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Personalize and Customize your Account

Mike Johnstone - 2024-04-22 - [Number Settings](#)

Personalize and Customize your Account

Manage your calling and customize features from within our Cloud PBX. Manage inbound and outbound calls, set up voicemail, call recordings and more.

Update Personal Account Details

Keeping your account's personal details current will make sure that you keep on top of all aspects of your CloudPBX from accounts to settings.

1. Log into your account.
2. Select **Profile > Contact Information**.
3. Fill in or update your details. Within this section you have the option to; fill in contact details, and billing details, select billing email options and reset the account password.
4. Click **Save** to update settings.

Notifications

1. Select **Profile > Notifications**.
2. Select the notifications you want to be sent to your email.

Check Account Credit Settings

By now you have entered your credit card details into your account. It is important to understand how and when payments will be deducted from your credit card.

There are two separate processes that trigger credit card payments and we will explain how these work.

1. Automatic account credit top-up.
2. Auto-Pay/Auto Debit: Payment of your fixed monthly account charges.

Account Credit and Top-Up Settings

If you are on a pay-as-you-go calling plan, each call you make and each service you purchase will be deducted from your account balance. So, if your account balance is \$10.00, every time you make a call this is deducted. Once you reach your specified threshold, your account can be automatically topped-up with a payment made via your saved credit card.

If you do not have your account set to automatically top-up you risk losing the ability to make outbound calls. This includes any calls that you may have forwarded to mobile numbers as these are outbound calls.

On a pre-paid calling bundle, this may not include international calls and/or calls to 13/1300 numbers. So you will need to have credit on your account to make these calls. Setting an auto top-up will ensure your credit is added to your account if you go over the calling allowance in your bundle.

We recommend setting this to **ON**.

1. Select **Billing**.
2. Select **Manage Billing**.
3. Toggle to **enable the option** "Auto top up my account when my balance drops below the balance threshold."
4. Define the **Balance Threshold**, Top-up amount, and Maximum per week.

Add Numbers

Numbers

You can add numbers to your account at any time. Once added to your account, you can then customize the settings for this number and also add a device such as a handset or a softphone.

- Select **Switchboard** from the top menu.
- Click "**Add Number**".
- Select your desired Country and State, locality, type (Voice or Fax), and the plan to that you want to add the number.

Add number

Country	Australia	▼
State	NSW	▼
Locality	Sydney	▼
Server type	Voice	▼
Plan	Bundled Line	▼
Cost	0.00	
Pro-rata charge	0.00	

ADD **CANCEL**

Number Porting

You can also bring your own numbers to 2talk at no cost to you.

We'll take care of bringing your numbers across to our network. Simply complete our online porting form to get started.

The porting process usually takes 5-7 business days.

You can find more information regarding number porting processes [here](#).

Note: Numbers and channels are charged as per the plan or bundle you have chosen.

Connect Handsets and Soft Phones

Handsets and Soft Phones are commonly referred to as "devices". Within your account, there are a few fundamental rules regarding devices:

- You can only have one device per number.
- Any physical device (handset) must be IP telephony capable.
- The device connects to a VoIP domain (proxy) which sends and receives your calls. You will find this address [here](#).
- Connecting your device is referred to as "provisioning".
- Auto device provisioning is supported for Yealink and Polycom. Config files for other IP devices may be available from your service provider.

Connecting a VoIP Handset

This is how you connect your physical device to a number in your CloudPBX account.

Note, that this is only for Yealink and Polycom phones.

1. Once logged into your Account click **Tools** and select device provisioning.
2. Select **Add Device**.
3. Select the number to be connected to the device.
4. Add the **MAC address**.
5. Add the **device name**.
6. Select the **time zone**.
7. **Save** the information.
8. Connect or restart your handset and the settings will be uploaded and you can now make and receive calls.

Connecting to a SoftPhone

You can make and receive calls through a softphone installed on your mobile device, desktop PC or Mac. This is so handy for anyone who travels, so they can make calls from their mobile using a local phone number. And also for teams who make lots of calls and they can have a device set up on their computer.

- You will need to install the appropriate app on your device.
- If you are using a softphone app given to you by your service provider, it is likely the domain proxy details will already be configured. If not, you will need to enter this.
- Enter the username which is your phone number, along with your password.
- You will see the phone saying "registered" and you will then be able to make and receive calls.

Device Provisioning in your Account is not used to set up SoftPhones.

Personalize Numbers

Now that you have numbers set up on your account, there is so much more than you can do to customize these numbers. This includes:

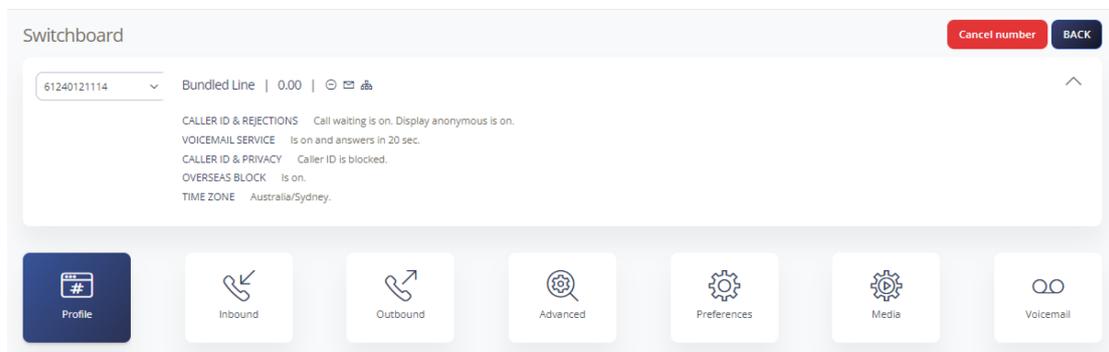
- Setting the Caller ID so that when outbound calls display your name or number.
- Add your voicemail messages.
- Set up your voicemail so your messages are automatically sent to an email address.

- Set up Call Recording so a .wav file for each in/outbound call is saved.

To enable functionality for each number, follow these steps:

1. Select **Switchboard** and you will see your phone numbers listed.
2. Click the number you want to update the settings for.
3. Click into the menu items, such as **Inbound Calls**, and you update the settings for your number.

There are multiple features that you can use to personalize your numbers. We recommend taking the time to see all the articles located in the Help Center and selecting those which would enhance your business communication.



Restrict Numbers

Okay, this might be a little tricky to get your head around, so take a moment to think this through. Here are some basic steps.

- You have set a user name and password for your account.
- You are the administrator of your account and you use the above credentials to access your account.
- When you assign a phone number to a person, you can give them access to your Account via their own user name and password, so they can now set up and manage the features. This is referred to as a Restricted Number.
- Restricted numbers should be assigned unique passwords with a minimum of eight characters.

Important!

- **Don't use** wildcard characters like # \$ * ! & in the password.
- **Don't use** the account password on Restricted Numbers.

