

FaxCore Quick Reference Guide



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QUICK HELP: Mouse over any text item or field and a quick tip will appear.

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Sending a Message

Select the SEND tab to send a message.

Header Information

Notify, Hold, Delay

Notes

From: Bob Jones Notify Me on Message Completion

Company: Notify Me on Recipient Errors

Subject: Hold For Preview

Tracking #: Delay Sending Until:

Importance: normal Today at Noon

Complete Header Information

From and Company – Sender's info;
Will display on Cover Page

Subject – Subject of message to display
on Cover Page

Tracking # - Searchable Sender identifier
(only viewable to sender)

Importance – Priority of message

Add Notes

Enter any notes to display on the Cover
Page.

Add Documents

Click DOCUMENTS tab

Notify, Hold, Delay

Select the appropriate checkboxes for the
message:

Notify me on Message Completion – will
notify you when the entire message
has been sent to all recipients.

Notify me on Recipient Errors – will notify
you if the message does not send
successfully to any recipient.

Hold for Preview – holds message in
Hold folder until it is released. Rendered
message can be viewed prior to release.

Delay Sending Until – delays sending
message until selected date and time.

DOCUMENTS RECIPIENTS SEND MESSAGE

Browse... Add X UP DN M N Document

SystemDefaultCoverPage

Once a document is added, it will display in the list. You can delete a document by clicking the X. Documents can be moved up or down by clicking UP or DN.

There are two ways to add documents:

- Click the browse button and locate the document from the file system. Click Add.
- Click on the specific document from the Document Menu. The document will add to the list in this window.

To have your cover page always added to the list by default, update your default send attachments in your **General Settings**. See page 5 for more details.

NOTE: Shared documents are added by the System Administrator

Sending a Message

Adding Recipients

Click on the RECIPIENTS tab.

To add the notifications, click in the appropriate column on the row of the recipient. See above columns NOD (notify on delivery) and NOE (notify on error). When selected, an exclamation mark displays in the cell.

- NOD will send a message to the recipient when the message has been delivered successfully.
- NOE will send a message to the recipient if the message does not send successfully.

To add a Generic Recipient

1. Add the following information:
 - Name – to be displayed on the cover
 - Delivery – type of delivery (fax, email, ftp or http)
 - Address – Fax Number (country code, area code, local number), email address, ftp or http address
 - Notify Email – this is where the notification, if selected, will be sent to the recipient
2. Click Add

To add a Recipient from Address Book:

1. Choose address book from drop list
2. Highlight the recipient and click Add, or double click on the recipient

Indicators:

- X: deletes the recipient
- UP: moves the document up in the list
- DN: moves the document down in the list
- NOD: notifies the recipient upon message delivery (notify upon delivery)
- NOE: notifies the recipient upon message error (notify upon error)

When all documents and recipients have been added, click **SEND MESSAGE**. Message will send and item will display in Outbox.

Sending a Message Using the Email Gateway

Open your email and select New.

Enter the fax number followed by @yourcompanygateway (defined by your system admin).

Attach document(s), enter subject and message text if needed and click Send.

If you have a default cover page selected in your General Settings, text in the body of the email will be added as notes.

If there is no default cover page, then any text will be added as a cover page. If there is no text in the body of the email, no cover page will be added.

Formatting the address with periods, like address to the left, will give it the best chance of sending successfully.

Searching for a Message

To locate a message, click the SEARCH tab.

FAXCORE MENU SEND SEARCH USER MENU

USER: BOB.JONES LOGOUT

Search Criteria

From Date

To Date

Message #

Tracking #

Delivered To

Country Code

Fax Number

Email

Email Domain

Status

Type

Errors

Refresh Delete Read Unread Cancel Hold Release Move to folder ... Move

#	Track #	From	To	CSID	Status	Errors	# Pages	Sent/Received	Folder
<input type="checkbox"/>	120	Contract01 Bob Jones	Accounting Myco	deliver	No		3	01/13/2003 03:02:11 PM	
<input type="checkbox"/>	116	Bob Jones	Joe Johnson	Myco	complete	No	3	01/13/2003 01:43:09 PM	

Record(s) 1 - 2

Enter the search criteria in the left pane and click the Search button.

The matches will display in a list like above.

Search tips:

- To limit the amount of matches, enter detailed criteria.
- If you are not sure of the criteria, type as much as you know and let the search engine help.
- You can cancel, hold, release and delete messages from the list.
- To view a message, click on the appropriate row.

Viewing a Message

To view any message, click on the specific row from any folder. The Message Viewer will open in a separate window like below.

The message details display in the upper corner.

You can choose which delivery to view and how to view the pages, as thumbnails or in a page list.

To view the page, click on the thumbnail or the link.

FAXCORE VIEW DETAIL ACTIONS MESSAGE VIEWER

USER: BOB.JONES

ID: 116

Date Created: 01/13/2003

Time Created: 01:43:09 PM

Tracking Key:

Status: complete

Delivery: Joe Johnson - fax

View: Thumbnails

[DETAILS] [PREV] [NEXT]

Scale by: [-33%] [-25%] [-10%] [+10%] [+25%] [+33%]

View rotated at: [0 deg] [90 deg] [180 deg] [270 deg]

FAXCORE

WHEN EVERY FAX IS MISSION CRITICAL

MOBILE SERVICE: 800-872-8722

CHATTANOOGA, TN 37411

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Quick Guide to Sending a Message with FaxCore

To view details about the message, click the DETAIL tab. You can view transmission replay for each delivery or notification.

Other details available include:

- Time created and completed
- Total transmission time
- Status of all deliveries and notification
- Total number of pages
- Billing information and costs
- List of recipients and transmission replay for each
- Details for each delivery attempt
- Error messages

Forwarding and Resending Messages

To forward or resend a message, open the Message Viewer for the specific message and click the ACTIONS tab.

The screenshot shows the FAXCORE MESSAGE VIEWER interface. At the top, there are tabs for VIEW, DETAIL, and ACTIONS, with MESSAGE VIEWER selected. Below the tabs, the user is identified as USER: BOB.JONES. The message details include ID: 116, Date Created: 01/13/2003, Time Created: 01:43:09 PM, Tracking Key, and Status: complete. The Delivery dropdown is set to Joe Johnson - fax, and the Download Type is TIF. There are buttons for Select All Pages, Forward Delivery, Unselect All Pages, Resend Delivery, and Generate Download Link. Below the details, there are three thumbnail images of the message pages.

Forward

1. Select the pages you want to forward by clicking on them. The selected pages will highlight in yellow. If you want to select all pages, you can use the Select All Pages button. NOTE: if you do not choose specific page, all pages will be selected.
2. Click Forward Delivery and the SEND page will open. Your attachment will be added in the list of documents.
3. Complete the send page and click SEND MESSAGE.

Resend

1. Select the recipient you want to resend the message to from the Delivery list.
2. Select the pages you want to resend or Select All Pages to resend the entire message.
3. Click Resend Delivery and the SEND page will open. Your attachment and the recipient will be in the lists.
4. Add any additional recipients or documents.
5. Complete the send page and click SEND MESSAGE.

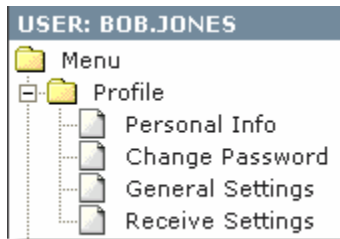
Saving Messages

The screenshot shows the FAXCORE MESSAGE VIEWER interface, similar to the previous one. The message details are the same. In this view, the two middle thumbnail images are highlighted in yellow. A callout box with a white background and black border points to the highlighted pages. The callout text reads: "Click on the page(s) you want to save and choose the download type (TIF or PDF). Click Generate Download Link. Click Download Delivery." The ACTIONS tab is selected, and the buttons for Select All Pages, Forward Delivery, Unselect All Pages, Resend Delivery, and Generate Download Link are visible. A [DOWNLOAD DELIVERY] button is also present below the Download Type dropdown.

Editing User Profile

Your user profile contains four areas:
Personal info, Change Password, General Settings and Receive Settings.

Note: Some information is set by the System Admin.



Personal Info

- Update your name and company information.
- Set defaults for your notifications. These defaults can be overridden on the send page.
- Enter your delivery information, such as fax numbers and email addresses.
- Choose your preferred delivery address for received faxes.

Change Password

- You can change your password from here. You will need to know your old password to change it.
- If you forget your password, you can select [Password Request] from the login page to have your password sent to your preferred email address.

General Settings

Most of these settings are set by the System Administrator. You can update them from the General Settings area.

On each item, there is a column called Inherit? Yes means that the value is inherited from the System Administrator's values. If No is selected, the value the user enters will be used. Some things you can set include:

- Company – this is the information that displays on the Cover Page.
- Dialing Rules – you can set rules based on area code and country code.
- Fax Send Settings – you can update your csid, local number and caller id values that display on the outgoing faxes.
- Imaging – you can set the details of how you want to view your messages.
- Default Send Attachments – you can specify the cover page and/or the documents you want to always be added to the document list when sending a message. Select document and select no in the Inherit? field.

default send attachments (cover pages)		Inherit?	Inherited Value
cover page	SystemDefaultCoverPage	no	
additional		yes	

Receive Settings

- Choose which address you want your received faxes to be delivered to.
- Choose the delivery format of your received messages (PDF or TIF).
- Select option to receive either a link or an attachment and link of your received fax. The system will have a default value. Select no under Inherit to use your choice.

Managing Contacts and Groups

To add contacts and groups to your FaxCore address book, click on the Default folder under Contacts. Or add a specific folder (see next section).

Add Contacts

- Select the Create Contact(s) button.
- Complete the contact information (see window to the right). You must enter at least one delivery address.
- You can select the default notifications for the contact.
- When all information is complete, click Save.
- To add another, you can click Clear and add another contact.

Add Groups

- Select the Create Group(s) button.
- Name your group.
- You can add generic recipients to the group or add contacts from your address books.
- Click Save.

Select the SEND tab to send a message.

The screenshot shows a 'Contact Information' window. At the top, there are fields for 'First Name', 'Middle Name', and 'Last Name', along with 'Company', 'Description', and a 'Folder' dropdown menu. Below this is a 'Notifications on Sent Messages' section with checkboxes for 'Notify on Delivery Completion' and 'Notify on Delivery Errors'. The 'Email Addresses' section has a 'Type' dropdown (set to 'home email'), an 'Address' field, and an 'Add' button. Below that is a table with columns 'Type', 'Address', 'Notify On', and 'Send'. A 'Remove Selected Emails' button is below the table. The 'Telco Numbers' section has a 'Type' dropdown (set to 'home phone'), a 'Number' field, and an 'Add' button. Below that is another table with columns 'Type' and 'Number', and a 'Remove Selected Numbers' button. At the bottom, there is a 'Preferred Delivery Address' dropdown menu and 'Clear' and 'Save' buttons.

Managing Folders and Uploading Documents

Managing Folders

- Right click on the folder you wish to create a folder under and select New Document Folder. You will be prompted to name the folder and then click OK.
- To change the name of a folder, right click on the folder you want to rename and choose the correct option (Rename). You will be prompted to rename the folder and click OK.
- To delete the folder, right click on the folder and choose Delete.

Uploading Documents

- Click on the folder you want to add a document to and click Create.
- Choose the type (standard or cover page) and enter the name of the document in the Label field.
- Browse for the document and click SAVE. Document will be uploaded and rendered.

The screenshot shows a 'Document Information' window. It has fields for 'ID' (83986368F20C4E3EA2BAF5AA42CD4821), 'Folder' (<default>), 'Type' (standard document), 'Label' (jpg), 'Status' ([The document is currently rendering, please check back shortly]), 'Created' (2/16/2003 11:31:12 PM), 'Visibility' (private), 'Rendering' (generic - better performance), and 'Description'. There is a '[DOWNLOAD]' button and a file path: 'C:\Documents and Settings\fbasil\Desktop\Sample_website_images\BUS20100_shaking_hands.jpg'. At the bottom, there are 'WORKFLOW', 'Token Reference', and 'SAVE' buttons.

Status: to refresh status and find out if document rendered successfully.

Workflow: to view workflow steps of document rendering.

Token Reference: displays a list of available tokens and instructions.



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