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

Enter the PIN number associated wit your fax account

Once you have entered the information click "Login"

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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

Shows quick reference information as well as your cover page defaults
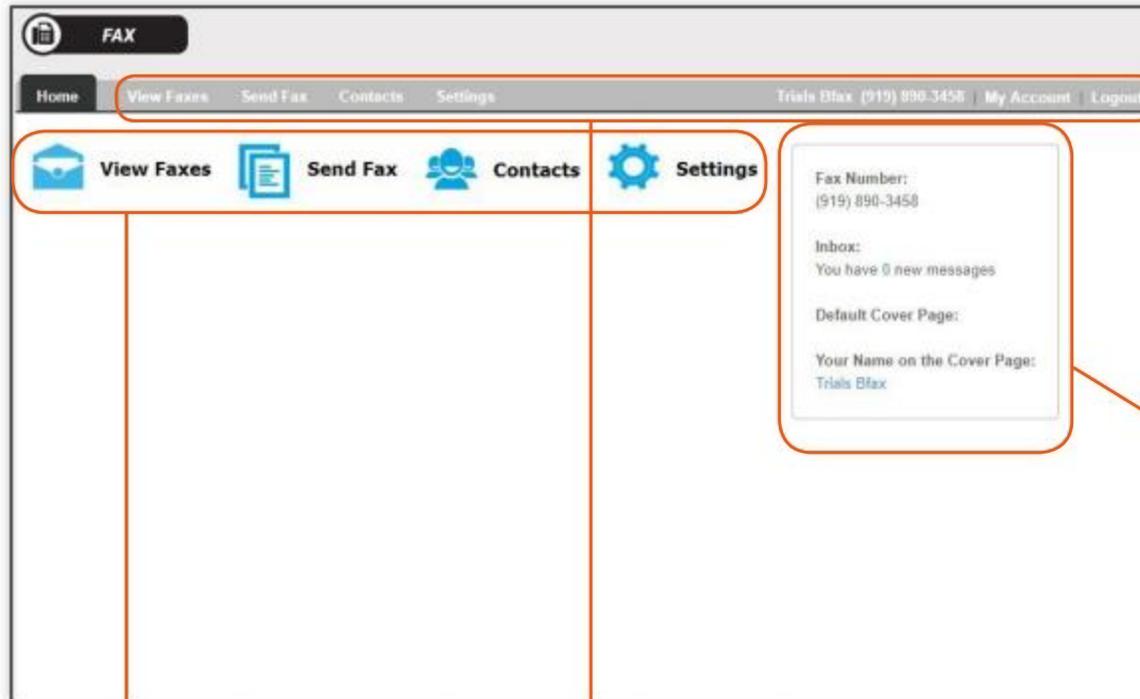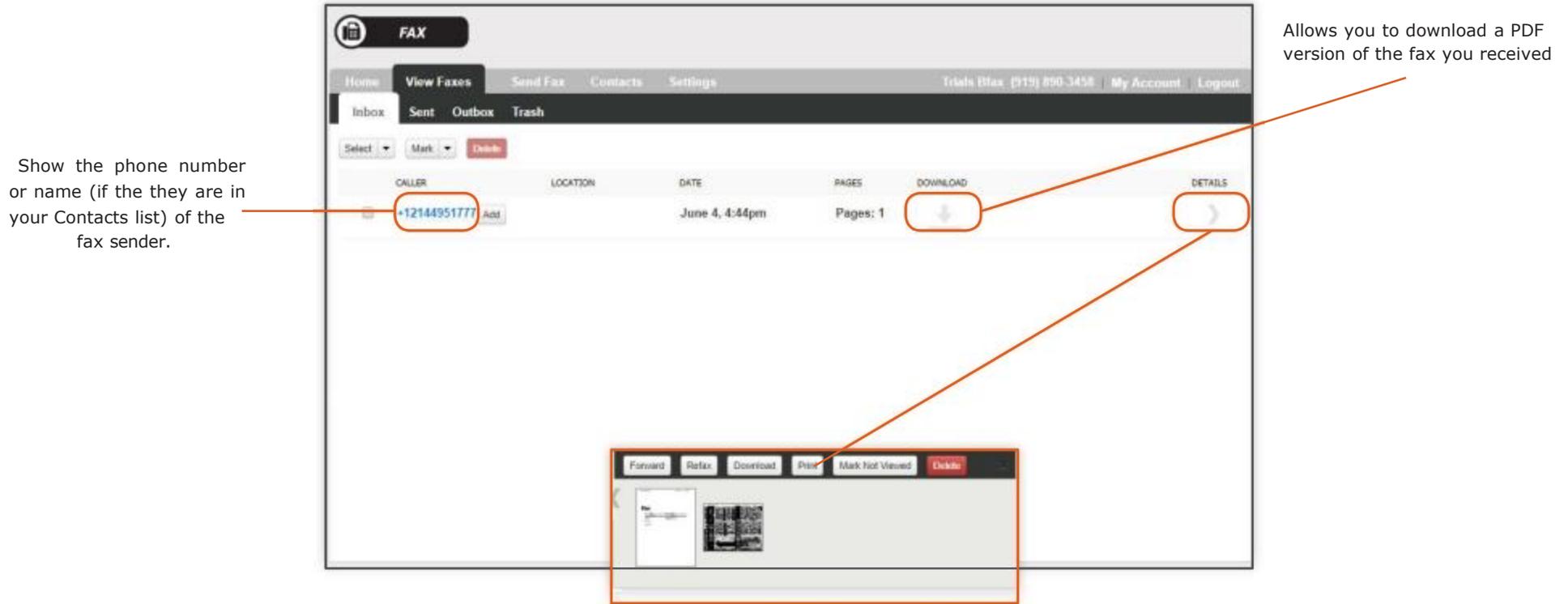
Quick links to the primary functions of the Fax

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

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View Faxes - Inbox

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

Allows you to download a PDF version of the fax you received

Show the phone number or name (if the they are in your Contacts list) of the fax sender.

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.

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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.

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

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

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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.

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

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.

19tep 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 drop down 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.

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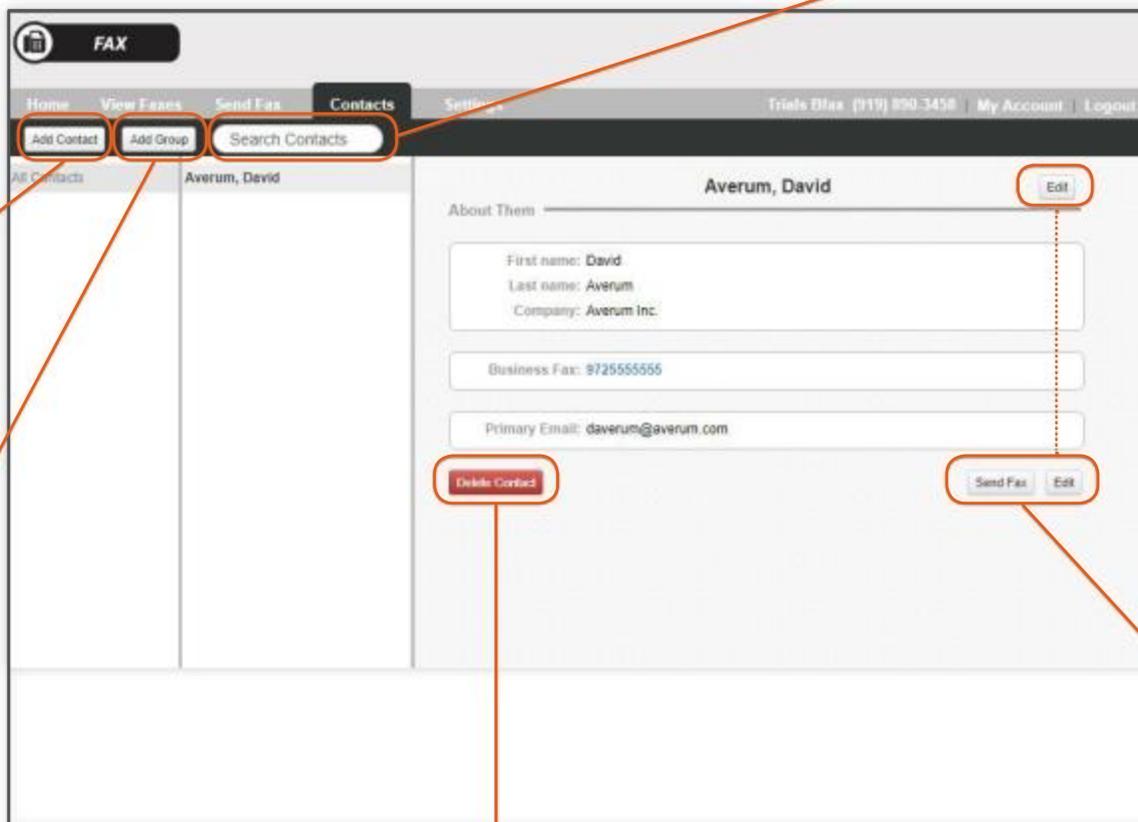
Delete a contact you no longer wish to have in your Contact list by clicking "Delete Contact"

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.

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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.


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.
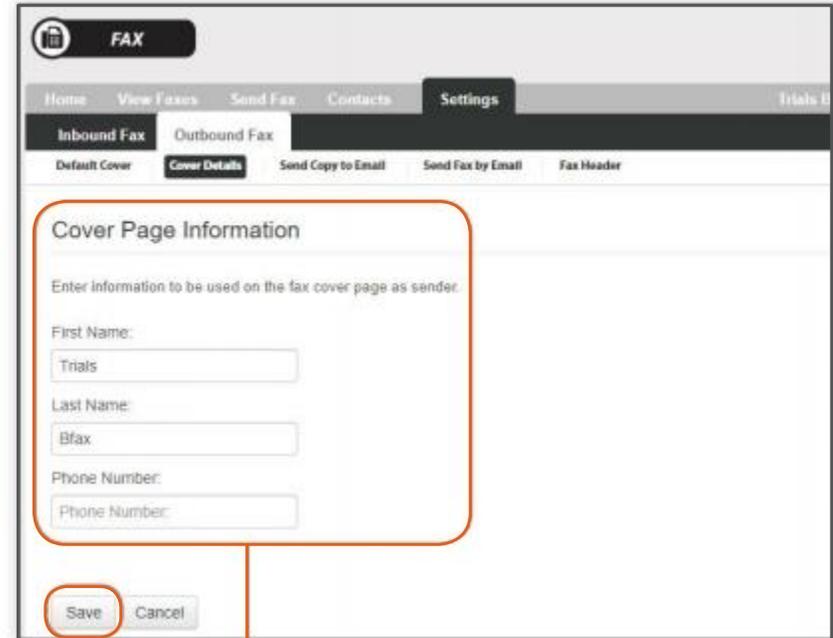
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Settings | Outbound Fax | Setting Fax Cover Defaults

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.
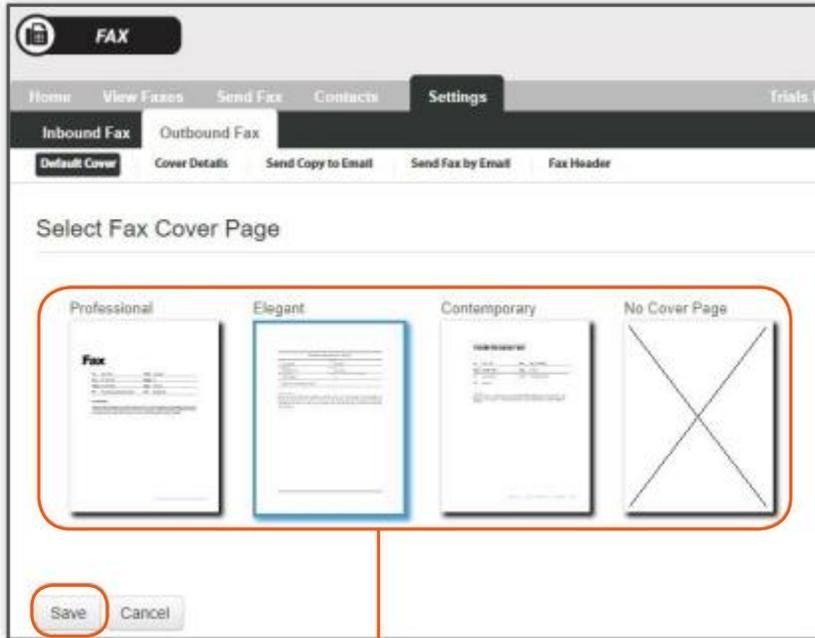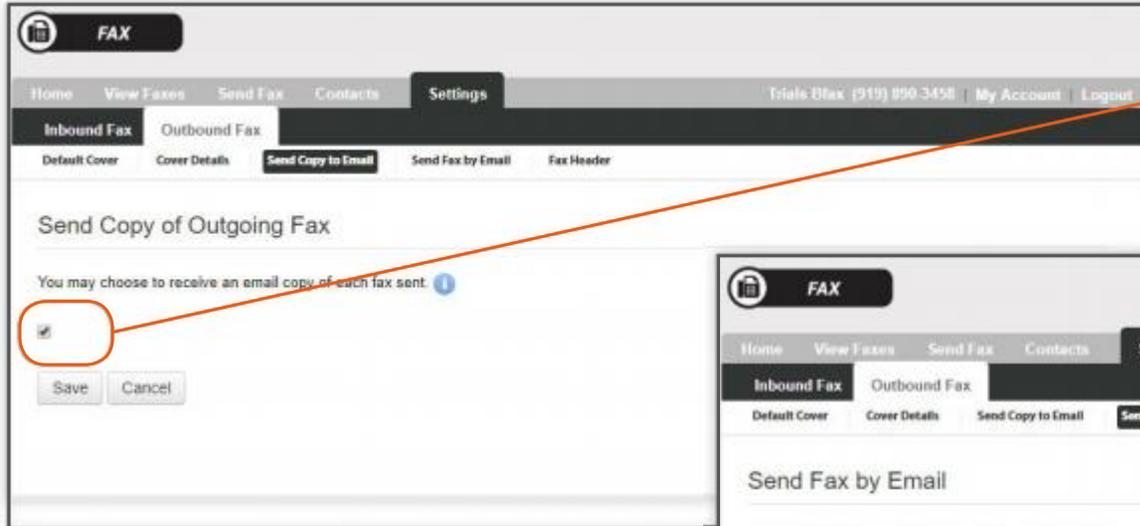

Choose a default cover

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

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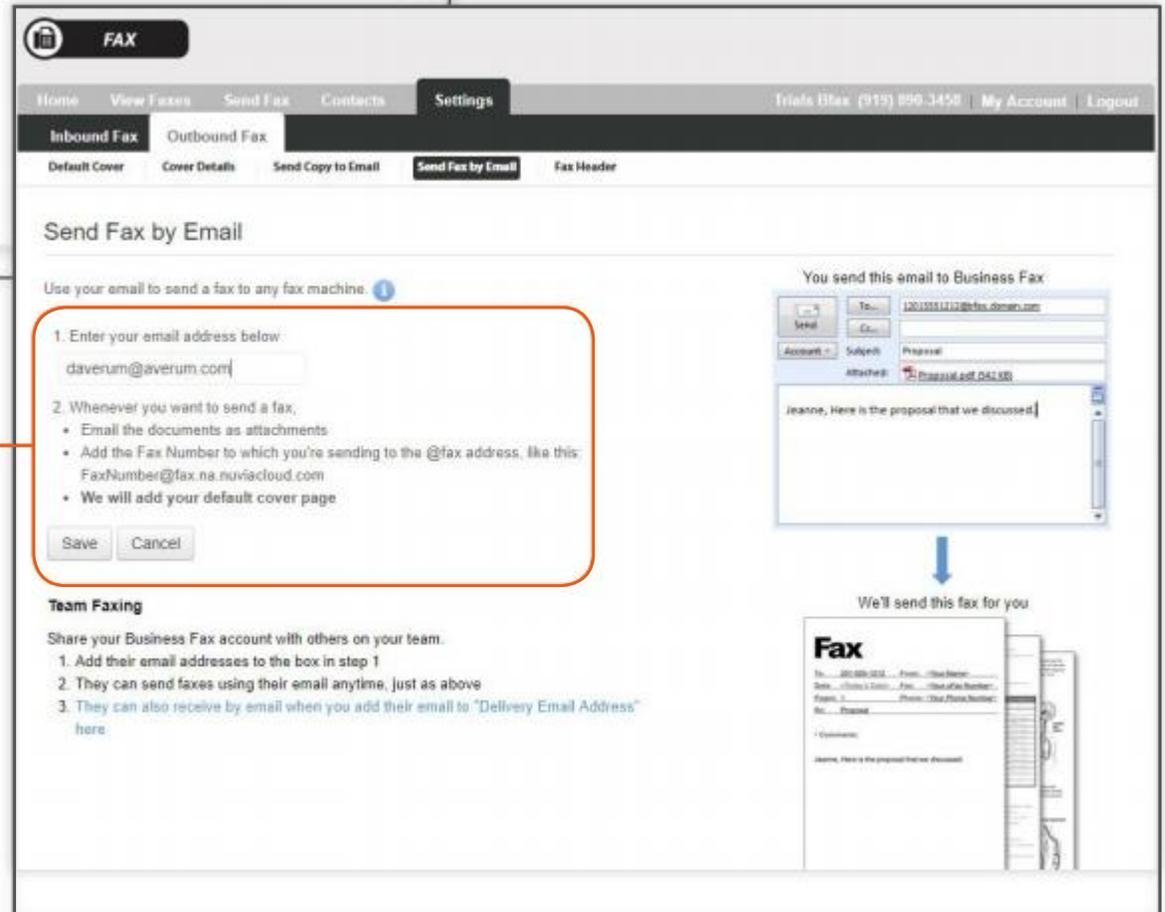
Enter the email address you will sending faxes from. Then simply send an email with an attachment to the faxnumber@ fax.nuviacloud.com

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

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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.