

# CITK

Phone numbers for users / Assign  
Twilio Numbers to Users



### TABLE OF CONTENTS

- [1. Go to location Settings > Phone numbers > Click on Add Number](#)
- [2. Once you buy the number for the user](#)
- [3. Expand Call & Voicemail Settings](#)
- [4. Click on the dropdown to Select Twilio Number](#)
- [5. To use the assigned Twilio number to initiate calls and SMS, we can add a workflow action Assign to user so the contact will be assigned to the user.](#)
- [6. You can use the following custom values in the workflow when sending sms/email:](#)
- [FAQs:](#)
  - [1. How to send from the user-assigned Twilio number for manual SMS?](#)
  - [2. How to use this phone assignment feature for SMS/Voice capable only Twilio number setup?](#)
  - [3. How to use this phone assignment feature if we bought a new Twilio number and want to keep the old Twilio number to communicate with leads?](#)

Once you [Purchase a Twilio Phone Number](#), here's how to assign a dedicated Twilio number to each user:

## 1. Go to location Settings > Phone numbers > Click on Add Number

## Phone numbers for users / Assign Twilio Numbers to Users : CITK

The screenshot shows the 'Phone Numbers' management page. On the left is a dark sidebar with a 'Settings' menu. The 'Phone Numbers' option is highlighted. The main content area has a 'Manage' tab. It includes a table for 'SMS Providers' with one entry for 'Twilio'. Below this is a table for 'Phone Numbers' with two entries. A red box highlights the '+ Add Number' button. At the bottom right, there is a '+ Add Number Pool' button.

**Phone Numbers** [Manage](#)

SMS Providers

Default Provider	Provider Name *	Provider Type
	Twilio	Twilio

[Save](#)

Phone Numbers 2 accounts [+ Add Number](#)

Default Outbound Number	Name	Phone Number	Forwarding number	Timeout	
	(778) 907-0712	+1 778-907-0712	+91 97428 28793	15s / 130s	
	447360544489	+44 7360 544489			<a href="#">Add</a>

Number Pool [+ Add Number Pool](#)

## 2. Once you buy the number for the user

Go to **My Staff > Team Management > Edit** the user you want to assign the number to

The screenshot shows the 'My Staff' > 'Team Management' page. On the left sidebar, 'My Staff' is highlighted with a red box and a red '1'. The main content area shows a list of team members. The 'Ebrahim Molai' entry has its 'Edit' button highlighted with a red box and a red '2'. The list includes names, emails, and phone numbers for several users.

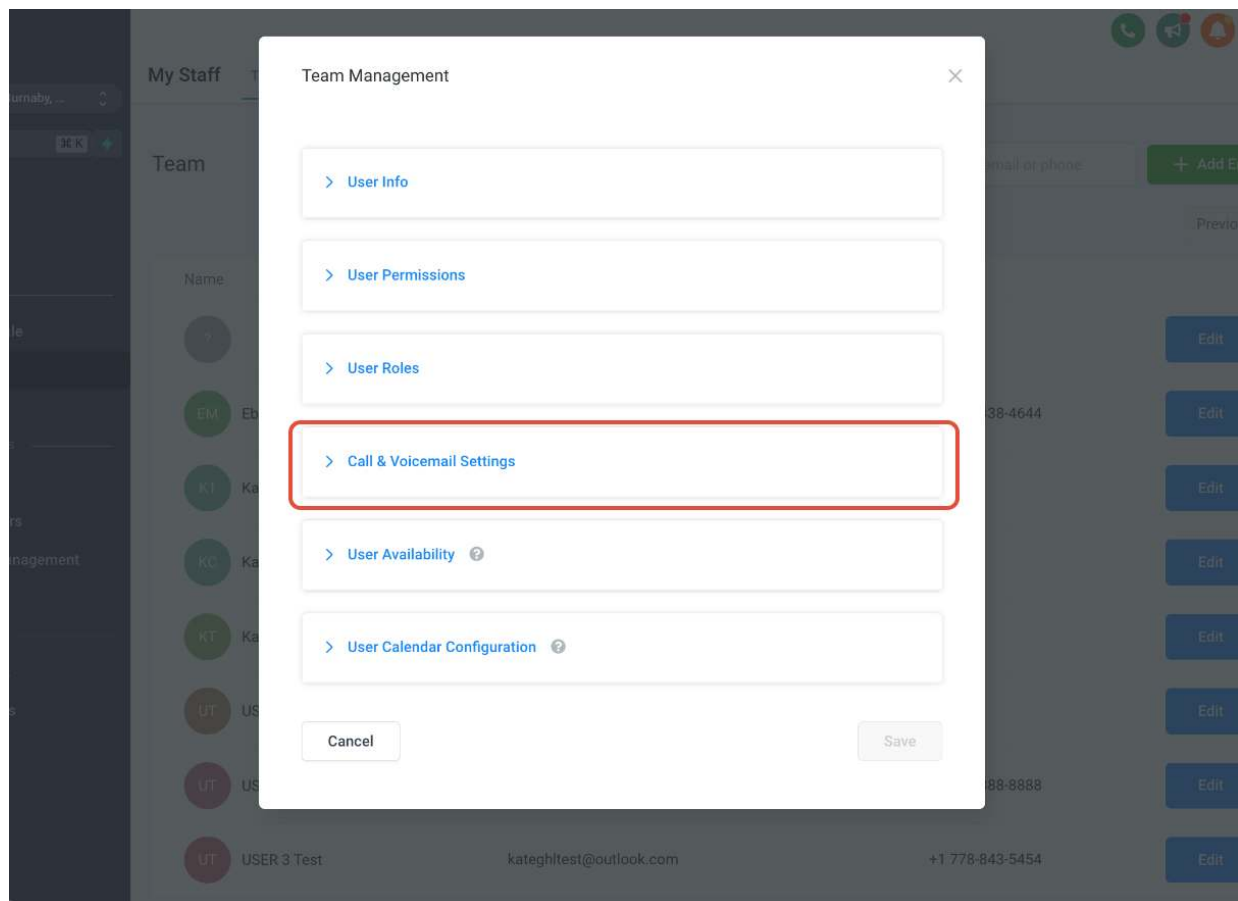
**My Staff** [Team Management](#) [Teams](#)

Team [Role](#)  [+ Add Employee](#)

[Previous](#) [Next](#)

Name	Email	Phone	
	kateghltest@gmail.com		<a href="#">Edit</a>
Ebrahim Molai	ebrahim@gohighlevel.com	+1 778-438-4644	<a href="#">Edit</a>
Kate 1	kateghltest@hotmail.com		<a href="#">Edit</a>
Kate C	kate+highlevel@gohighlevel.com		<a href="#">Edit</a>
Kate Test	kateghltest@yahoo.com		<a href="#">Edit</a>
USER 1 test	kate@gohighlevel.com		<a href="#">Edit</a>
USER 2 test	deletecontacttest+1@gmail.com	+1 778-888-8888	<a href="#">Edit</a>
USER 3 Test	kateghltest@outlook.com	+1 778-843-5454	<a href="#">Edit</a>

### 3. Expand Call & Voicemail Settings



### 4. Click on the dropdown to Select Twilio Number

Choose the number you bought for the user

We could only assign one Twilio number to one user.

Once the Twilio number is assigned, all calls to that Twilio number will route to the user's phone number even if the contact is assigned to another user.

▼ Call & Voicemail Settings

Inbound Twilio Number

Select Twilio Number

▼

☐ Forward calls to mobile app ⓘ

This is only required if the users needs a dedicated number. Not required for voicemail or for routing the call to the assigned user.

This voicemail message will be played instead of the one by phone carrier. We recommend a timeout of 20 seconds or less.

Incoming Call Timeout

No timeout

10 Secs

20 Secs

📎 Upload mp3/wav file

We will record a voicemail if call isn't answered before this duration

All calls & SMS will be using the Twilio number assigned to the user then.

Phone numbers for users / Assign Twilio Numbers to Users : CITK

Call test

Assign User

Actions Settings History

Add New Workflow Trigger

+

Assign To User

+

Call

+

ACTION NAME

Assign to user

USERS

Ebrahim Molai

☐ ONLY APPLY TO UNASSIGNED CONTACTS

## 6. You can use the following custom values in the workflow when sending sms/email:

User > Twilio Phone: {{user.twilio\_phone\_number}}

User > Twilio Phone raw format: {{user.twilio\_phone\_number\_raw}}

Call test

Twilio Phone

SettingsHistory

Add New Workflow Trigger

Assign To User

Call

Please select action

Sms

Sends a text message to the contact

Edit ActionStatistics

ACTION NAME

SMS

TEMPLATES

Select Template

MESSAGE

Custom Values Trigger Links

Contact

User

Appointment

Calendar

Message

Account

Right now

Attribution

Custom Values

Full Name

First Name

Last Name

Email

Phone

Phone (raw format)

Signature

Calendar Link

Twilio Phone

0 WORDS

CancelSave Action

## FAQs:

### 1. How to send from the user-assigned Twilio number for manual SMS?

If you assigned the Twilio number to the user but SMS is still sending from the old default Twilio number instead of the Twilio number assigned to the user, please make sure you are login as the user to test SMS.

When sending an SMS to a contact we always get the User who is Logged In to be used as the Sender, we do that because even though the Contact may be Assigned to someone else, the specific User that is there might be talking about something else, or have a different approach, therefore they will want to use their own number to get replies to.

If the user login has no Twilio number assigned, we will use the default Twilio number in the location.

**2. How to use this phone assignment feature for SMS/Voice capable only Twilio number setup?**

**3. How to use this phone assignment feature if we bought a new Twilio number and want to keep the old Twilio number to communicate with leads?**