



Version 1.1

FaxFinder Cloud User Manual

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Introduction

FaxFinder Cloud is the next generation fax hosting service; it is a high-performance service designed to track, document, manage and deliver fax traffic over enterprise networks of any size. The only major fax solution built native for Microsoft's .NET platform, FaxFinder lets your organization leverage the full potential of fax archiving vital data, speeding communication and fax-enabling your applications. FaxFinder is technology that adapts to how you use fax every day. Not the other way around.

The information provided in this guide instructs users how to send messages using FaxFinder services. It also provides additional information on more advanced product features.

The terms **fax**, **message**, and **transmission** are interchangeable and all are used throughout this document.

Contacting the FaxFinder Team

The FaxFinder team strives to provide you with the highest quality product support. Send your questions to support@faxfinder.net. Please send your feedback and comments regarding this documentation to documentation@faxfinder.net.

Getting Started

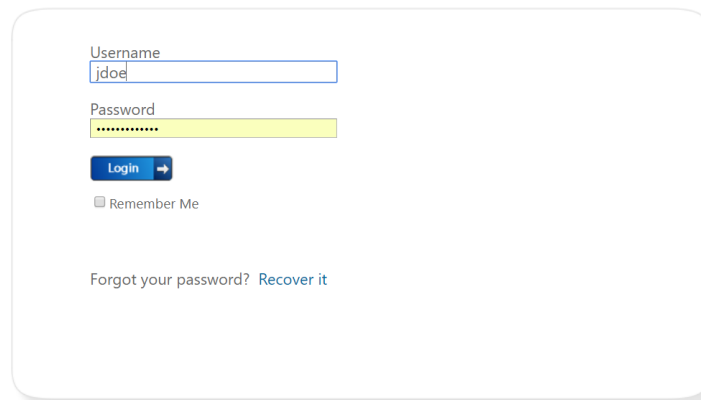
This section summarizes the User Interface menu and offers quick step-by-step instructions on sending a message to a single recipient. This assumes that this user account has been configured by the administrator with permission for sending and an inbound route.

1. Launch Internet Explorer (IE 8.x or higher) and enter the FaxFinder website URL (address) in the Address Bar.
Mozilla's Firefox and Google Chrome web browsers are also supported.

FaxFinder Cloud URL (Address)

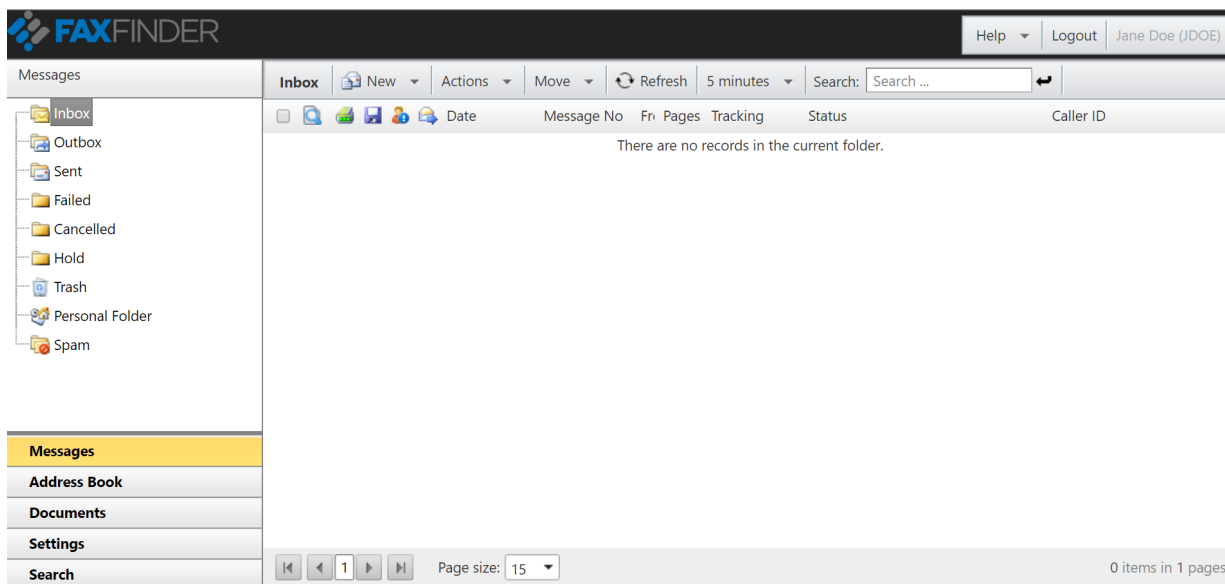
<https://www.faxfinder.cloud/>

2. Enter your **Username** and **Password** and click on the  button.

A login form with a white background and rounded corners. It contains a "Username" label above a text input field with "jdoe" entered. Below that is a "Password" label above a password input field with masked characters. A "Login" button with a right arrow is positioned below the password field. Underneath the button is a checkbox labeled "Remember Me". At the bottom, there is a link that says "Forgot your password? Recover it".

FaxFinder and the FaxFinder logo are trademarks or registered trademarks of Multi-Tech Systems, Inc.

Upon successful login, the primary window appears. The **Navigation Pane** is on the left-hand side.



3. Click  if not already selected.

Understanding FaxFinder Cloud User Interface

FaxFinder Cloud is a 100% browser-based web application. It possesses a standard look and feel; it is easy to use especially if you have grown accustomed to products like Microsoft Outlook.

Following is an introduction to FaxFinder Cloud user interface. You will find that the interface is consistent throughout the application. The same components are used on each web page. The website consists of five primary sections, all are accessible from the **Navigation Pane**.

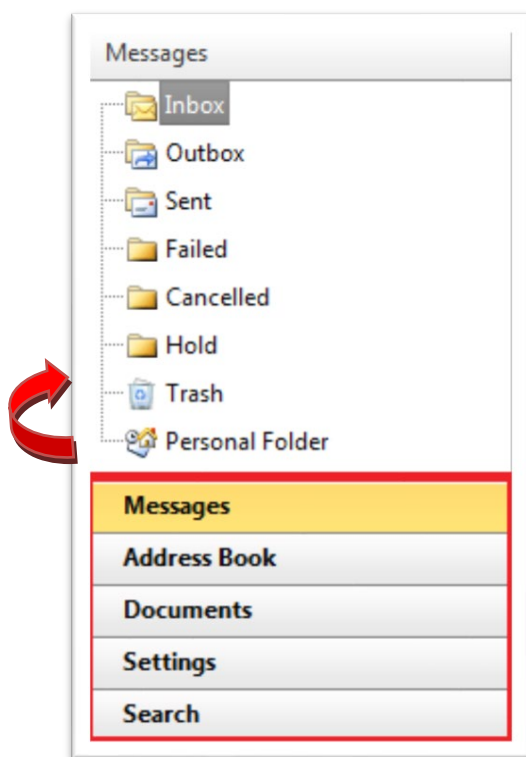


Figure 3 - Navigation Pane

The five primary sections are as follows:

Messages

Access this section to send faxes and to manage all outgoing and incoming faxes. When faxes are received, they show in the Inbox. Other folders in this section are the Outbox, Sent, Failed, Cancelled, Hold, Trash, and Personal Folders.

Address Book

The Address Book encourages organization of personal information of those who will receive faxes from you.

Documents

Manage and organize documents for outbound faxing.

Settings

Define your personal profile, change your password, and store company, regional, and notification settings.

Search

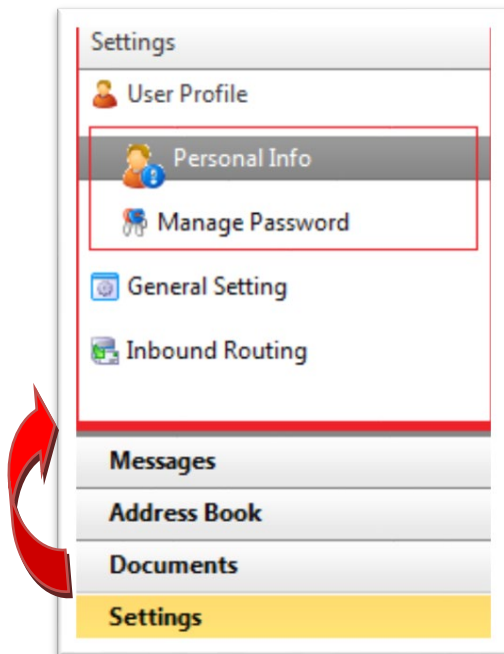
Search for a particular fax that resides in your fax library. Search using one or more message properties.

To navigate to one of the five primary sections, merely click the section's name in the **Navigation Pane**. When a section is selected, its name is displayed in another color at the top of the pane and its folder structure is accessible. In the figure above, the **Messages** section has been selected and the **Inbox** folder is highlighted. The information to the right (not shown in figure 3) changes to reflect the selected folder within the section. All the folders that may reside in a section are listed above the **Navigation Pane** and the contents of the selected folder will show to the right of the **Navigation Pane**. Click each of the sections in the **Navigation Pane** to see what appears above and to the right of the **Navigation Pane**.

Settings

User Profile configuration options may be modified by the user.

Click **Settings** in the **Navigation Pane** to configure your User Profile.



FaxFinder Cloud allows you to define the following profile parameters.

Personal Info (and Addresses)

This section contains your user name, displayed name, and contact information.

Manage Password

Change your password regularly from this location.

General Settings

Enter your physical address. If you are an employee, enter your company's name and address. Include your language and time zone. Define your default notification settings and if a cover page should be attached along with your fax transmission.

Figure 4 - Settings - User Profile Configuration

Refer to the following for additional details.

Personal Information

This information is about you, the registered FaxFinder Cloud User. The information entered becomes the default information required when sending a transmission to a recipient.

1. Click  **Personal Info** to access the **Personal Information** screen.

Note: User Name (Account Login Username)

No changes may be made to the User Name field.

2. Press **[Tab]** to move from one field to the next.
Enter and/or change all applicable information.
3. Click to update your profile.

Refer to the following example.

The following shows the current information contained in each field.

The screenshot shows a web interface for 'Personal Information'. At the top, there are 'Save' and 'Refresh' buttons. Below this, the form is divided into two sections. The first section, 'User Name', contains six input fields: 'User Name' (JDOE), 'Display Name' (Jane Doe), 'First Name' (Jane), 'Middle Name' (empty), 'Last Name' (Doe), and 'Prefer Address Type' (Email). The second section, 'Addresses', features a table with one row. The table has columns for 'Address Type' (Email), 'Address' (jdoe@yourco.com), and a 'Primary' checkbox (checked). To the right of the table is an 'Add Address' button.

Personal Information Save Refresh	
User Name	JDOE
Display Name	Jane Doe
First Name	Jane
Middle Name	
Last Name	Doe
Prefer Address Type	Email
Addresses Add Address	
<input checked="" type="checkbox"/> <input type="checkbox"/> NOR NOS Primary Address Type	Address
<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Email	jdoe@yourco.com

Figure 5 - Personal Information

Next, notice the changes that this user has made to her personal information (a middle name was added, and the display name was changed).

This screenshot shows the same 'Personal Information' form as Figure 5, but with updated information. In the 'User Name' section, the 'Display Name' has been changed to 'Mrs. JLDoe' and a 'Middle Name' of 'Lilly' has been added. The 'Addresses' table remains the same, with the 'Email' address 'jdoe@yourco.com' and the 'Primary' checkbox checked.


Personal Information Save Refresh	
User Name	JDOE
Display Name	Mrs. JLDoe
First Name	Jane
Middle Name	Lilly
Last Name	Doe
Prefer Address Type	Email
Addresses Add Address	
<input checked="" type="checkbox"/> <input type="checkbox"/> NOR NOS Primary Address Type	Address
<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Email	jdoe@yourco.com

Figure 6 - Personal Information with Changes

The Personal Information folder also lets you add additional Addresses to your contact information. Although being notified via EMAIL (when a fax transmission is sent or received) is set as the default, you may prefer a copy of your fax delivered to an FTP or HTTP location or via one of the other options.

The following shows how to add additional **Address Types** (i.e. contact details) to your profile.

The following changes may or may not be necessary.

1. Click the **Add Address** button on the Personal Information screen.
2. Click the Address Type  to see the various types.

Address Dialog

Add As New Add & Close Reset

Address

Address Type: Email

Address *

Format: PDF

☐ include address in receive notification

☐ include address in send notification

Address Dialog

Add As New Add & Close Reset

Address

Address Type: [Dropdown Menu]

Address *

Format: [Dropdown Menu]

☐ include address in receive notification

☐ include address in send notification

Dropdown Menu Options: Email, Fax, Raw Fax, File, Ftp, Http, Mobile, Phone, Printer

Figures 7 & 8 - Address Types for Notification

3. Select the required Address Type.

The previous screen shows that when EMAIL type is selected, the Address field below it is prepared to accept an email address. However, if another Address Type is selected, the field prepares accordingly. The most common methods of notification are by **Email**, **HTTP**, and **FTP**. When being notified via Email the **Addresses** section appears as follows. Notice the **NOR** (notification of receipt) and **NOS** (notification of send) at the base of the section. Notifications will be sent via **Email**.

Addresses Add Address

	NOR	NOS	Primary	Address Type	Address
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	john@faxfinder.net
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	jsmith@faxfinder.net

Figure 9 - Notification via Email (NOR and NOS are Enabled)

Note: More Detail on Notifications (NOR and NOS)

- A TIF email notification will be sent to mailbox jsmith@faxfinder.net when receiving a fax.
- A PDF email notification will be sent to mailbox john@faxfinder.net when sending a fax.

Ensure notification settings are defined in **General Settings**.

The image displays two screenshots of the 'Address Dialog' window, which is used for configuring notification settings. The window has a title bar with a close button and a toolbar with buttons for 'Add As New', 'Add & Close', 'Update', and 'Reset'. Below the toolbar, there is a section titled 'Address' with a person icon. The 'Address Type' is set to 'Email'. The 'Address' field contains the email address. The 'Format' dropdown menu is highlighted with a red box. In the first screenshot, the 'Format' is 'TIF', and the checkbox 'include address in receive notification' is checked, while 'include address in send notification' is unchecked. In the second screenshot, the 'Format' is 'PDF', and the checkbox 'include address in send notification' is checked, while 'include address in receive notification' is unchecked.

Address Dialog

Add As New Add & Close Update Reset

Address

Address Type Email

Address jsmith@faxfinder.net

Format TIF

☒ include address in receive notification

☐ include address in send notification

Address Dialog

Add As New Add & Close Update Reset

Address

Address Type Email

Address john@faxfinder.net

Format PDF


☐ include address in receive notification

☒ include address in send notification

Figure 10 - Additional Notification of Receipt and Notification of Sent Settings

The address entered can be notified when transmissions are received and/or when transmissions are sent.

You may choose to receive your notification in one of two file formats. Both are imaged; this means that the text and/or graphics contained in the file cannot be selected. As a result, no ability to copy and paste the content exists. The text cannot be extracted; it is a graphic.

4. Click  and select the appropriate file format for your notifications. The first is the default file format.
 - Portable Document Format (PDF)
 - Tagged Image File Format (abbreviated TIFF or TIF)

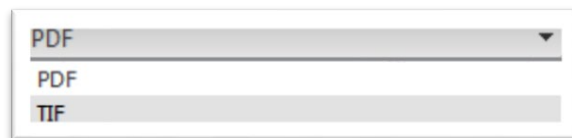

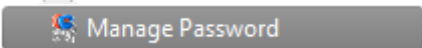


Figure 11 - Notifications May Be Received in One of Two File Formats

Note: Save Changes

Remember to click  **Save** to save any changes and update your profile.

Manage Password

1. Click  to arrive at the following screen. From this location, you may change your password.

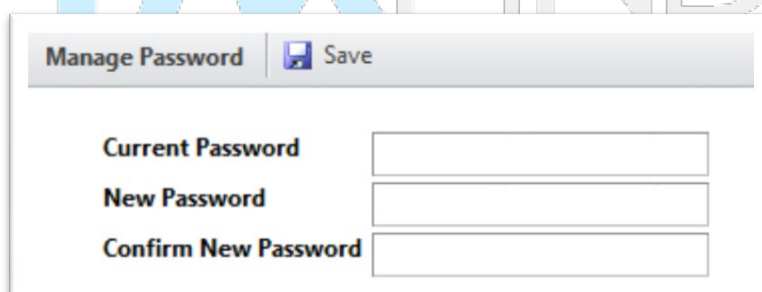
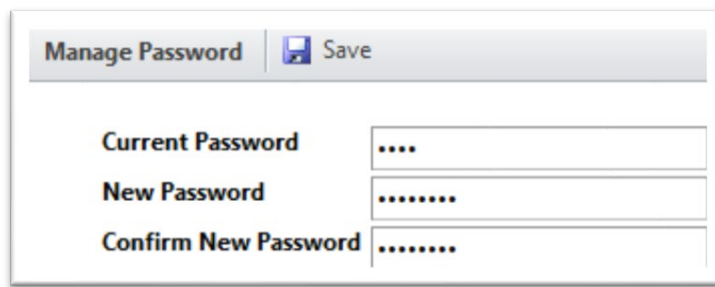
A screenshot of the 'Manage Password' web form. The form has a title bar with 'Manage Password' and a 'Save' button. Below the title bar, there are three labeled text input fields: 'Current Password', 'New Password', and 'Confirm New Password'. The 'Current Password' field is the first and is currently empty.

Figure 12- Manage Password - Preparing to Change Password


2. Click in the **Current Password** field and enter the password used to login to FaxFinder.
3. Press **[Tab]** to move the next field.
4. Enter your new password and press **[Tab]**.
5. Re-enter your new password.



The image shows a 'Manage Password' dialog box. At the top, there is a header bar with the text 'Manage Password' and a 'Save' button with a floppy disk icon. Below the header, there are three input fields. The first field is labeled 'Current Password' and contains four dots. The second field is labeled 'New Password' and contains seven dots. The third field is labeled 'Confirm New Password' and contains seven dots.

Manage Password	
Current Password
New Password
Confirm New Password


Figure 13 - Manage Password - Changing Password Entries

6. Click  to update your password.

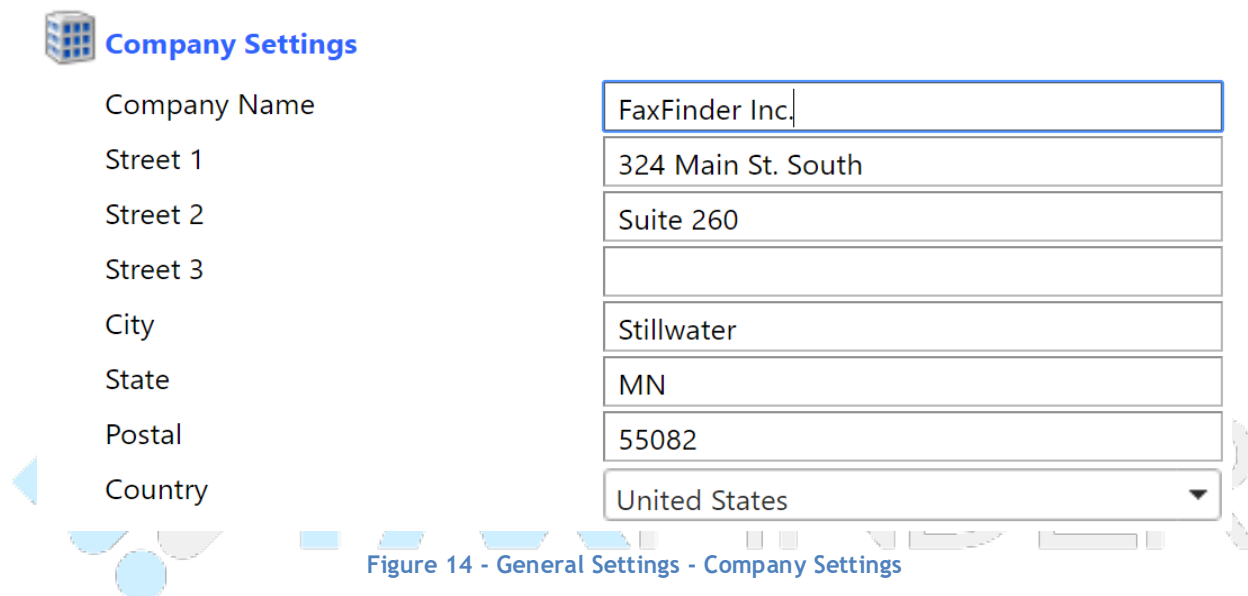


General Settings

To define **Company**, **Regional & Language**, **Notification**, and **Default Send Attachment (Cover Page)** settings, follow the steps below.





1. Click  **General Setting** to arrive at the following screen.
Begin with the **Company Settings** section.
2. Press [Tab] to move from one field to the next.
Enter the address of your company or organization.
The example that follows shows the physical address for FaxFinder Cloud.

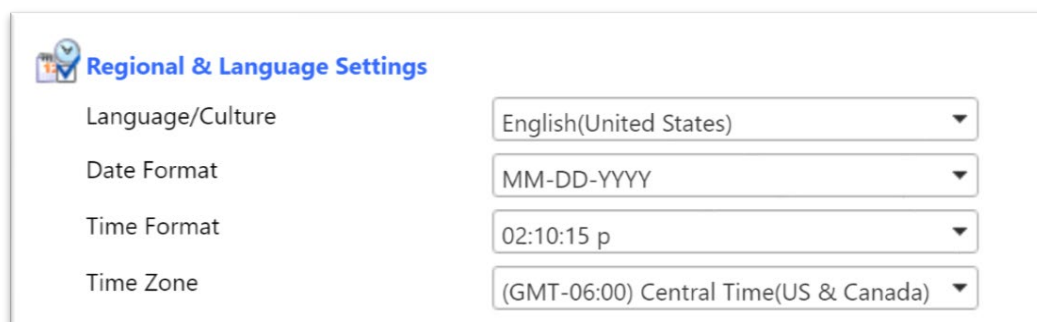
The information entered here is used as the default information when sending a transmission.



Company Name	FaxFinder Inc.
Street 1	324 Main St. South
Street 2	Suite 260
Street 3	
City	Stillwater
State	MN
Postal	55082
Country	United States


Figure 14 - General Settings - Company Settings

3. Click  **Save** to update your profile.
Continue to the **Regional & Language Settings** section.
4. Click  and select the **Regional & Language Settings**.
5. Click  and select the appropriate **Date** and **Time** formats.
6. Click  to select the appropriate **Time Zone**.



Language/Culture	English(United States)
Date Format	MM-DD-YYYY
Time Format	02:10:15 p
Time Zone	(GMT-06:00) Central Time(US & Canada)

Figure 15 - General Settings - Regional & Language Settings

7. Click  to update your profile.



Continue to the **Notifications Settings** section.

- Click to place a check mark in the appropriate check boxes.

Keep in mind you are defining default settings. Defaults settings are those settings you would like to have applied most often to a transmission received or sent.

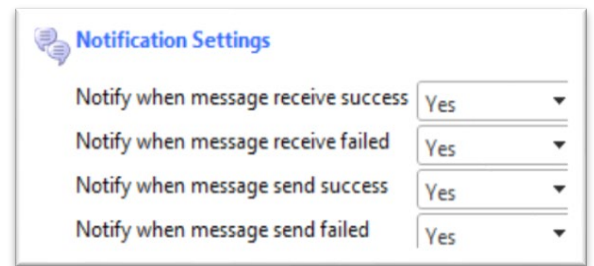

A screenshot of the 'Notification Settings' section in a software interface. It features a title 'Notification Settings' with a small icon. Below the title are four rows, each with a label and a dropdown menu. The labels are: 'Notify when message receive success', 'Notify when message receive failed', 'Notify when message send success', and 'Notify when message send failed'. All four dropdown menus are currently set to 'Yes'.

Figure 16 - General Settings - Notification Settings

- Click  **Save** to save changes and update your profile.

Continue to the **Default Send Attachment (Cover Page)** section.

By default a cover page is sent with each fax transmission. You may or may not require a cover page be added to the transmission of the document being sent at your organization. If a cover page is required, do nothing.

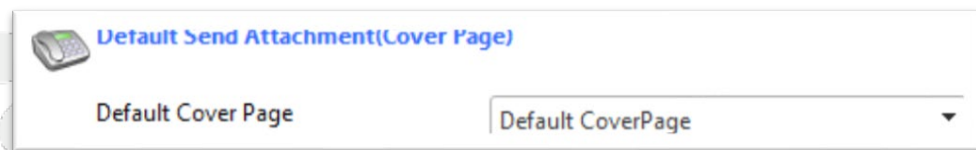

A screenshot of the 'Default Send Attachment (Cover Page)' section. It has a title with a fax icon. Below the title is a label 'Default Cover Page' followed by a dropdown menu. The dropdown menu is currently showing 'Default CoverPage'.

Figure 17 - General Settings - Default Send Attachment (Cover Page)

- If no cover page is necessary, click  to produce the dropdown menu and select **None** above **Default Cover Page** in the dropdown.

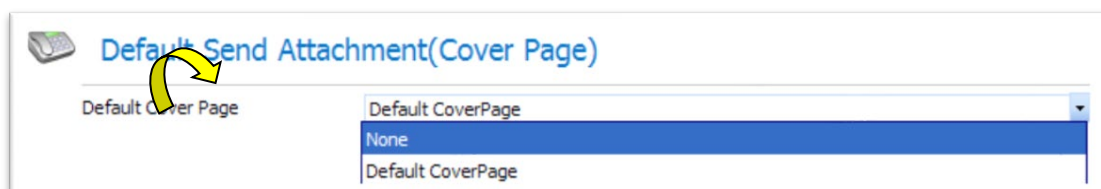
A screenshot of the 'Default Send Attachment (Cover Page)' section. The dropdown menu is open, showing three options: 'Default CoverPage', 'None', and 'Default CoverPage'. A yellow arrow points to the 'None' option, which is highlighted in blue.

Figure 18 - General Settings - Default Send Attachment - No Cover Page Necessary

If no cover page is necessary, this field shows as follows.

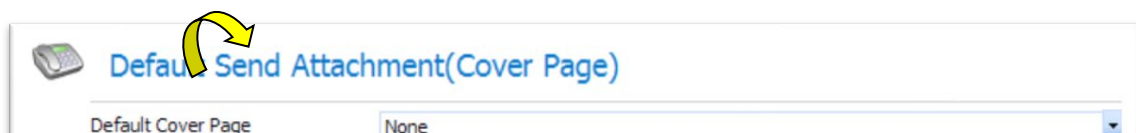
A screenshot of the 'Default Send Attachment (Cover Page)' section. The dropdown menu is closed, and the text 'None' is visible in the field next to the label 'Default Cover Page'. A yellow arrow points to the 'None' text.

Figure 19 - General Settings - Default Send Attachment - Cover Page Field Empty

- Click  **Save** to update your profile.

Your User Profile has been defined. Please, feel free to edit your profile at any time.

Messages

Simply Send

1. Click **Messages** in the **Navigation Pane**. The following is displayed.

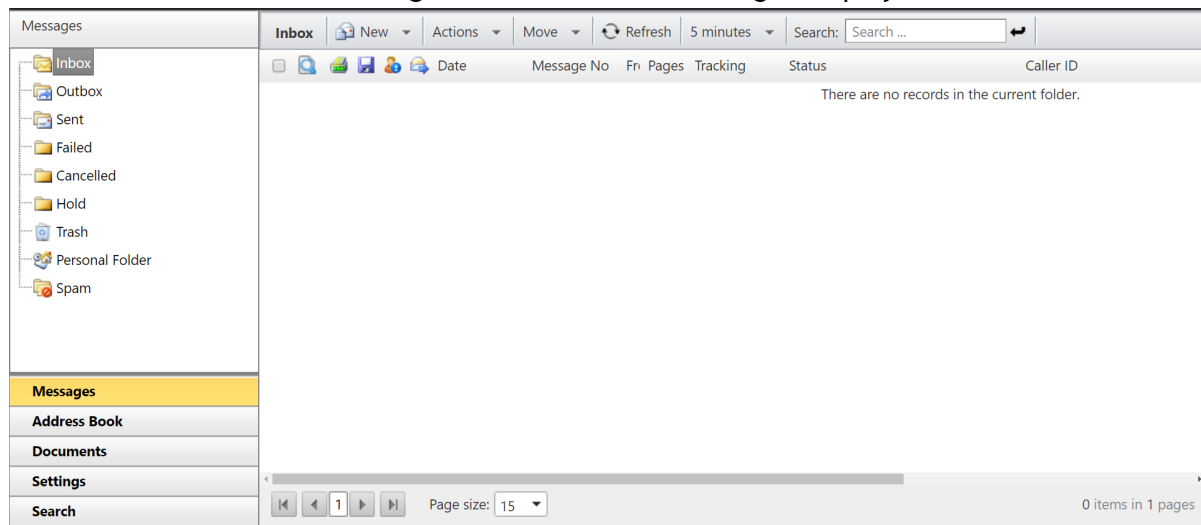


Figure 20 - Messages section

2. Click **New** to open (pop-up) a **New Message** window. The **Sender Profile** section automatically populates with your name and the name of your company.

The screenshot shows the 'New Message' window. It has a 'Send' button in the top right. The window is divided into several sections. The 'Sender Profile' section has fields for 'From' (John Smith) and 'Company' (FaxFinder). The 'Message Info' section has fields for 'Subject' (Sample Documentation), 'Notes' (This is a sample user guide.), and 'Priority' (Lowest). The 'Tracking Info' section has a 'Tracking No.' field. Below these is a 'Recipients' section with tabs for 'Recipients', 'Documents', and 'Options'. The 'Recipients' tab is active, showing a table with columns: Add Generic, Add Contact, Add User, NS, NE, Name, Company, Delivery Address, and Notify Address. The table is empty, displaying the message 'Empty record.' To the left of the table is a 'Generic Recipient' section with fields for 'Name' (Paul Banco), 'Company' (etherFAX), 'Delivery' (Fax), 'Fax #' (+12153839994), and 'Notify Email' (pbanco@etherfax.net). There is also a checkbox for 'Add to address book'. At the bottom, there is a pagination bar showing 'Page size: 15' and '0 items in 1 pages'.

Figure 21 - New Message Window

3. Enter the **Subject** and any applicable **Notes**.
Press the [Tab] key to move from one field to the next.
4. Enter the recipient's **Name** and **Fax #**. When entering the **FAX #**, include the area code. No need exists for spaces, dashes, or parenthesis. These fields are bolded to show they are required.

Note: check box Add to address book.



Add to address book

Selecting this will add the Generic Recipient details as a contact record to your Address

5. Click **Add Generic**. The recipient's name shows in the **Recipients** section.

✕	NS	NE	Name	Company	Delivery Address	Notify Address
✕	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dennis Fong	ABC Consulting	+1 (720) 55	dfong@abc.com

Figure 22 - New Message: Recipients (to Receive Transmission)

Additional recipients may receive the same message.

6. Enter the next recipient's information.

Figure 23 - New Message: Another Recipient Receives the Same FAX

7. Click **Add Generic**.
The names of both recipients show.

✕	NS	NE	Name	Company	Delivery Address	Notify Address
✕	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dennis Fong	ABC Consulting	+1 (720) 55	dfong@abc.com
✕	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jeremy Tan	ABC Consulting	+1 (720) 55	Jtan@abc.com

Figure 24 - New Message: Multiple Recipients Receive the FAX

8. Click the **Documents** tab.



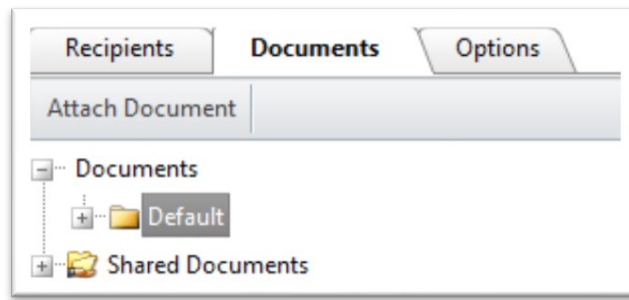


Figure 25 - New Message: Documents Tab

Documents that reside in the following locations may be attached to a message and be transmitted along with it.

- FaxFinder personal folders (Documents , initially only the **Default** folder resides in this location)
- Shared (public) folder (Shared Documents)
- Your computer's local drives or the network drives to which you have access

9. Click to the left of the **Shared Documents** folder.

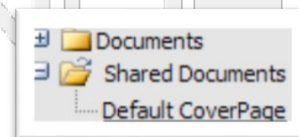
The becomes a once the folder is opened.

The list of documents uploaded by the system administrator displays.

Examples of shared documents may include the fax cover page, company brochures, price lists, contracts, and other documentation available within an organization.

The **Default Cover Page** will be transmitted along with your message and any other attachments selected.

To remove the Default Cover Page so it is not included along with particular message click .



this



Figure 26 - New Message: Documents Tab - Default Cover Page Attached

To attach a document from the local or network drive, complete the following steps.

10. Click **Attach Document** to locate the document(s) to attach.

The **Attach Documents** dialog box shows.

Select a document from the local hard drive, network drive, or personal FaxFinder folder to attach and transmit along with the fax.

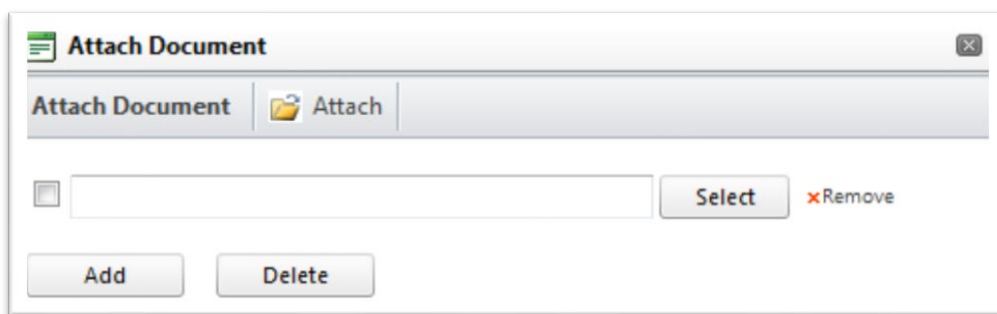
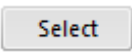


Figure 27 - New Message: Attach Documents Dialog Box

Click .

The **Choose File** dialog box opens.

Locate the folder that contains the document(s) to attach to the message.

11. Click the name of the file to attach.

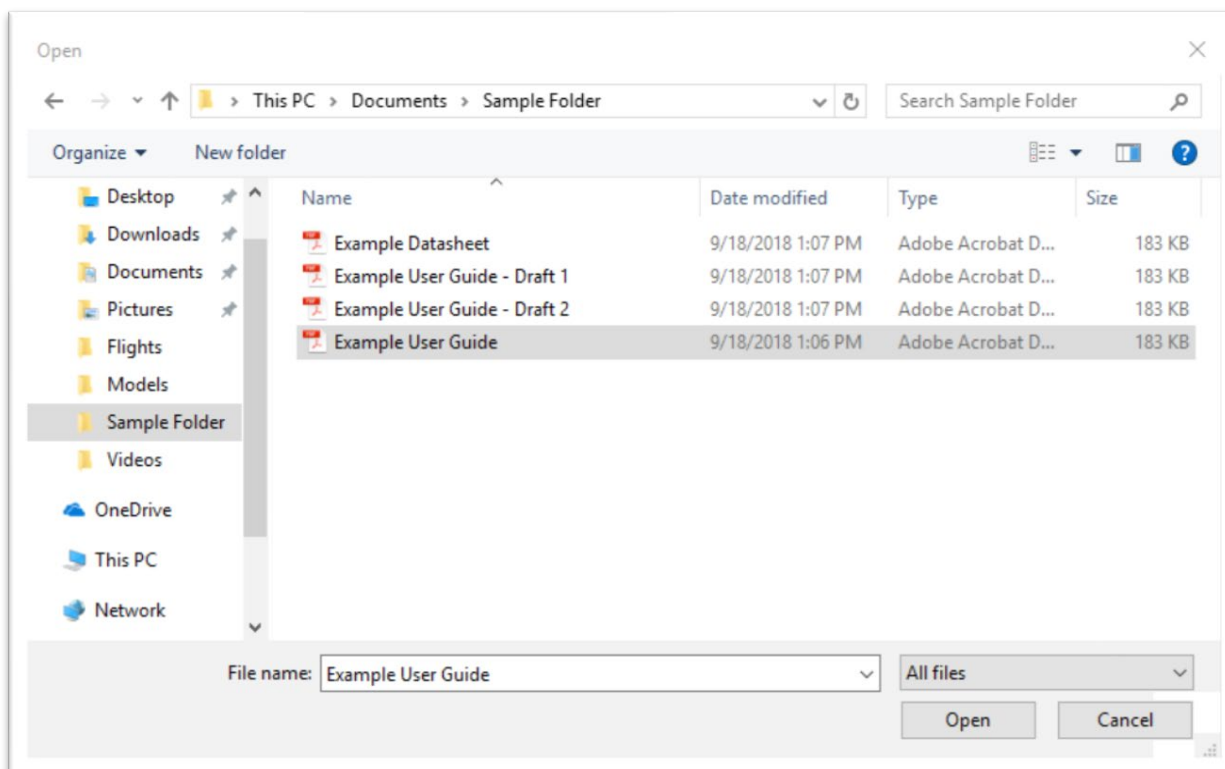
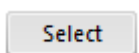


Figure 28 - New Message: Choose File to Attach (Local Hard Drive)

12. Click .

The name of the file selected, and its location show to the left of .

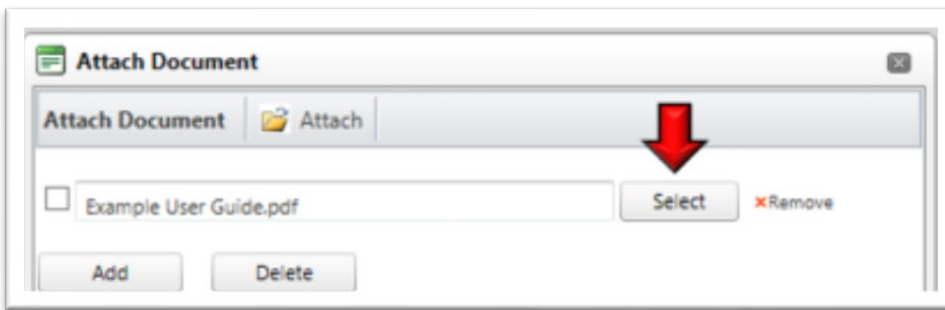


Figure 29 - New Message: Attach Documents Dialog Box with Selection

13. Click **Add** to browse for an additional document to attach, if necessary.
14. Click **Attach** once all attachments have been selected.

The **Attach Documents** dialog box closes and the **New Message** screen appears. The selected attachments list to the right of the **Documents** tab. An example follows.

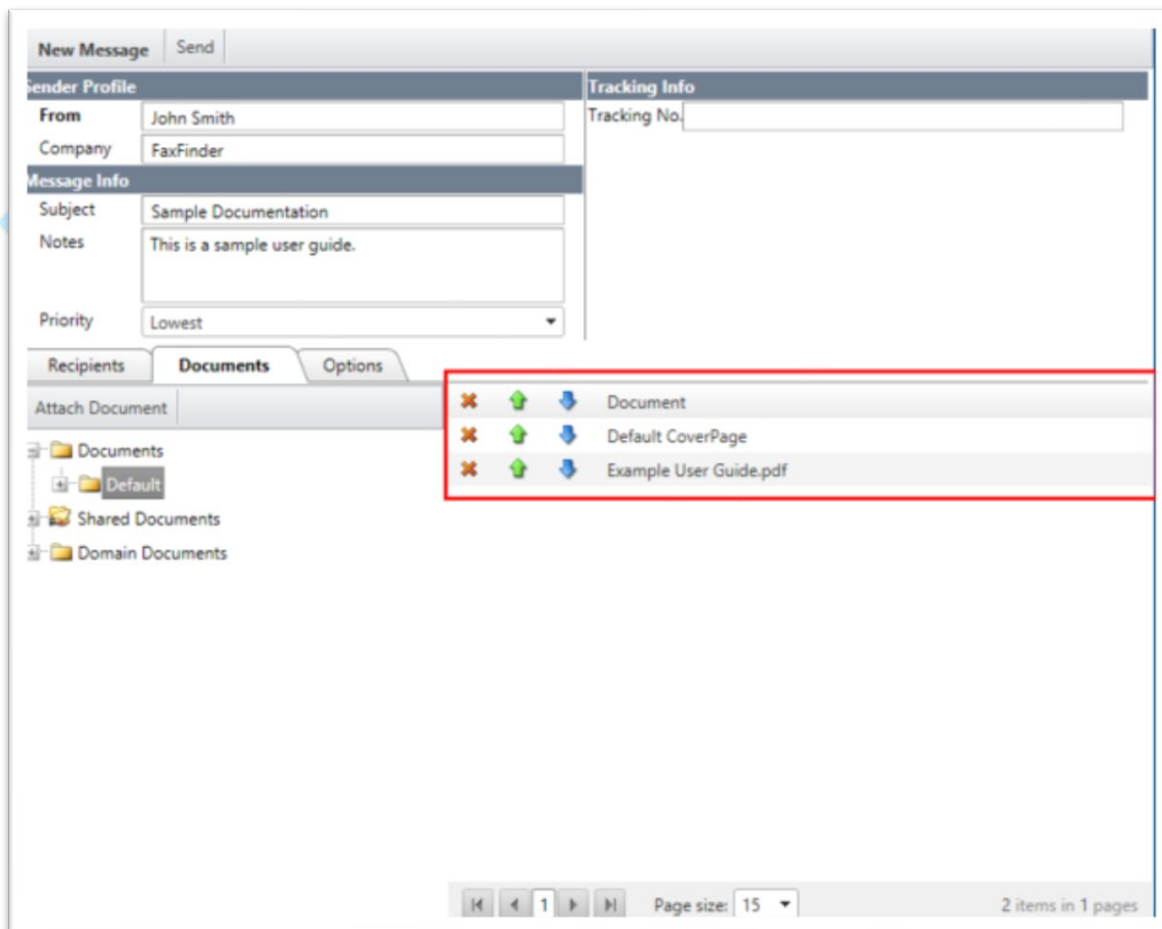


Figure 30 - New Message: Attachments List to the Right of the Documents Tab

15. Click the **Options** tab. Select those settings that apply to each fax or use the defaults defined. Notification options, the ability to place a transmission on hold until for approval, delay transmission until a certain time and date and add a billing code become available.

Recipients	Documents	Options
Notification Options		Others
<input checked="" type="checkbox"/> Notify me on message success <input checked="" type="checkbox"/> Notify me on message failure <input type="checkbox"/> Notify me on message summary <input type="checkbox"/> Hold for preview <input type="checkbox"/> Delay Until <input type="text"/>		Billing Code <input type="text"/>

Figures 31 - New Message: Options Available When Sending a Fax

You may also place the fax on hold for review and or delay its transmission for a future date. Refer to the following notes:

Note: Faxes Held for Preview or Scheduled to be sent at a Future Date

The fax may be placed on hold (☐ Hold for preview) in the event the sender or another individual must preview it before it is sent. It remains in the sender's Outbox until released.

Faxes may also be stored in a queue and scheduled to be transmitted to recipients at a future date () and/or time (). (☐ Delay Until)

Figure 32 - Tracking Field

Note: To Enable or Disable Notification Options

To enable any of the **Notification Options**, click to place a check mark ☒ in the check box.

To disable an option, click to remove its check mark, ☐.

Let us set the following.

- Click to enable the following two **Notification Options**.

We would like to be notified whether a message is successfully or unsuccessfully transmitted.

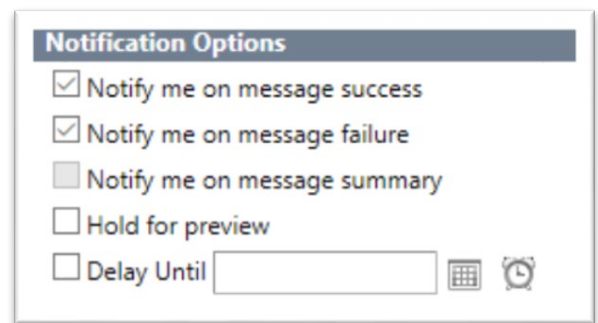
A dialog box titled "Notification Options" with a dark header bar. It contains five checkboxes: "Notify me on message success" (checked), "Notify me on message failure" (checked), "Notify me on message summary" (unchecked), "Hold for preview" (unchecked), and "Delay Until" (unchecked) followed by a text input field, a calendar icon, and a clock icon.

Figure 33 - An Example of Notification Options Selected

17. Click  to the right of **Priority** to display the available settings.

The default **Priority** setting is **Priority** .

Choose the setting which best applies to this particular fax transmission.

A dropdown menu for "Priority" with options: "Lowest", "Low", "Normal", and "High". The "Normal" option is currently selected and highlighted.

Figure 34 - Priority Settings

Perhaps **Normal** is most appropriate for this transmission.

Priority .

18. Enter a **Billing Code**, if applicable.
This is an optional field used for billing purposes.

It may consist of a combination of numbers and letters.

A form section titled "Others" with a sub-header "Billing Code" and an adjacent empty text input field.

Figure 35 - Billing Code

Such as **Billing Code** .

19. Make an entry in the **Tracking No.** field, if necessary.

A form section titled "Tracking Info" with a sub-header "Tracking No." and an adjacent empty text input field.

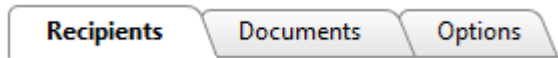
Figure 36 - Tracking Field

Note: Billing Code and Tracking No. Fields

The Tracking No. field may be customized by your administrator.

The Tracking No. field could work in conjunction with the Billing Code field. For example, a series of internal billing codes could be established and assigned to a group or an individual. Since the same billing code would apply to an individual regardless of the message sent or received, it becomes easier to track those messages.

20. Click the **Recipients** tab and confirm all recipients are listed.



21. Click **Send** once all recipients have been listed and the appropriate options are set. The fax will be transmitted to those on your distribution (i.e. Recipients) list. Upon clicking the **Send** button a message pops up indicating the fax job has been created with a unique message number and placed into the **Outbox** for processing. The **New Message** window closes and the primary window showing the **Inbox** appears in the foreground.

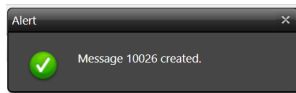


Figure 37 - Message Banner Advises the Fax has been created

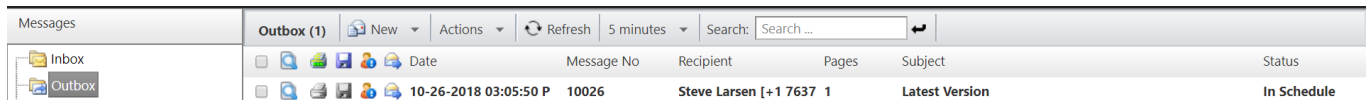


Figure 38 - Outbox showing Fax Transmission Status

As we prepared to send this particular fax, we selected the option that each fax recipient be notified when the fax was successfully transmitted or if the transmission failed. This means the Recipient will receive a fax via their fax solution and they will also receive an email notifying them a fax has been sent to them (or if the attempted transmission failed).

It's important to know the purpose of each folder and why a certain message appears in one folder and not another.

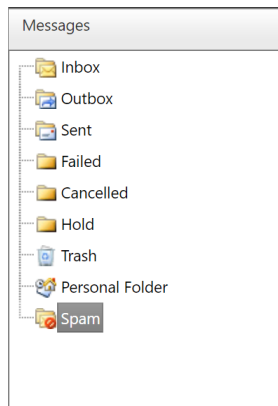

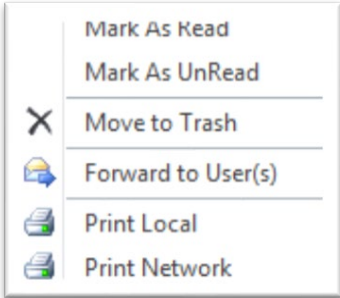






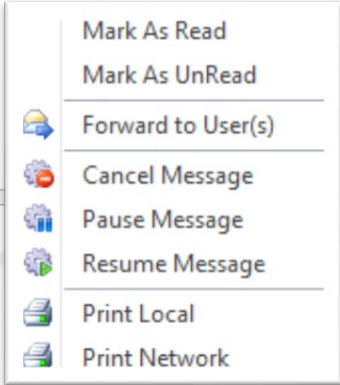







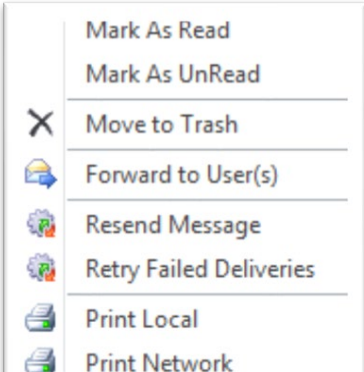










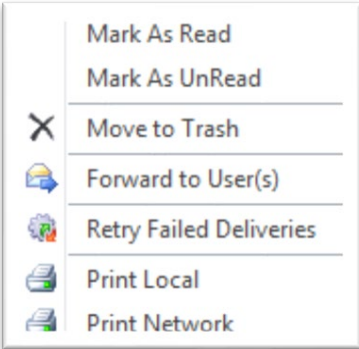


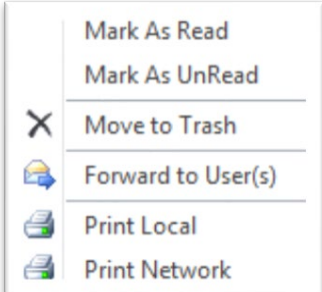

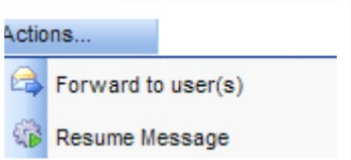

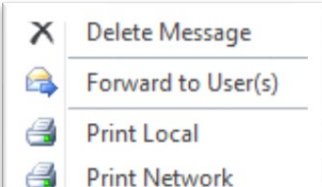

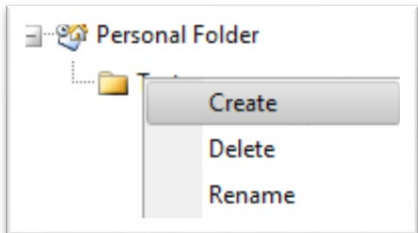
Figure 39 - Folders that Store Transmissions

The following table introduces the various folders that show above. The table explains the purpose of each folder and the actions that can be taken with the messages that reside in it.

What Happened to My Fax? An Intro to Message Folders

Each transmission, whether sent by you or received by you is stored in a specific folder dedicated to that type of transmission.

<u>Where is my Fax?</u>	<u>What can I do with this fax?</u>
<p>Transmissions you receive from others reside in your  Inbox.</p> <p>Transmissions assigned (delegated) to you by others also reside in this folder.</p>	 <ul style="list-style-type: none">Mark As ReadMark As UnRead Move to Trash Forward to User(s) Print Local Print Network
<p>Faxes in the  Outbox are waiting to be sent.</p> <p>They may have been scheduled to be sent on another day or at another time.</p> <p>These transmissions will be moved to the  Sent folder once they are processed.</p>	 <ul style="list-style-type: none">Mark As ReadMark As UnRead Forward to User(s) Cancel Message Pause Message Resume Message Print Local Print Network
<p>Faxes in the  Sent folder are fax transmissions you sent to others.</p> <p>All completed transmissions, even those that failed are stored in this folder.</p>	 <ul style="list-style-type: none">Mark As ReadMark As UnRead Move to Trash Forward to User(s) Resend Message Retry Failed Deliveries Print Local Print Network

Where is my Fax?	What can I do with this fax?
<p>Faxes not successfully transmitted are moved to the  Failed folder.</p> <p>These same transmissions appear in the  Sent folder.</p>	
<p>Only transmissions that were cancelled list in the  Cancelled folder.</p> <p>A copy of each is stored in the  Sent folder.</p>	
<p>Faxes in the  Hold folder are incomplete and not yet ready to send.</p> <p>They may be on hold for previewing. Once sent, they will be removed from this folder.</p>	
<p>Faxes in the  Trash are expected to be permanently removed eventually. However, they may be restored if not yet permanently deleted.</p>	
<p>The  Personal Folder may house other folders you create to keep transmissions organized.</p> <div data-bbox="121 1732 703 1837" style="border: 1px solid black; padding: 5px;"> <p>Note: These items will be deleted when messages are purged by the system. The system administrator sets the purge rules.</p> </div>	




Now that you are familiar with the various folders and what they do, it is time to revisit the following three.

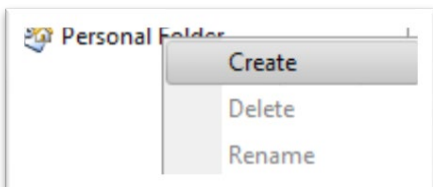
- Personal folder
- Sent folder
- Failed folder

The Personal Folder

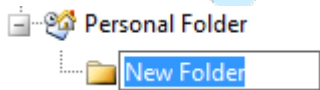
These folders are used to store messages in a folder structure that you establish. Multiple personal folders may be created and as a result, you may organize your messages as you choose.



To add a new personal folder, perform the following steps.



1. Click **Messages** in the **Navigation Pane**, if not already selected.
2. Click  **Personal Folder**.
3. Right-click  **Personal Folder** and choose  from the dropdown menu as shown to the bottom.



The following shows.

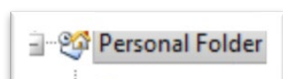
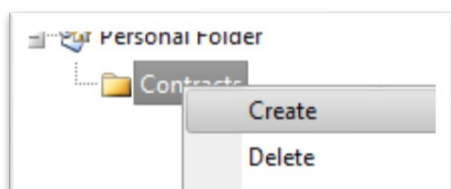


4. Type the name of the new folder and press the [Enter] key.
-  **Personal Folder** Additional folders may be added at the same level as our **Contracts** folder. Other folders may be added that are nested within **Contracts**.
-  **Contracts**

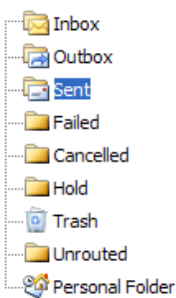
To add another folder at the same level as **Contracts**, right-click  **Personal Folder** and choose . Assign a name to the new folder.

To add a nested folder inside **Contracts**, right-click **Contracts** and choose . Assign a name to the new folder.

Feel free to organize your folders and messages any way that is logical and convenient for you.



The Sent Folder

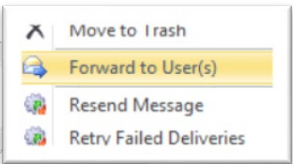


Click Sent in the **Folder List** to see the fax transmissions you initiated.
An example of faxes sent show below.

Sent (3)									
<div>Buttons: New, Actions, Move, Refresh, 5 minutes, Search: Search ...</div>									
<input type="checkbox"/>					Date	Message No	Recipient	Pages	Status
<input type="checkbox"/>					09-18-2018 02:11:14	10008	Paul Banco [+1215]	2	Completed
<input type="checkbox"/>					09-18-2018 02:07:54	10007	Test Fax [+1555987]	2	Failed - Inva
<input type="checkbox"/>					09-18-2018 01:39:36	10006	Test 1 [+155512345]	2	Failed - Inva

Figure 40 - Transmission Sent

One of four actions may be performed on the transmissions stored in this folder. The transmission may be tagged for deletion, forwarded delegated to other users, or another attempt may be made to send the transmission which was not successfully sent the first



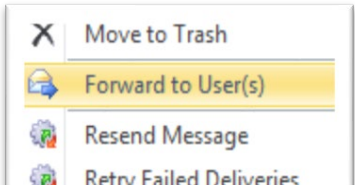
The Failed Folder

Click Failed to show transmission attempts that were unsuccessful.

Failed (2)									
<div>Buttons: New, Actions, Move, Refresh, 5 minutes, Search: Search ...</div>									
<input type="checkbox"/>					Date	Message No	Recipient	Pages	Status
<input type="checkbox"/>					09-18-2018 02:07:54	10007	Test Fax [+1555987]	2	Failed - Inva
<input type="checkbox"/>					09-18-2018 01:39:36	10006	Test 1 [+155512345]	2	Failed - Inva

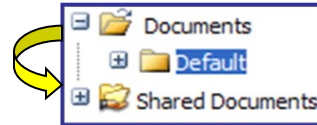
Figure 41 - Transmission Attempted and Failed

The following actions may be performed on faxes that reside in Failed. These are the same actions that may be performed on messages in Sent.



Documents

1. Click **Documents** on the **Navigation Pane**.
Document folders show above the **Navigation Pane**.



The **Default** window shows to the right of the **Navigation Pane**.

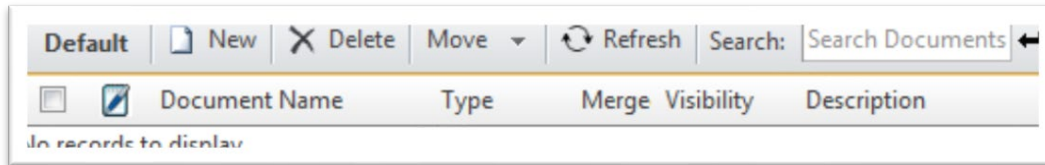


Figure 42 - Documents - Default Folder

2. Click **New** to add a new document to the folder.
The **Create Document - Document Information** dialog box appears.

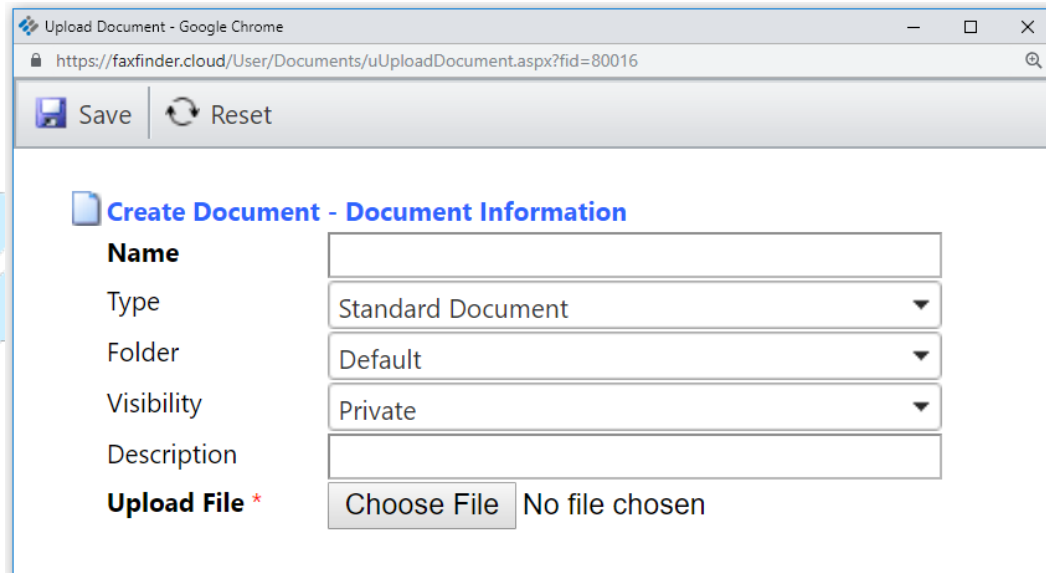


Figure 43 - Documents - Default Folder

Figure 42 - Create Document - Document Information Dialog Box

3. Enter the name of the file to upload in the **Name** field.
4. Enter a file **Description**, if applicable.
5. Click on **Choose File** to open the folder that contains the document(s) to attach to the message.
6. Navigate to the file and Click the name of the file to be attached.

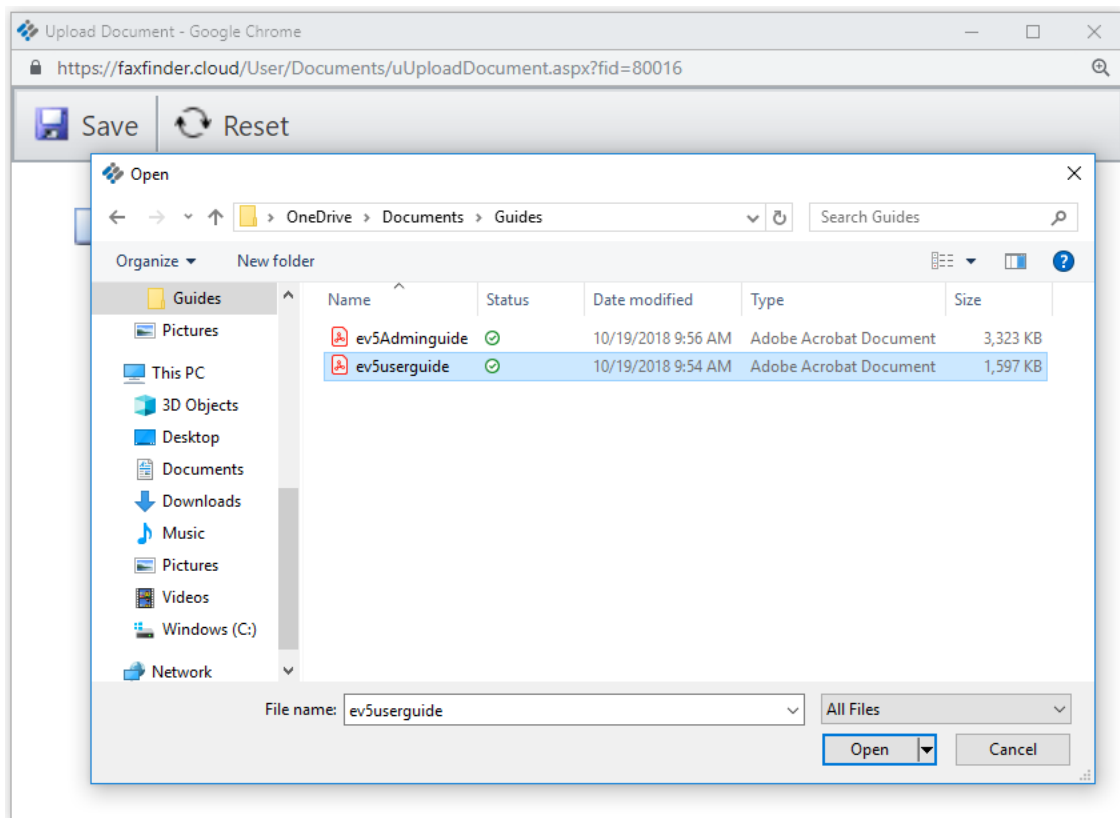


Figure 44 - Choose File to Upload

7.

Click



The name of the file selected will appear to the right of **Choose File** in the **Upload File** field.

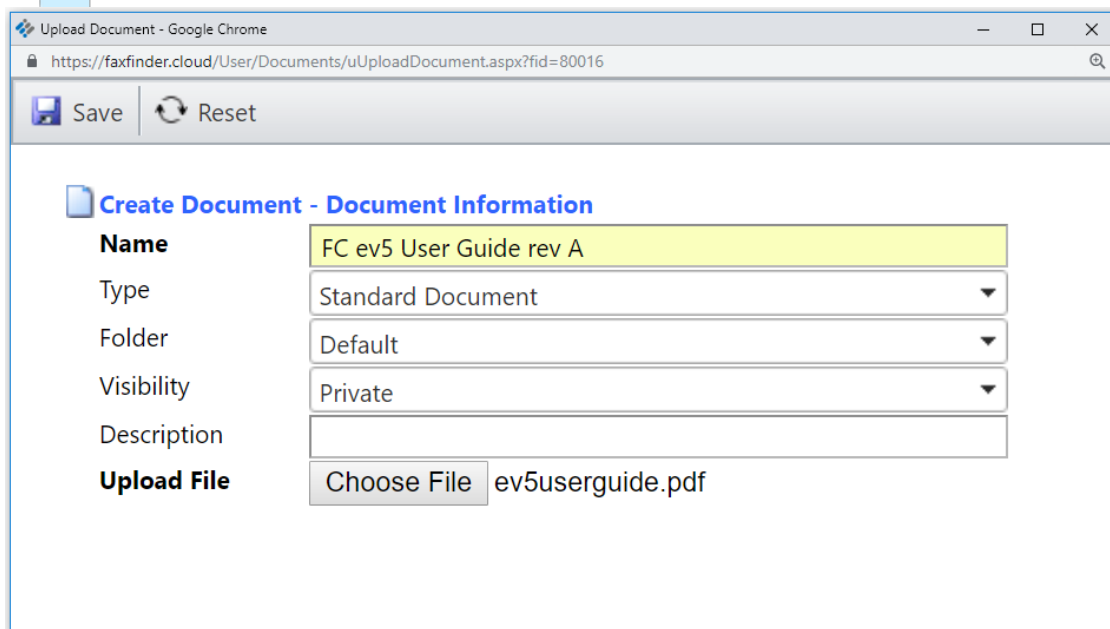
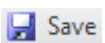


Figure 45 - Create Document - Document Information Dialog Box - File Selected to Upload

8.

Click



The **Create Document - Document Information** dialog box closes.

A copy of the document is saved to the **Default** folder since that is the folder selected in the **Create Document - Document Information** dialog box. The file also resides in its original location; it was only a copy of the file that was uploaded.

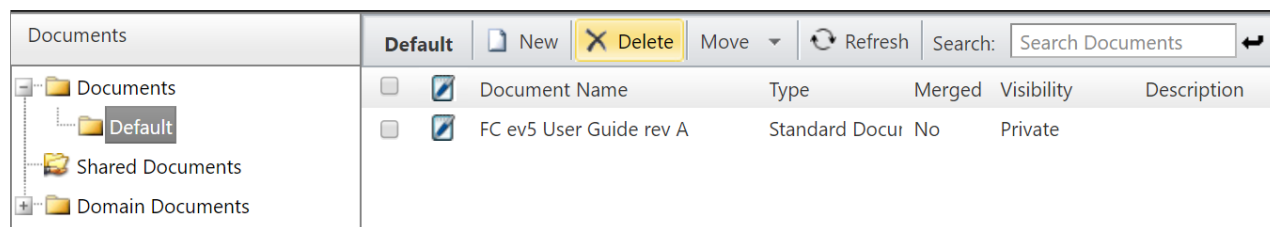


Figure 46 - Document is Uploaded to the Default Document Folder

Additional folders, aside from **Default**, may be nested in the **Documents** folder.

Any document contained in the **Default** folder, **Shared Documents** folder, or other folders added by the user, may be attached to any message.

New Message with Attachment Uploaded to Documents Folder

When creating a new message, complete the following step to add an attachment from one or more of these folders.

1. Click **Messages** in the **Navigation Pane** if not already selected.
2. Click **New** to open a **New Message** window.
The **Sender Profile** section automatically populates with your name and the name of your company.
3. Enter the **Subject** and any applicable **Notes**.
Press the **[Tab]** key to move from one field to the next.
4. Enter the recipient's **Name** and **Fax #**.
When entering the **FAX #**, include the area code. No need exists for spaces, dashes, or parenthesis.
These fields are bolded to show they are required.
5. Click **Add Generic**.
The recipient's name shows in the **Recipients** section.
6. Click the **Documents** tab.

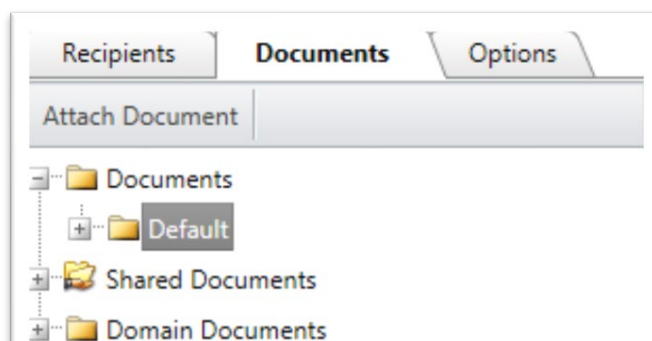


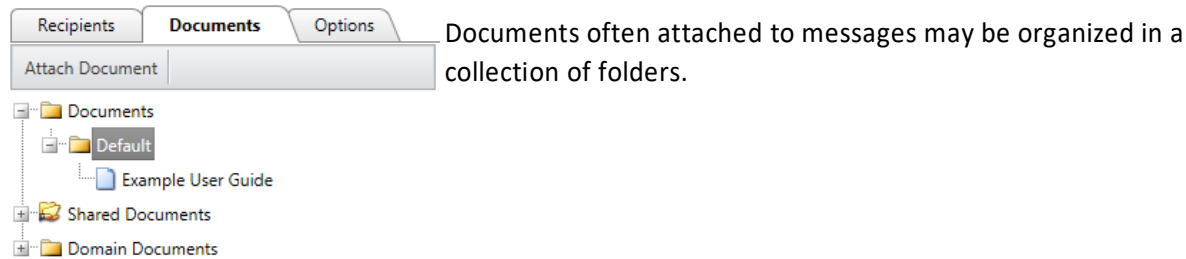


Figure 47 - New Message: Document Tab

7. Click  to the left of the **Documents** folder to display the **Default** folder nested within it. If the **Default** folder is visible, click the  to its left.

The  becomes a  once the folder is opened.

A list of documents uploaded to this folder displays. In this example, only one file has been uploaded; the **Rules and Regulations** file resides in the **Default** folder.



8. Double-click the name of the file to attach to the message.

In this example, only the one file is available.

The name of the file shows to the right of the **Documents** tab along with the **Default Cover Page** that it is provided.

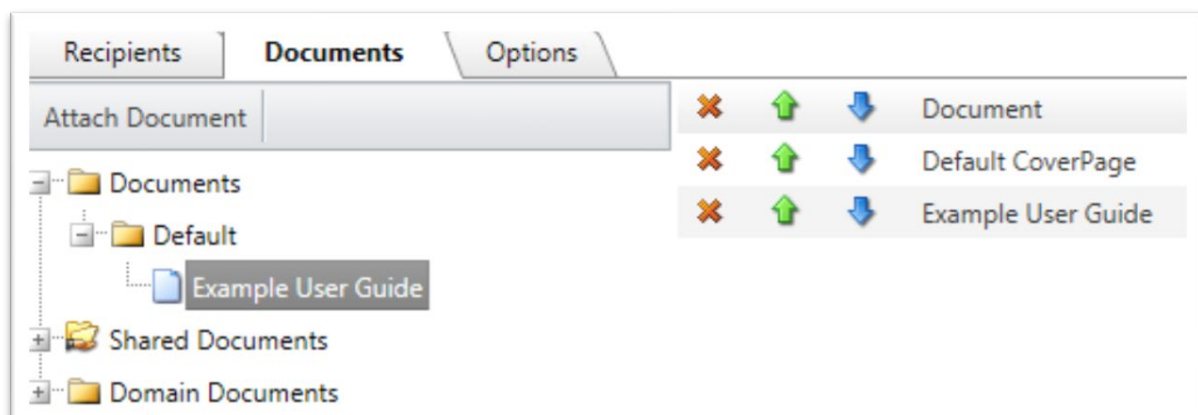



Figure 48 - An Uploaded Document is Attached

9. Click the **Options** tab.

Select the settings that apply to each fax or use the defaults defined.

Notification Options, the ability to set a priority, and add a billing code become available.

You may request notification on the successful transmission of the fax or upon its failure to transmit; you may select both options, if you choose.

10. Click  once all recipients have been listed, documents attached, and the appropriate options are set.

Address Books

Rather than typing the recipient's information, you may also pull it from the **Address Book**.

Click **Address Book** in the **Navigation Pane** if not already selected.

The **Address Books** structure shows above the **Navigation Pane**. The **Default** address book is selected.

To the right of the **Navigation Pane** is the **Address Books** screen. Most likely, at this time, no contacts exist in your **Default** address book.

Let's add one.

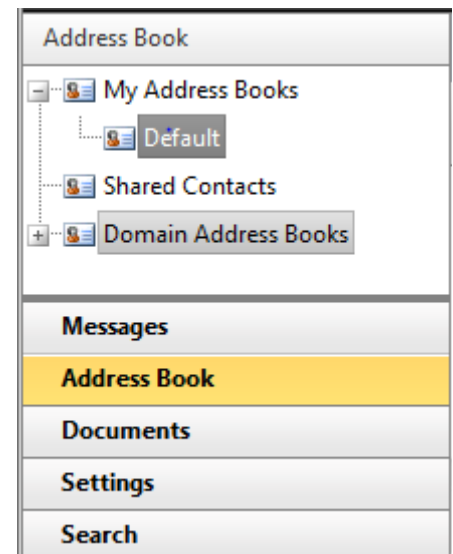
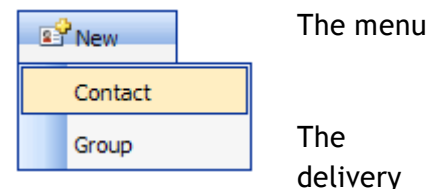


Figure 58 - Navigation Pane - Address Books

Add a Contact to the Address Book

To add a contact to the **Default Address Book**, follow the steps below.

1. Click **Default** if not already selected.
2. Click **New** or allow the mouse pointer to hover over it.
3. Click **Contact**.
following screen allows the entry of your contact's profile and information.
4. Enter the applicable information.
Press **[Tab]** to move from one field to the next.



It is not necessary to complete each field. The following would be most relevant, but only the **Display Name** and **Email (address)** are required fields. Some of the remaining fields may be displayed on your cover page and so entering such information may be advantageous.

- Display Name (Contact Profile)
- First Name
- Last Name
- Address Book - where the contact information will be stored
- Preferred Address Type - in this case, EMAIL
- Email (address) (Delivery Information)
- Fax Number

Contact Profile

Display Name	Karen Kelly
First Name	Karen
Middle Name	
Last Name	Kelly
Company Name	
Description	
Address Book	Default
Preferred Address Type	EMAIL
Visibility	Private
<input type="checkbox"/> notify this contact when message FAILS to send	
<input type="checkbox"/> notify this contact when message is SUCCESSFUL	

Delivery Information

Email	karen@abc.com	pdf
Fax Number	+ 1 (720) 8701666	
Phone Number	+ ()	
Mobile Number	+ ()	
Ftp		pdf
Http		pdf
Network Printer		

Delivery Information

Email	karen@abc.com	pdf
Fax Number	+ 1 (720) 8701666	
Phone Number	+ ()	
Mobile Number	+ ()	
Ftp		pdf
Http		pdf
Network Printer		
Raw Fax		
File		pdf
CSID/Caller ID		

Figure 59 - Address Book - Contact Profile and Delivery Information

5. Click .

The **Contact Profile** and **Delivery Information** window closes and the **Default Address Book** shows with the new contact listed.

Default		New	Import	Delete	Move	Refresh	Search: Search Contacts	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Display Name	Contact Type	First Name	Last Name	Company Name	Preferred Delivery Address	Visibility
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Karen Kelly	Contact	Karen	Kelly		karen@abc.com	Private

Figure 60 - Default Address Book - Contact Lists

Once contacts are contained in an address book, it is no longer necessary to type their information when sending a transmission to them.

Send to a Contact in the Address Book

It is time to send a transmission to the individual in our address book.

1. Click **Messages** in the **Navigation Pane**.
2. Click **New** to open a **New Message** window.
The **Sender Profile** section automatically populates with your name and the name of your company.
3. Enter the **Subject** and any applicable **Notes**.
Press the [Tab] key to move from one field to the next.
4. Click **Add Contact** in the **Recipients** section.
The **Address Books** window displays.
5. Select the correct address book; in this case, **Default**.

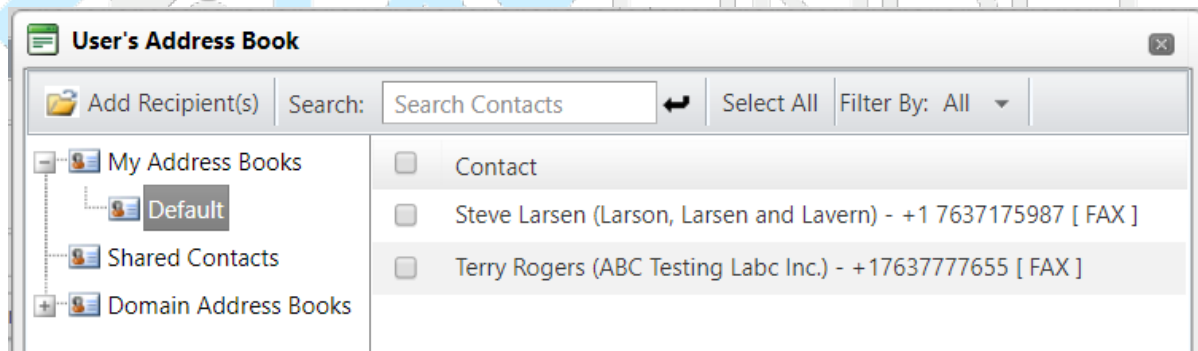


Figure 61 - Address Books - Default with Listing

6. Click the name of the contact as shown below.

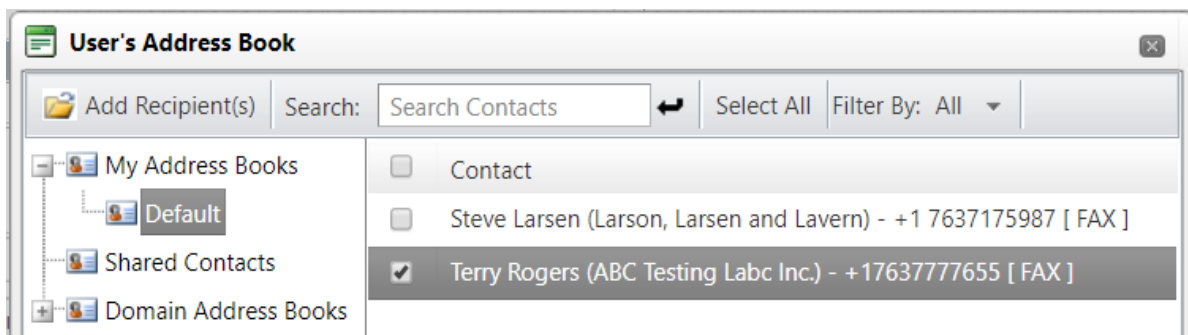


Figure 62 - Address Books - Default with Recipient Selected

7. Click **Add Recipient(s)** to include the selected contact as a recipient.

The **Address Books** window closes; the **New Message** window returns with the recipient's information listed in the **Recipients** section.



	NS	NE	Name	Company	Delivery Address	Notify Address
	<input type="checkbox"/>	<input type="checkbox"/>	Terry Rogers	ABC Testing Labc Inc.	+17637777655	

Figure 63 - Recipient from Default Address Book

8. Click **Send** once all recipients have been listed and the appropriate options are set.
Each recipient or an alternate will be notified via email that the message has been transmitted.

9. Click **OK** to acknowledge and close the message box.

The **New Message** window closes and the primary window showing our **Inbox** appears in the foreground.

Receive a Fax

Incoming messages may be received via email or in the user's FaxFinder Inbox.

1. Click **Messages** in the **Navigation Pane**.
2. Click **Inbox** to return to the **Inbox** folder.
Once the **Inbox** is the active folder, click **Refresh** to refresh the screen and show new messages.
3. Double-click a particular message to open it for viewing in the **Message Viewer**.

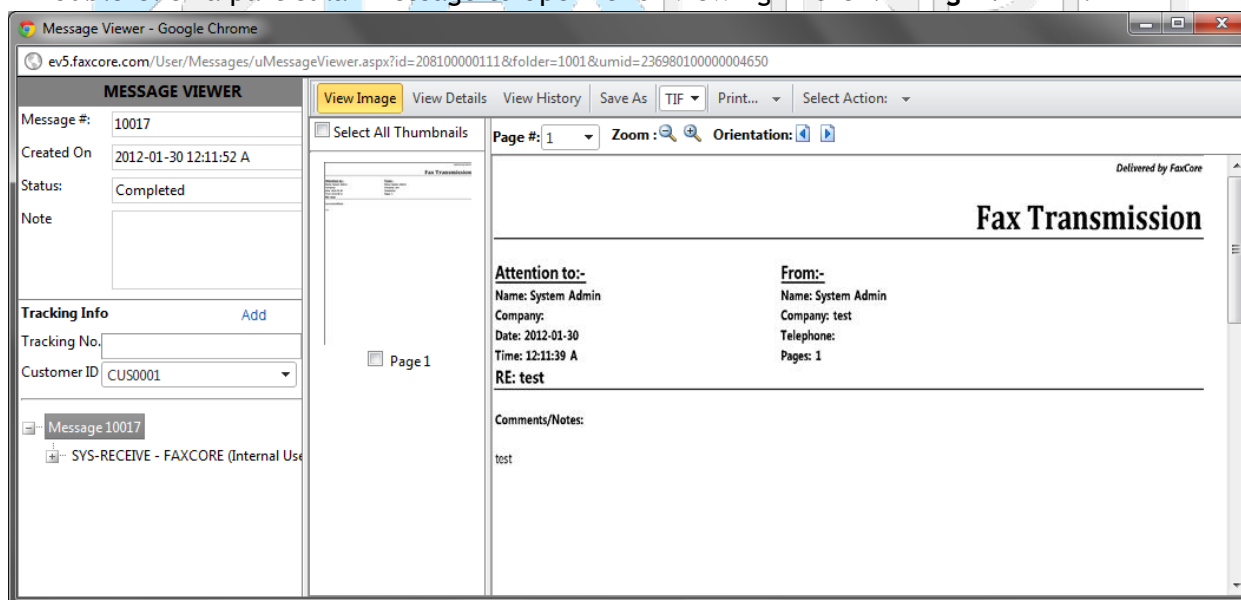

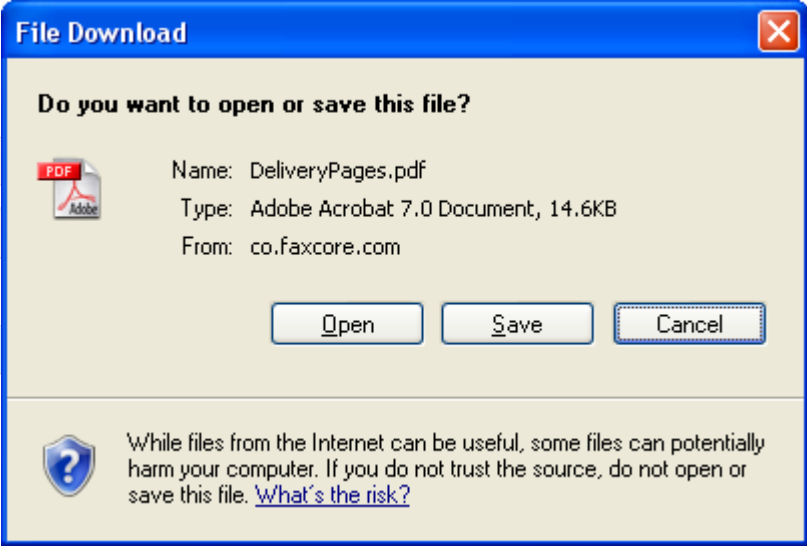








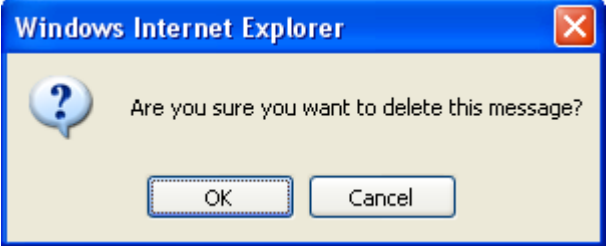

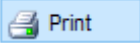



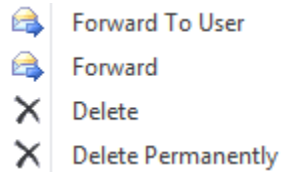
Figure 64 - Message Viewer - Read the Fax

4. Click **Save As**, **Print...** or **Select Action:** on the top of the window to see what may be done with the fax. The following actions are available.

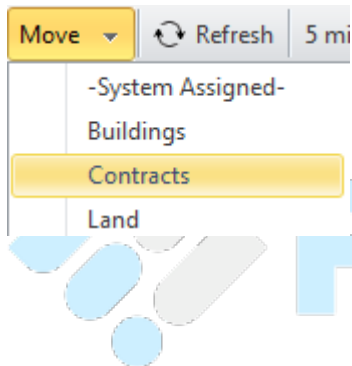
Action	Description
Print...	Print the message to a local or network printer. When the message opens in the Adobe Reader window, click  to print.
Save As	 <p>File Download</p> <p>Do you want to open or save this file?</p> <p> Name: DeliveryPages.pdf Type: Adobe Acrobat 7.0 Document, 14.6KB From: co.faxcore.com</p> <p><input type="button" value="Open"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/></p> <p> While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?</p>
 Forward	Choose  Forward to forward this message to selected recipients.
 Resend	Choose  Resend to resend this message to the original recipients who are still listed.
 Delete	<p>Click  Delete to remove this message from the Inbox. You are asked to confirm your request.</p> <p>Click <input type="button" value="OK"/> to complete the process and delete the message.</p>  <p>Windows Internet Explorer</p> <p> Are you sure you want to delete this message?</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>

Without opening the message, and while the message lists in the **Inbox**, the following actions may be taken.

- Click  **Print** to open the message in its PDF format using Adobe Reader.
Click  on the Adobe Reader toolbar to print the message and any accompanying attachments.
- From the **Actions** menu, the message may be deleted or forwarded to others



- The message may be moved to a personal folder.
Contracts, **Land**, and **Building** are personal folders we created earlier.
The **Land** and **Building** folders reside in the **Contracts** folder.



Search for a Fax

1. Click **Search** in the **Navigation Pane** if not already selected.
The fields on which a message can be searched display above the **Navigation Pane**.

A search may be accomplished by entering criteria in one or more fields.

If the **Message #** or **Tracking #** is known, enter the value in either field. Since these numbers are unique, only one message that meets the criteria will be found. Searching on either of these two fields provides the fastest results. However, the **Message #** and **Tracking #** may not be known.

Searching by a Recipient's name may produce a long list of messages. Still, this is an efficient way to search for the one message that must be located.

It is possible to search on multiple criteria. This narrows the search results. For example, search for all messages sent or received during a range of dates by using the **From Date** and **To Date** fields. If you prefer, you may still enter the recipient's name in the **Recipient** field, if you know how to spell it.

Figure 65 - Search Fields - Enter Criteria

2. Enter the criteria in the field or fields on which you wish to search.
3. Click **Search**.
The results of the search show to the right in the **Search Results** window.

Following are two examples of successful searches.

The first search was accomplished by entering a single criteria; the recipient's name was entered in the **Recipient** field.

The screenshot shows the FAXFINDER web application. On the left is a search filter sidebar with fields for From Date, To Date, Message #, Tracking #, Recipient (set to BU1), Fax #, CSID, Email, Subject, Routing Info, Type, Failed?, Held?, Saved?, and Printed?. The main area displays a table of search results with columns: Message #, Date, Subject, User, Sender, Recipient, Status, Total Page #, Type, Tracking, and Address. The results table contains 6 items. At the bottom right, it says '6 items in 1 pages'.

Message #	Date	Subject	User	Sender	Recipient	Status	Total Page #	Type	Tracking	Address
10027	10-29-2018 02:21:03 P	Hey	BLEUSER1	Blees User 1	BU1 TestRecipeint	Completed	4	Outbound		+17637777655
10021	10-25-2018 02:16:36 P	D's Spot	BLEUSER1	Blees User 1	BU1 TestRecipeint	Completed	1	Outbound		+17637777655
10020	10-24-2018 10:06:39 A	4th time is a charm	BLEUSER1	Blees User 1	BU1 TestRecipeint	Completed	2	Outbound		+17637777655
10019	10-24-2018 09:58:04 A	Not Sure of Worthiness	BLEUSER1	Blees User 1	BU1 TestRecipeint	Completed	2	Outbound		+17637777655
10018	10-24-2018 09:37:25 A		BLEUSER1	Blees User 1	BU1 TestRecipeint	Completed	1	Outbound		+17637777655
10016	10-24-2018 09:12:09 A	A Fax worth Faxing	BLEUSER1	Blees User 1	BU1 TestRecipeint	Cancelled	1	Outbound		+17637777655

Figure 66 - Results of Search on Recipient's Name

The second search was accomplished by entering multiple criteria; the recipient's name was entered in the **Recipient** field and the **From Date** and **To Date** fields also contain entries. Multiple criteria tend to limit the results of the search; fewer messages meet the criteria.

The screenshot shows the FAXFINDER web application with the search filters updated: From Date is 10-25-2018 12:00, To Date is 10-26-2018 11:51, and Recipient is BU1. The search results table now only contains 1 item. At the bottom right, it says '1 items in 1 pages'.

Message #	Date	Subject	User	Sender	Recipient	Status	Total Page	Type	Tracking	Address
10021	10-25-2018 02:16:36 P	D's Spot	BLEUSER1	Blees User 1	BU1 TestRecipe	Completed	1	Outbound		+1763777

Figure 67 - Results of Search using Multiple Criteria

To Log Off FaxFinder

Click on the **Logout** button found on the top menu bar to exit the application and return to the **Login** screen.

