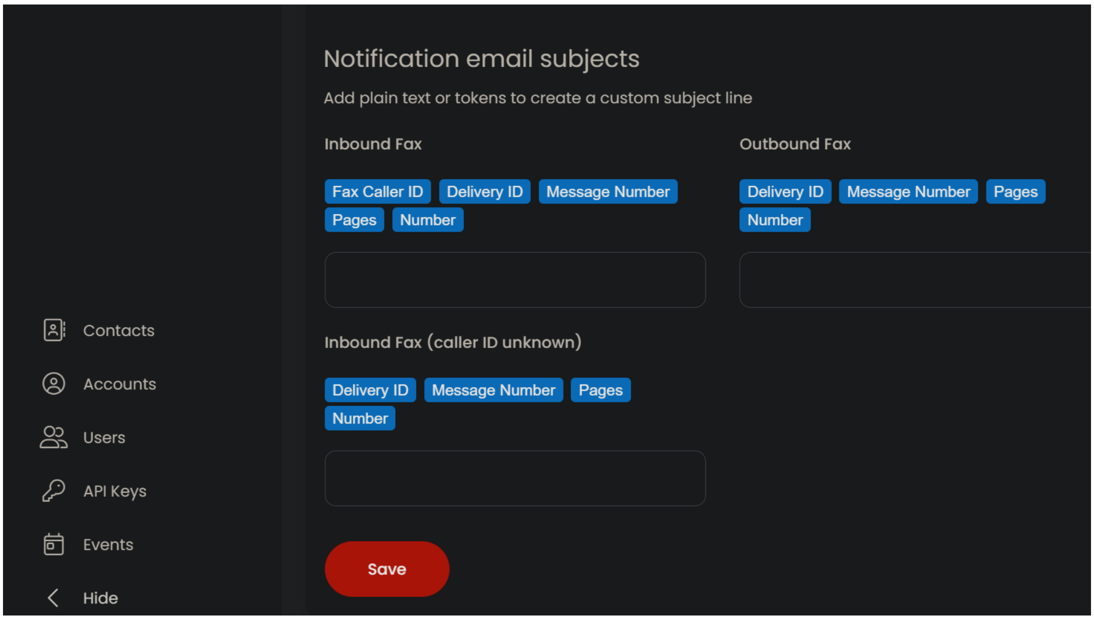
Go back to the **Accounts** page, search for the customer's account, then select **Settings**:



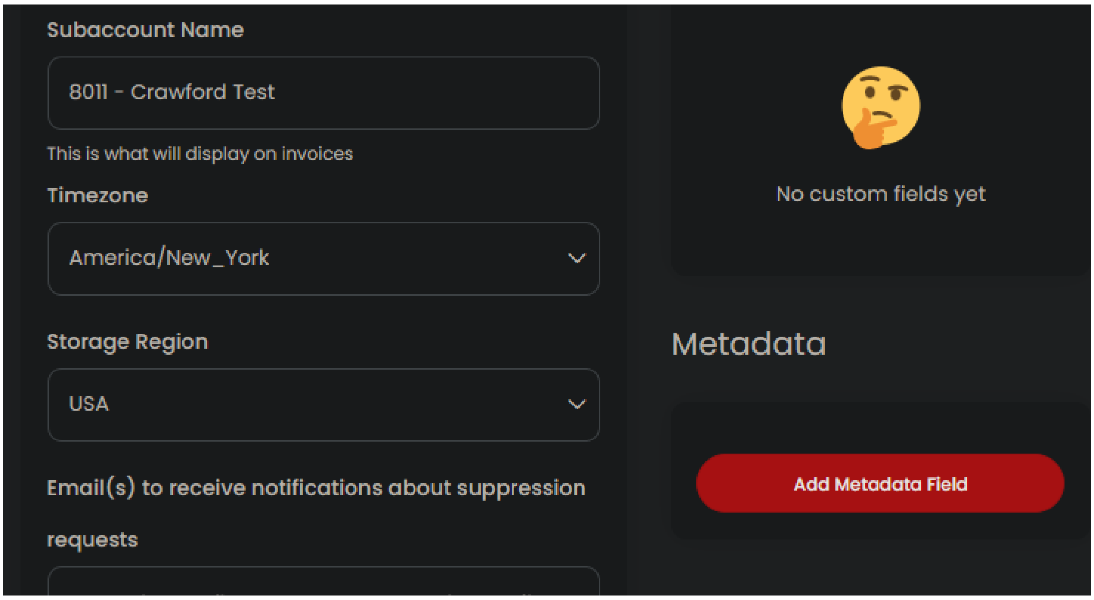
Next, go to the **Fax** tab, then select the **Fax Caller ID** dropdown. Select the added number:



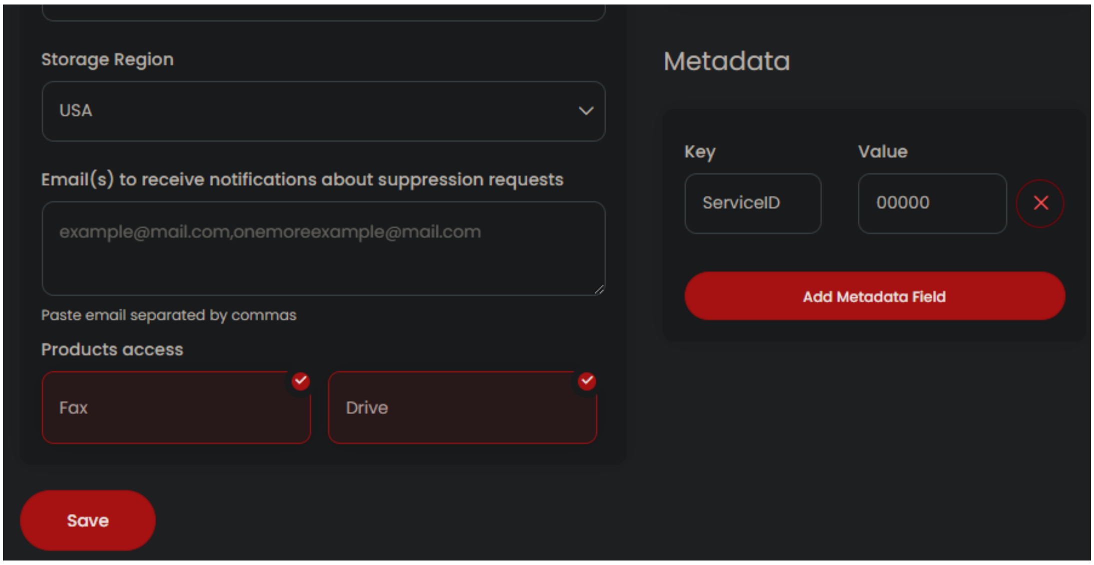
Then, way down at the bottom of the screen, select **Save**:



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:



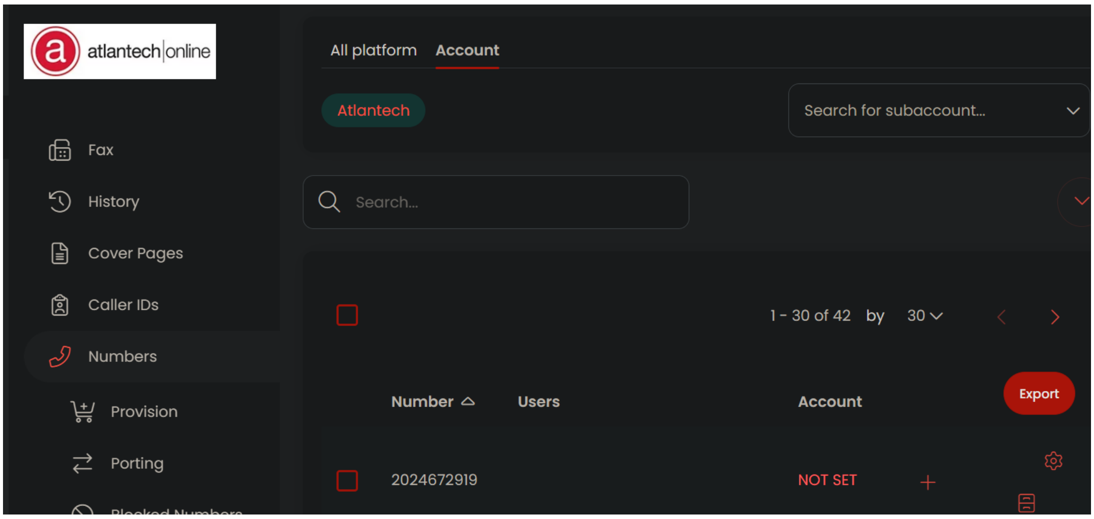
Select the **Add Metadata Field** button. In the **Key** field, enter "ServiceID" and in the **Value** field, enter the actual service ID for the Cloudfax service in Rev.io for the customer. Once this is completed, select the **Save** button at the bottom of the screen to save the change:

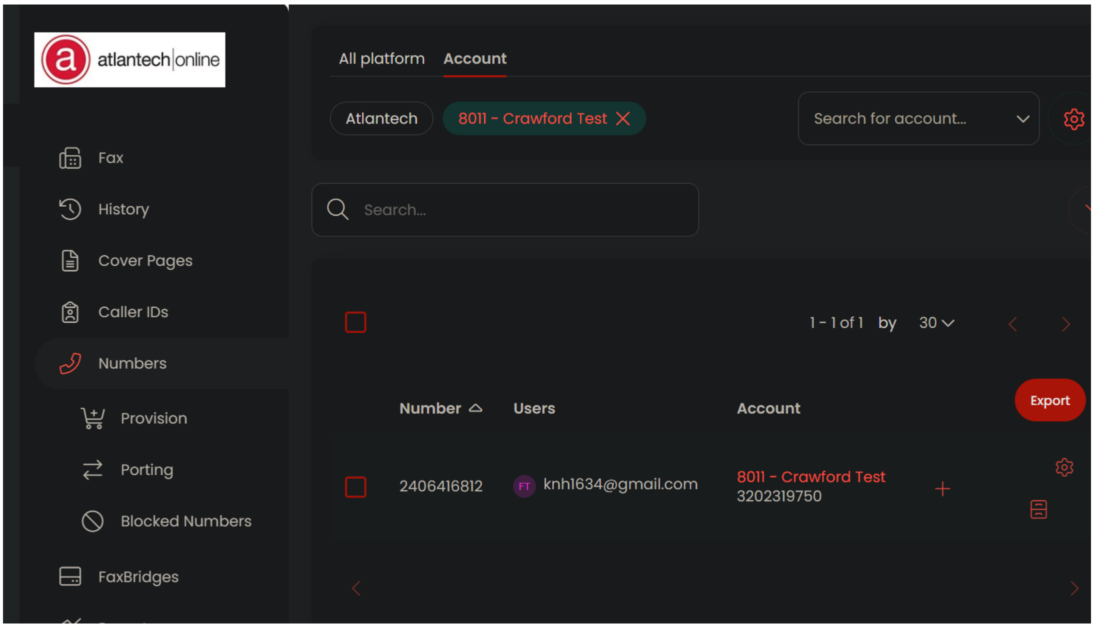


Note: As this is a test account, the value was entered as "00000".

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:

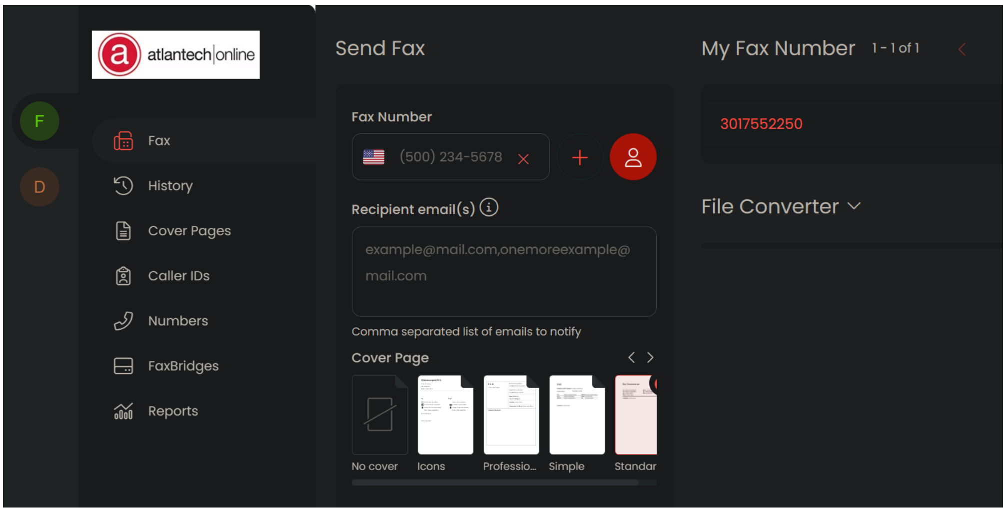
Your Cloudfax service has been configured; please see the details below:
Cloudfax Interface URL:
https://atlantech.documo.com/signin
Email address/username and password:
Email/Username: knh1634@gmail.com
Password: FsphE5-VK7
Here are a series of links to help articles on Documo's (our Cloudfax provider) 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

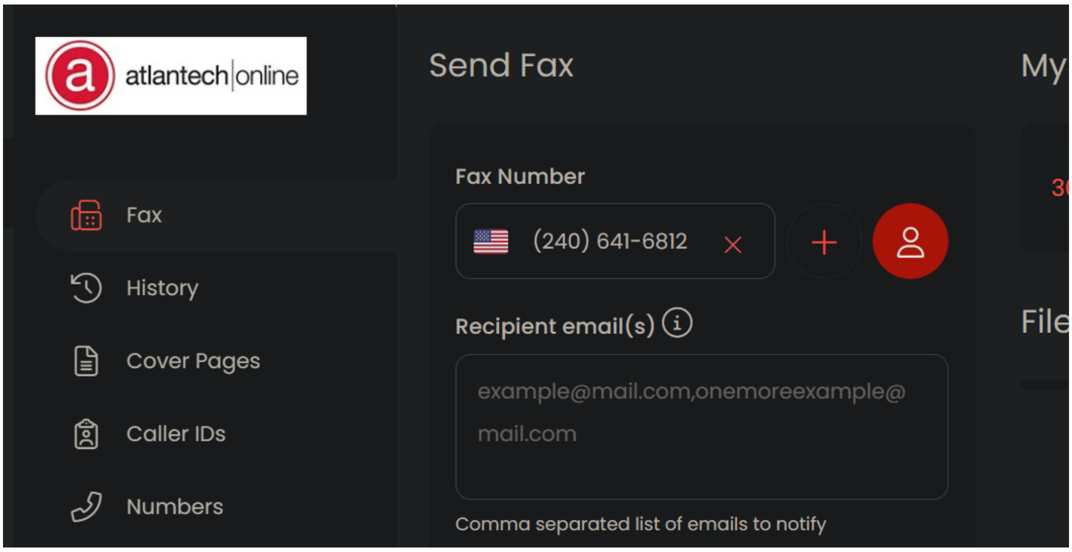
Please note that while the screenshots on these articles will look different than the Cloudfax interface, the instructions will work exactly. In a few minutes, I'll be sending a test fax from the Technical Support account (it will appear to come from 833-520-1652; this is a default Caller ID number and 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:

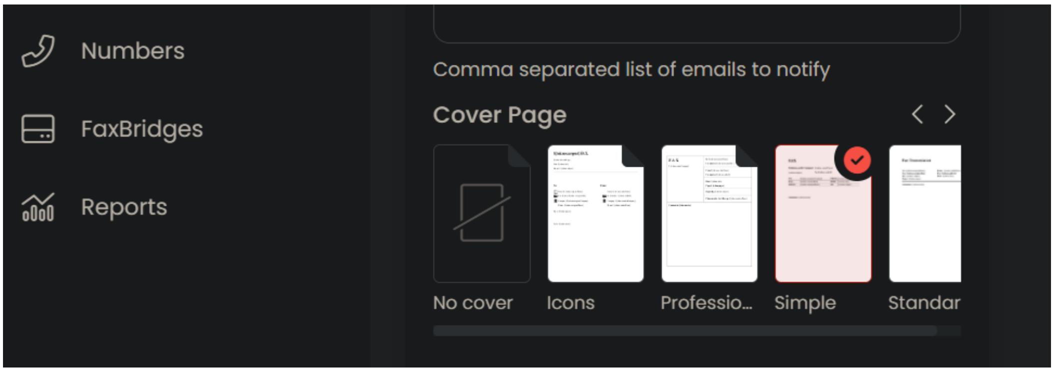
At the top of the menu on the left-hand side, select **Fax**:



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

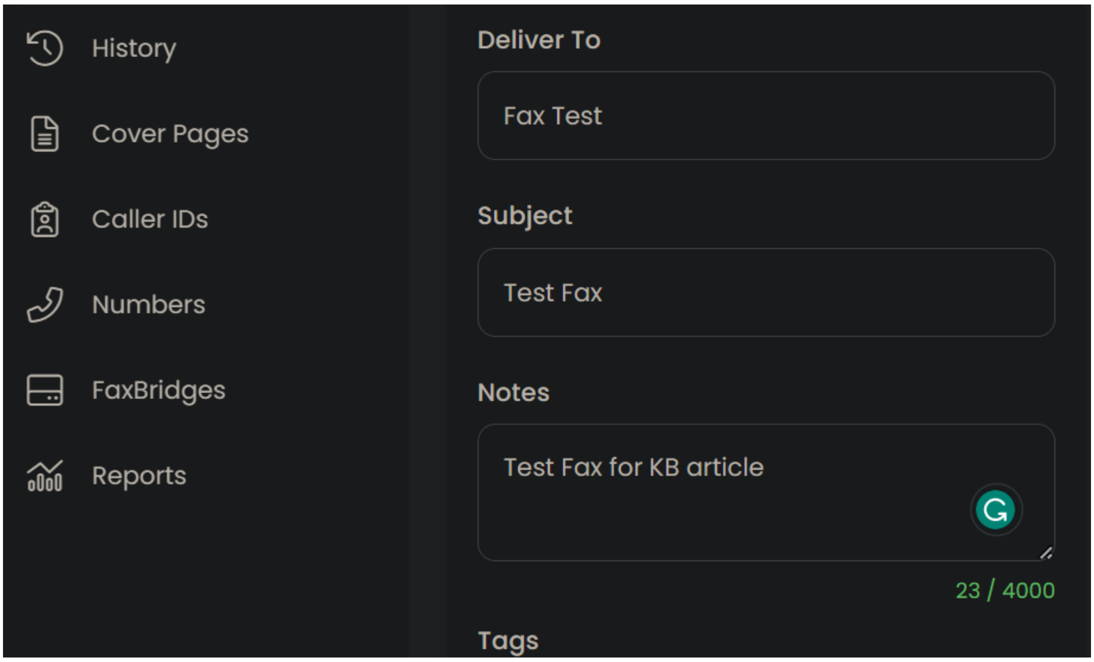


Select one of the items under **Cover Page**:

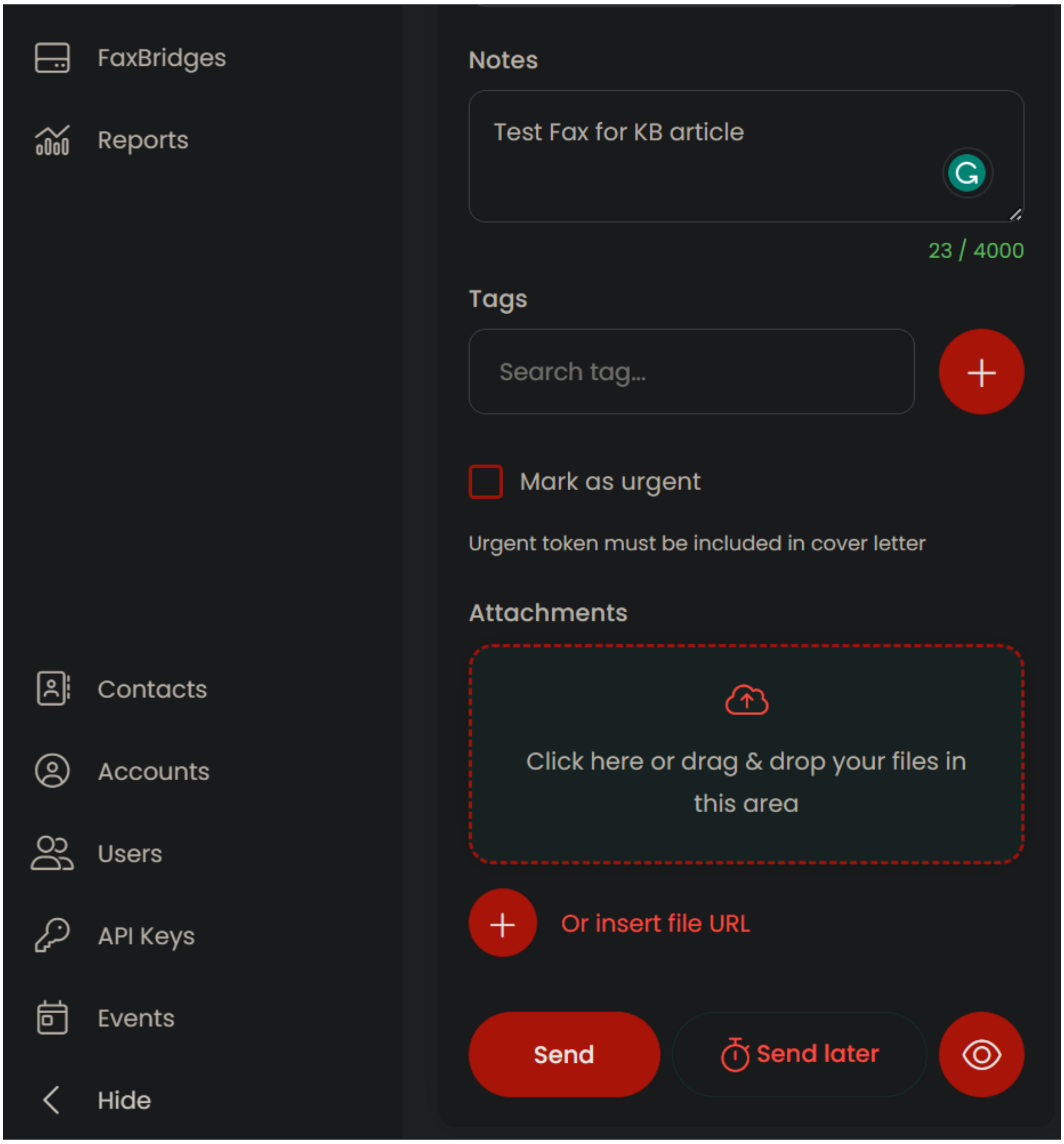


This step can be skipped if you have your own cover page saved as a file that you would like to use.

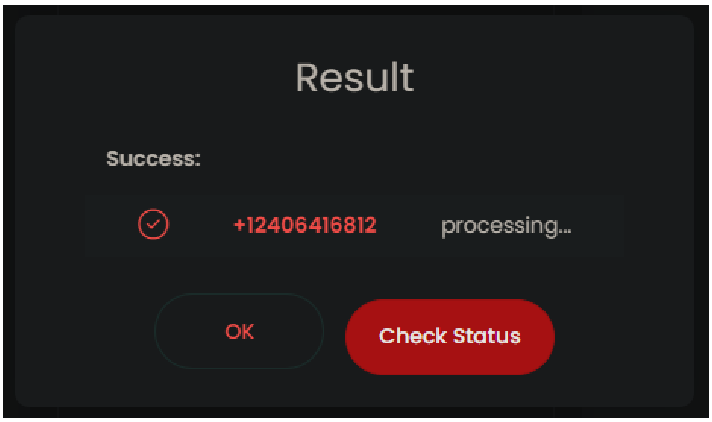
If you selected one of the built-in cover pages, you'll need to fill in the **Deliver To, Subject, and Notes** fields to fill in the information:



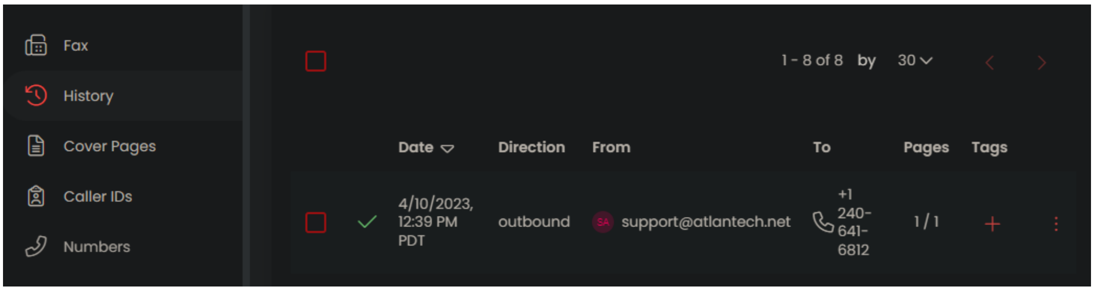
Once everything is in place, select **Send:**



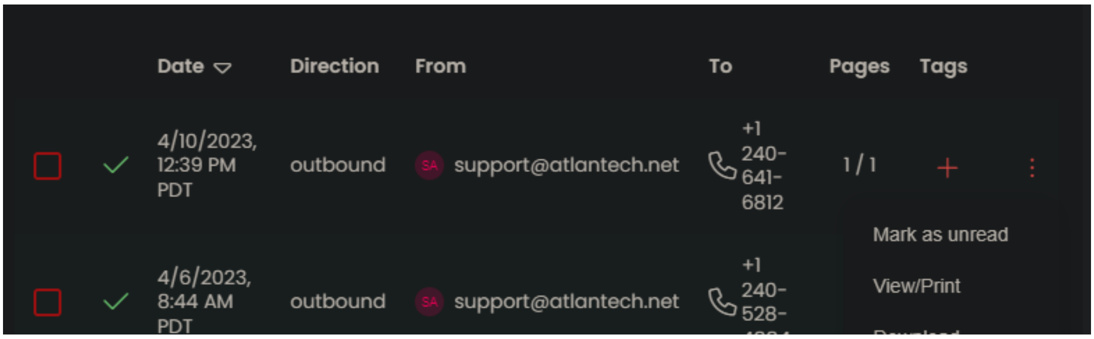
You'll get a status prompt where you'll be told if the fax was successful:

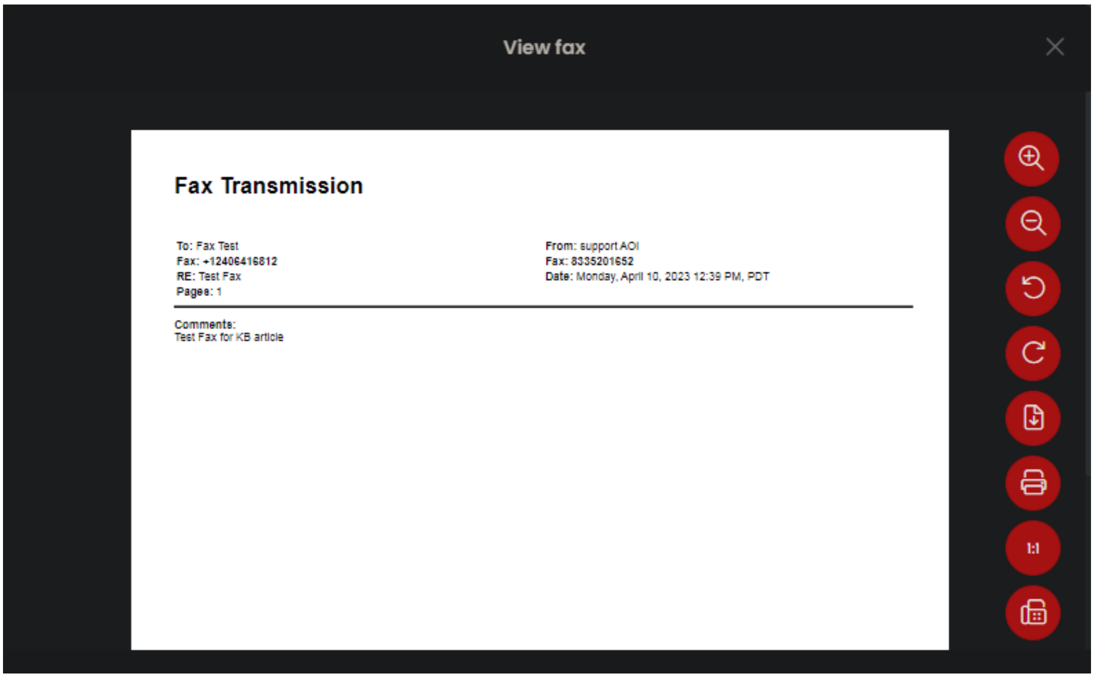


Select **Check Status** and you'll be taken directly to the history, where you should be able to see the fax in there:

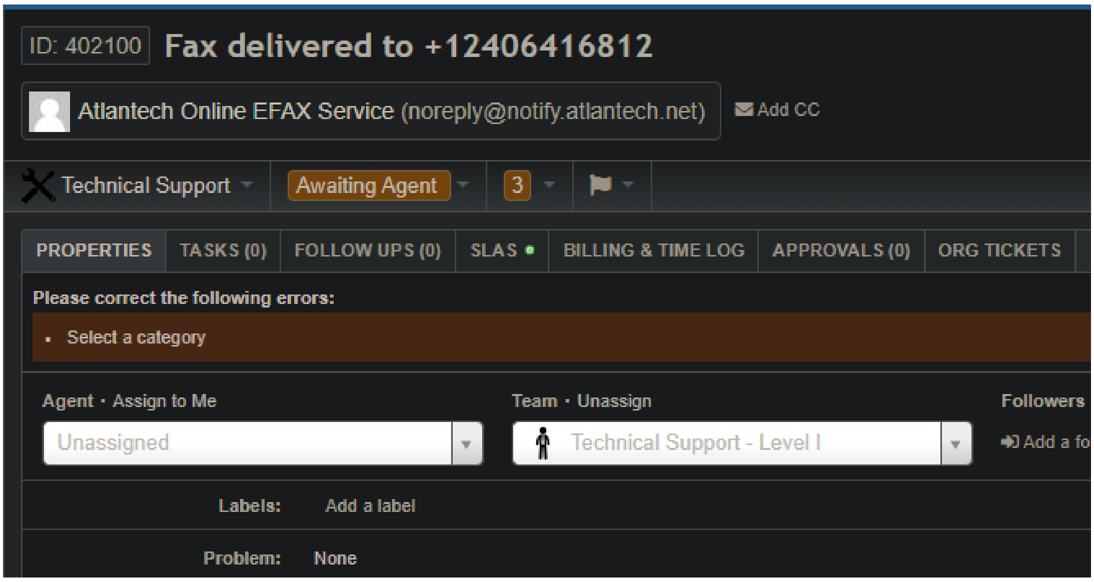


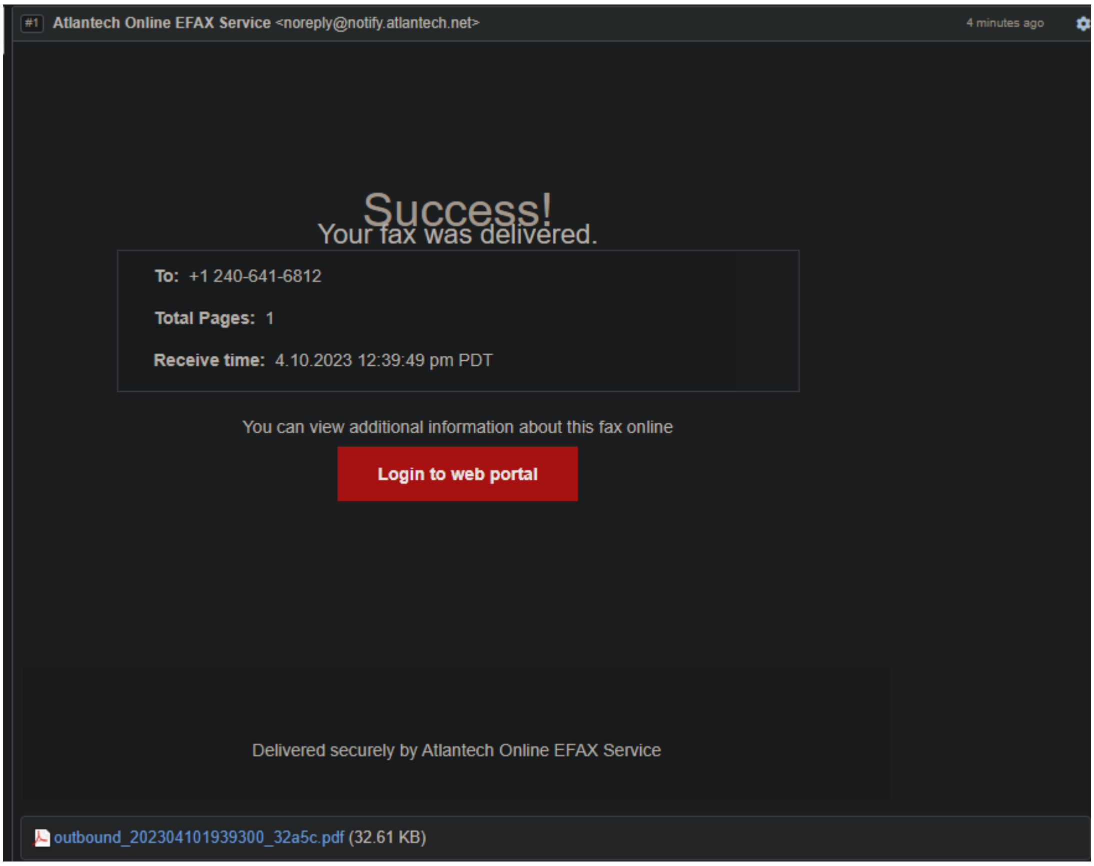
Select the three dots on the right and select **View/Print** to see what was sent:





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





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