User's Guide

EC Data Systems, Inc.
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Patent information available at http://www.faxage.com/patent_notice.php

Contents

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Introduction

Welcome to FAXAGE! We are excited to have you on board and hope that your experience with our software will be both pleasant and productive. The FAXAGE application is designed primarily based on user feedback. **If you have suggestions or comments we would love to hear them**.

In order to get help, we recommend that you email support@faxage.com. It is our goal to answer your support queries the same day if possible and by the next business day at the latest. In addition, feel free to call our office at (800)853-3293 x 200 at any time. We are generally available to answer the phone Monday through Friday from 9:30 AM to 4:30 PM Mountain Standard Time, but will return voice mails left at other times.

This user's guide takes a functional approach to describing each component of the FAXAGE system and its use. We hope you find it helpful in learning how to use the system as well as for use as a reference over time.

Web Application Component Summary

The major components of the FAXAGE web site application are as follows:

- **Administrative Tools** – These allow you to set your personal preferences such as your email address and password as well as to maintain your 'phonebook' in the system. If you are designated as a 'manager' for your organization, you will have additional options as shown in the table below (regular users can only use the 'My Account' tools). The various administrative tools are grouped into categories as shown

My Account		Personal account tools
	Change Email/Password	Change email or password
	Phonebook	Frequently dialed numbers
Company Settings		Overall account administration
	Auto Purge Faxes	Set the system to delete records of faxes sent and/or received automatically after a certain time period
	User Accounts	Create and delete users within your company and reset passwords for existing users if they forget them
	Update Credit Card	Update your payment information
	Set Fax Tagline	Modify the 'tagline' that appears at the top of faxed pages
	Set Login Company	Set an alias to use for logging in to the website, rather than using your 'Company Number' that is assigned during setup
	Set Timezone	Set the timezone that the system uses on fax notifications, website reports, etc.
	PGP Keys	Manage PGP keys to be used for secure faxing via email
Outgoing Fax Settings		Settings related to sending faxes
	Notifications	Set options for your company related to the confirmation emails that are sent back when sending faxes using your email
	File Types	Controls addition of HTML and Text documents by default when sending faxes using your email
	Resolution and Retries	Sets the number of retries and

		resolution to use for outbound faxing
	Cover Sheet	Sets up FAXAGE to auto-generate coversheets for faxes sent
Incoming Fax Settings		Settings related to receiving faxes
	Email Routing	Set up any of your fax lines to email a copy of faxes that are received to one or more of your users
	Incoming Fax Format	Set received faxes to be in either Adobe PDF or TIFF Image format
	Caller ID Blacklist	Block certain numbers from sending faxes to your account
	Secure Email	Turn on capability to receive a secure link to download faxes instead of the fax attached to the email itself and/or to use PGP encryption
	Website Count Display	Turn on or off the summary counts of 'new' faxes received in the website to increase performance
	Fax to Email Preview	Turn on or off preview images of the first page of received faxes you get in your email
Reports		Account administrative reports
	Month-To-Date Charges/Calls	See a summary of your current billing cycle amount, access detailed call records for the current month to date.
	Busy Calls	Report of any inbound calls that have received busy signals if you do not have a 'never busy' type of account
	Billing History and Call Details	See historical billing invoices and call details for your account.

In addition to the 'Admin' tools, the following general areas of functionality are available in the FAXAGE website:

- **Lists** – Tools for maintaining and finding lists of frequently faxed people

- **Folders** – Create unlimited folders to store your faxes in. Managers can set security on folders to allow only certain users to have access to them
- **Status** – Outbound fax job management and status viewing
- **Receive** – Check for new faxes and download or open them. Managers can set security on lines to only allow certain users to view them
- **Send** – Send faxes to individuals and groups of people using list entries (from the Lists component) or by manually specifying the name and number to send to. The types of faxes you can send are:
    - *Upload Files* – Send a fax by uploading the file and specifying the entries from lists to send to, manually entering or using recently faxed numbers or 'phonebook' entries. This form of sending also allows for an optional coversheet to be created in the website
    - *Free Form Fax* – Simply type in the cover sheet details and send them without uploading a file at all

Additional Component Summary

In addition to the web site application, FAXAGE also provides the following functionality:

- **Email to Fax** – Send an email and have the attached file faxed out. See the FAXAGE-email-sending.pdf document for a more detailed guide
- **Fax to Email** – When a fax is received, it can be emailed to you automatically. This is set up by default for the email you type in when signing up. To add other emails see the 'Email Routing' section under 'Admin' in this document
- **Web API** – Web-based (HTTPS POST) API for both sending and receiving faxes via your own custom application
- **Additional Features** – Additional features such as customizing the tagline at the top of fax pages, adding your logo to cover sheets automatically, adding standard 'disclaimer' texts to cover sheets and receiving transmittal pages for sent faxes can all be configured with the admin tools available in the FAXAGE website

The remainder of this guide is dedicated to a step-by-step exploration of the procedures to use the functionality in each component described above.

Understanding Users, Managers and Security

Before we begin an in-depth exploration of the system, some conceptual detail needs to be provided regarding FAXAGE security.

Organizations

Essentially, as a user of FAXAGE, you belong to a 'company' or 'organization' that is set up within the system. This setup is necessary to make sure no one from any other company who uses the system will have access to any of your information.

Users

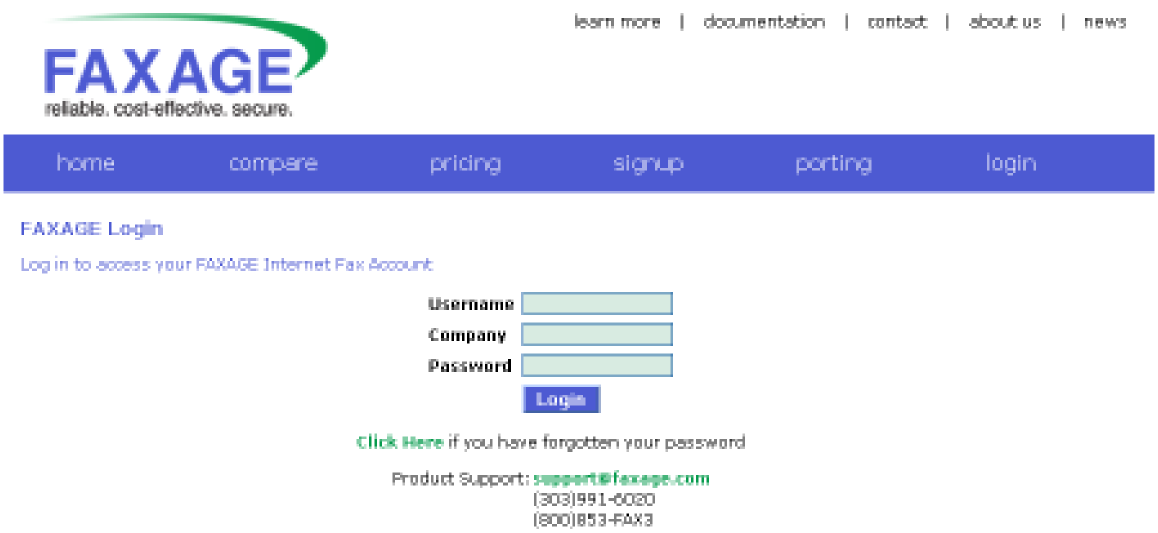
Within your company, there can be an unlimited number of 'users'. Each user represents a person who can log in to the system by providing a user name, a company number and a password as well as someone who can potentially send and receive faxes using the email address associated with their user account.

There are two kinds of users: Managers and Regular Users. Generally, we will refer to a regular user as a 'user' and a manager user as a 'manager'. If your account is the first one set up in your company by us, we will have set you up as a 'manager'. The differences between managers and users are detailed throughout the descriptions of system functions. The functions labeled 'Managers Only' will only be able to be performed by manager accounts. Managers are additionally able to access any folder in the company and any fax line in the company as well as view the faxes sent by anyone in the company. Users, on the other hand, must be granted access to folders and fax lines by managers; otherwise they will not have access to them. Users can never see anyone else's sent faxes but their own.

NOTE: When setting up new user (non-manager) accounts, it is essential that you then visit the 'receive' page and give them access to at least one fax line and/or specify this when adding the user (a drop-down is provided on the Admin screen where users are added). Otherwise, the new user will be unable to send or receive faxes using FAXAGE.

Logging In

Logically, using the FAXAGE system begins with logging in. To do so, point your web browser at http://www.faxage.com and click the link that says 'login' in the upper right of the screen. Once there, you should be presented with a screen that looks like this:

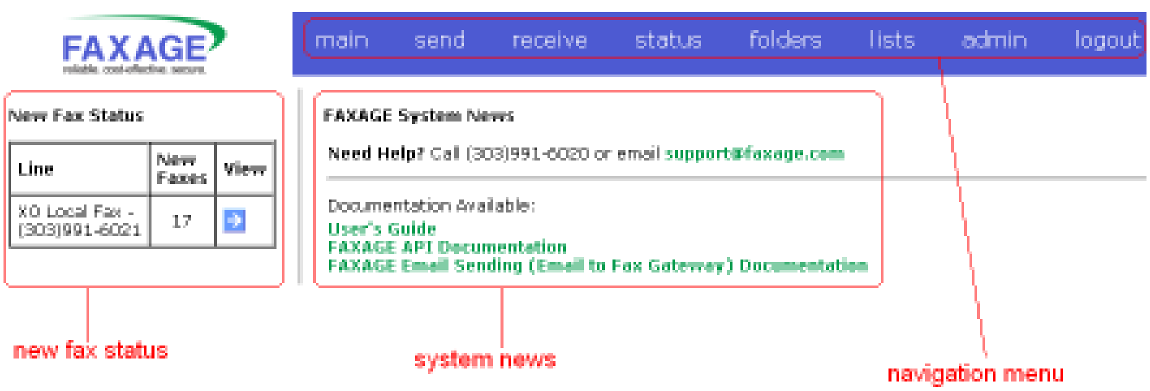


Type your Username, Company number (provided by the automatic setup process via website and confirmation email when you are set up. See the 'Admin' function 'Set Login Company' in this guide for directions on changing this) and Password in the spaces provided and click the 'Login' button. A 'forgotten password' link as also available on the login screen. The link will reset your password and email you a new one if you have forgotten it.

The Main Menu

Once you have logged in, you will be presented with the Main Menu screen. The components of the Main Menu are as follows and are labeled on the screen shot below:

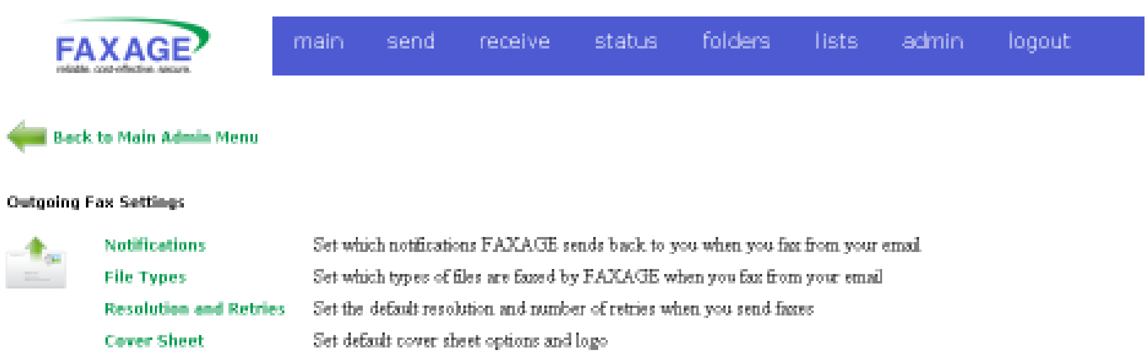
- *New Fax Status* – You are presented with a quick summary of all fax lines that you can access and how many 'new faxes' there are in each. A 'new fax' is one that has been received on the number associated with the fax line that you have not yet viewed through the website. The designation of 'New' is on a per-user basis. You may click the arrow button next to each line to quickly open the receive screen to that line and view any new faxes. This is a shortcut to a place in the 'receive' screen which will be covered later
- *System News* – EC Data Systems will periodically post messages of interest to all users of FAXAGE in this area. Notices of upgrades, planned maintenance, new features, etc. will appear in this area for your reference. In addition, we sometimes make announcements to our users via email as well
- *The Navigation Menu* – This menu stays consistent from screen to screen within FAXAGE
- *The Logout Link* – From any screen, you can click the word logout on the right of the Navigation Menu to log out of FAXAGE



Administrative Tools

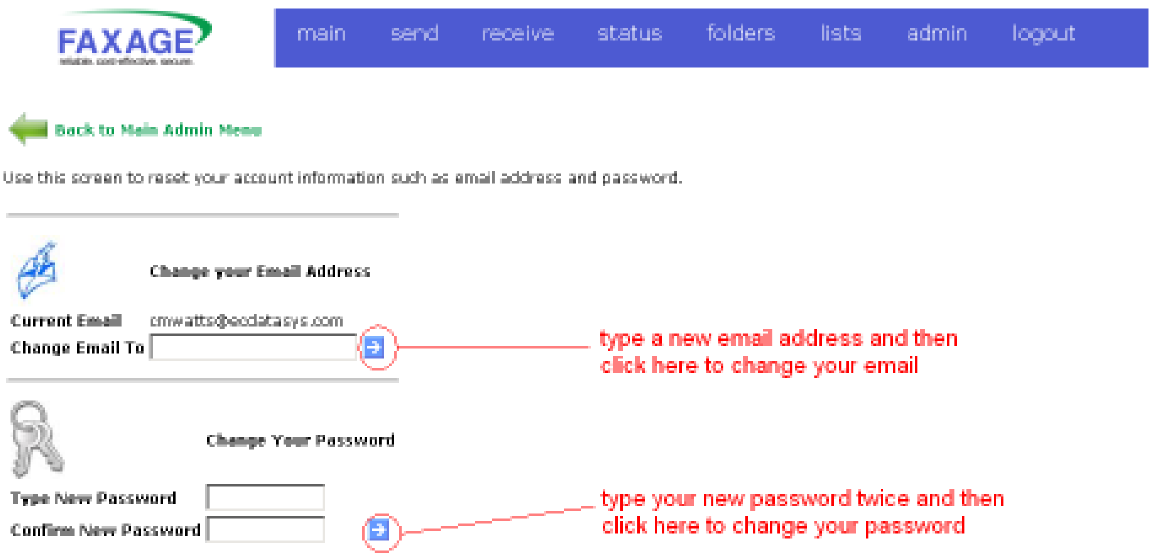
To access the Administrative Tools, click ‘admin’ from the Navigation Menu. Once there, you will be presented with a series of options as previously detailed in this guide. You can choose an option directly or click one of the icons to receive a page that describes what each of the options under that category is used for

Below is an example of a ‘description page’ that would come back if you clicked the ‘Outgoing Fax Settings’ icon on the screen above. You can go to the tools by clicking on any of the links on this description screen, as well as go back to the main admin menu.



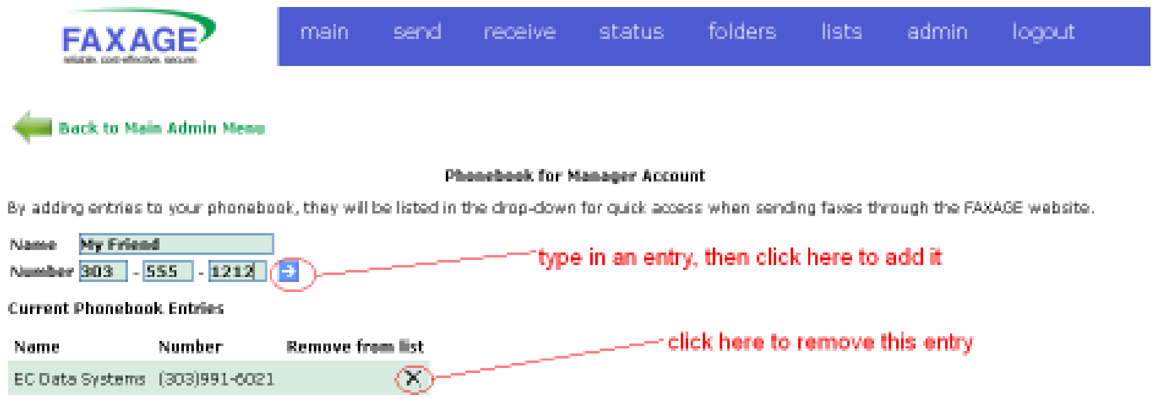
Change Email/Password

The first option under the 'My Accounts' section, available to all users, is called Change Email/Password. By selecting this option, you will be presented with a screen to change your password and/or to change the email address associated with your account as shown:



Phonebook

The next option under 'My Account', available to all users, is called Phonebook. By selecting this option, you will be presented with a screen to add and remove 'phonebook' entries, which are available for quick selection when sending faxes using the website

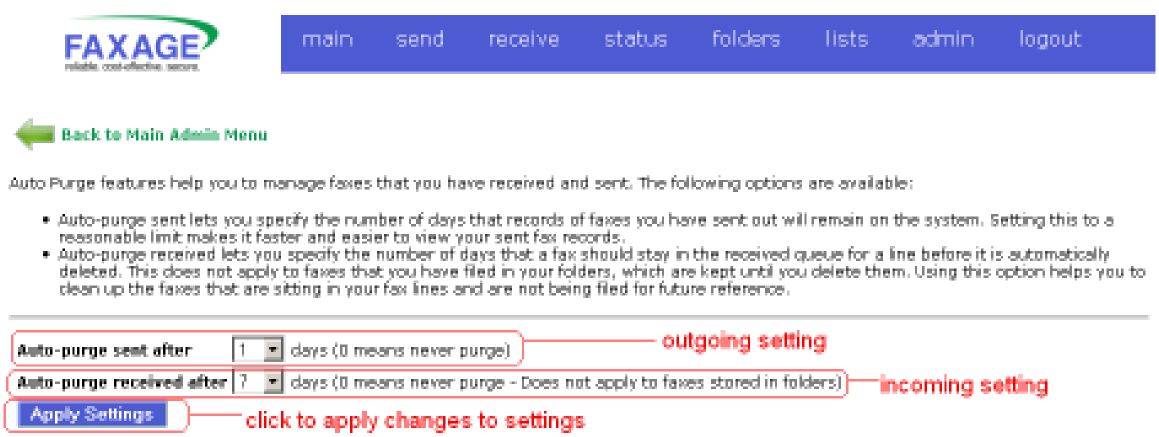


Auto Purge Faxes – Managers Only!

If you are a manager and you choose the Auto Purge Faxes option under the 'Company Settings' section, you will be presented with the screen below. There are detailed instructions as to what each setting does on the screen as well as here:

Auto Purge Sent – If you set this to anything other than 0, records of sent faxes will be automatically deleted after the number of days you specify. This can be helpful to keep the 'status' screen from getting crowded with faxes and taking a long time to display. However, you always have the option of deleting sent faxes from the status screen individually if you do not want to use this option. '0' means never and is the default setting unless you change it

Auto Purge Received – If you set this to anything other than 0, faxes that have been received but have not been filed in your folders will be deleted after they are older than the number of days you specify. Again, this option is a convenience, you can always delete faxes by hand. '0' means never and is the default setting unless you change it

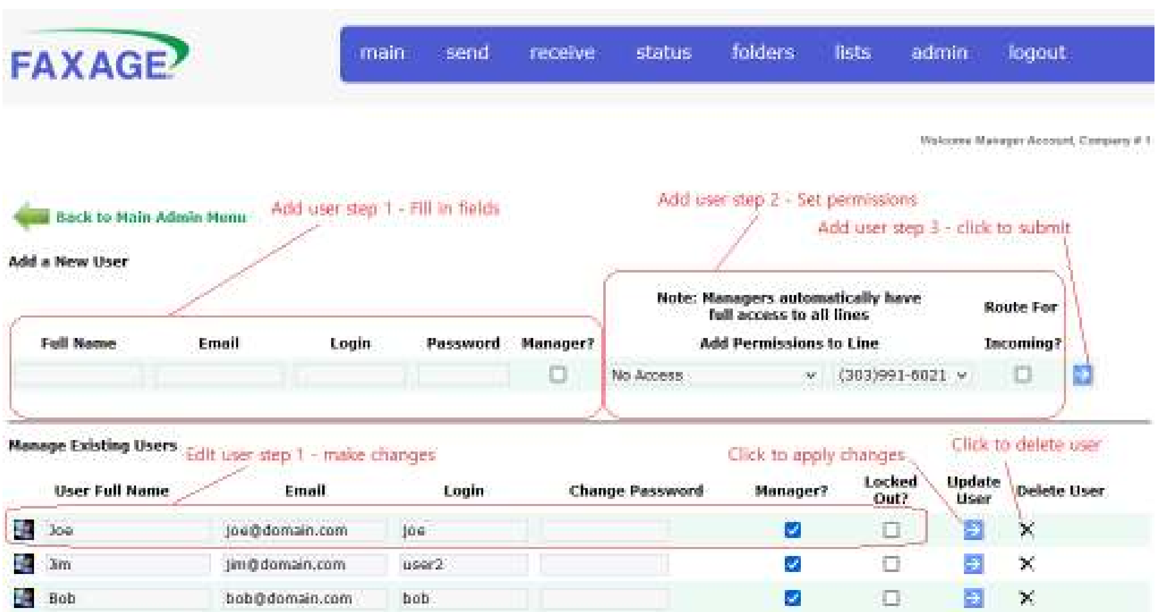


User Accounts – Managers Only!

If you are a manager and you choose the User Accounts from the 'Company Settings' section, you will be presented with the screen below. From this screen, you can:

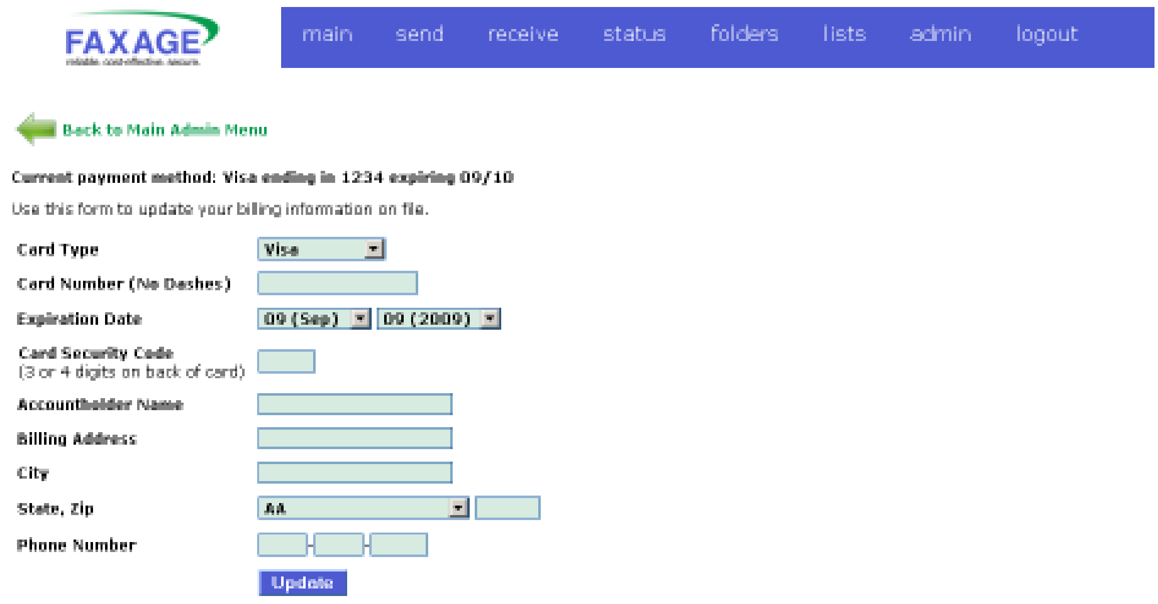
- Add a new user
- Make an existing user a manager or not and edit other properties such as full name, login, email address and reset password
- Delete a user
- Lock a user out. This keeps the user from logging in, but does not delete the account. This might be useful for someone who will be gone temporarily

This screen will not allow you to modify certain properties of or delete your own account. Create another manager user and log in with that account if necessary to edit your own settings and/or use the 'My Account' tools to change your own password. The example below is logged in as 'manager', note the settings that cannot be changed for the currently logged in account



Update Credit Card – Managers Only!

This screen allows you to enter new billing details into the FAXAGE system. Any new information entered here will overwrite previous information and will be used for all future billing activities. Note that both this screen and the 'billing' screen display the last 4 digits, card type and expiration of the current billing information for your reference.



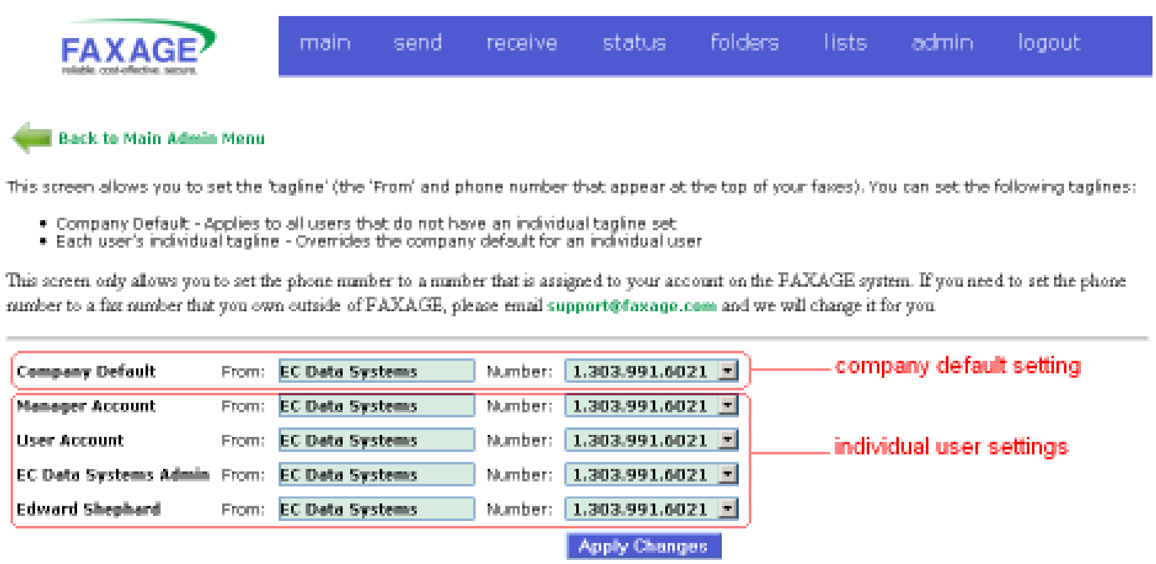
Set Fax Tagline – Managers Only!

A tagline is the line that appears at the top every page when a fax is sent. By FCC regulation, all fax senders must identify themselves with, at a minimum, a valid fax number in the tagline.

By default, the FAXAGE tagline contains the From: the company name or contact name (if the company name was blank) specified when you signed up, your initial fax number on the FAXAGE system, a date/time stamp and a page count (page 1 of 2, etc.). No FAXAGE name or branding is present in the tagline.

This screen allows you to change the 'From:' name and the fax number that appears on a company default and a per-user basis. Per-user settings override the company default setting for the specified user.

Note that the number to use is a drop-down of all numbers you have on the FAXAGE system (due to ensuring compliance with the FCC regulation mentioned previously). If you wish your own fax number that is outside of the FAXAGE system to appear (for example, if you have a fax machine for receiving and just use FAXAGE for sending), please email support@faxage.com and we can add a number to the dropdown list for your account. Please note that we will validate that the fax number you supply us with is valid and belongs to you before we will make the change.



Set Login Company – Managers Only!

When you sign up, the FAXAGE system auto-generates an ‘account number’ that is used in the ‘Company’ field when you log in to the system. While the account number remains unchanged, you can use this screen to change what needs to be typed into the ‘Company’ field of the website when logging in to something easier to remember.

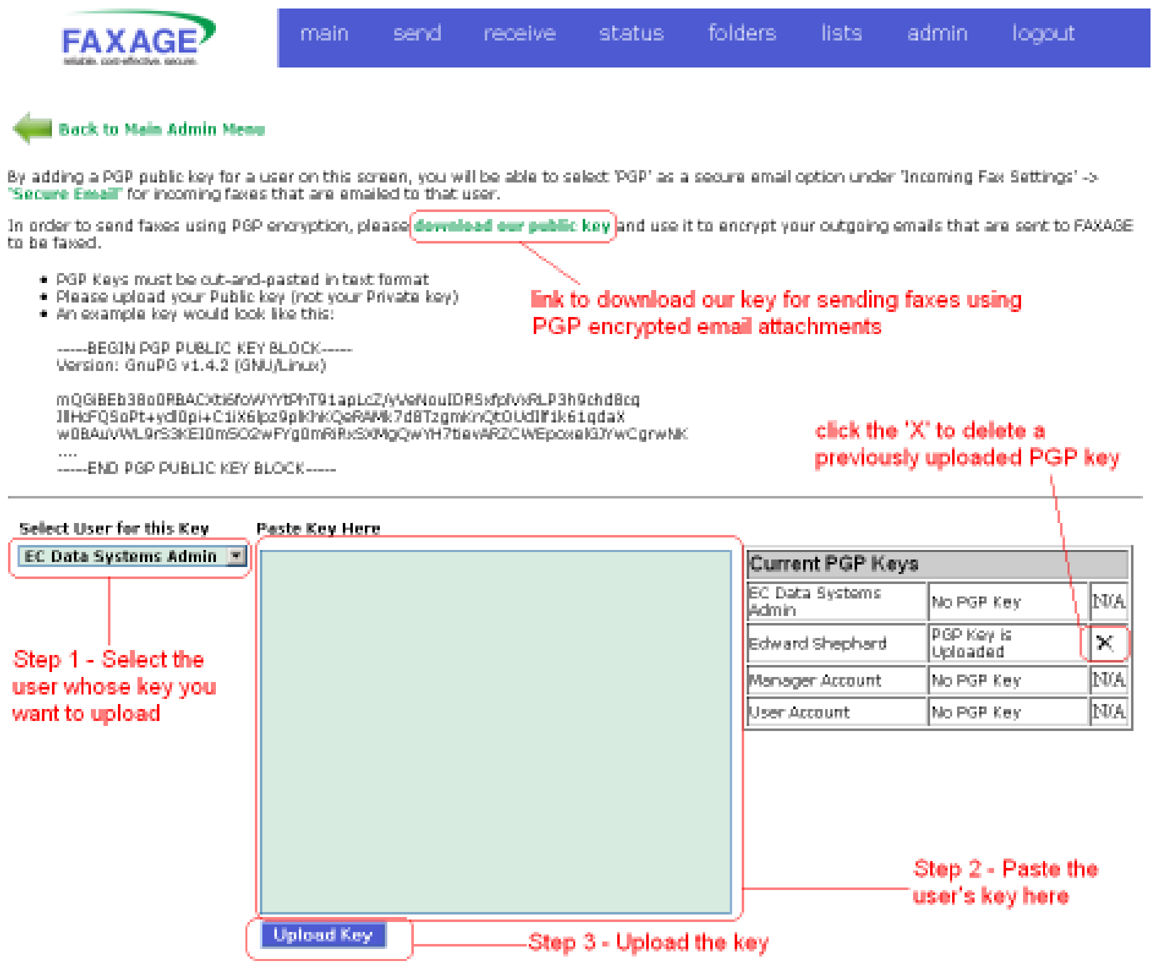
Set Timezone – Managers Only!

The 'Set Timezone' screen lets you specify the timezone as a company default and for each of your users. Specific user settings override the company default setting. By default, all FAXAGE system times are in MST/MDT unless changed here. Changing these settings causes FAXAGE timestamps on the website, in emails, and on fax taglines and transmittal pages (when sending) to reflect your local time.

PGP Keys – Managers Only!

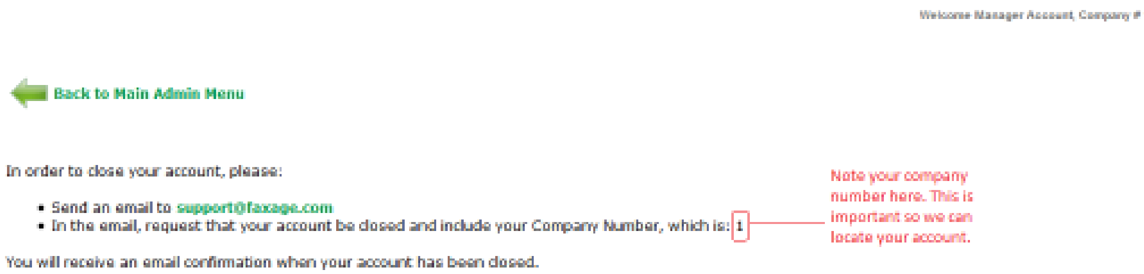
The ‘PGP Keys’ screen lets you specify a PGP key to be used to encrypt faxes that FAXAGE receives and then emails to your users. The PGP key is specified on a per-user basis. This screen also has a link to download our PGP key, which can be used to encrypt faxes you send from your email.

After adding a PGP Key for a user, remember to visit ‘Secure Email’ under ‘Incoming Fax Settings’ in order to turn on the PGP encryption for faxes received by that user.



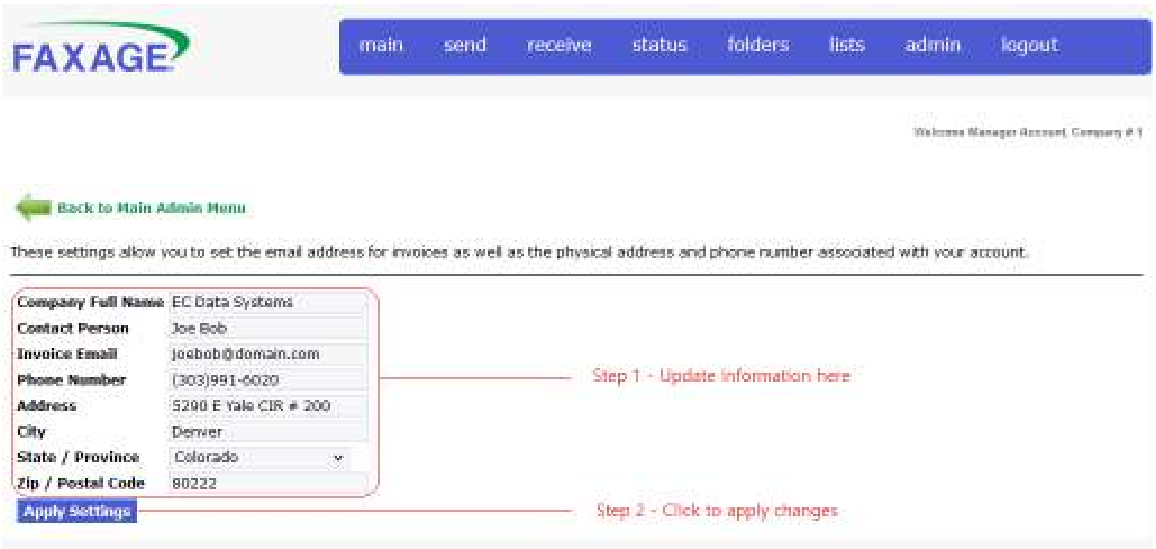
Close Account

Provides directions on how to email us to close your account.



Update Contact Info – Managers Only!

The ‘Update Contact Info’ screen allows you to update the billing and authorized account contact information for your FAXAGE account.

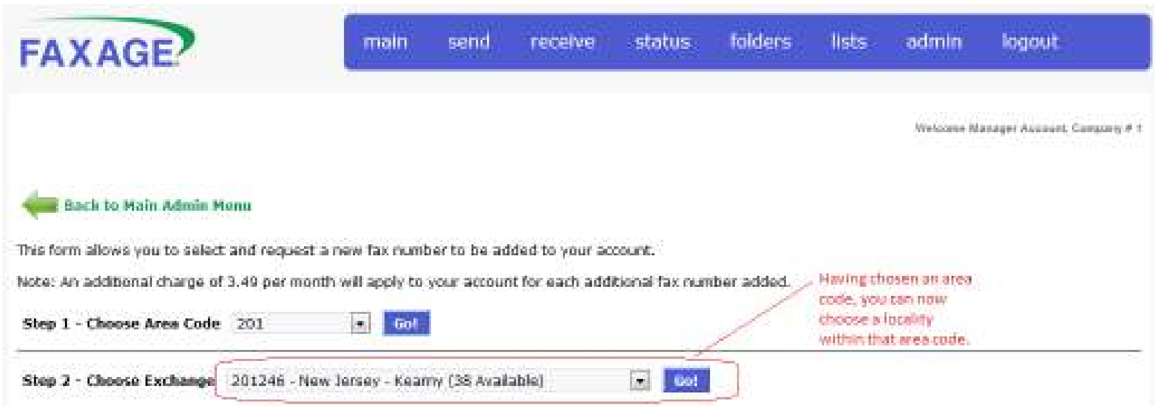


Request Additional Fax Number – Managers Only!

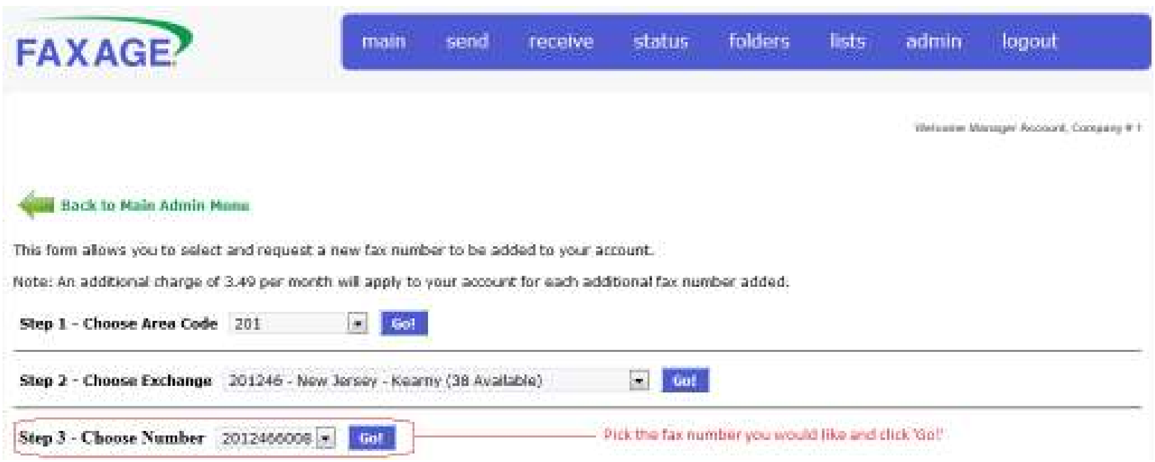
This screen allows you to look through fax numbers that FAXAGE has available and request that one be added to your account. Note that fax numbers have a cost, dependent on your pricing plan. This screen provides information as to the cost.

STEP 1 - INITIAL SCREEN

STEP 2 - CHOOSE EXCHANGE



STEP 3 – CHOOSE FAX NUMBER



Notifications – Managers Only!

Notifications is the first option under 'Outgoing Fax Settings'. By default, when a user sends an email to have it faxed (See the 'Email to FAX' section of this document for a description), two confirmation emails are returned:

- A 'Successful Receipt' email stating that the submission was received and that the job is being queued for sending
- A 'Transmission Status' email stating the status (success or failure) of the fax transmission, once the job is actually completed

By using this screen, you may enable or disable either or both of these emails on a company-default basis and on a per-user basis. Differing per-user settings override the company-default for the specific user who has that setting.

One company-wide option on this page is the 'Transmittal Page' option. By setting this to 'Yes', the 'transmission status' email (referenced above) will have a PDF attached that looks like a transmittal generated by a fax machine (key details such as date/time, destination, number of pages, duration and a reduced image of the first page). This is on or off on a company-wide basis, so all users will receive transmittal pages if it is turned on (provided that they are set up to receive the 'transmission status' email in the first place).

A second company-wide option is the 'Email Subject' option. This causes the 'Transmission Status' notification to return the subject line of the original email to the user for tracking purposes.

main send receive status folders lists admin logout

Back to Main Admin Menu

Email to Fax Notifications lets you control the notification emails that are returned when you send a fax by sending an email to us. The following settings are available:

- Successful Receipt - Controls whether an email is sent to you to confirm that we have successfully received your email and queued your fax.
- Transmission Status - Controls whether an email is sent to you with success or failure status when your fax job completes.
- Transmittal Page - If set to 'yes', then all transmission status notification emails from FAXAGE will include an attachment that gives a summary of the transmission and a scaled-down image of the first page - similar to what you would get from a fax machine
- Email Subject - If set to 'yes', the notification will contain a copy of the subject line from the email that was sent in to be faxed

If a user's individual settings are different than the 'Company Default' settings, the individual settings will override the 'Company Default' settings for that user

	Successful Receipt	Transmission Status
Company Default Setting	Yes	Yes
EC Data Systems Admin	Yes	Yes
Edward Shephard	Yes	Yes
Manager Account	Yes	Yes
User Account	Yes	Yes
Transmittal Page?	Yes	No
Email Subject?	Yes	No

Apply Changes

company-wide setting

individual settings

additional company-wide options

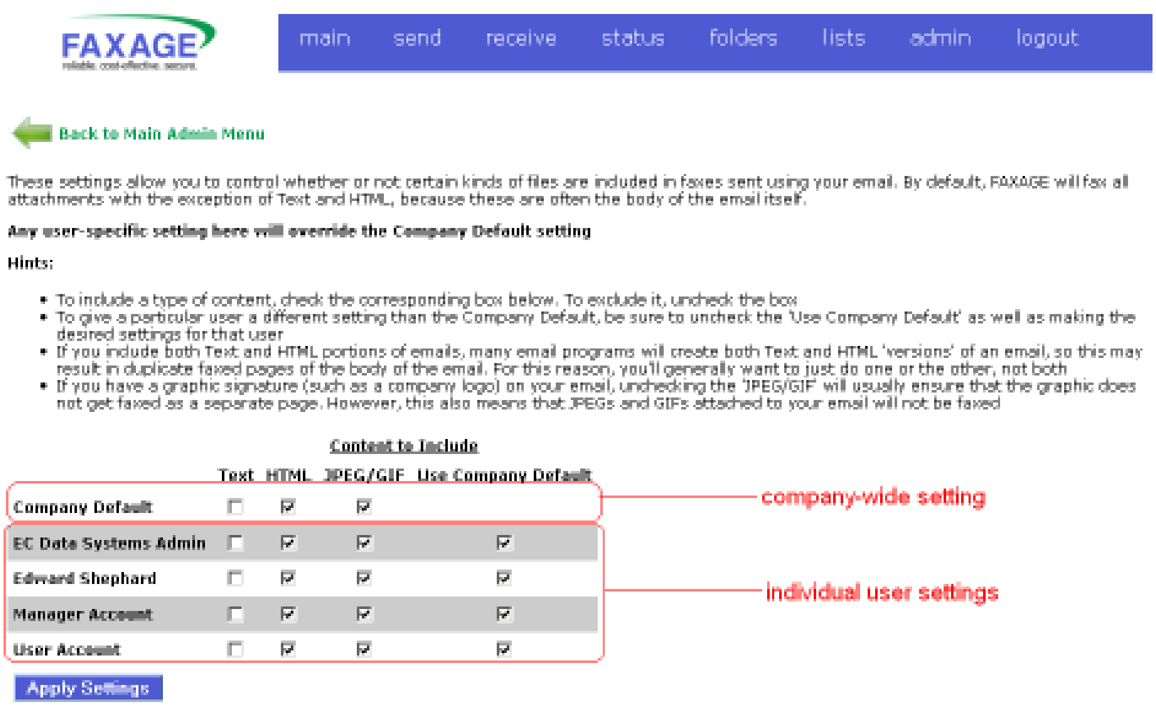
File Types – Managers Only!

Text and/or HTML attachments are not enabled by default when using the email interface to send faxes. This is because the body of an email usually contains both an HTML and a Text version. In general, then, turning one of these on will result in both the body of the email and whatever Text or HTML documents are attached to be added to the Fax job. The body is always included before any attachments, so this could be used as a 'cover page' of sorts. Note that the cover sheet administrative tool (detailed later in this guide) can be used to include the email body on the cover sheet. If you do that, you should not also do the Text or HTML option here.

It is usually undesirable to turn on both, because this will result in two copies of the body of the email being sent (assuming you have a mail client such as Outlook that generates both Text and HTML 'versions' of the email body).

The settings for including text and/or HTML attachments by default can be specified as a default setting for your entire account and as per-user settings, which would override the company default if they differ for a particular user.

Also available on this screen is 'JPEG/GIF'. Turning this off can result in graphic email signatures not being included in outgoing faxes as separate pages. However, this also means that you cannot attach JPEGs or GIFs to your emails to be faxed if it is turned off.



Resolution and Retries – *Managers Only!*

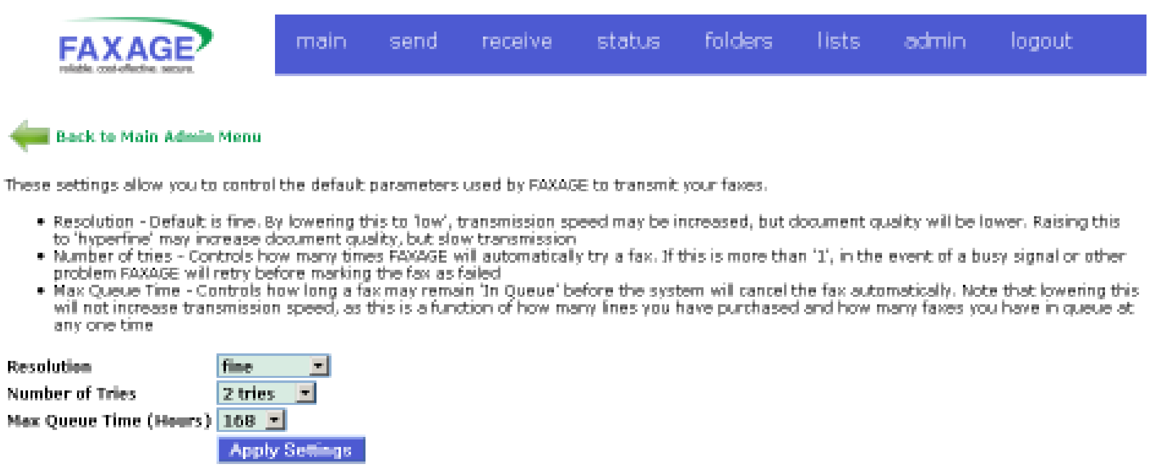
Resolution and Retries allows for three settings to be changed that influence FAXAGE's transmission of your outbound faxes:

- Resolution – The default is 'fine'. Setting to 'low' results in lower quality faxes that may transmit more quickly. Conversely, setting to 'hyperfine' results in the highest quality of faxes at a cost of increased transmission time

- Number of Tries – Controls how many times the system will try a fax before giving up. The default is three tries, but can be set from one to ten tries. The time between tries is one minute

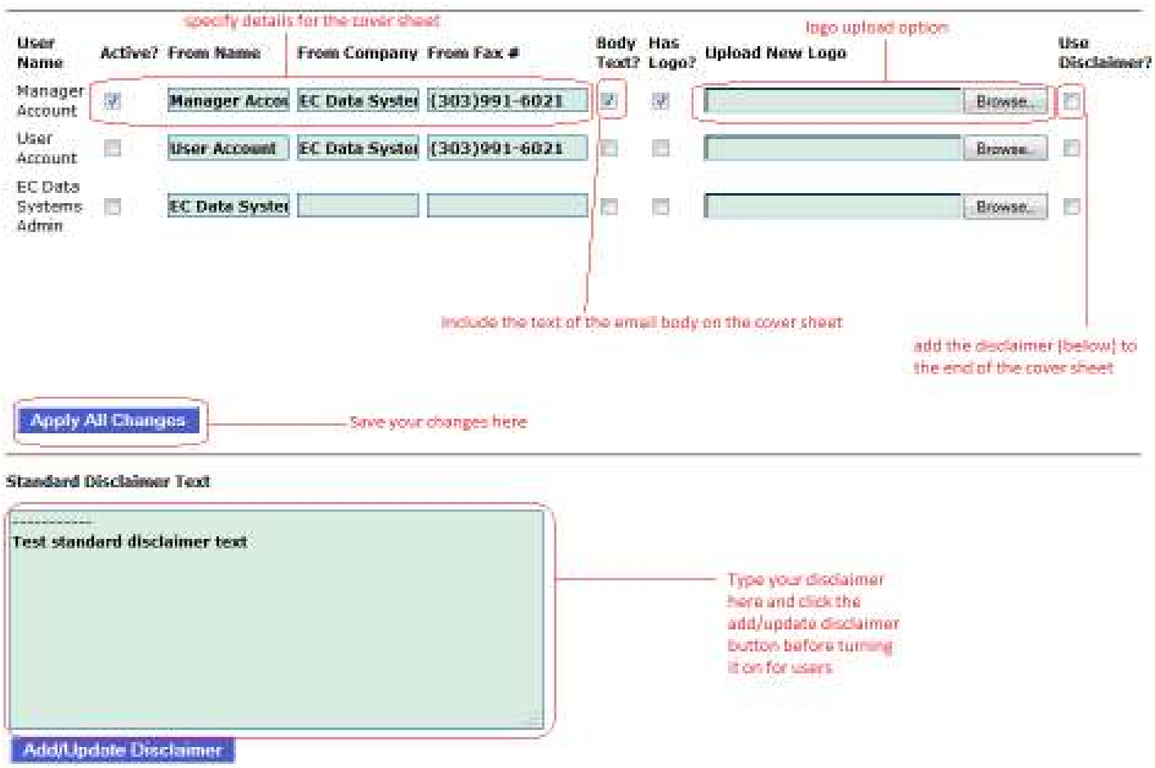
- Max Queue Time – Controls how long a fax can sit in the Queue at FAXAGE before it will fail without sending. This does not speed up your faxes, but helps in situations where you queue up many faxes on your line or lines and want the system to stop sending your batch after a certain point in time. The default is 168 hours (7 days), but can be set anywhere from one to 168 hours

These are all company-wide settings that apply to all users and are not specifiable on a user-by-user basis.



Cover Sheet – Managers Only!

By default, FAXAGE does not supply a cover page when faxes are sent via email. This page allows you to set up the system to generate a cover page automatically, if this is desired. It also auto-fills fields when using the website interface to send faxes, including the addition of the logo, if one is uploaded here.



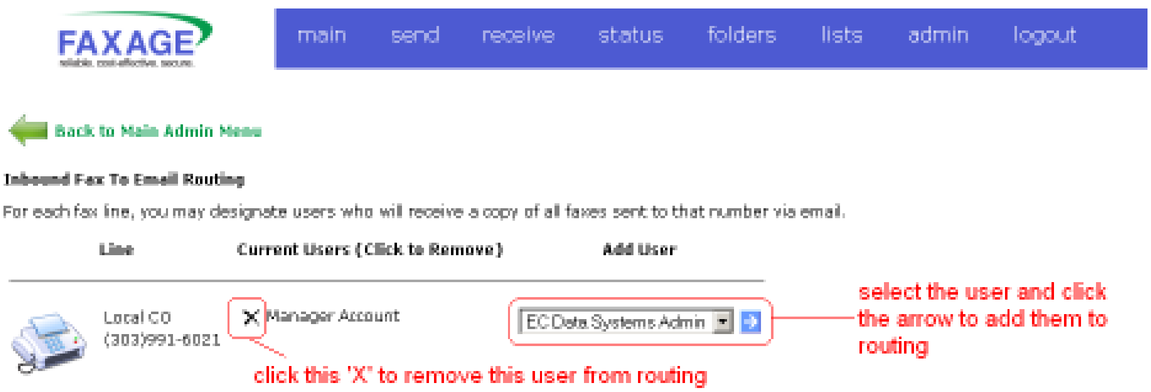
Uploading a logo image will cause the system to put the logo at the top of the generated cover sheet. The fields on the coversheet for From Name, From Company and From Fax # will be auto-filled based on what is set here. The To: number will be filled in based on where the fax is being sent and a recipient ATTN: will be added to the coversheet if the 'To: (name)' optional parameter is used when the email is sent (see the Fax to Email documentation for a more detailed explanation of faxing by email and optional parameters that can be used).

NOTE: If the 'Has Logo?' checkbox is checked, it means that a logo was previously uploaded for this user. Un-checking it will remove whatever was previously uploaded. This is only necessary if you are not uploading a new logo (which would just replace it), but instead wish to just remove a logo from a user so that they have no logo at all.

NOTE: The 'Active' box must be checked, otherwise filling in the details just saves them in the system, but does not turn on coversheet generation for the user. Conversely, unchecking the ‘Active’ box will turn off coversheet generation for a user that previously had it turned on.

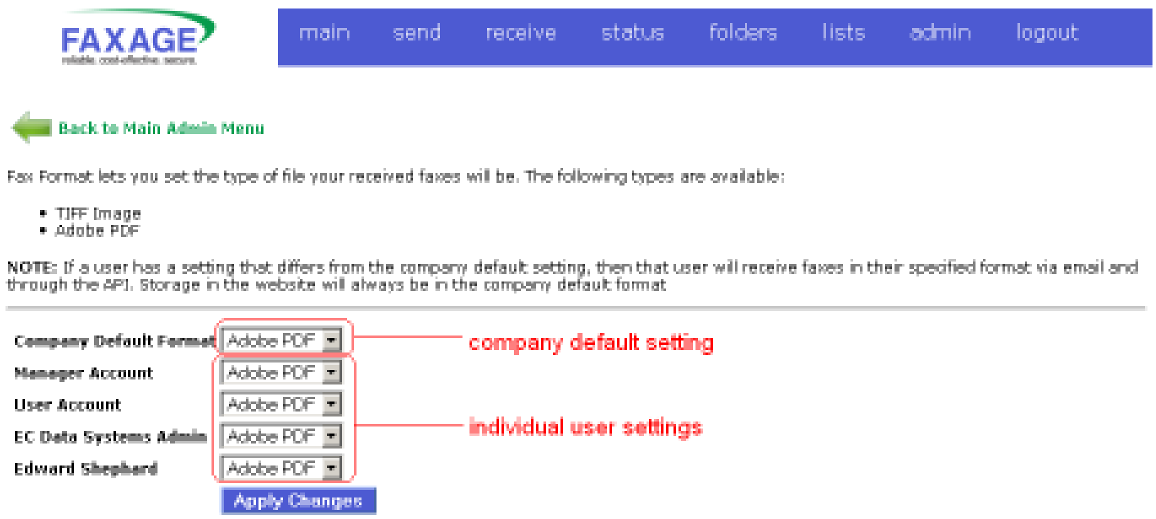
Email Routing – Managers Only!

If you are a manager and you choose Email Routing from the admin screen (under ‘Incoming Fax Settings’), you will be presented with the screen below. From this screen, you can set up an unlimited number of users who will receive copies of faxes sent to a particular line via email. The email address is determined by the current email address that FAXAGE has for each user. By default, the initial user when you set up your account is set up for email for the initial fax line you receive. Otherwise, only users that you add here will be emailed. Faxes can also be picked up from the ‘receive’ screen in the website.



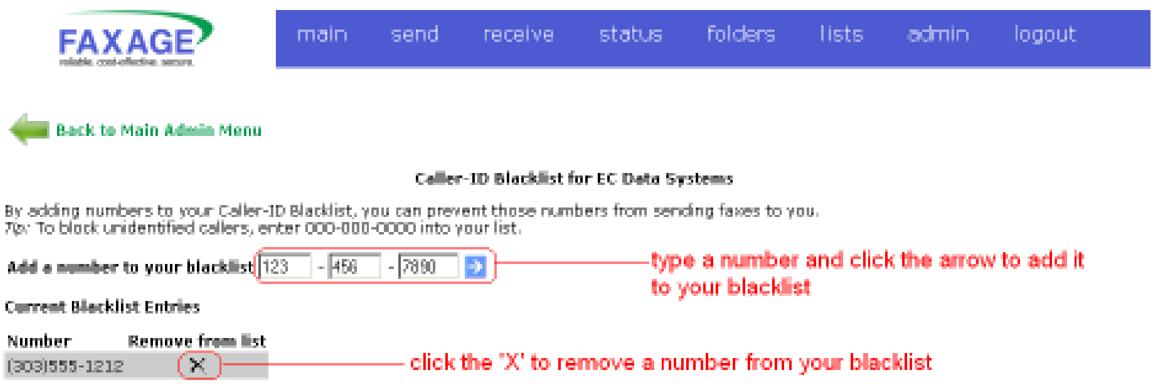
Incoming Fax Format – Managers Only!

The Incoming Fax Format administrative tool allows a manager to set whether received faxes will be in Adobe PDF (the default) or TIFF Image format. The 'company default' setting is the format for storage in the website and for every new user added. An individual setting that differs from the company default setting will cause that user to receive faxes in their specified format when faxes are emailed to them, but will not influence the format they receive if they download from the receive screen in the website (which is always the 'company default' setting).



Caller ID Blacklist – Managers Only!

The Caller ID blacklist is one mechanism that FAXAGE offers to help reduce FAX spam to your account. If a number sends you junk, you can add it to your blacklist and the FAXAGE system will automatically send a busy signal to future calls from that number. You can also enter all 0's (0000000000) to block all unidentified callers from faxing you.

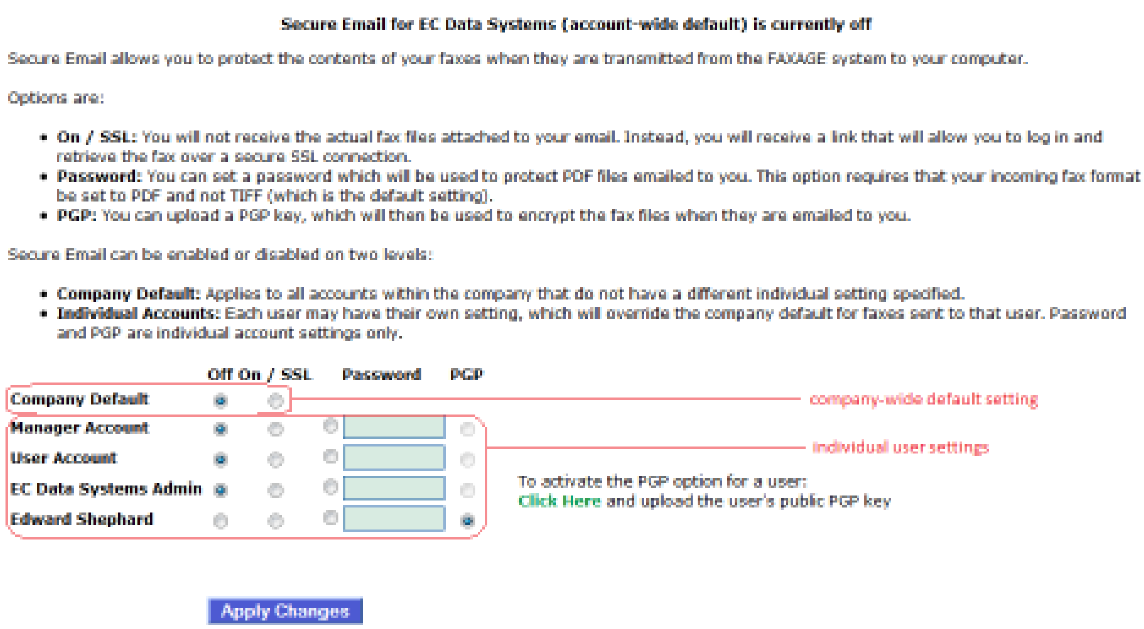


Secure Email – Managers Only!

By default, FAXAGE attaches the fax itself as a PDF file to emails you receive when you get a fax. The Secure Email option allows you to instead receive a link requiring you to log in over a secure SSL connection to retrieve the actual fax, to have password protection on the PDF, or to use PGP encryption to protect confidential faxes when they are emailed to you. This can be useful in situations where faxed documents are highly sensitive, for regulatory compliance purposes (HIPPAA, GLB, etc.) and for situations where faxes are being received on a device such as a PDA or SmartPhone and download of a PDF is not desired, just the notification.

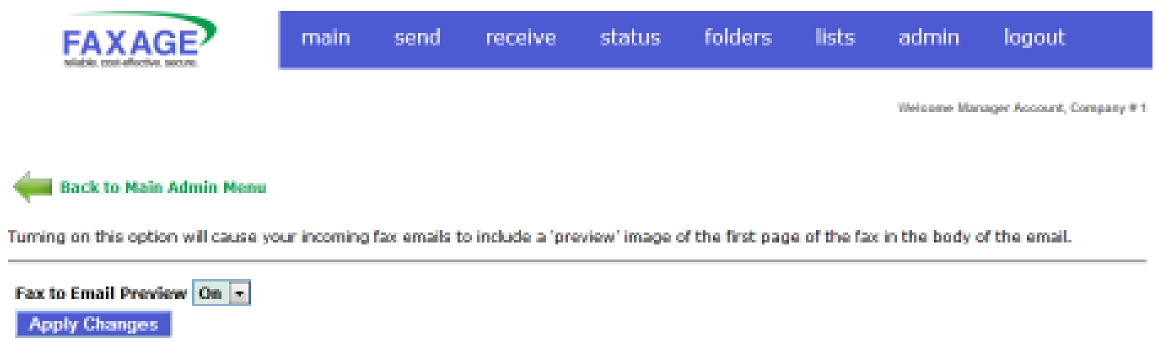
Note that both the API and retrieving via the website are SSL secured automatically, so this setting is only necessary for the email component of FAXAGE. Also, FAXAGE supplies a TLS-enabled mail gateway that will automatically encrypt emails to you if your email server is configured to support TLS. See our Secure Internet Faxing Data Sheet for more details on FAXAGE security in general.

As with many of the administrative utilities in FAXAGE, per-user settings can be made which override the company default setting for a particular user (allowing some email addresses to receive via the 'Secure Email' mechanism, while others get standard attachments). Note that the 'PGP' option is only available for users who have PGP keys uploaded into FAXAGE (through the 'PGP Keys' tool under 'Company Settings'). Password is activated simply by typing in a password the system should use.



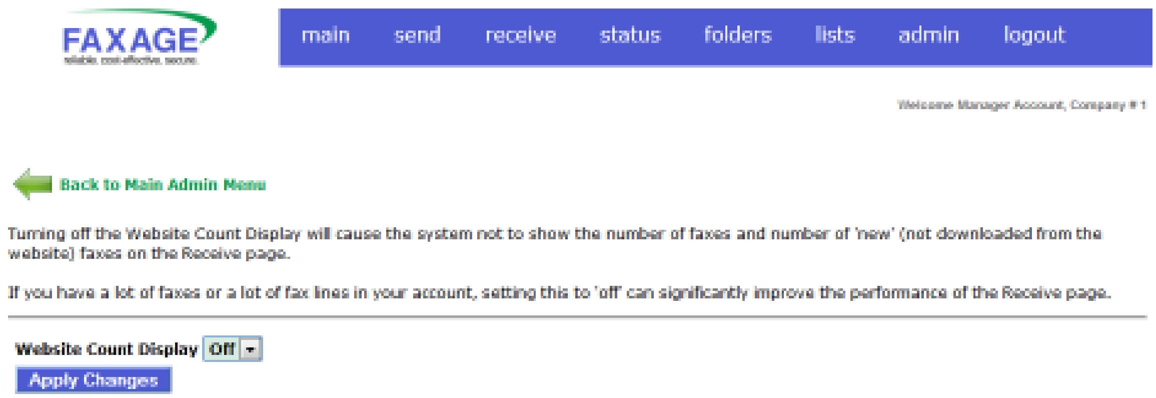
Fax to Email Preview – Managers Only!

Managers may turn on a ‘preview’ page using this tool. If this is on, then, when users receive faxes in their email, an image of the first page of the fax received is embedded in the body of the email.



Website Count Display – Managers Only!

Website count display is used to increase performance if you’re keeping a lot of faxes stored in the FAXAGE website. Turning this off (it is on by default) makes the system not show counts of how many faxes are ‘new’ (not downloaded from the website previously) versus not when showing the line summaries on the receive page and when logging in. If you have a lot of faxes and navigating the receive page is slow, then turning this off should be helpful.



Month-to-Date Charges/Calls – Managers Only!

If you are a manager and you choose the Month-to-Date Charges/Calls from the admin screen under Reports, you will be presented with the screen below. This screen:

- Summarizes your monthly rate plan
- Shows current month-to-date usage and total charges
- Allows for download of call-detail records for the current month-to-date (both inbound and outbound calls in both PDF or CSV for Excel format)
- For Historical invoices and calls, see the next option – Billing History and Call Details

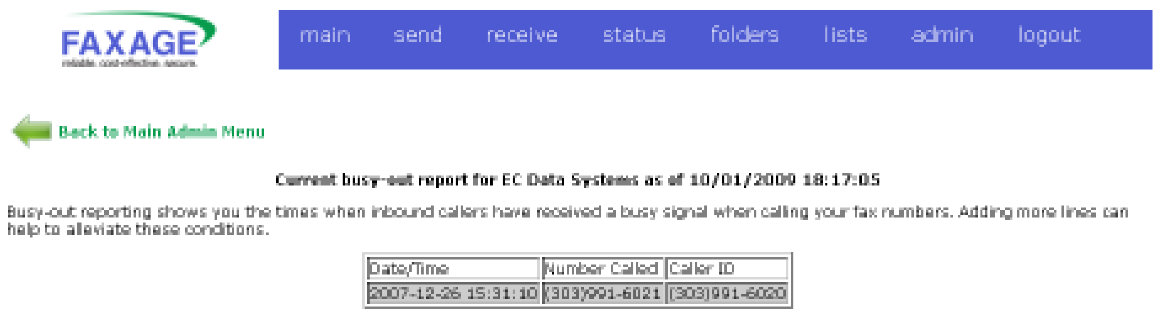
Billing History and Call Details – Managers Only!

If you are a manager and you choose the Billing History and Call Details from the admin screen under Reports, you will be presented with the screen blow. This screen:

- Shows each historical charge or credit on your account
- For monthly invoices, allows you to download the associated call details as a CSV that can be opened with Excel for further analysis
- For monthly invoices, allows you to download a copy of the original invoice

Busy Calls – Managers Only!

For accounts that are set up for unlimited inbound (I.e.: accounts that are not 'never busy'), the Busy Calls report can be a useful way to monitor callers receiving a busy signal as an indicator that purchasing more lines may be a good idea. The report basically shows whenever a busy signal was generated by the system due to more simultaneous calls arriving than the account had lines available at a given time. This should never happen with a 'never busy' type of account.



main send receive status folders lists admin logout

Back to Main Admin Menu

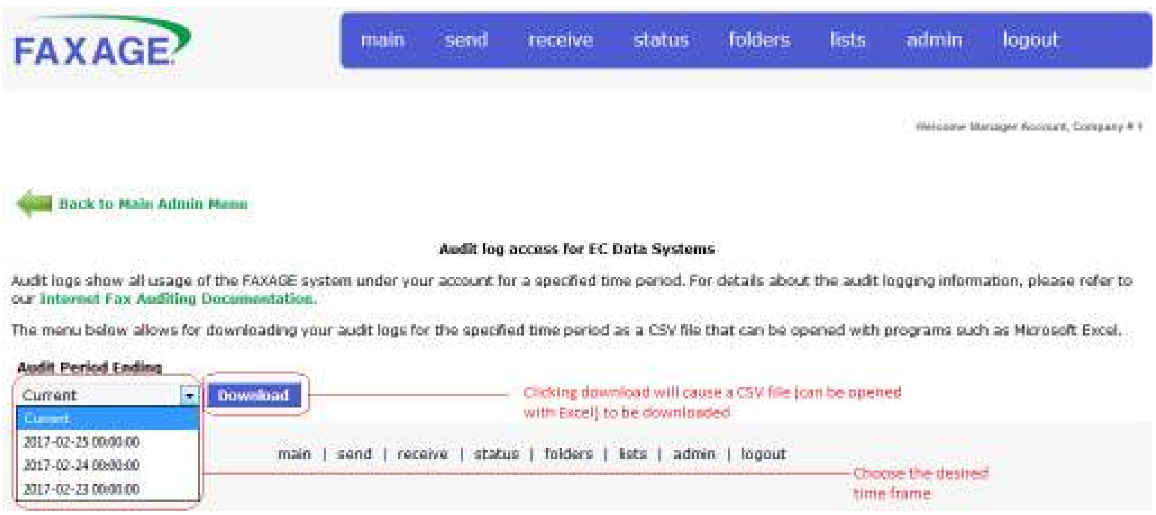
Current busy-out report for EC Data Systems as of 10/01/2009 18:17:05

Busy-out reporting shows you the times when inbound callers have received a busy signal when calling your fax numbers. Adding more lines can help to alleviate these conditions.

Date/Time	Number Called	Caller ID
2007-12-26 15:31:10	(303)991-6021	(303)991-6020

Audit Logs – Managers Only!

Audit log access allows you to download detailed information regarding what your users have been doing within your FAXAGE account. Please see the Internet Fax Auditing Documentation for detailed information about the audit logging structure. This page allows you to either view current logs (past 48 hours, plus current day) or to retrieve historical logs for a given day. Historical logs are kept for seven days with the oldest logs automatically being removed. So, if retaining these for a longer period of time is desired, it is recommended to download and save them regularly.



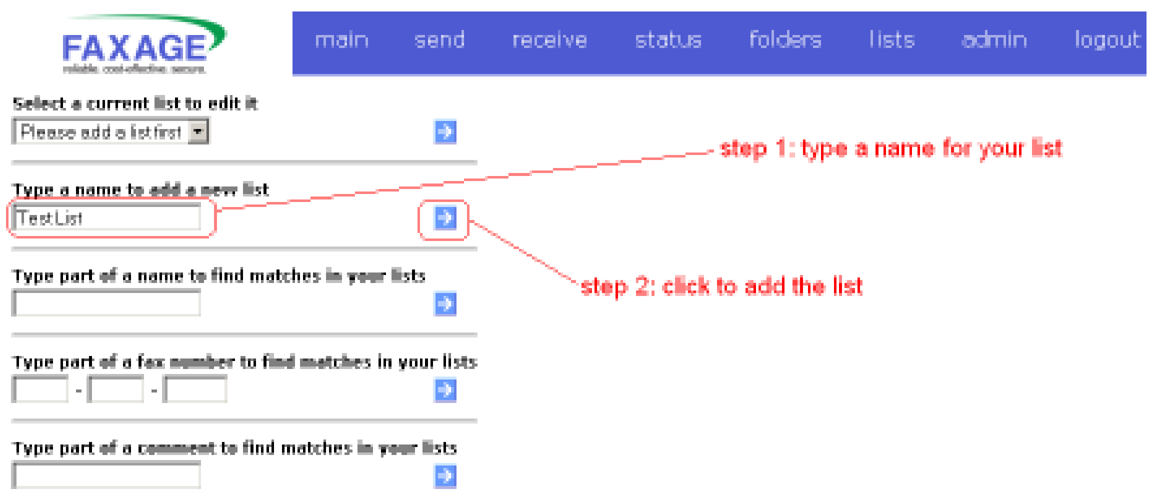
Lists

The next option on the Navigation Menu after 'admin' is 'lists'. Lists allow you to record a name, fax number and optional comments about people you frequently fax. Using lists, you can create new lists, edit and update existing lists and search for contacts stored in your lists. You may also upload a CSV file generated with Excel or another suitable tool in order to populate a list with entries.

Later, when we explore the 'send' function, you will see how lists can make sending to frequently used recipients quick and easy. Lists can also be used to automate faxing the same document to multiple people.

Creating a New List

When your account is set up, there are no lists created. To get started with using lists, create a new list by giving it a name as shown:



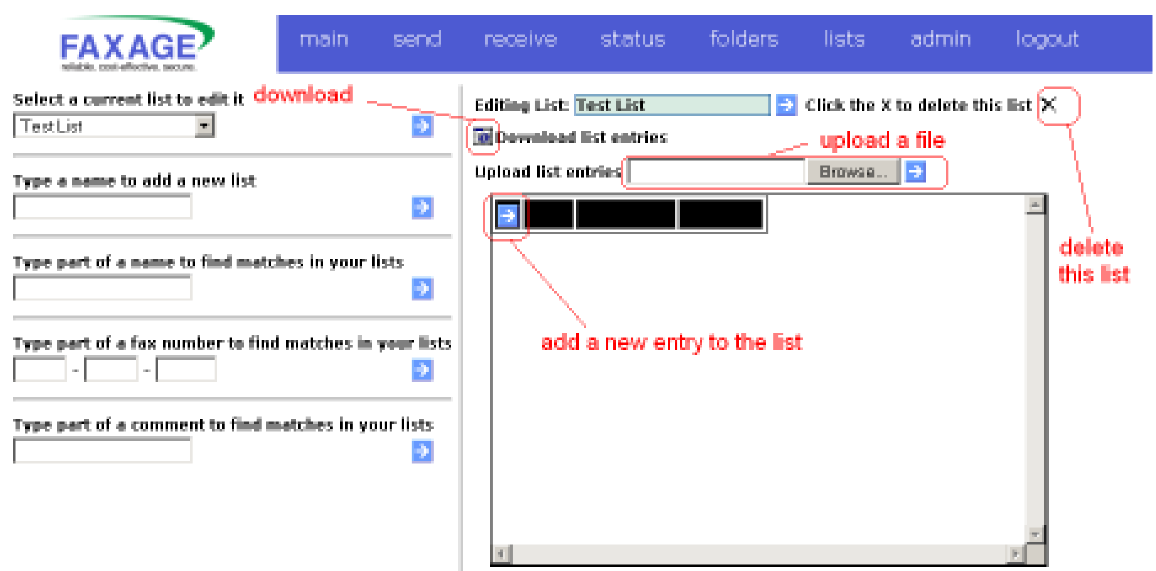
Editing a List

Once you have created a list, you can select it from the top drop-down menu to edit it. Editing a list allows you to:

- Add entries (people) to the list
- Modify entries in the list
- Delete entries from the list
- Delete the list and all of its entries
- Download the list

Note that any user can use the full functionality of lists and that deleting entries or lists cannot be undone. Therefore, remind your users to exercise caution with this tool in order to avoid having to retype data into the system.

Below is a screen shot of the list editor after we selected the 'Test List' list that we just created. There are currently no entries in the list.



Adding an entry

There are two ways to add entries to your new list:

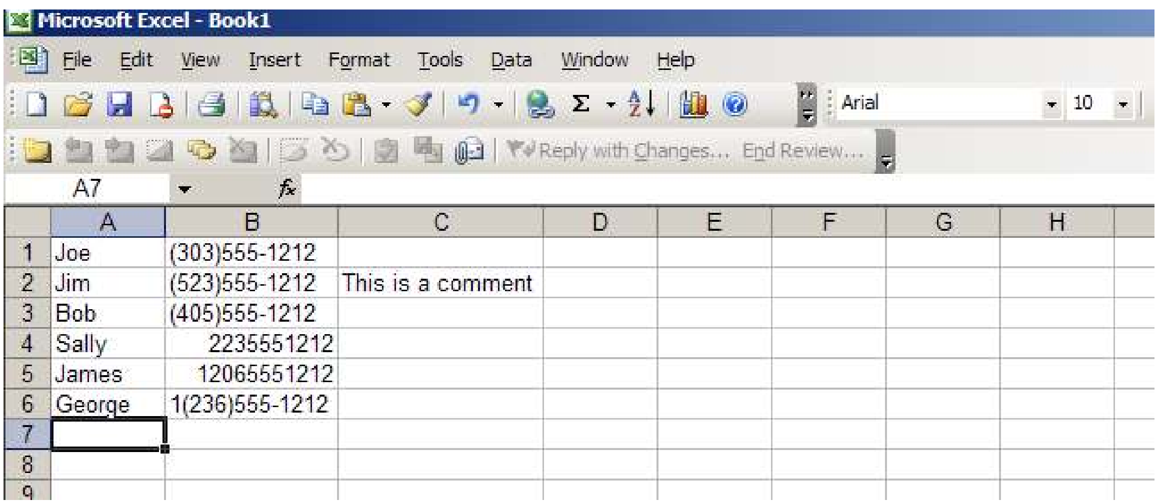
- Upload a file containing entries
- Manually type in entries

In order to upload a file containing list entries, the file must be in the proper format. The specification for the file is that it be a CSV file (comma-delimited) containing the following columns:

Name, Number, Comments

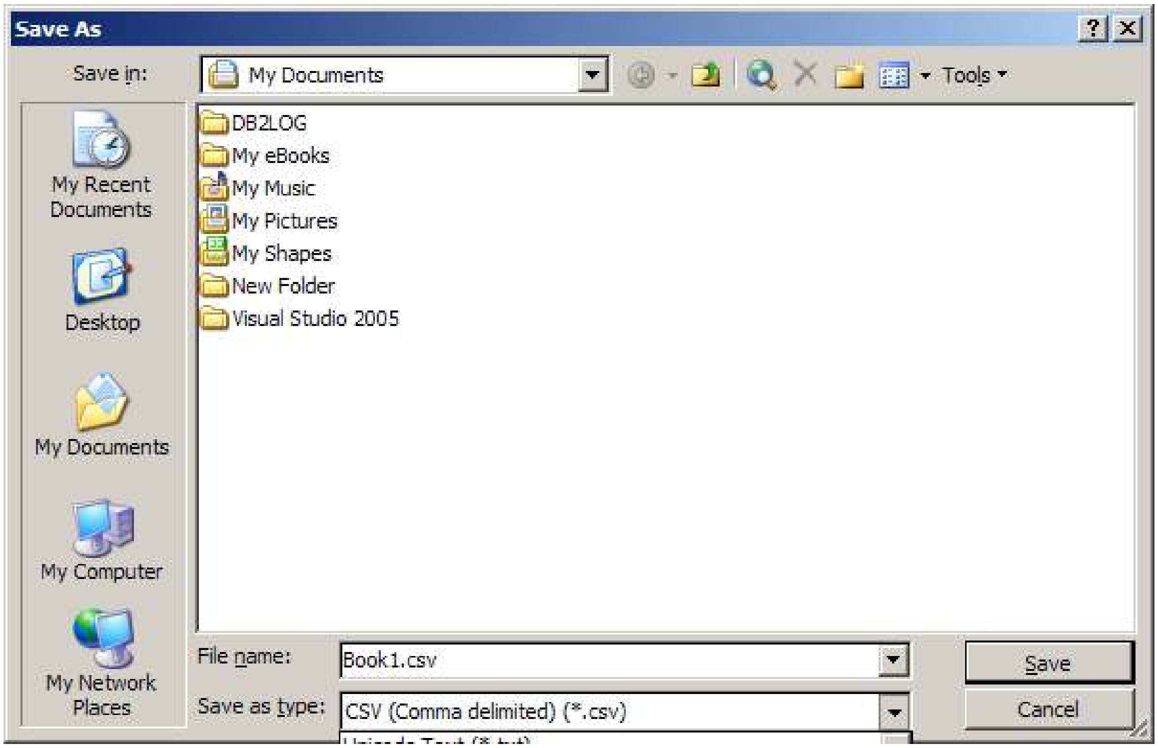
Comments are optional, but Name and Number are required. The following series of screen shots depict how to create the proper kind of file using Excel on Windows.

Step 1 - Create the Excel Spreadsheet with entries in it:

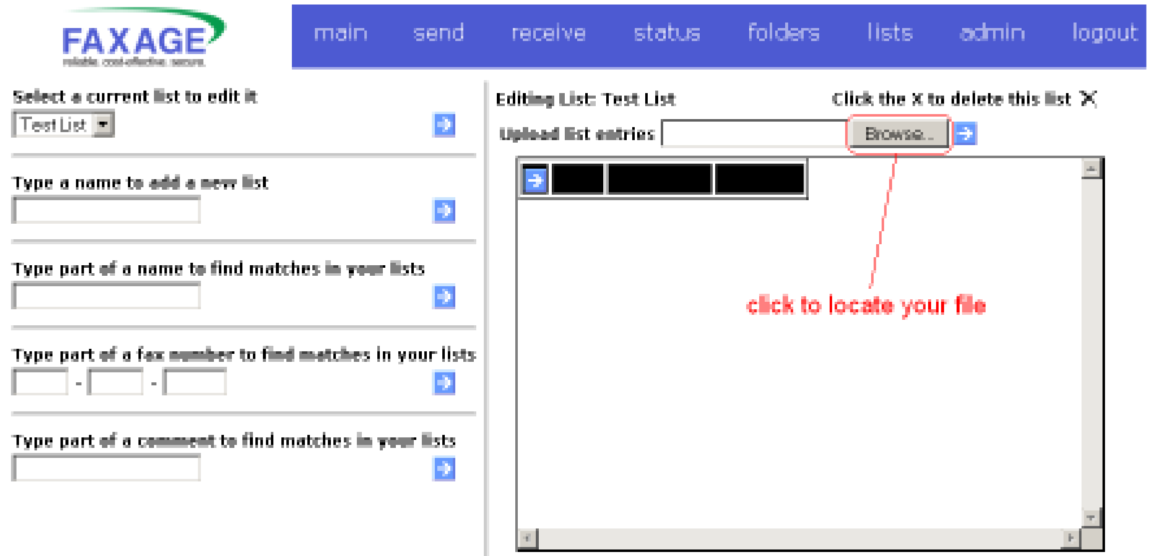


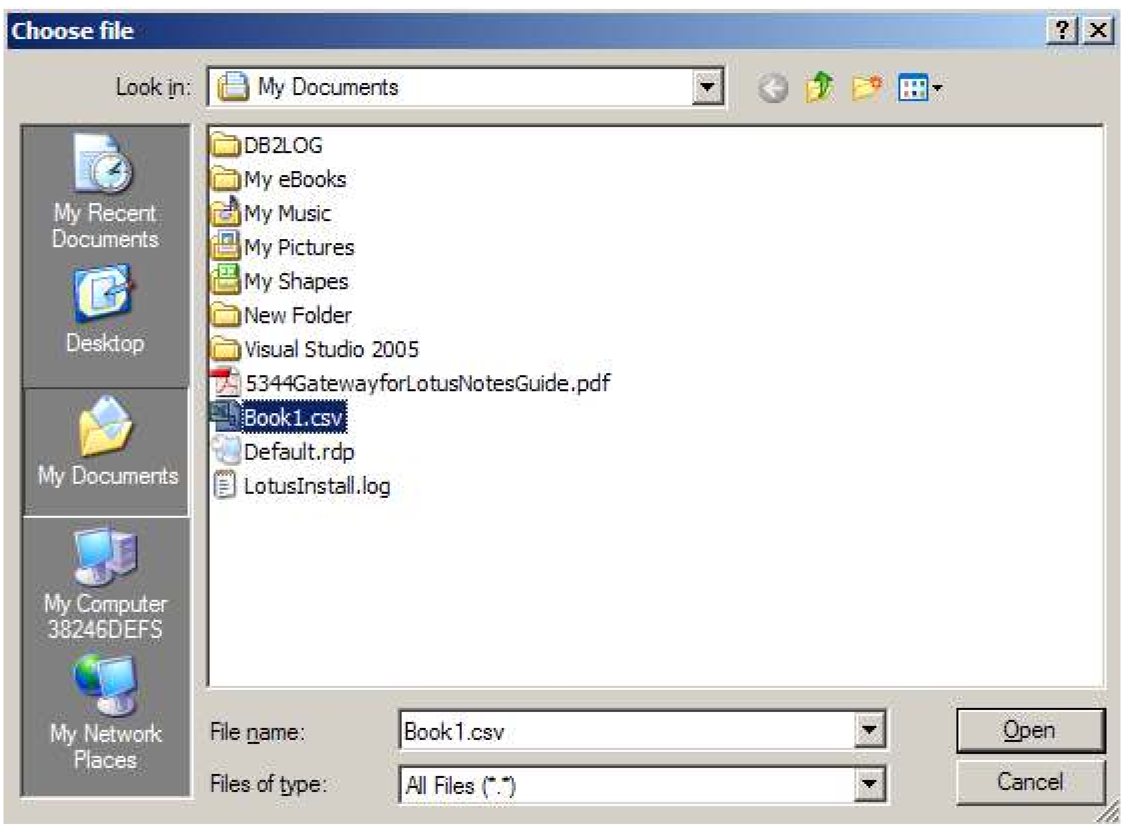
Note that phone numbers can be entered in just about any format, as shown above. The only requirement is that they contain at least 10 digits.

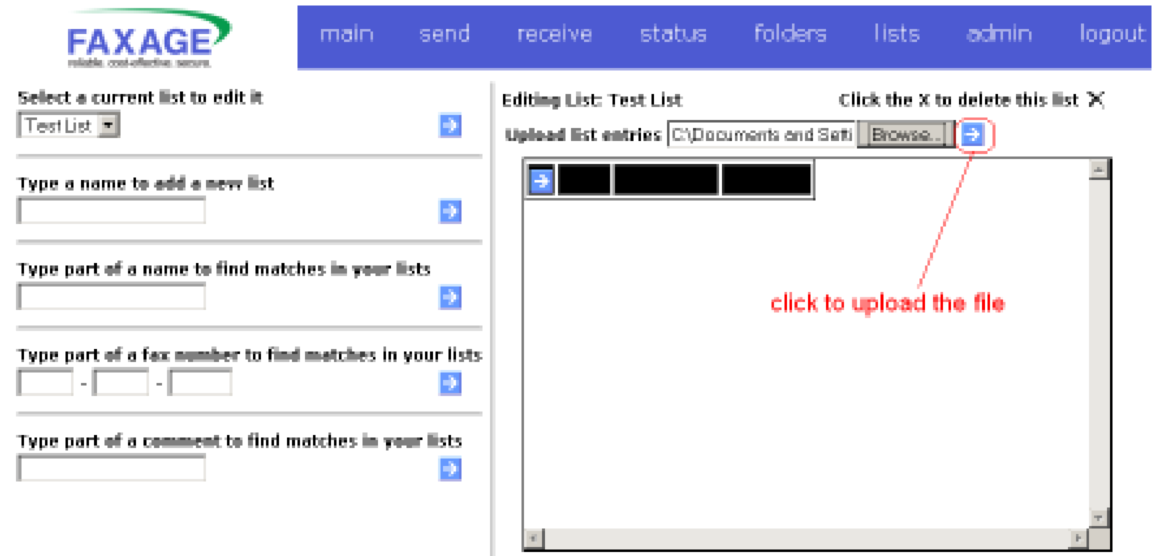
Step 2 – Save the file using 'Save As' to create a CSV file. Note that CSV (Comma delimited) (*.csv) is selected under the 'Save as type' box at the bottom of the screen.



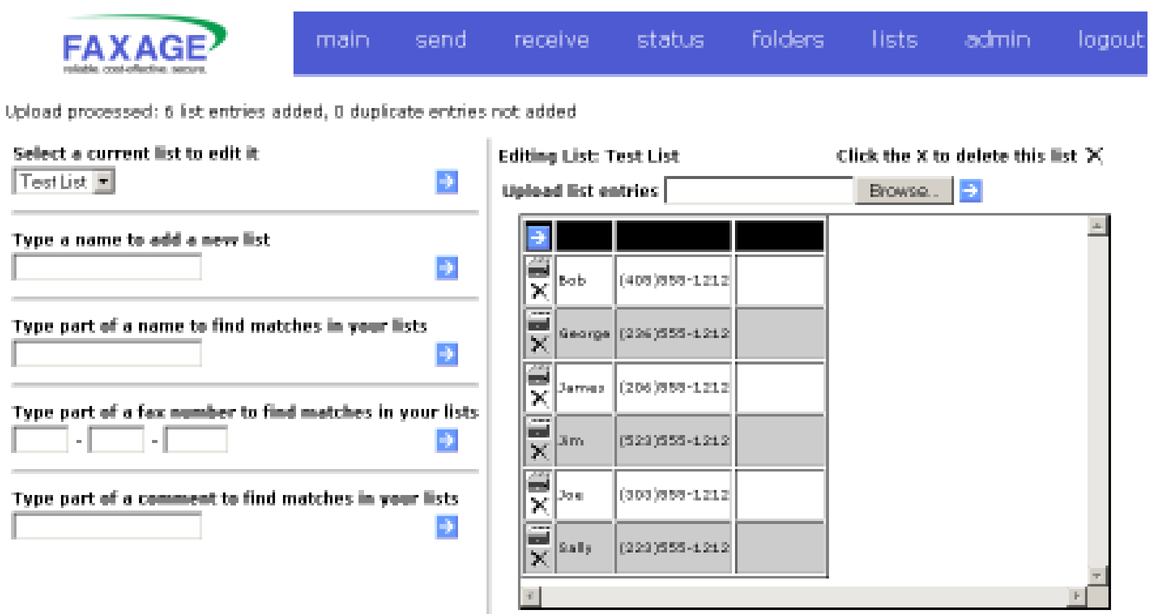
Step 3 – Upload the file into FAXAGE





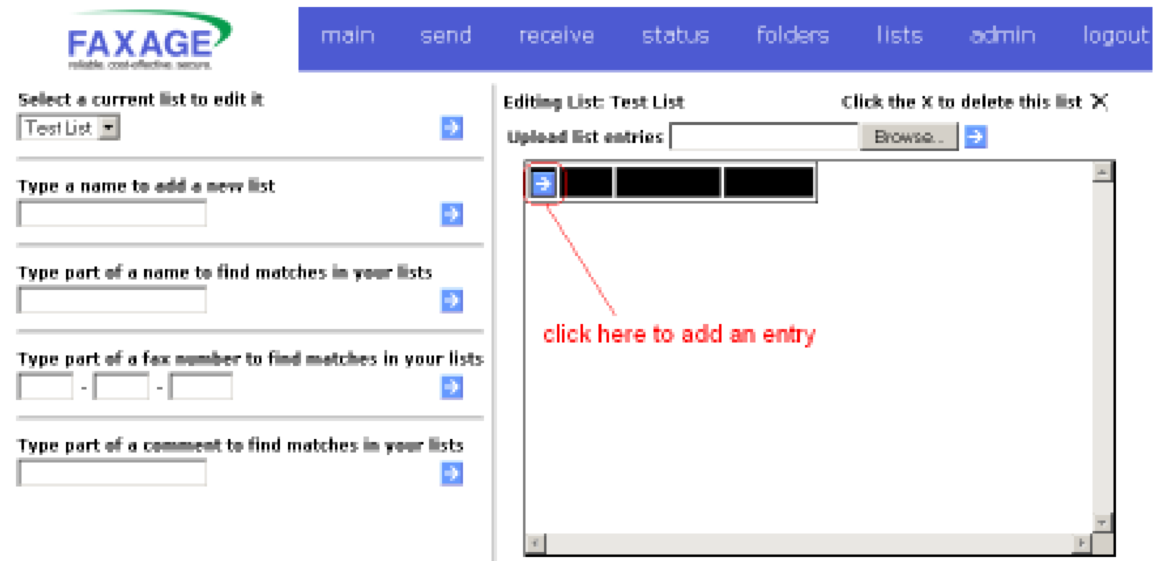


Step 4 – List entries will now appear

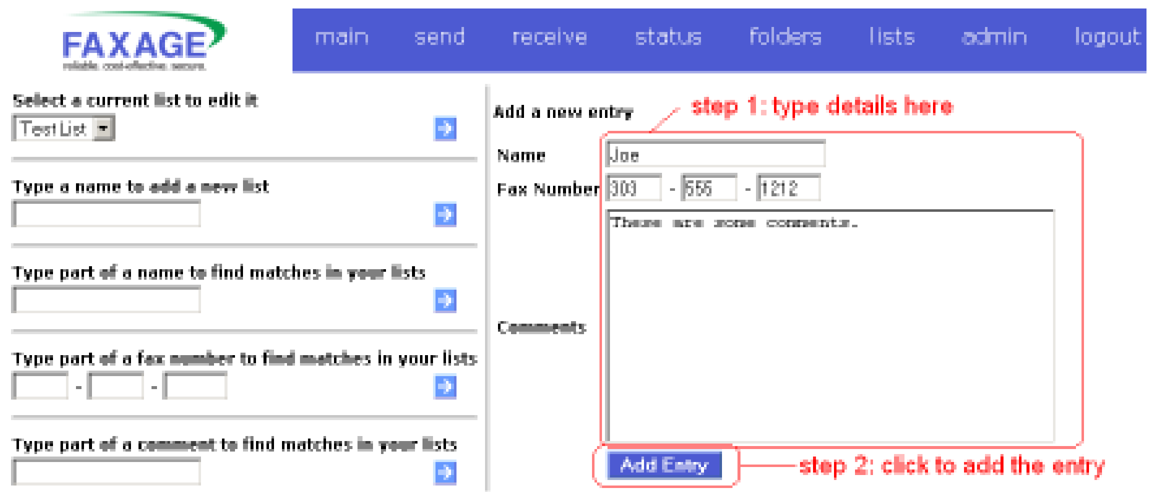


The second method for adding entries to a list is to type them in manually. The following directions relate to this approach.

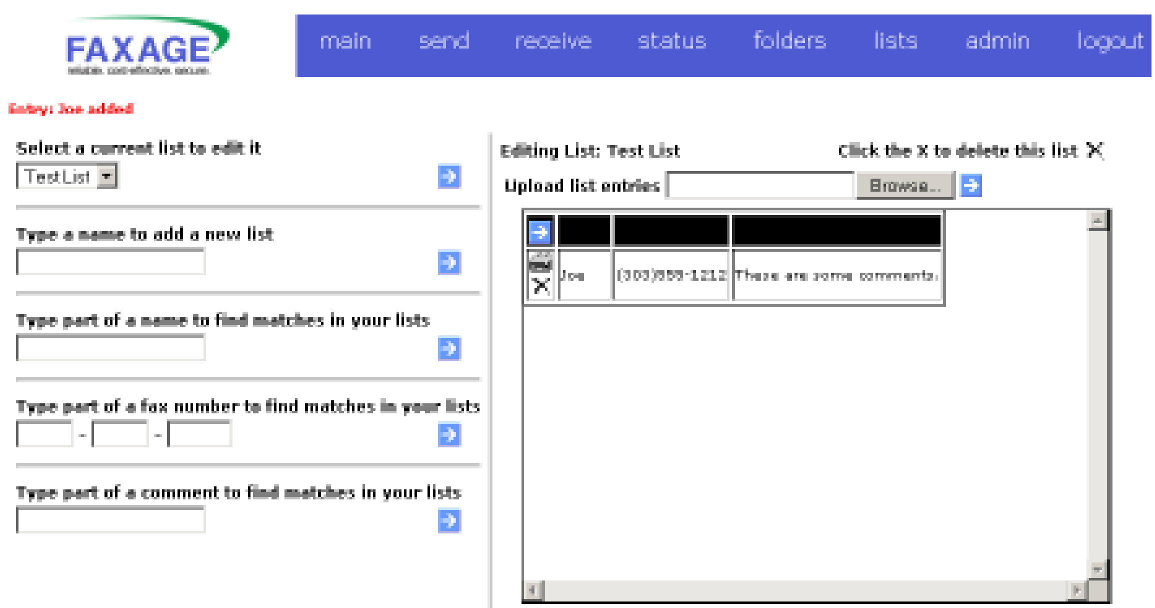
Step 1 – Click the arrow to add an entry



Step 2 – Type in the details for your new entry. Name and Fax Number are required, Comments are optional.

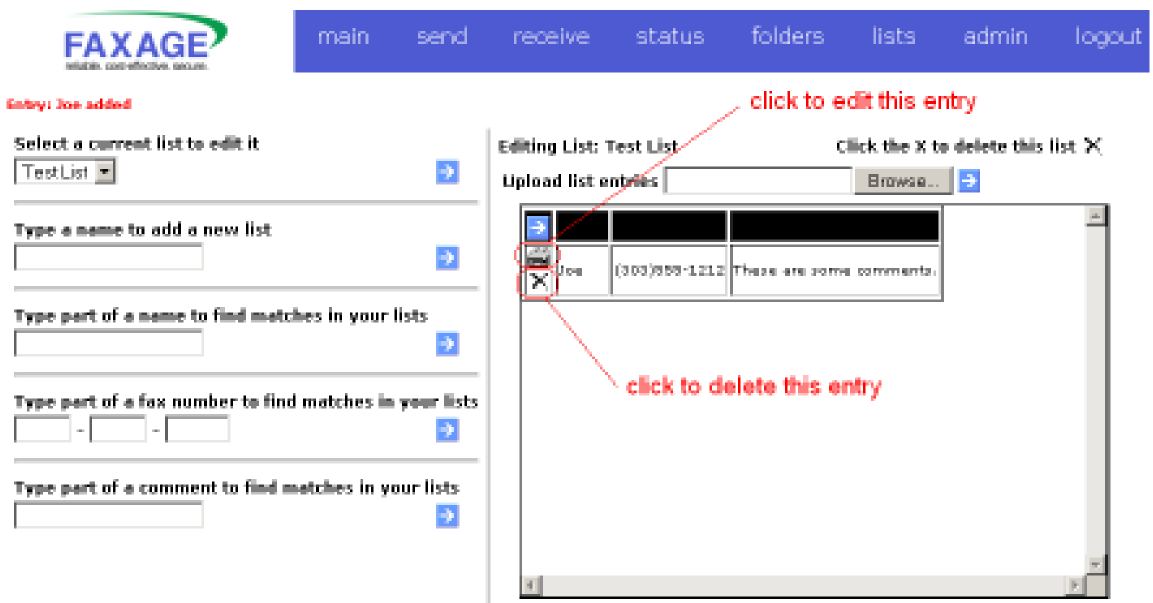


Step 3 – Your new entry is now added to the list as shown.



Editing and Deleting Entries

To edit or delete an existing list entry, use the appropriate button as shown below. If there were multiple entries, the next entry would appear on a new line. The list editor will scroll in order to support an unlimited number of entries (though a reasonable limit of a few thousand per list is recommended, just to help with load time in your browser). Entries are always displayed in alphabetical order when editing a list.

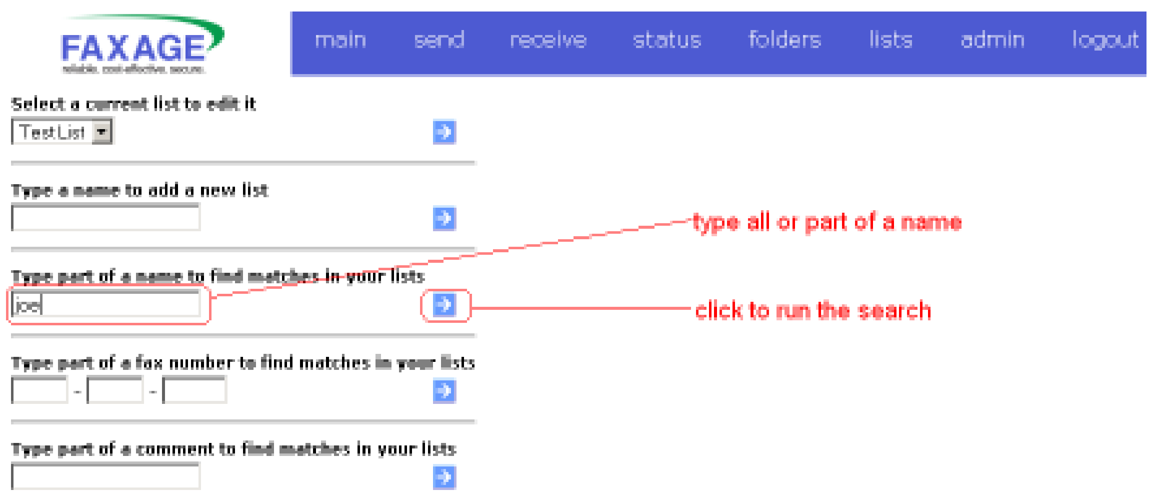


Editing the entry will bring up the screen depicted under manually adding an entry above and will allow you to type in new details to save for this list entry. Deleting the entry will immediately remove it from the system.

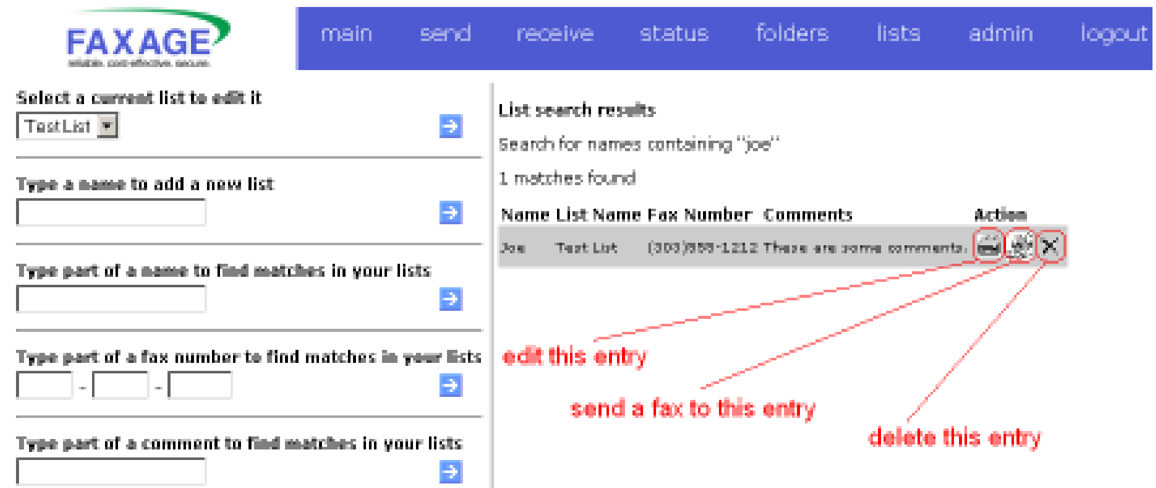
Finding List Entries

On the left side of the lists screen, you can search for entries in your lists by name, by fax number or by comments. Each of these will accept part of a name, fax number or comment and show all matches. For the sake of example, we will search for our 'Joe' entry by looking for names containing 'Joe'. We could as easily search for 'j' to pull up all entries with the letter 'j' in them. The matching is based on 'containing' rather than 'begins with' logic and is not case sensitive. That is, capital and lower case letters are the same in this search and someone named 'Billy Joel' would match 'joe' as a search term.

Here is the search screen filled out:



And here are the results of our search. The keyboard button opens the list editor to this entry, the icon of a fax machine allows you to immediately send this entry a fax, and the 'X' icon allows you to delete the entry from whatever list it is in from this screen (as opposed to having to pull up the editor and scroll through if you have a large list).



Search by fax number or by comment works similarly to name and will yield the same options shown here for whatever match or matches are found.

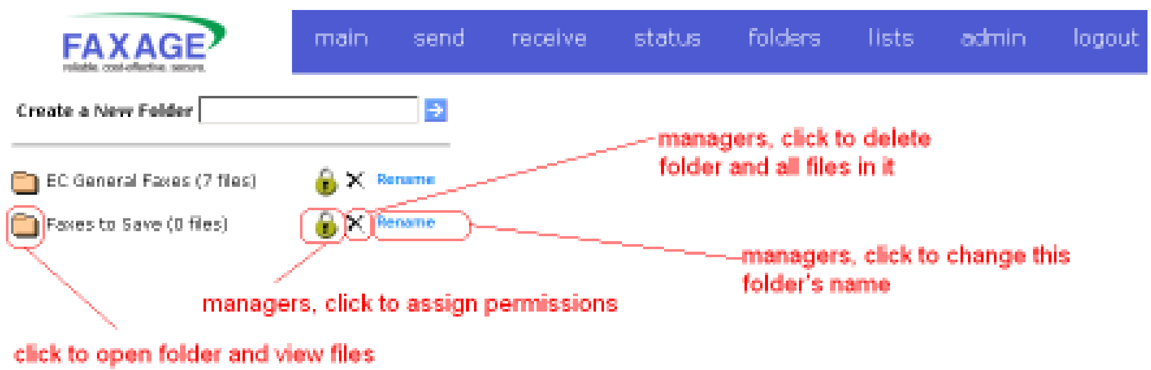
Folders

After lists, the next function on the Navigation Menu is 'folders'. The folders screen allows you to file your faxes for later viewing or reference.

Creating a New Folder – Managers Only!

If you are a manager, you will be presented with the option to create a new folder. In order to do this, type a new folder name and click the arrow as shown to create the folder.

Once you have created the folder, it will appear as shown below:



If you have created more than one folder, each folder will appear on its own line and folders will appear in alphabetical order by name. Note that a user will not have access to a newly created folder until a manager uses the padlock button to assign permission on the folder to that user.

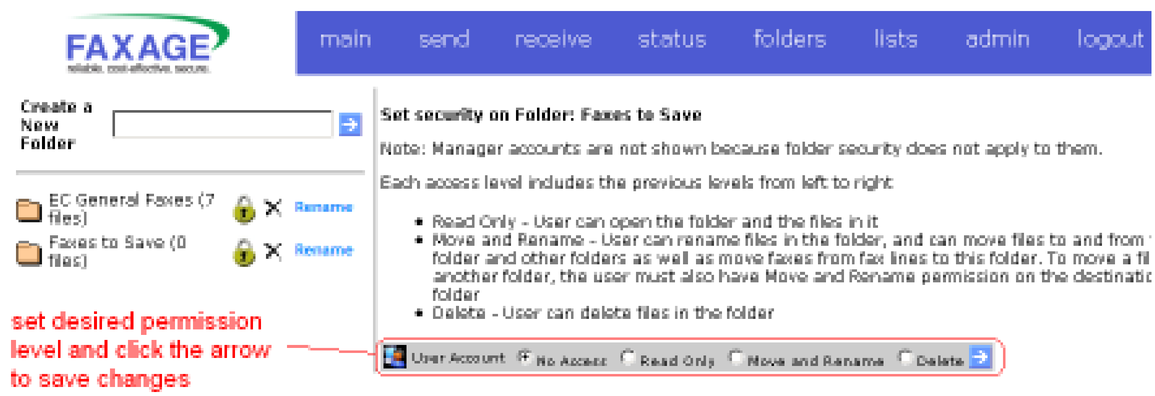
Note that a folder can only be deleted if it is empty. The system will return a message to either delete the files or move them to another folder first if a folder that is not empty is attempted to be deleted.

Setting Folder Security – Managers Only!

By clicking the padlock button, as shown above, managers may assign users permissions to access a folder. Any one of 4 access levels may be set on a folder as described below:

Access Level	**Description**
No Access	The user has no access – this is the default
Read Only	The user may view/download files stored in the folder
Move and Rename	The user has Read Only, plus they can rename files in the folder and move files to another folder. Moving files requires that the user also have Move and Rename on the destination folder
Delete	The user has Read Only and Move and Rename permissions, plus they can delete files stored in the folder

The screen shot below shows the steps for assigning user permissions on a folder after the padlock icon has been clicked



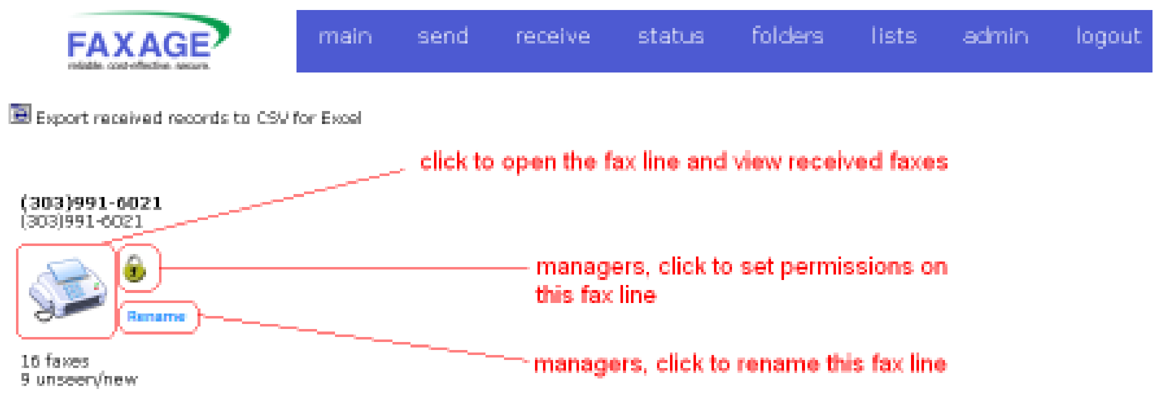
Viewing Files in Folders

For the sake of example, we have added a fax to the 'Faxes to Save' folder. Next, when we review the 'receive' screen, you will see how this is done. For now, the following screen shot shows what it looks like when a folder with faxes in it is opened by clicking the folder icon to the left of the folder name. Note that a user may see some, all or none of these options, depending on the access level assigned by a manager.

Receiving Faxes

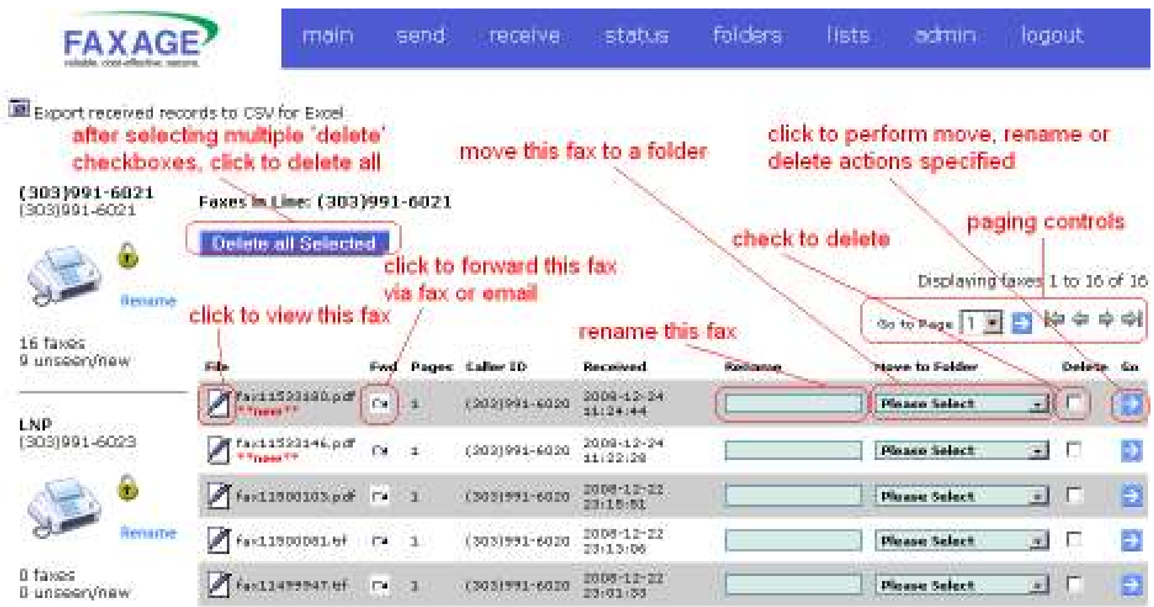
When you click the receive option from the Navigation Menu, you will be taken to the receive screen. From here, you can view faxes, forward faxes (by fax or email), rename faxes, delete faxes and/or move faxes to folders for storage. Note that users do not have access to fax lines until a manager grants access. Each user needs 'read/send' on at least one line in order to be able to send faxes out as well as to read faxes on that line.

The receive screen looks like this when you first open it:



Viewing Faxes

When you click the fax machine icon for a line on the receive screen, you will be presented with a screen showing all the faxes received on that line along with actions that can be taken on those faxes. Note that a user may see all, some or none of these options depending on their access level. We will look at setting security on fax lines next.



Note that selecting a folder under 'Move to Folder' and clicking the arrow button will move the fax off the fax line and into the specified folder. This was how we moved the file in the previous example under the 'folders' section.

Also note the 'paging controls' above. FAXAGE will break faxes into pages of 50 faxes each, in order to help with browser load times. The paging controls allow you to scroll through the pages. Faxes are arranged from newest to oldest.

Setting Fax Line Security – Managers Only!

By clicking the padlock button next to a fax line, a manager may set access levels on the fax line for each user. By default, users have no access to fax lines unless a manager sets it for them. The process works in the same way as setting security on a folder, but the access levels are slightly different. The table below details the possible access levels:

Access Level	**Description**
No Access	The user may not access this line for sending or receiving – This is the default
Read/Send	The user may read/download faxes received on this line and may utilize this line for sending faxes and forward faxes from this line
Move and Rename	The user has Read/Send permission plus they can rename received faxes and move them to folders. In order to move a fax to a folder, the user must also have Move and Rename permission on the folder that they are moving the fax to
Delete	The user has Read/Send permission and Move and Rename permission, plus they can delete faxes received on this line

The screen shot below shows how these settings are made:

Forwarding Received Faxes

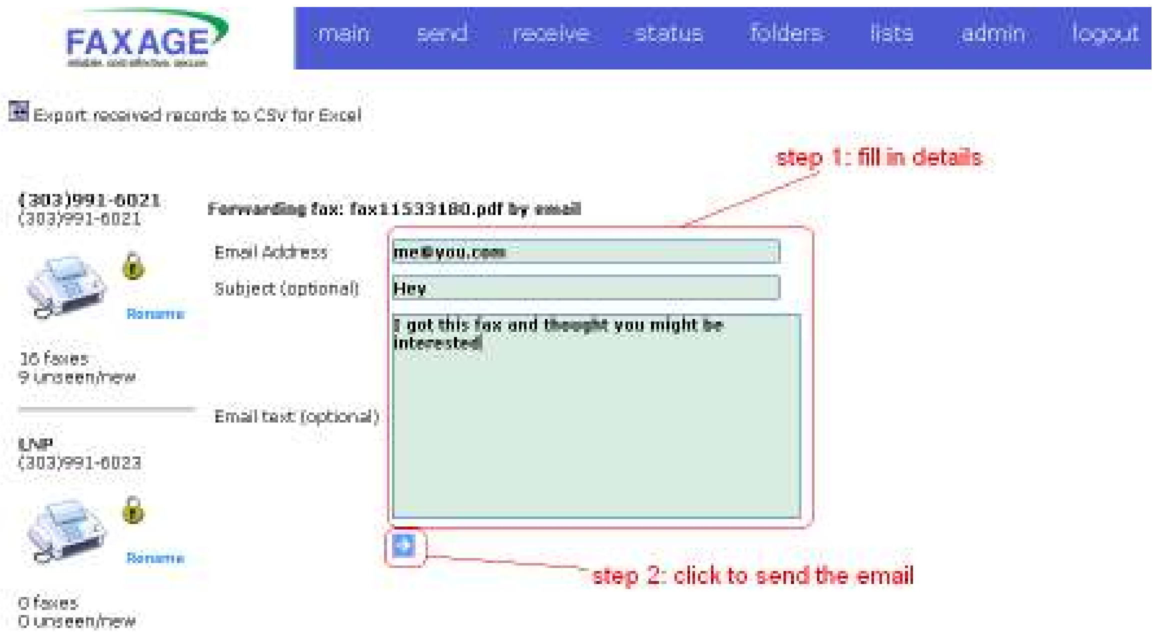
Received faxes may be forwarded by fax or by email by clicking the arrow icon to the right of the fax on the receive screen. The following screenshots depict this process.

Step 1 – Click the forward button

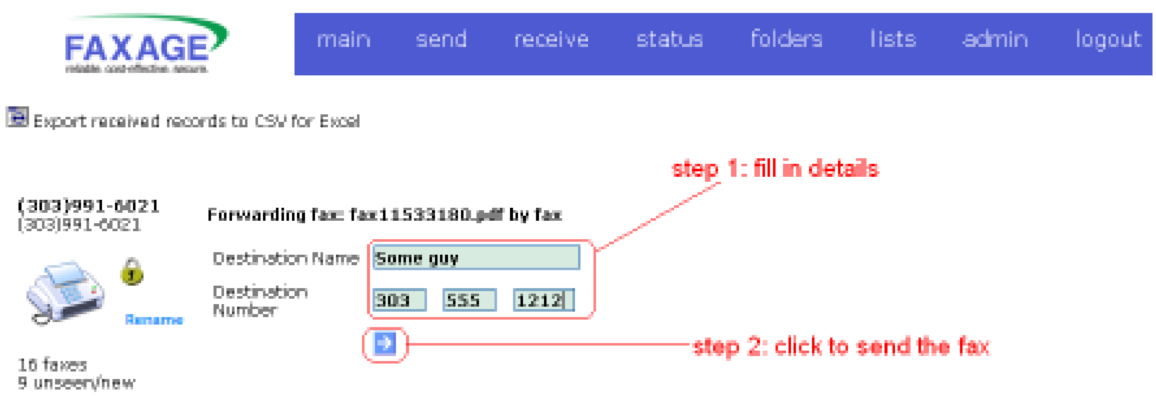
Step 2 – Select whether to forward via Fax or via Email

Step 3 – Fill in appropriate details depending on fax or email forwarding selection

Forwarding by Email



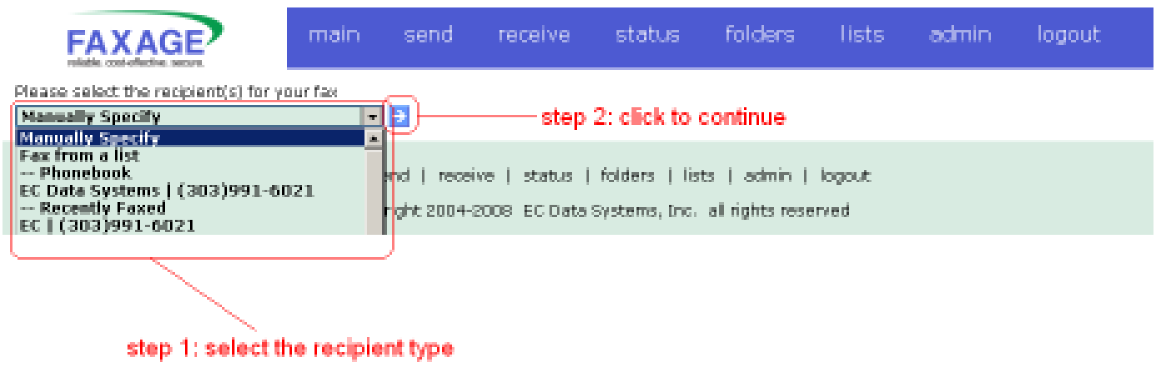
Forwarding by FAX



Sending Faxes

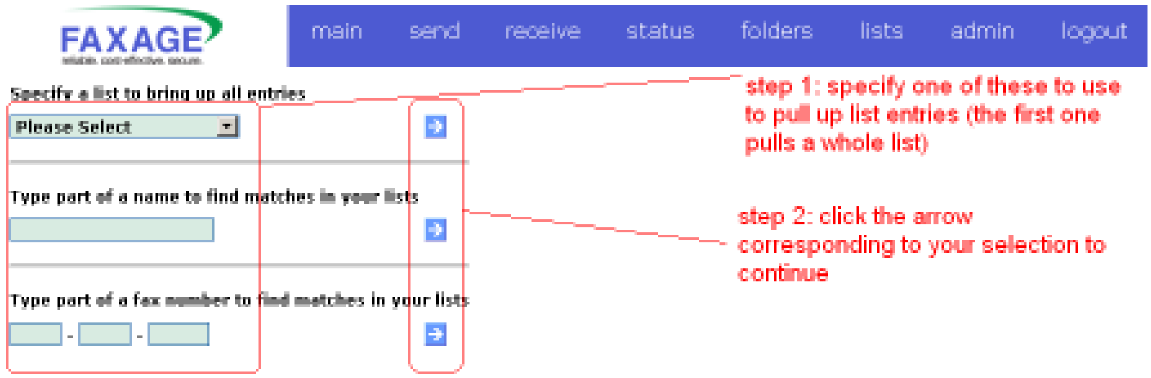
By choosing Send from the Navigation Menu, you can send faxes to individuals or to groups of people by using your lists.

When you initially start the sending process, you will be asked to manually specify recipients, send from a list, send to a recently sent to destination or send to an entry on your phonebook (set up with the ‘Phonebook’ option under ‘Admin’) as shown:

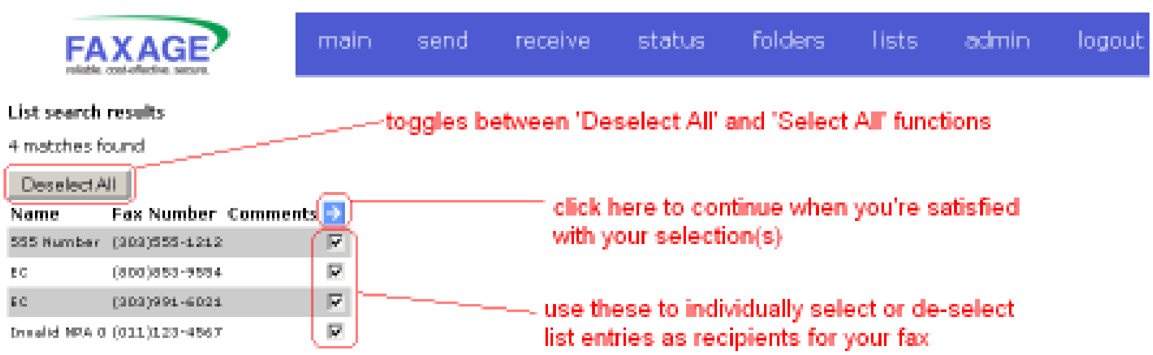


If you choose the option to Manually Specify, you will be presented with a screen to type the name and number to fax to. If you use your phonebook or a recently sent entry from the dropdown, these fields will be pre-filled-in for you, and you can just click the arrow to continue.

If you choose to fax from a list, you will be presented with the option of searching for list entries (just like on the lists screen) or pulling up an entire list as follows:

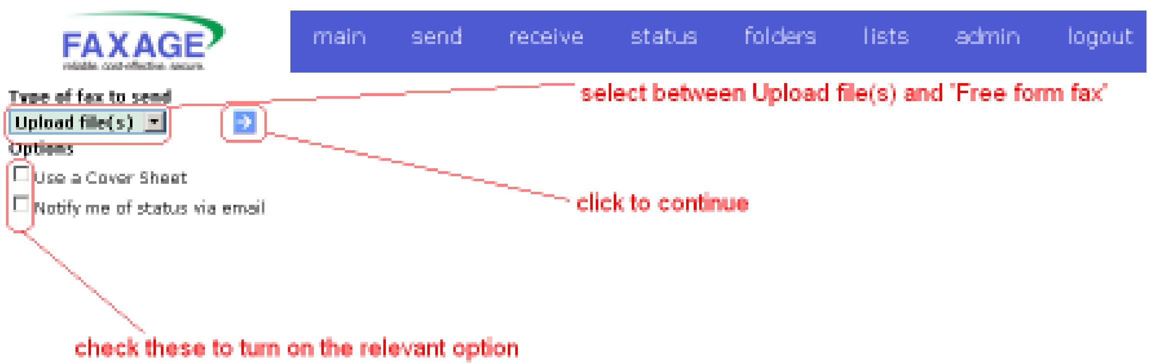


Once you have either searched or displayed an entire list, your results will be presented. In this example, we chose to pull up all entries in our 'Test Customer List'. Check the ones you want to fax and click the arrow to continue. Note the 'Deselect All' option. By default, all matches are selected for faxing. If you accidentally click this, the button changes to 'Select All', so that you can re-select all your matches if desired.



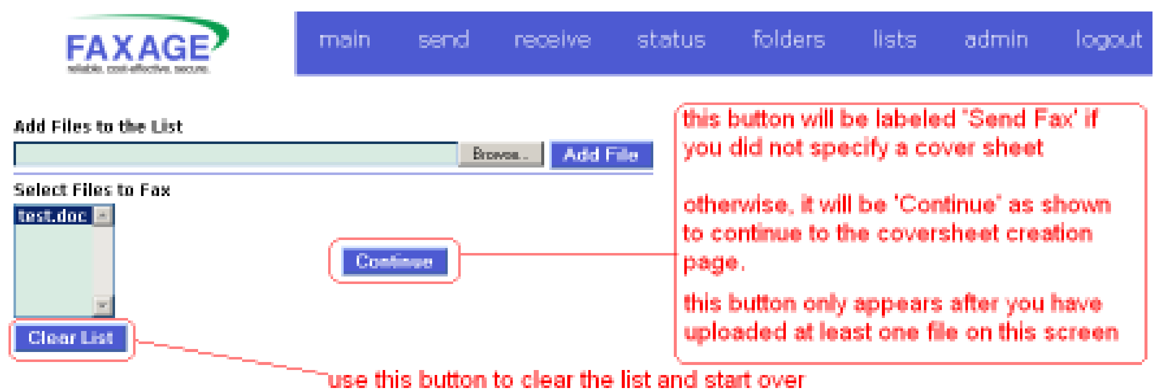
Whether you chose to fax manually or from a list, you have now either specified or chosen your recipient(s). You will be presented with a screen at this point to choose the 'type' of fax you want to send from the following options:

- Upload file(s) – This option means you will upload one or more files to fax and may use a cover sheet in front of the files, depending on whether or not you select the option to do so
- Free form fax – Select this option to only fill out a cover sheet and send it without uploading anything
- Both options allow for email notification to be set up so that you will be emailed with status when the fax completes



If you chose Upload file(s), you will be presented with the file upload screen next.

In order to upload a file, click the ‘Browse …’ button, select the file from your computer and then click ‘Add File’. When the file is done uploading, it will appear in the ‘Select Files to Fax’ box at the bottom of the screen as shown below:

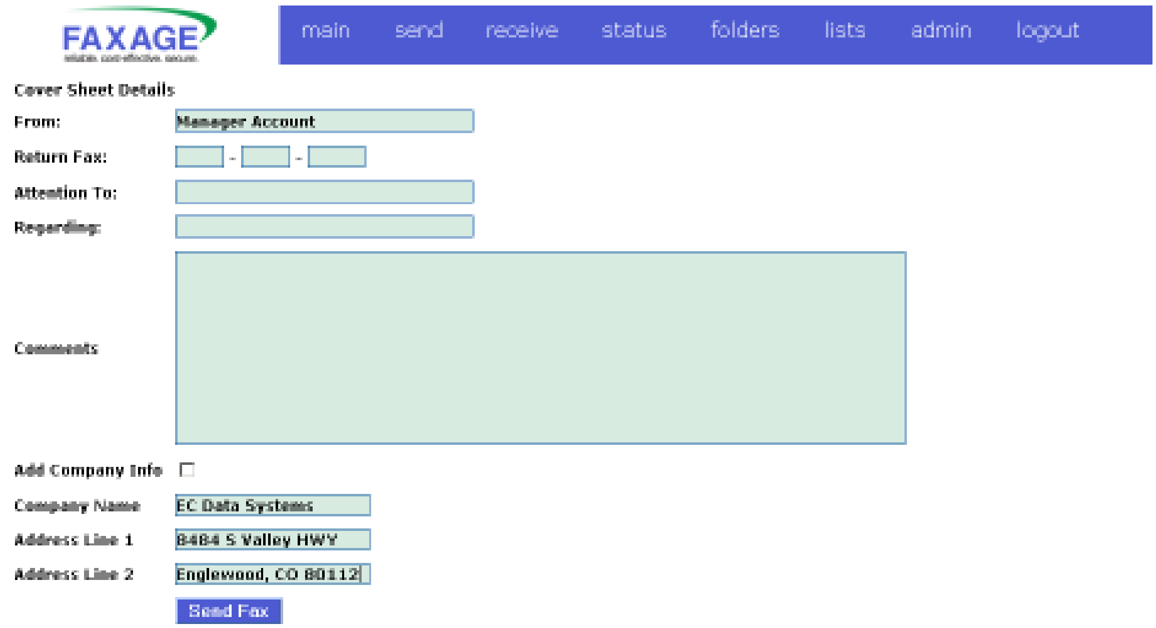


Repeat the process above to upload multiple files.

When you are done uploading, make sure all the files you want to fax are highlighted (select multiple files by holding down the *ctrl* key and clicking, they will all be selected by default unless you’ve clicked one or more in the meantime) and then click either ‘Continue’ or ‘Send Fax’. The button will appear in the same place, but will be labeled ‘Continue’ if you chose to create a cover sheet (because you need to continue to the cover sheet page) or ‘Send Fax’ if you chose not to, as the fax is now ready to be sent in this case.

If you wish to clear the list and start over with uploading, click the ‘Clear List’ button.

Once you are done uploading or have selected Free form fax, you will see the following screen. Note that the ‘Upload file(s)’ option without a coversheet will simply send the fax when the file uploading is done and the ‘Send Fax’ button (in place of ‘Continue’ above is clicked). In that case, the system will not display this next screen.



Fill out the details that you wish to put on the cover sheet and click ‘Send Fax’ to send the fax. Note that many of these details can be pre-filled by using the ‘Cover Sheet’ tool in the ‘Admin’ section under ‘Outgoing Fax Settings’.

Something like the following screen will appear at this point:

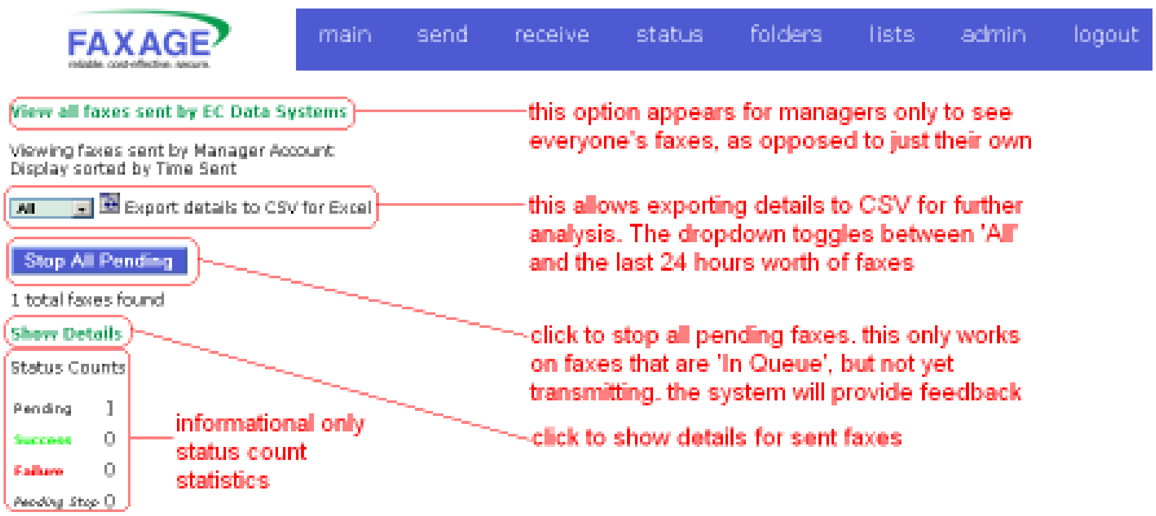
Note that the ‘Notify me of status via email’ was used in this example. The system will acknowledge at this point whether or not it is going to send a status email. Also, had this fax been to multiple list entries, it would say how many faxes are being set up (in this case, just one)

Checking Outbound Fax Status

Once you have sent a fax, you can check its status by using the 'status' Navigation Menu option.

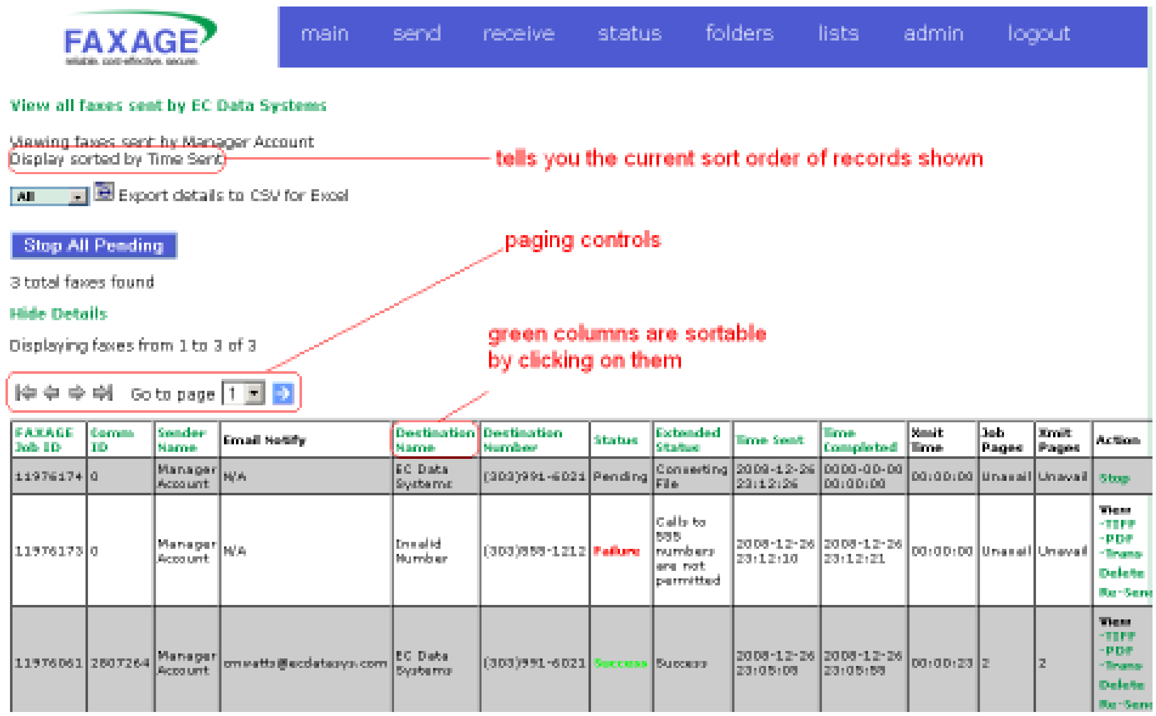
Managers can view all faxes for the entire company. By default, when 'status' is clicked, you are viewing only faxes sent by your account.

Also note the option to download the status details into Excel for further analysis.



The screen shot below shows what the status screen looks like if ‘Show Details’ is clicked above.

A successful job, a failed job and a pending job are shown.

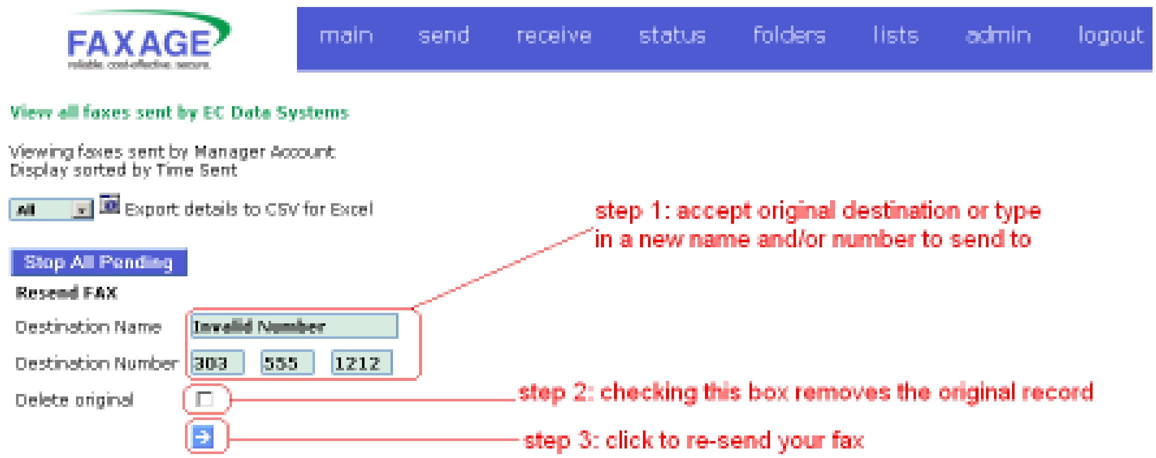


Columns in green text can be clicked to sort the display by that column. In addition:

- The Delete option allows you to delete a fax once it has finished
- A ‘Re-Send’ option appears once a fax is finished, allowing it to be retried or sent to a different number. See the next section for a description
- While a fax is pending, there is a ‘Stop’ option rather than ‘Delete’. The ‘Stop All Pending’ button above the list is equivalent to pressing ‘Stop’ on every Pending record
- The display will be paginated on 100 records per page. The paging controls can be used to scroll through if you have more than 100 sent fax records
- Additional viewing options appear once a fax has been sent, these are:
    - TIFF – View what the sent fax looked like as a TIFF Image file
    - PDF – View what the sent fax looked like as a PDF file
    - Trans – View a ‘Transmittal Page’ for the sent fax including date/time, destination, duration, status and a reduced-size copy of the first page

Re-sending a Sent Fax

Once a job has completed with either a successful or failed status, note the 'Re-send' option on the screen above. Clicking this will allow you to re-send the completed fax to the same fax number or a different fax number. The screenshot below depicts a re-send of the failed fax shown above.



Additional Features

Email to Fax

Email to Fax is a feature that allows you to send an email and have an attached file faxed out. In order to utilize this feature, you must send the email from an address that is associated with a valid FAXAGE user account on the system.

Basic use of Email to Fax works like this:

1. Address an email to (number)@faxage.com – for example 3035551212@faxage.com if you wanted to send a fax to 303-555-1212.

2. Attach the file or files you want faxed out. The system will collate multiple attachments in the order you attach them (I.e.: the first thing attached will be first when the fax is generated)

3. Send the email

The system will then send a receipt that it got the job and a further receipt when the job has completed, acknowledging the status of the job (success or failure and reason if the job failed, such as busy, etc.).

Note that there are several Administrative tools, explained earlier in this guide, that can be used to control various pieces of functionality around how email to fax will work with your account. Also, please see the separate email sending documentation for a more detailed explanation of the advanced options available for Email to Fax.

Fax to Email

Fax to Email is a feature that allows you to receive faxes in your email. By default the initial email address you put in when you set up your FAXAGE account will receive an email whenever a fax comes in with the fax attached to the email as a PDF file.

The ‘User Accounts’ and ‘Email Routing’ sections under the ‘Admin’ section of this document explain how to set up additional email addresses (users) to also receive emails. The ‘Secure Email’ option (also under ‘Admin’) allows for emails to contain a link to download instead of an attachment, to password protect the attachment or to use PGP for security purposes. Finally, the ‘Fax Format’ option (also under ‘Admin’) controls whether the attachments will by PDF or TIFF Image format.

Web API

The Web API allows a programmer to custom-create their own application using FAXAGE as a Fax backend service. The API provides access to sending and receiving faxes, checking status, number provisioning, call detail record pulls and more through a programmatic interface. If this is of interest, please download the FAXAGE API documentation from our website here:

http://www.faxage.com/docs.php

Conclusion

At EC Data Systems, we pride ourselves on producing easy to use solutions that make people more productive. We hope this guide has been informative and helpful not only in using FAXAGE, but also in making your business more efficient and effective.

Again, if you have any questions, comments or suggestions related to this guide or to the FAXAGE system, do not hesitate to contact us.