

USER GUIDE

Fusion FAX Admin User Guide

About FusionFax

FusionFax allows users to manage, send, and receive faxes from an *authorized user's Email address* or through the *FusionFax User Portal*.

There are two separate web logins / two separate portals – one for Admins and one for Users.

This guide covers the functionalities available for **Administrators via your FusionFAX ADMIN PORTAL**.

Logging In

To log in as an administrator, go to the web site: <http://faxadmin.fusionconnect.com>

Login

Windows Authentication

Fax Server Authentication

Administrator name:

Password:

System Administrator

Site Administrator

Site Name:

Remember me on this computer

Login

- Choose "Fax Server Authentication" and enter your **Administrator Name** (case sensitive)
- Enter your Password (case sensitive)
- Choose **Site Administrator**
- Enter your "Site Name" ...provided by Fusion Connect (case sensitive, NO SPACES after your name)
- Click: **LOGIN**

Note: You must log in as a "Site Administrator". If System Administrator is accidentally selected, you will not be able to log in to the portal.

Once you are logged in, you will be presented with the following screen:

XM Fax > Configuration > Internal Users

fusionFAX Configuration Monitor

Internal Users

+ Add - Remove Switch Profile Properties Change Password Unlock Import Users Export Users

Filter: Profile: All Search Show options

Internal Users
4 Items

	SMTP Address	Profile Name	NT Account	Locked	Enabled
<input type="checkbox"/>	billy.fisher@fusionconnect.com	Basic		No	Yes
<input type="checkbox"/>	fisherwilliamj@aol.com	Basic	Training	No	Yes
<input type="checkbox"/>	voicetraining@fusionconnect.com	Basic	Training	No	Yes
<input type="checkbox"/>	wfisher1972@gmail.com	Basic		No	Yes

Across the top, there are three sections available to administrators: **Configuration**, **Monitor**, and **Phone Book**. Each of these sections will be reviewed in separate sections below. Functions within the specific modules are listed down the left-hand window.

Internal Users

This section lists all user accounts associated with the account. Administrators are able to manage the properties and profile of users.

Functions available to the administrator within this menu are:

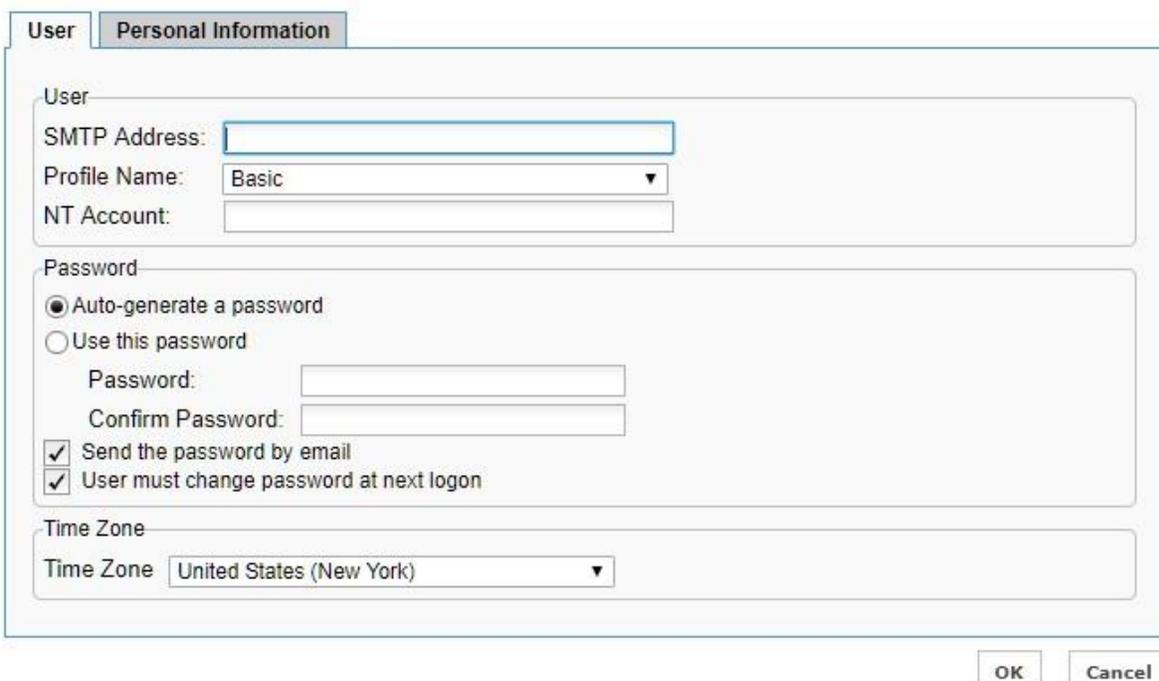
- **Add:** Add a new User
- **Remove:** Remove User(s)
- **Switch Profile:** change the profile settings between two users
- **Properties:** Change the properties of a User
- **Change Password:** Change the password of a User

Note: The User ID must be selected before the above options will be available. To Switch Profiles, two User IDs must be selected

Note: Users can be filtered using the filter bar. Wildcards (“*”) are required if the match is not exact

Creating a New User

To create a new Fusion Fax user, select  from the top of the page. You will then be presented with the following screen:



The screenshot shows a web form for creating a new user. The form is titled "User" and has a tab labeled "Personal Information". The form contains the following fields and options:

- User:** A text input field.
- SMTP Address:** A text input field.
- Profile Name:** A dropdown menu with "Basic" selected.
- NT Account:** A text input field.
- Password:** A section with two radio buttons: "Auto-generate a password" (selected) and "Use this password".
- Password:** A text input field (only visible if "Use this password" is selected).
- Confirm Password:** A text input field (only visible if "Use this password" is selected).
- Send the password by email
- User must change password at next logon
- Time Zone:** A dropdown menu with "United States (New York)" selected.

At the bottom right of the form are two buttons: "OK" and "Cancel".

When creating a new user, the administrator is presented following fields

User:

- **SMTP Address:** Enter the User's email address
- **Profile Name:** Disregard
- **NT Account:** Optional Field

Password:

- **Auto-generate a password:** The system will automatically create a new password for the user for their User Portal *(IF they choose to use it)*
- **Use this password:** Allows the administrator to manually enter a password for the User Portal *(IF the User chooses to use it rather than sending a fax via their email address)*
- **Send the password by email:** Emails the password directly to the user. Users will receive an automated email from support@fusionconnect.com providing them with their username and password. *Note: Uncheck this box if the User chooses to send faxes via their email address because this password will not be needed.*
- **User must change password at next logon:** The user will be required to change their password the next time they log onto their portal. New passwords created by users must have 8 a minimum characters, including at least 1 upper case letter and 1 number. *NOTE: Uncheck this box if the User chooses to send faxes via their email address because this password will not be needed.*

Time Zone

- **Time Zone:** Allows the administrator to specify the time zone of the user

Personal Information Tab:

Personal information allows the administrator to enter information about the user. This information will be used when the User sends a fax via the USER Portal -or via their email address. **This information will be displayed when they send a fax hence, will be used and listed on their Fax Cover Page.**

Once the information have been entered, select **OK**

Incoming Routing Table

The incoming routing table determines where new faxes will be sent (via EMAIL), when they arrive.

When selecting this tab, you will see your FAX number(s) associated with your FusionFax account. To change the properties of a number's routing, select either the Destination Email Address or your DNIS Fax number:

XM Fax > Configuration > Incoming Routing Table

The screenshot shows the FusionFax Configuration interface. The 'Incoming Routing Table' tab is selected in the left sidebar. The main area displays a table with 2 items. The table has columns for Type, Destinations, and DNIS/DID Filter. The first item is 'Direct' with the destination 'billy.fisher@fusionconnect.com' and the filter '7034838616'. The second item is 'Directories Lookup'. Above the table are buttons for Add, Remove, Move Up, Move Down, Properties, and Test Routing Table. The 'Add' button is highlighted with a red box.

Type	Destinations	DNIS/DID Filter
Direct	billy.fisher@fusionconnect.com	7034838616
Directories Lookup		

To **add another Destination Email Address**, select **Add**. Enter the email information in the **Filter Field** and select **"Add to List"**. *NOTE: You must enter the entire email address of the User.*

To **Remove** a User, select the User and then select **Remove**. Once your users have been selected, to save your changes, **click OK...**

The screenshot shows the 'Routing' dialog box. It has a 'Routing' section with checkboxes for Match DNIS/DID, Match ANI, Match CSID, and Match DTMF, each with a corresponding 'Pattern' field. The 'Match DNIS/DID' checkbox is checked, and the pattern is '7034838616'. Below this is a 'Routing Destinations' table with columns for Type, User, and Display Name. The table contains one entry: 'User' with the value 'billy.fisher@fusionconnect.com'. To the right of the table are 'Add...' and 'Remove' buttons. At the bottom of the dialog is a checkbox labeled 'If this routing entry matches, continue processing the routing table', which is checked. At the bottom right are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box.

Type	User	Display Name
User	billy.fisher@fusionconnect.com	

Phone Number Restrictions

This section allows administrators to set restrictions on fax usage (i.e. No international, etc.), hence allows you to block numbers you wish not to fax you.

- Create a Folder by clicking ADD. You can call the Folder SPAM FAXES, etc
- Once the Folder is created, click it and add number(s) to your Portal that you wish to block, meaning forbid them from faxing you.

To add a blocked number:

- Click ADD

XM Fax > Configuration > Phone Number Restriction

The screenshot shows the Fusion FAX Configuration interface. The left sidebar contains a navigation menu with 'Internal Users', 'Incoming Routing Table', and 'Phone Number Restriction' (highlighted with a red box). The main content area is titled 'Number Restriction Group Properties' and contains a 'Number Restriction Group' form. The form includes a 'Group Name' field with the value 'SPAM FAXES'. Under 'Number Restrictions', the 'Forbid these numbers' radio button is selected. A table lists three numbers: 7044512222, 7039991212, and 7065551212, each with 1 digit and the condition 'At least'. To the right of the table are buttons for 'Add', 'Remove', and 'Properties', with the 'Add' button highlighted by a red box. At the bottom right are 'OK' and 'Cancel' buttons.

fusionFAX Configuration Monitor

Internal Users
Incoming Routing Table
Phone Number Restriction

Number Restriction Group Properties

Number Restriction Group

Group Name
Group Name: SPAM FAXES

Number Restrictions
 Forbid these numbers
 Allow only these numbers

	Number Pattern	Digits	Condition
<input type="checkbox"/>	7044512222	1	At least
<input type="checkbox"/>	7039991212	1	At least
<input type="checkbox"/>	7065551212	1	At least

Add
Remove
Properties

OK Cancel

- Add a 10-Digit number into the “Number Pattern” field and **click OK**:

Number Entry Properties

Criteria

Criteria

Number Pattern: 7039991212

Condition: At least

Number of digits: 1

OK Back

- Under your *Number Restriction Group* window, **click OK again** to save your changes:

Number Restriction Group

Group Name

Group Name: SPAM FAXES

Number Restrictions

Forbid these numbers

Allow only these numbers

	Number Pattern	Digits	Condition
<input type="checkbox"/>	7044512222	1	At least
<input type="checkbox"/>	7039635555	1	At least
<input type="checkbox"/>	7039991212	1	At least

Add

Remove

Properties

OK Cancel

Monitor

Inbound History

The Inbound History folder provides an overview of all inbound faxes received. Individual faxes can be selected to view details, including:

- **Fax Properties**
- **Routed To**
- **Event Log**

Outbound History

The Inbound History folder provides an overview of all inbound faxes received. Individual faxes can be selected to view details, including:

- **Fax Properties**
- **Feedback Sent To**
- **Event Log**

Outgoing Queue

This section shows faxes are currently being transmitted (*note: ONLY if they're being sent by Users via the User Portal*).