



KANDY™

an  AVCtechnologies company

Kandy Business Solutions

Business Fax for Web User Guide

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Described are some common features for Business Fax for Web use.

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For access to technical documentation, log in through the Kandy Partner/Customer Portal at <https://www.kandy.io/ecosystem/kandy-partner-portal>.

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What's New for Web Users in Kandy Business Solutions 51.2

Kandy Business Solutions (KBS) 51.2 includes new, changed, and deprecated features.

To review updates from previous releases, see the [Kandy Business Solutions Release Notes \(630-03441-01\)](#).

Revision 01.06

October 27, 2021. KBS 51.2.

Browser Support Updates

Internet Explorer is no longer a supported browser for the KBS Portal.

Business Fax for Web User Overview

The described features and services are not a comprehensive list. Some features may not be available to all users. Contact your service provider for the list of applicable features.

Web application requirements

You must have one of the following web browsers:

- Google Chrome 30.0 or later
- Mozilla Firefox 20.0 or later
- Safari 5.0 or later

Supported operating systems include:

- Windows XP or later
- Mac Mavericks 10.9 or later
- Apple iOS 7.x or later
- Android 4.x or later

Supported languages

Business Fax applications support the following language options:

- US English
- UK English
- German
- Castilian Spanish
- Latin American Spanish
- Canadian French
- Brazilian Portuguese
- European Portuguese

Supported telephone numbering plans

Phone numbers may be entered in your country's national format (for example in the United States, xxx-xxx-xxxx) or in the international numbering plan format (for example, for the United States, +1 xxx-xxx-xxxx). Currently, telephone numbering plans for the United States, Germany, Spain, United Kingdom, and Fiji are supported. All phone number fields in the web application can support up to 20 characters.

Logging into the web application

Use this procedure to log into the application. The first time you log into the Web GUI, your default password is the same as the default PIN given to you by your service provider. You may be required to change this default password after successfully logging in. Future logins will require your password; you will only use your PIN for mobile application access.

Prerequisites

- You know the URL for the web application.
- Your browser meets the [Web application requirements](#) on page 7.
- You know your login credentials. Your Account ID is your fax number.

If you do not know your login credentials, click **Forgot your PIN/Password?** on the login screen for PIN or Password reset instructions.

Step	Action
1	In your web browser, navigate to the URL for the web application.
2	Enter your Fax Number and PIN/Password . <i>After three unsuccessful attempts to log in with your PIN, you will be locked out for five minutes.</i>
3	Click Login .
4	The following navigation links and tabs are accessible from the Home page and throughout the web application: <ul style="list-style-type: none">• <i>Home</i>• <i>View Faxes</i>• <i>Send Fax</i>• <i>Contacts</i>• <i>Settings</i>• <i>My Account</i>• <i>Logout</i>

10 Logging into the web application

The number of new faxes and your cover page details are also displayed on the right side of the Home page. You can click on any of these items to view their details and settings.

- 5 To log out of the application, click the **Logout** link on the top right of the screen.

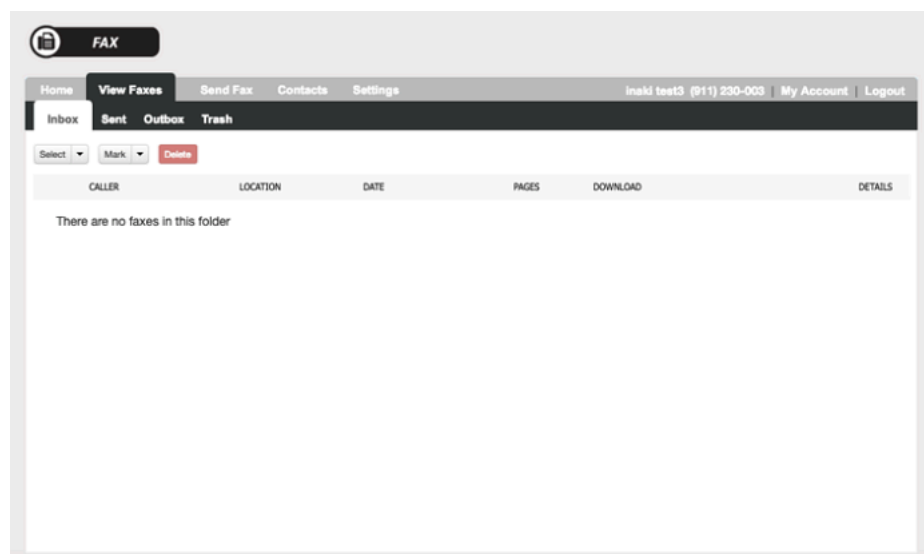
--End--

View Faxes

The View Faxes page provides access to received, sent, scheduled, and deleted faxes. It is accessible from any page by clicking on the tab at the top of the screen. The most recent faxes are displayed first, and the page has four sub-tabs: Inbox, Sent, Outbox, and Trash.

The following figure shows the information and options available for fax messages:

View Faxes Inbox Tab



The Details panel provides additional information and actions for each fax.

Sent faxes also indicate the status (Sent Successfully, Transmit Failure, or Pending) for each fax. Clicking **Info** provides additional transmission details and options.

Use the following procedures to perform fax actions.

Prerequisites

- You are on the View Faxes page of the web application.
- You have faxes in Inbox, Sent, Outbox, or Trash.

Downloading a fax

Use this procedure to download a fax from any View Faxes page.

Step	Action
1	Click the Download icon next to the fax you wish to view.
2	If prompted, select whether to open or save the file and click OK . <i>Your fax download will begin.</i>
--End--	

Forwarding to an email address

Use this procedure to forward a fax to an email address. Faxes may be forwarded from any of the View Faxes tabs.

Step	Action
1	Click the Details next to the fax you wish to forward.
2	Click Forward .
3	Enter a valid email address and click Send . <i>Note: Multiple email addresses are not supported.</i>
4	The fax is sent as a PDF attachment to the email address entered.
--End--	

Sending to a fax number

Use this procedure to send a fax to another fax number. Faxes may be refaxed from any of the View Faxes tabs.

Note: See [Refaxing a failed fax](#) on page 13 to try refaxing a failed fax to the same number.

Send to a new number

Step	Action
1	Click the Details icon next to the fax you wish to refax.
2	Click Refax .
3	Enter a phone number and click Send .

Note: Multiple phone numbers are not supported.

- 4 The fax is sent to the fax number entered.

--End--

Refaxing a failed fax

Step	Action
------	--------

- | | |
|---|--|
| 1 | Navigate to the "Sent" tab. |
| 2 | Locate the failed fax and click Info . |
| 3 | Click Refax to try refaxing to the same number. |
| 4 | Click the Refax button when prompted. |

--End--

Printing a fax

Use the following procedure to print a fax using your PDF viewer.

Step	Action
------	--------

- | | |
|---|--|
| 1 | Click the Details button next to the fax you wish to view. |
| 2 | Click Print . |
| 3 | If prompted, select whether to open or save the file and click OK .
<i>Your fax download will begin.</i> |
| 4 | Open the fax in your PDF viewer (if the PDF did not open automatically) and use the print command to print the document. |

--End--

Deleting a fax

Use the following procedure to delete a fax or to delete multiple faxes.

Attention

Faxes deleted from the Sent tab are permanently deleted. They do not move to the Trash folder and cannot be recovered.

Step	Action
------	--------

- 1 Select the checkbox(es) next to the fax(es) you wish to delete and click the **Delete** button.
*Note: To select all messages, click the **Select** drop-down and click **Select All**.*
 - 2 Click the **Delete** button when prompted.
Faxes deleted from the Inbox move to Trash.
 - 3 To permanently delete a message, navigate to **Trash**.
 - 4 Select the checkbox(es) next to the fax(es) you wish to permanently delete and click the **Delete** button.
 - 5 Click the **Delete** button when prompted.
-
- End--
-

Restoring a deleted fax

Use the following procedure to restore a deleted fax.

Step	Action
1	From the View Faxes page, click the Trash tab.
2	Select the checkbox(es) next to the fax(es) you wish to restore. <i>Note: To select all messages, click the Select drop-down and click Select All.</i>
3	Click the Move to Inbox button <i>The selected faxes are moved to your Inbox.</i>

--End--

Marking fax as viewed/not viewed

Faxes in Inbox or Trash may be marked as “viewed” or “not viewed”. Faxes that are “not viewed” (i.e. new) are listed in bold.

Step	Action
1	Select the checkbox(es) next to the fax(es) you wish to mark as viewed or not viewed. <i>Note: To select all messages, click the Select drop-down and click Select All.</i>

-
- 2 Click the **Mark** drop-down and select either **Mark Viewed** or **Mark Not Viewed**.

--End--

Adding a caller as a contact

Use this procedure to add a caller to your contacts list.

Step	Action
1	Faxes from callers who are not in your contacts list have an Add button next to their number. <i>Click Add to add the caller as a contact.</i>
2	Enter a contact name and phone number type (e.g. Business Fax) when prompted.
3	Click Save .

--End--

Sending Faxes

Use this procedure to create and send new faxes.

Note: The default values (e.g. cover page, cover page information, and confirmation email) used to send faxes are determined by the application Settings. See [Changing outbound fax settings](#) on page 26 to change the default settings.

Step	Action
1	Click the Send Fax tab to create a new fax.
2	Select a cover page and click Next .
3	Enter the fax numbers, separated by commas, or click the Contacts button to select recipients.

Note: If you initiated Send Fax from a particular contact or group's details page, their fax number(s) will be pre-filled.

Fax Recipients

Select recipients from contacts or enter phone numbers to send the fax. International numbers should be entered with a '+'.
 Cover Page

Recipient Number:

Select From Your Contacts

Groups	Contacts with Fax Numbers
All Contacts <input type="checkbox"/>	Adams, Joe
Friends	Doe, John <input checked="" type="checkbox"/> (b) 555-123-4567
Sales Team	Smith, Joan

- 4 Complete the cover page information and click **Next**.

- 5 Attach your fax document(s) from your local PC or an online cloud service (e.g. Google Drive) and click **Next**.
- 6 Click **Preview Fax** to open a preview or select your delivery options.
- 7 Select your delivery options:
 - *To send the fax immediately, click **Send Fax**.
The fax will appear in the View Faxes “Sent” list.*
 - *To send the fax later, click **Schedule for Later** and select the date/time to send the fax.
The fax will appear in the View Faxes “Outbox”. It will move to “Sent” once it has been sent.*

Note: *To cancel a scheduled fax, navigate to the View Faxes “Outbox”, select the fax, and click **Cancel Send**.*

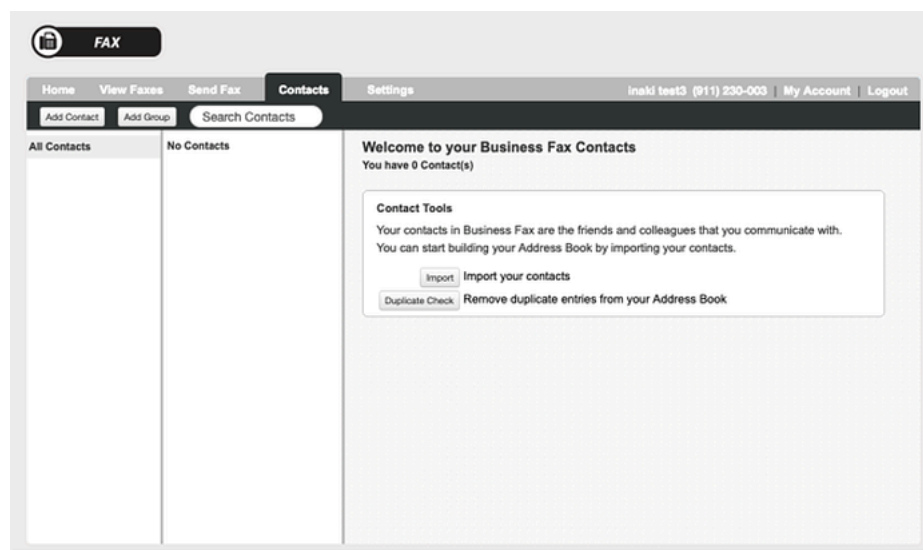
--End--

Contacts

The Contacts page displays your saved contacts. It is accessible from any page by clicking on the tab at the top of the screen. From this page, you can:

- View a list of your saved contacts
- Import contacts
- Check for duplicate contacts
- Search your contacts
- Select a contact to view
- Add a contact
- Add a contact group

Contacts Tab



Clicking on a contact displays their contact details. From this screen, you can:

- Edit contact information
- Send a fax to a contact (if a fax number is on file)

- Delete a contact

Contact Details

Use the following procedures to perform Contact actions.

Prerequisites

You are on the Contacts page of the web application.

Importing contacts

Use this procedure to import existing contacts. Your contacts must be stored in a comma-separated values (.csv) file.

The first row of your .csv file should identify the contact fields (for example, "First name", "Last name", "Home") with each contact entry on a new row. Each contact entry must have either a first name or a last name entry. Entry information that cannot be matched with a contact field is discarded.

The following shows an example of a plain text .csv with contact name, phone number, and email data:

```
"First name", "Last name", "Email", "Home"
John, Doe, john@example.com, 555-555-5555
Jane, Doe, , 555-123-4567
Karen, , karen@example.com,
```

Step	Action
1	On the Contacts Page, click Import .
2	Click Choose File and select your .csv file.

Import Address Book

Where is the Comma-Separated Address Book file located?
 Locate the .csv file containing the address records
 File outlookcontacts.CSV

How would you like us to handle the import?

Import option

- Overwrite duplicates in Address Book with imported items (keep the new ones)
- Do not overwrite duplicates in Address Book (keep the old ones)
- Add all imported items to Address Book - without affecting any existing entries
- Replace entire Address Book with imported items

Names option

- Accept nickname as-is (do not take from firstname or lastname)
- If nickname not present, use firstname as nickname
- If nickname not present, use lastname as nickname

(Why is this important? The nickname is the field used when searching your Address Book from the telephone.)

One last step

Click on the Import button below to begin importing your Address Book.

- 3 Select how you would like the import handled (e.g. whether to overwrite duplicates).
- 4 Click **Import**.

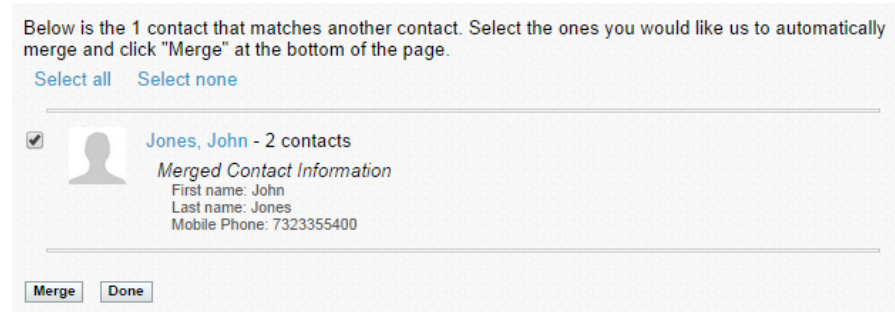
--End--

Checking for duplicates

Use this procedure to check for duplicate contacts.

Step	Action
1	Click Duplicate Check .
	<p>Contact Tools Your contacts are the friends and colleagues that you communicate with. You can start building your Contact List by importing your contacts.</p> <p><input type="button" value="Import"/> Import your contacts</p> <p><input checked="" type="button" value="Duplicate Check"/> Remove duplicate entries from your Contact List</p>
2	If you do <i>not</i> have any duplicates, a message appears stating no contacts match one another.

If you do have duplicates, the web application displays the duplicates.



- 3 Select the contacts you would like to merge and click **Merge**.
- 4 Click **Done** once the contacts have merged.

--End--

Searching for a contact

Use this procedure to search your list of contacts. Contacts matching your search will display.

Step	Action
1	Enter your contact's information (for example, name or fax number) In the "Search Contacts" text box.
2	Click a contact to display their details.
3	If you would like to fax the contact, click Send Fax . <i>If you have a fax number listed for the contact, you will be taken to the Sending Faxes on page 17 page to create your fax.</i>
4	If you would like to edit or delete a contact, see Editing or deleting a contact on page 22.

--End--

Editing or deleting a contact

Use these procedures to edit or delete an existing contact.

Editing a contact

Step	Action
1	Select a contact from your contacts list.

The contact's details are displayed.

- 2 Click the **Edit** button.
- 3 Click the **Edit** button for the information block you would like to change.

- 4 Complete the fields and click the **Save** button.

- 5 Click **Done** when you have completed the changes.

Note: If you click **Done** before saving your changes, you will receive a prompt asking you to confirm you are finished editing.

--End--

Deleting a contact

Step	Action
1	Select a contact from your contacts list.
2	The contact's details are displayed.
3	Click the Delete Contact button.
4	A prompt will display to confirm you wish to delete the contact. Click Delete to confirm.

--End--

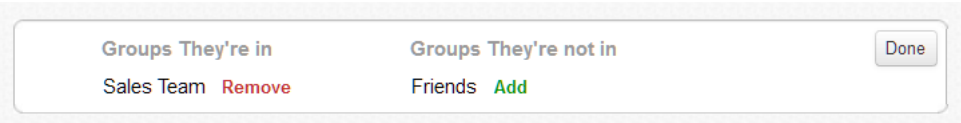
Adding a contact

Use this procedure to add a new contact.

Step	Action
1	Click the Add Contact button at the top of the page.
2	Complete the new contact information and click Save . <i>Note:</i> You can also add callers as contacts from the View Faxes page. See Adding a caller as a contact on page 15 for the procedure.
--End--	

Adding a contact group

Contacts can be added to groups to allow you to easily send a fax to multiple people. Use this procedure to add a new contact group and to add members to the group.

Step	Action
1	Click the Add Group button at the top of the page.
2	Complete the new group information and click Save .
3	To add contacts to the new group, select a Contact from your contacts list and click Edit .
4	Click the Edit button next to the “Groups They’re In” information box. 
5	Click the Add link to add the contact to a group or Remove to remove them from a group.
6	Click Done in the information box.
7	Click Done at the top of the page when you have completed all changes. <i>Note:</i> If you click Done before saving your changes, you will receive a prompt asking you to confirm you are finished editing.
--End--	

Settings

The Settings page lets you change your Inbound and Outbound fax settings. It is accessible from any page by clicking on the tab at the top of the screen.

Changing inbound fax settings

Use the following procedures to change your inbound fax settings.

Prerequisites

You are on the Inbound Fax tab of the Settings page.

Settings Inbound Fax tab

The screenshot shows the 'Settings' page for 'Inbound Fax'. At the top, there is a navigation bar with 'Home', 'View Faxes', 'Send Fax', 'Contacts', and 'Settings' (which is active). Below this, there are tabs for 'Inbound Fax' and 'Outbound Fax'. The main content area is divided into two sections:

- Delivery Email Address:** A heading followed by a text input field. Below the field is the instruction: "Enter the email addresses where you want all incoming faxes delivered." and a label "Email Address:".
- File Type and Security:** A heading followed by the instruction: "Select whether you'd like the fax attached to the email as a PDF document or as a TIFF image file." Below this are two radio buttons: "PDF" (which is selected) and "TIFF". Under the "PDF" option, there is a sub-section for "Encryption On" with a radio button and a "Password:" field with a placeholder "Enter 4-6 characters".

Setting email delivery address

Use this procedure to set the email address(es) where inbound faxes will be delivered. Faxes will also remain in your Business Fax Inbox.

Step	Action
------	--------

- 1 Enter an email address to receive inbound faxes. Multiple email addresses should be separated by commas.

Note: The first email address entered is also where you will receive outbound fax copies, if enabled. See [Receiving a copy of outgoing faxes](#) on page 27 to enable the setting.

- 2 Click **Save**.

--End--

Changing attachment file type and security

Step	Action
1	Click the checkbox next to PDF or TIFF to specify how faxes should be attached for email delivery.
2	If you selected “PDF” and wish to password protect the fax, check Encryption On and enter the password the recipient must enter to view the fax.
3	Click Save .

--End--

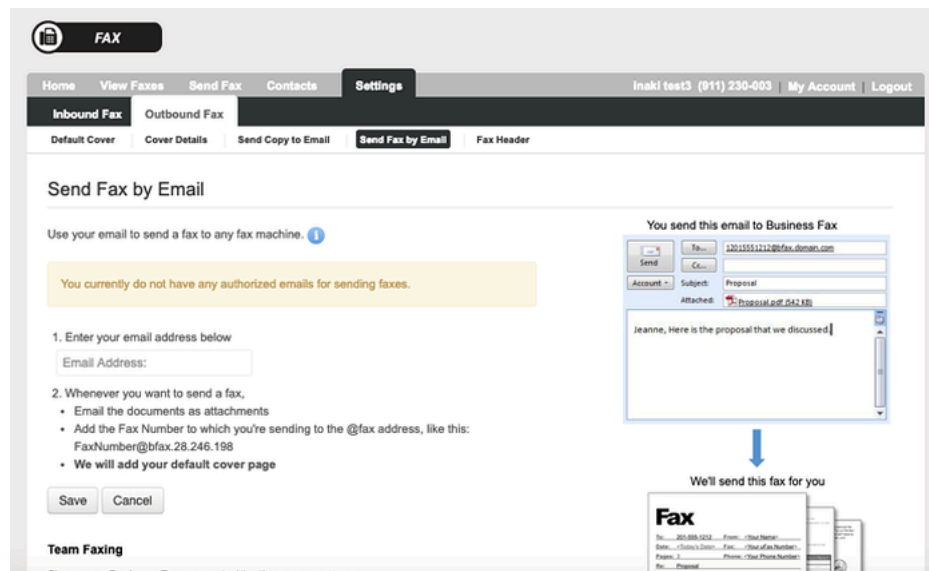
Changing outbound fax settings

Use the following procedures to change your outbound fax settings.

Prerequisites

You are on the Outbound Fax tab of the Settings page.

Settings Outbound Fax tab



Setting your default cover page

Step	Action
1	Click the Default Cover tab. <i>Note: A direct link to the default cover page setting is also available from the Home page of the web application.</i>
2	Click the cover page to use for outbound faxes.
3	Click Save .
--End--	

Changing cover page information

Step	Action
1	Click the Cover Details tab. <i>Note: A direct link to this setting is also available from the Home page under "Your name on the cover page".</i>
2	Enter the first name, last name, and phone number to use for outgoing faxes.
3	Click Save .
--End--	

Receiving a copy of outgoing faxes

Step	Action
1	Click the Send Copy to Email tab.
2	Click the checkbox to have a PDF of all outgoing faxes emailed to the address listed. <i>Note: The email address is the first email set on the Inbound Fax page (see Setting email delivery address on page 25).</i>
3	Click Save .
--End--	

Enabling faxing from an email application

Use this procedure to enable faxing from email applications. Each email address granted fax permissions on this account must be listed.

Step	Action
------	--------

- 1 Click the **Send Fax by Email** tab.
- 2 Enter each email address to enable, separated by commas.
Note: When faxing from an email application, the following email elements are used for the fax:
 - *To: <Recipient Fax Number>@<Your Domain>*
 - *Subject: <Subject to include on the cover page>*
 - *Attached: <Attach any documents to fax>*
 - *Email body: <Include as comments on the default cover page>*
- 3 Click **Save**.

--End--

Changing fax header information

Step	Action
1	Click the Fax Header tab.
2	Select the fax header information (i.e. Date, Company, Number, and Pages) to print at the top of outgoing faxes.
3	Click Save .

--End--

My Account

The My Account page lets you view and update your profile information, change your password, change your PIN, view and download your fax activity, block and unblock incoming faxes from particular numbers, and change your Web application language. My Account is accessible from any page by clicking the My Account link at the top right of the screen.

My Account tabs



Changing your profile

Use this procedure to update profile information (for example, your address or time zone).

Step	Action
1	Click the My Account link at the top right of the screen.
2	Click the Profile tab.
3	Update your information.
4	Click Update to save the changes or Cancel to discard the changes.

--End--

Changing your password

Use this procedure to change the password you use to access the Web GUI. Your password must:

- Contain at least one uppercase letter.
- Contain at least one lowercase letter.

- Contain at least one number.
- Contain at least one special character.
- Not contain four or more consecutive, repeating characters.
- Not contain your mailbox number.

Additionally, your administrator may have placed restrictions on how often you may reuse the same password (for example, your new password cannot be the same as one of your previous three passwords).

Step	Action
1	Click the My Account link at the top right of the screen.
2	Click the Security tab.
3	Enter your Current Password , then enter your New Password twice.
4	Click Update to save the changes or Cancel to discard the changes.

--End--

Changing your PIN

Use this procedure to change the PIN you use to access the mobile application.

Step	Action
1	Click the My Account link at the top right of the screen.
2	Click the Security tab.
3	Enter your Current Password , then enter your New PIN twice. <i>Your PIN must be non-sequential digits only.</i>
4	Click Update to save the changes or Cancel to discard the changes.

--End--

Viewing fax activity

Use this procedure to view and download incoming and outgoing fax activity.

Step	Action
1	Click the My Account link at the top right of the screen.

-
- 2 Click the **Activity** tab.
The details of your incoming and outgoing faxes are listed with the most recent displayed first.
 - 3 To open the list in Microsoft Excel, click **Download CSV**.
 - 4 If prompted, select whether to open or save the file and click **OK**.
The comma separated values (CSV) file will be downloaded.
-
- End--
-

Blocking or unblocking numbers

Use this procedure to block or unblock incoming faxes from particular numbers.

Step	Action
1	Click the My Account link at the top right of the screen.
2	Click the Activity tab.
3	Click Blocked Numbers List to view the full list of blocked numbers. <i>To remove a number from the list, click Unblock next to that number.</i>
4	To add a number to the blocked numbers list, click the Block button next to that number in the Activity list.
5	Click Okay, block it when prompted.

--End--

Changing your GUI language

Use this procedure to change the language displayed in the Graphical User Interface (GUI).

Step	Action
1	Click the My Account link at the top right of the screen.
2	Click the Language tab. <i>Your current Language settings display.</i>

Language

Web Language

Language Select the language displayed on the Web.

- 3 Click the drop-down box to select your Web language.
- 4 Click **Update** to save the changes or **Cancel** to discard the changes.

--End--
