

Fax Quick Reference Guide

Fax

Many still heavily rely on faxing as a form of reliable and secure communications — Fax takes the hassle out of sending and receiving faxes. Running in parallel with traditional stand-alone fax machines, Fax eliminates the need to print every document manually to send or view it. It's easy to send and manage most content as electronic documents. Before accessing the Fax service your organization's service provider will need to provide a few fundamental pieces of information:

- The URL for the Fax. This URL is specific to your organization.
- Your fax number and pin

Browse to the service provider provided URL. At the login screen enter your fax number and password and click "Login".

Enter the fax number associated with your account

VOICE MAIL

+1 Phone Number

PIN

Login

Forgot your PIN?

Copyright © 2019 Ribbon Communications. All rights reserved.

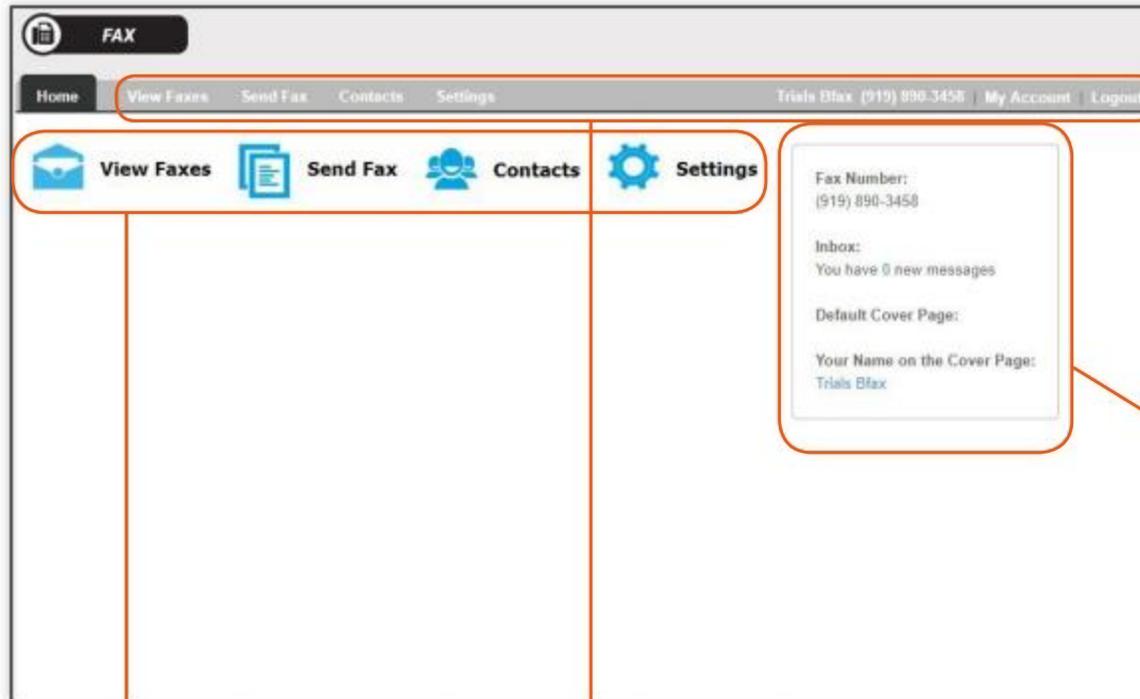
Enter the PIN number associated with your fax account

Once you have entered the information click "Login"

Fax Quick Reference Guide

Home Page

Logging into the portal automatically opens the "Home" page. The "Home" page provides quick links to primary functions. It also displays a quick look at the information that is on your fax headers



Quick links to the primary functions of the Fax

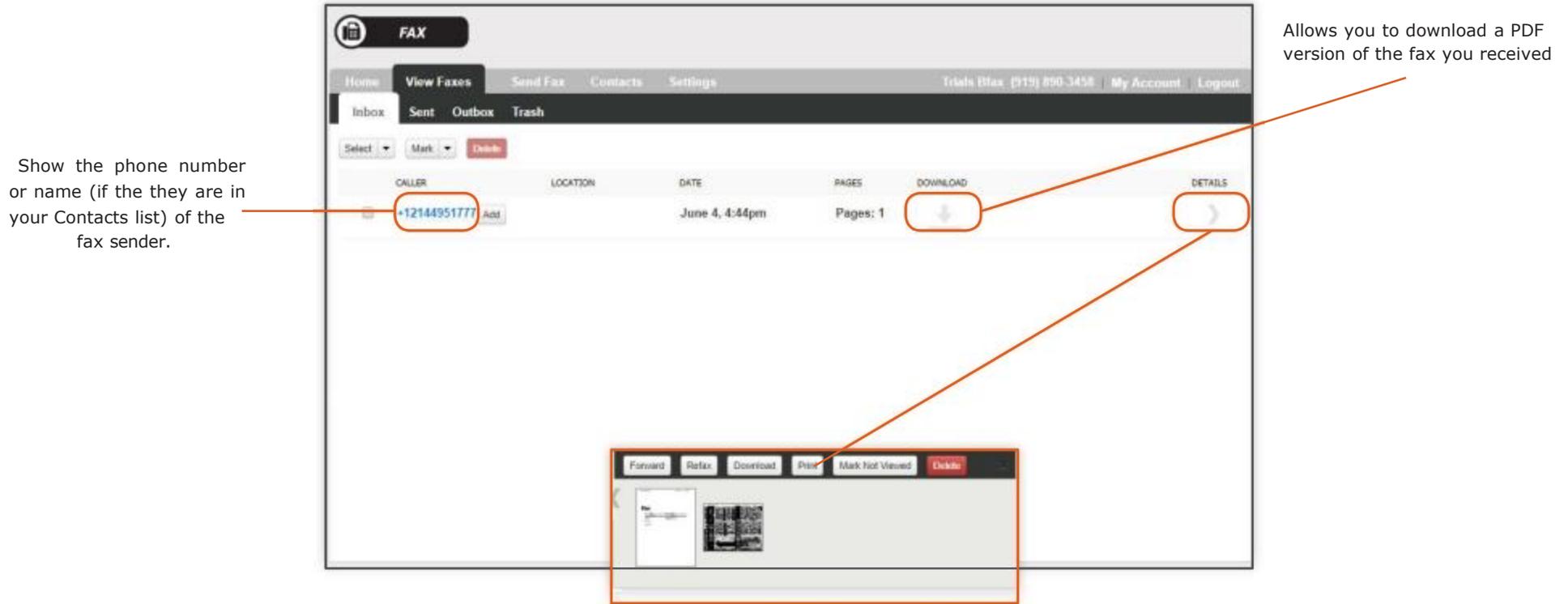
Main navigation. This navigation mirrors the quick links allowing you to easily navigate to other sections of Fax from any other pages.

Shows quick reference information as well as your cover page defaults

Fax Quick Reference Guide

View Faxes - Inbox

The Fax inbox provides one place to view, download, and manage faxes that you have received.



Clicking details provides a group of additional actions you can perform on received faxes.

- **Forward:** You can forward a received fax to an email address
- **Refax:** You can fax a received fax to a new fax number
- **Download:** You can download the fax as a file
- **Print:** You can print a fax on a printer
- **Mark Not Viewed:** Allows you to mark a fax as not viewed. This will make it displayed bold in the Inbox.
- **Delete:** Moves the fax to the Trash. This does not permanently delete the fax. You must go to the Trash tab to delete it permanently.

Fax Quick Reference Guide

View Faxes - Sent Faxes

Fax gives you the ability to track the status of your sent faxes and choose additional actions.

A "check mark" means a fax was sent successfully. Click "Info" to find out more information.

A screenshot of a confirmation window for a successful fax job. The title is "Fax Job: Sales Quote". It shows the recipient as "(919) 890-3395" and the outcome as "Sent Successfully". There is a "More Details" button.

A screenshot of a confirmation window for a failed fax job. The title is "Fax Job: Its your turn". It shows the recipient as "(973) 470-9471" and the outcome as "Transmit Failure". There are "More Details" and "Refax" buttons.

An X means that a fax was sent unsuccessfully. Click "Info" to find out more information and to attempt to "Refax"

RECIPIENT	STATUS	DATE SENT	PAGES	DOWNLOD	DETAILS
(919) 890-3395	✓ Info	September 22, 4:27pm	Pages: 1	↓	⋮
(987) 654-3210	✓ Info	September 22, 3:49pm	Pages: 1	↓	⋮
(470) 9471	✗ Info	September 16, 11:06am	Pages: 1	↓	⋮
(470) 9471	✗ Info	September 16, 10:52am	Pages: 1	↓	⋮
(470) 9471	✗ Info	September 16, 10:41am	Pages: 1	↓	⋮
(470) 9471	✗ Info	September 16, 10:28am	Pages: 1	↓	⋮
(919) 890-3395	✓ Info	September 14, 4:51pm	Pages: 1	↓	⋮
(1867) 3480	✓ Info	September 14, 2:29pm	Pages: 1	↓	⋮
(1280) 1524	✓ Info	September 14, 2:26pm	Pages: 1	↓	⋮
(919) 890-3395	✗ Info	September 14, 1:35pm	Pages: 1	↓	⋮



A screenshot of the fax action menu. It contains buttons for "Forward", "Refax", "Download", "Print", "Mark Not Viewed", and "Delete". Below the buttons is a preview of a fax document.

Click the "Details" arrow to show additional functions such as forwarding the fax to an email address, refaxing to a fax number, and downloading, printing, or deleting the fax.

Download a file of your sent fax

Fax Quick Reference Guide

Sending a Fax

Fax provides a step-by-step process for sending a fax.

Step 1: Choose a Cover Page

You can choose the style of your fax cover. If you have set up a default style for you fax cover page in settings that choice will be automatically highlighted.

Click "Next" to move to the next screen.

Home View Faxes Send Fax Contacts Settings
Select Cover Page Enter Details Attach Files Preview Fax

Select Fax Cover Page

Professional Elegant Contemporary

Next

Fax Recipients

Select recipients from contacts or enter phone numbers to send the fax. International numbers should be entered with a '+'.
Recipient Number: [Recipient Number] Contacts
Separate multiple recipients with a comma

Cover Page Information

Recipient's Name: [Recipient's Name]
From: Trusee Bfax
Your Fax Number: (919) 890-3458
Your Phone Number: [Your Phone Number]
Date: 4 June 2019
Subject: [Subject] *Subject is also used
Comments: [Comments]

Next

Step 2: Enter Details

Fill out the recipient and sender information. If you have From, Your Fax Number, Your Phone Number, assigned in settings these fields will automatically populate.

Click "Next" to move to the next screen.

Home View Faxes Send Fax Contacts Settings
Select Cover Page Enter Details Attach Files Preview Fax

Attach Fax Document

Attach Document

Virtual_Receptionist_Quick_Reference_Ca...

Next

Attachments

Press Choose File to launch the file prompter, select a file, and then click Choose File to file chosen

Choose File

File 1: Virtual_Receptionist_Quick_Reference_Caig-062019.pdf (367...

File 2:

File 3:

File 4:

File 5:

File 6:

File 7:

File 8:

File 9:

File 10:

Your attachments total: 0.4MB

Attach Done

Next

Preview Your Fax

Preview Fax

Send confirmation when delivered (we always send if fax not delivered)

Send Fax Schedule for Later

You can choose to receive delivery confirmation and a copy of your fax to your e-mail address.

19step 3: Attach Documents

Click "Attach Document". Choose the file or files that you wish to fax. Then click "Attach". You can repeat this process to attach more files. When you are done choosing files click "Done".

19his will bring you back to the Attach Files screen. You will see the files you attached from the dropdown menu. You can delete attachments on this screen by choosing the file from the dropdown and clicking "Delete".

Click "Next" to move to the next screen.

Step 4: Preview Fax and Send

You can preview your fax before you send. Click "Preview Fax" to download a PDF version of the fax you are about to send. When you are ready click "Send Fax" or "Schedule for Later" to send it at a different time.

Fax Quick Reference Guide

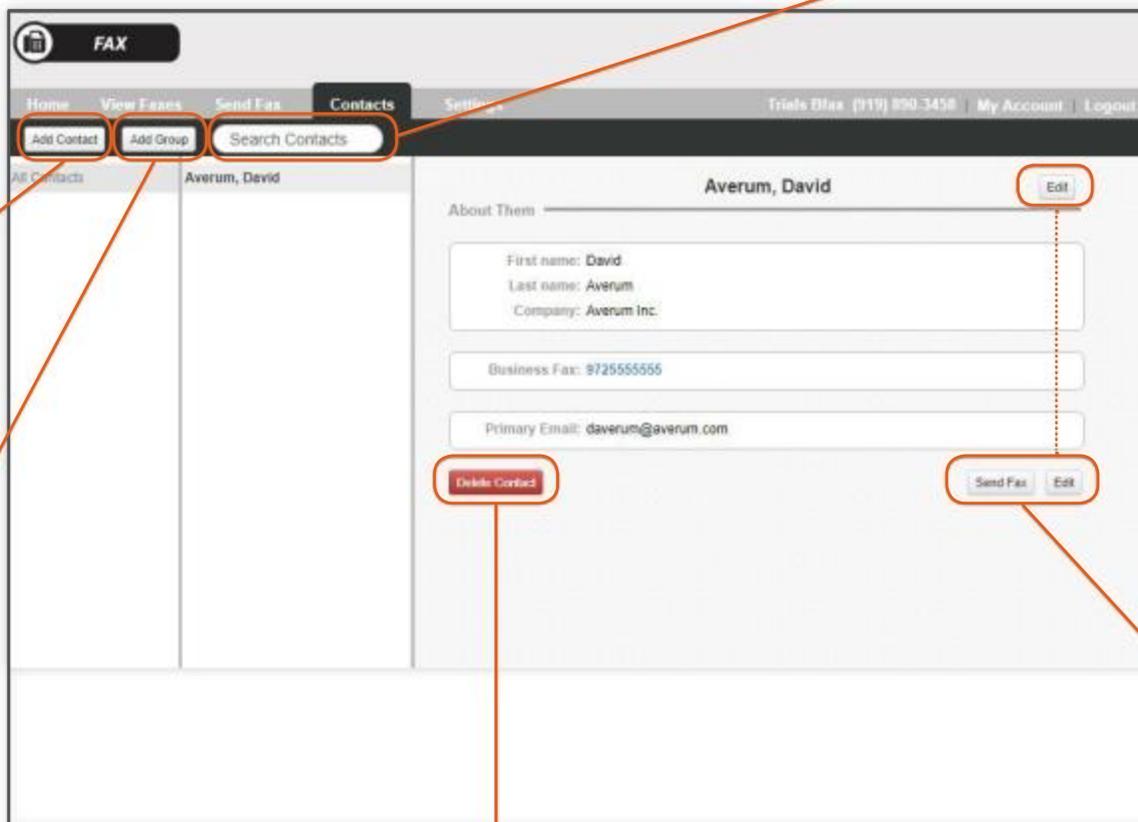
Contacts

Fax allows you to create a customer contact list for contacts or organizations that you fax frequently. Adding contacts makes it easier to send faxes to them in the future.

Click inside the search box. Type all or part of the name of the contact you are searching for and hit the enter/return key. This will create a list of contacts with matching criteria.

Click "Add Contact" to create a new contact. You can also assign these contacts to a group for easier organization.

Click "Create Group" to create a new contact group. You can then assign several contacts to that group. This makes it easier to find contact later, and it also allows you send a fax to the entire group.



Delete a contact you no longer wish to have in your Contact list by clicking "Delete Contact"

Click one of the "Edit" buttons to edit your contact. You can also send a fax directly from the contact listing by clicking "Send Fax". This will take you to the Send Fax screen and will prepopulate your contacts information.

Fax Quick Reference Guide

Settings - Inbound Fax

To get the most out of your Fax service, and provide an extra layer of security, there are a few default settings that can be changed.

Home View Faxes Send Fax Contacts Settings Trial Fax (919) 890-3458 My Account Logout

Inbound Fax Outbound Fax

Delivery Email Address

Enter the email addresses where you want all incoming faxes delivered. ⓘ

Email Address:
john.doe@doe.com

File Type and Security

Select whether you'd like the fax attached to the email as a PDF document or as a TIFF image file. ⓘ

PDF
Optionally encrypt and password protect the PDF fax files delivered in email.

Encryption On

Password:
Enter 4-6 characters

Confirm Password:
Enter Again

TIFF

Save Cancel

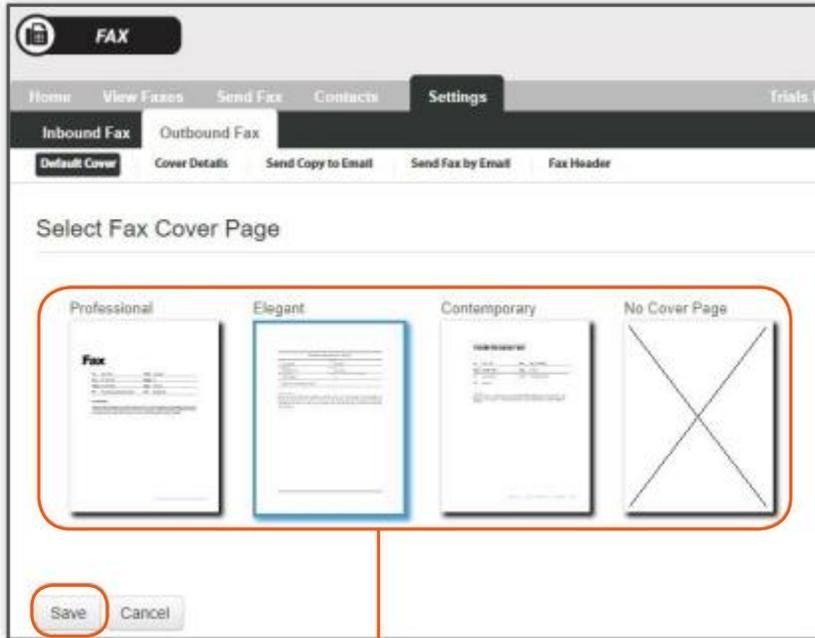
Enter the e-mail address that you would like to receive incoming faxes as file attachments.

Choose between PDF and TIFF file formats. If you chose the PDF file format you can also enable encryption. When you turn on encryption you must choose a password and confirm it. This means that only someone with the password will be able to open these fax attachments.

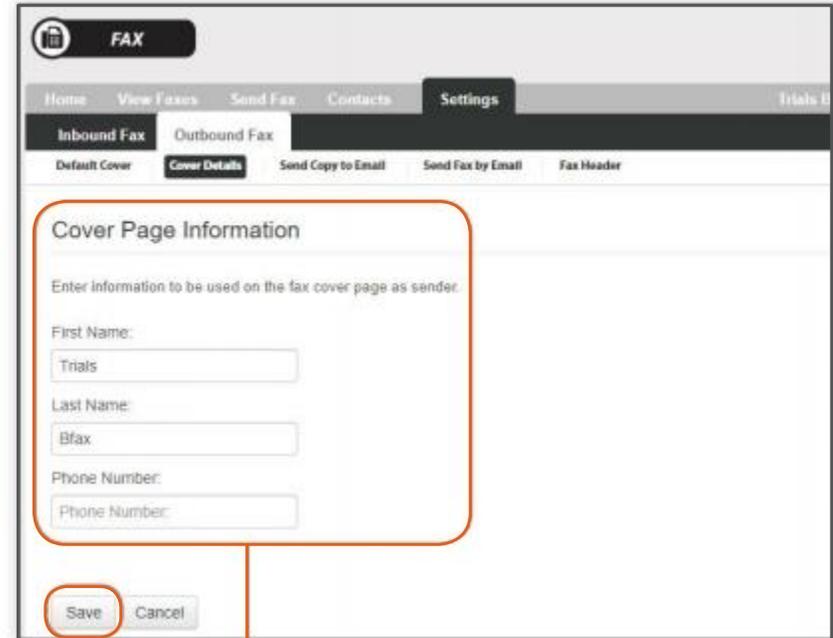
Fax Quick Reference Guide

Settings | Outbound Fax | Setting Fax Cover Defaults

Fax allows you to set defaults for your outbound faxes. This makes sending faxes much faster because Fax will prepopulate these defaults into your outbound faxes, you won't need to repeatedly enter the same information.



Choose a default cover

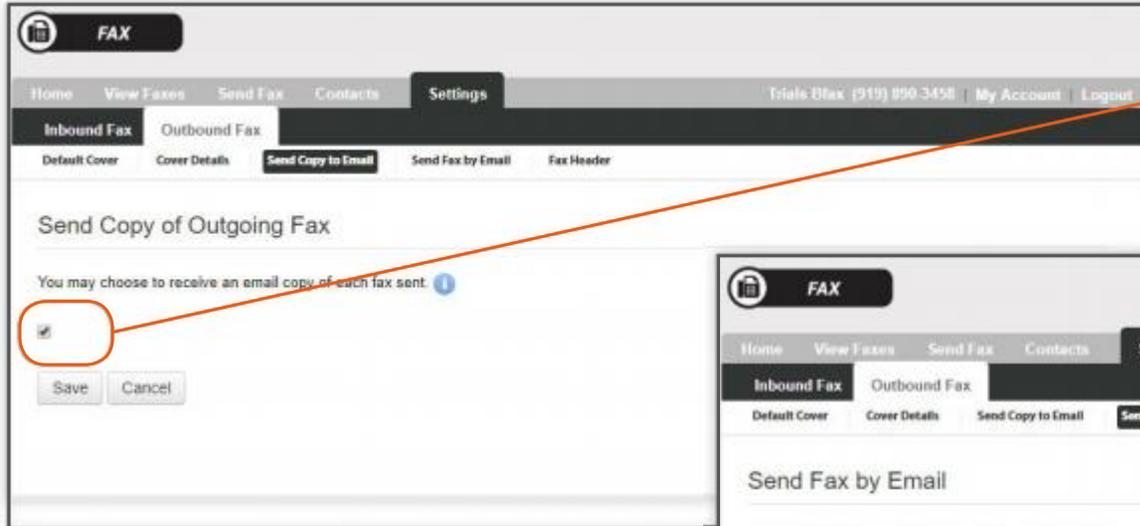


Choose the default information that will be displayed on your cover page.

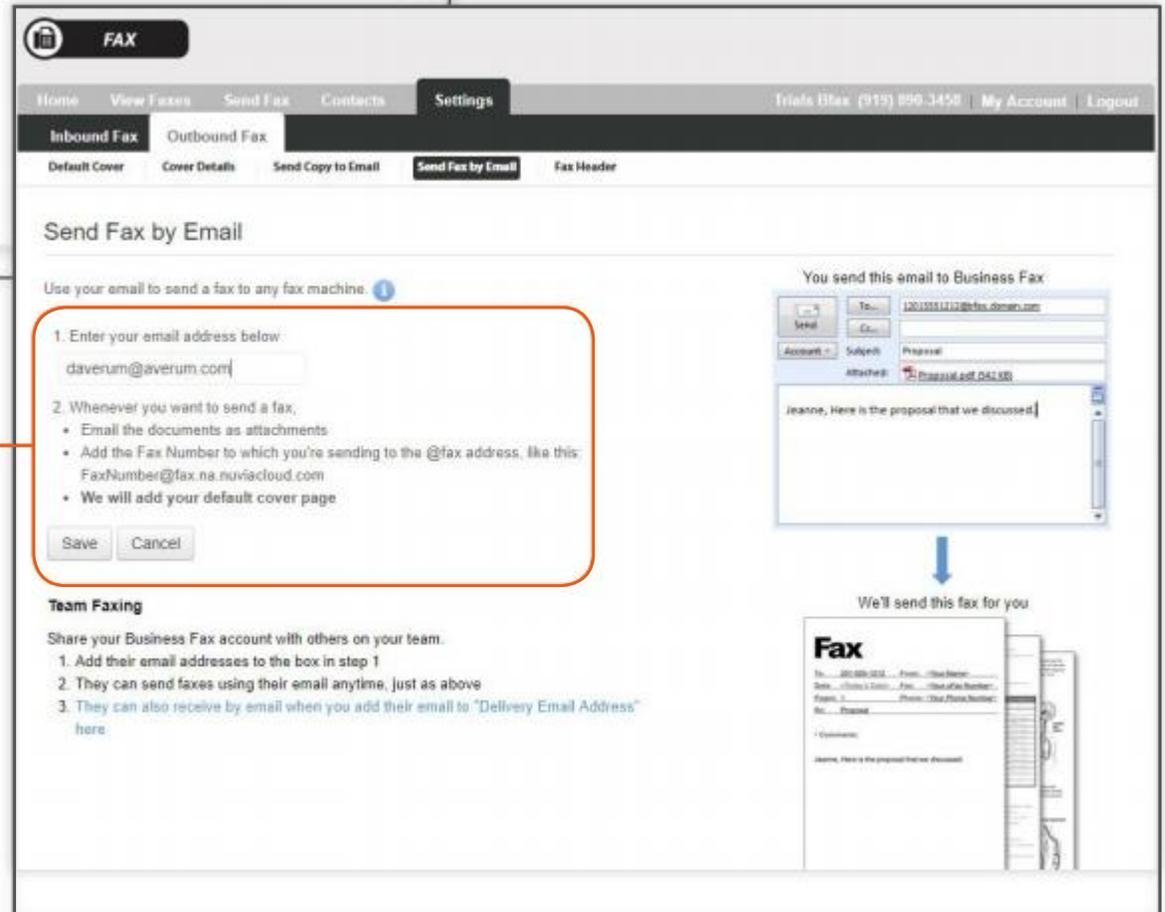
Fax Quick Reference Guide

Settings - Sending and Receiving Faxes Via E-mail

Fax allows you to e-mail yourself a copy of your outgoing faxes, it also allows you to send faxes directly from your e-mail without having to go to the web interface.



Check the box if you automatically want to receive e-mail attachments of your outbound faxes.



Enter the email address you will sending faxes from. Then simply send an email with an attachment to the faxnumber@fax.nuviacloud.com

**Note* Check with your service provider to verify the send to address*

Fax Quick Reference Guide

Settings - Setting Up Default Fax Header

Fax allows you to choose defaults that will always appear on your fax header.

Enter the company name and choose what information you would like to have appear on your fax header.

The screenshot displays the 'Fax Header' configuration interface. At the top, there is a navigation bar with 'Home', 'View Faxes', 'Send Fax', 'Contacts', and 'Settings'. Below this, there are tabs for 'Inbound Fax' and 'Outbound Fax', with sub-tabs for 'Default Cover', 'Cover Details', 'Send Copy to Email', 'Send Fax by Email', and 'Fax Header'. The main content area is titled 'Fax Header' and includes the instruction: 'Enter information that is displayed at the top of each fax page sent.' Below this, there is a 'Company Name' field with the text 'Averum Group'. Three checkboxes are present, all of which are checked: 'Show the Date (e.g. "Dec 25 2013 04:14pm ET")', 'Show your Business Fax Phone Number (e.g. "732-555-1212")', and 'Show the Page Number (e.g. "1/3")'. At the bottom left, there are 'Save' and 'Cancel' buttons. On the right side, a preview of the fax header is shown, featuring a yellow header bar with the text 'Dec 25 2013 04:14pm ET Company 732-555-1212 PAGE 1/3'. Below this bar, there are four columns with arrows pointing up: 'Date', 'Your Company', 'Your Fax Phone', and 'Pages'. The main body of the preview shows the word 'Fax' in a large font, followed by fields for 'To:', 'From:', 'Date:', 'Fax:', 'Pages:', and 'Phone:'. A 'Comments' section is also visible at the bottom of the preview.