FusionWorks Pro
Fax Service

fusion

Contents:

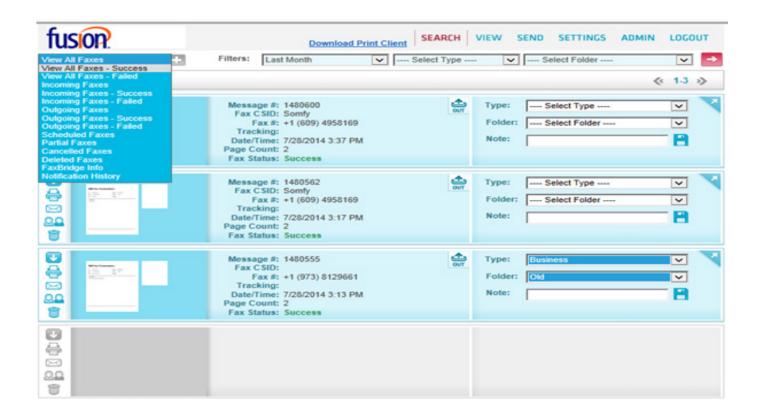## Access Fusion Fax Service

To access the Fusion Fax Service Portal:

1. Go to http://fax.fusionconnect.com (we recommend using MS Internet Explorer).

2. At Welcome Screen enter your own unique User ID and Password.

Search Tab

Reviewing the menu choices in the upper right of the screen, the first item listed is the "SEARCH" tab. Once logged in you will see the "Search" screen pop up if you have sent or received any fax documents previously. Using the "SEARCH" tab you can search through existing documents by several different criteria.

When you click the Icons along left side of page the following functions will be performed:

1.   Download

2.   Print Preview

3.   E-Mail

4.   Assign

5.   Delete

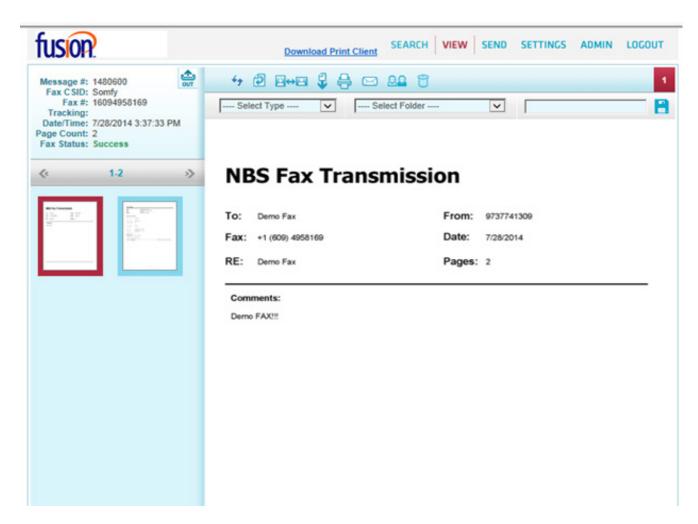   There is also one icon along the right border of the page (Launch).

    This launches the "View" page (in a separate window) for that particular document.

The Search Tab allows you to search Incoming, Outgoing or Cancelled faxes, by date, type (business, personal, etc.) and within New or Old Folders. You can also print or preview a copy of any of the documents listed on the page with the click of a single button.

View Tab

The VIEW tab allows you to view documents along with their delivery, tracking and status information. You can also UPDATE the TYPE and FOLDER status of the document so that it can be archived and searched for later.
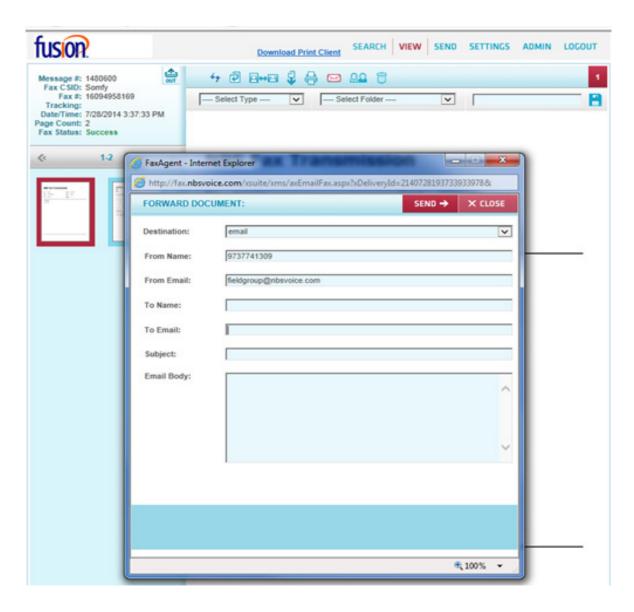

The Icons along top of the page perform the following functions (note: download, print preview, e-mail and delete icons are the same):

To E-mail From View Page

Clicking on the "email" icon here will pull up a separate "send" window that will allow you to e-mail an electronic copy of the document.
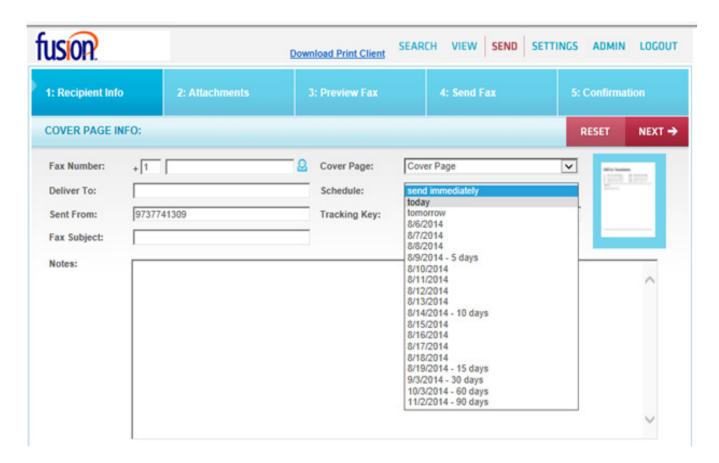
Fill in the Name and Email Address of the intended recipient. Then enter the Subject and Email Body or message and press SEND.

Send Tab

Recipient Info Section

A fax can be sent with or without a "Cover Page" (click the drop down menu to choose). If you choose to include a Cover Page a small preview image of the page will display in the small box on the right side of the page.
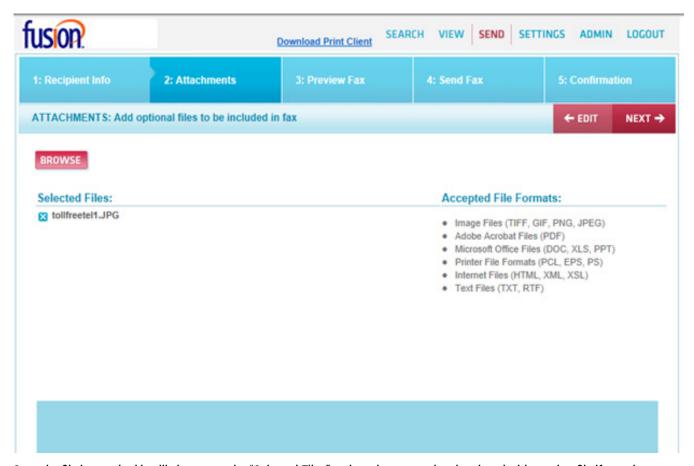

You can also "Schedule" when to send your fax. You can pick "send immediately" or "today" or any day within a two week period.

Attachments Section

To add file "Attachments" to your Fax click the "Browse" button and choose any file from your computer. Multiple file formats can be accepted and attached to follow your cover page. A list of these file formats is provided on the "Attachments" page.
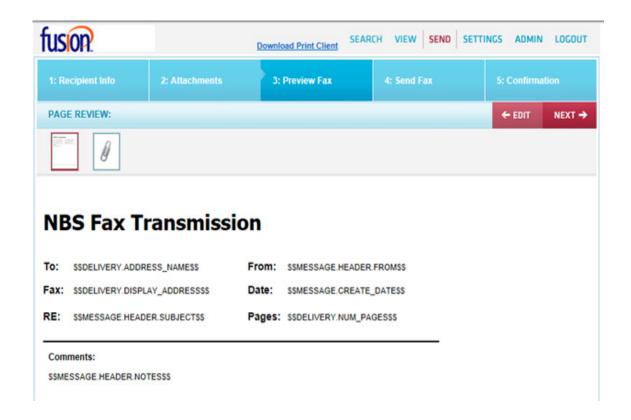
Once the file is attached it will show up under "Selected Files" and can be removed and replaced with another file if you change your mind.

Preview Fax Section

The PREVIEW FAX page displays a "Page Review" that shows you a small image of the Cover Page (along the top of the page) and it also indicates whether or not you have a file attached.
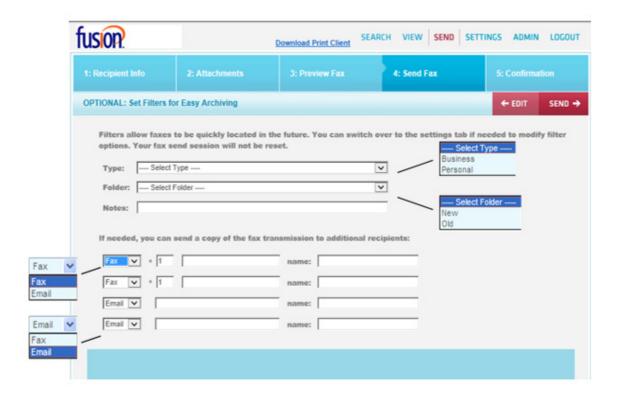
The large Cover Page image shows how your cover page will be laid out. It substitutes strings of letters and symbols in the fields where your message and contact details will be listed. The data you entered in the "Recipient Info" section will populate these fields in the actual cover page that is sent.

Send Fax Section

Before sending your fax, the system gives you the option to "Set Filters for Easy Archiving." Pull downs ask you to choose a Type and Folder and there is a box where you can add a Note.
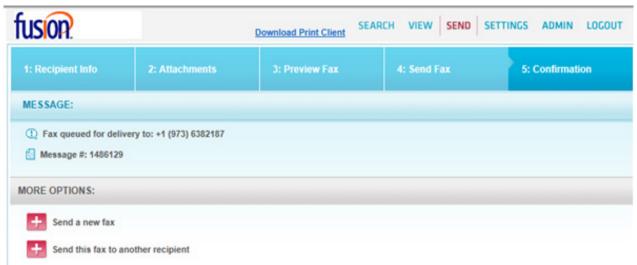
In addition, copies of your fax can be sent to up to 4 other recipients. There are options for sending each copy to either a Fax or Email address, and a place to fill in the name of each recipient.

When finished, press the "SEND" button to initiate your fax transmission.

Confirmation Section

Your fax is now queued for delivery and a message tracking number is created so that you can search for the document later. Click on the "Search" tab to view the new document and its transmission status.
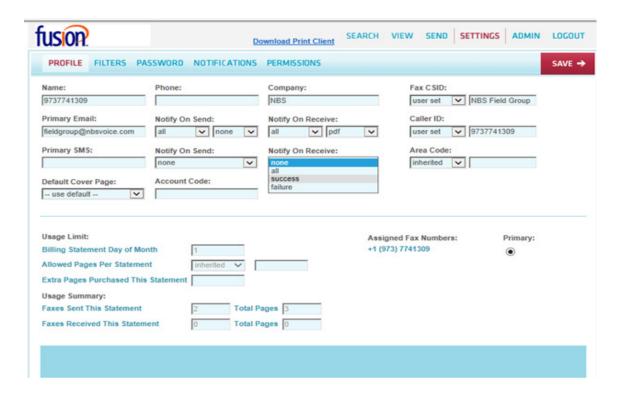
There are "More Options" along the bottom of the page that allow you to either send another copy of this document, or to send a new fax altogether.

Settings Tab

Profile Section

The Profile section allows the user to choose default settings for the use of cover pages, return e-mail address, how and when you are notified of fax status and other self-identifying information.
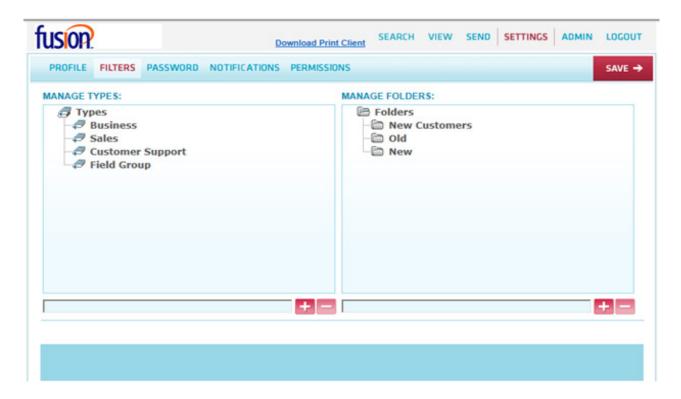

Some of the settings on this page are set by the System Administrator based on the options chosen by the customer when the service is initiated.

Filters Section

Filters are used to archive and organize your Fax. documents. Documents can be designated as "Business" or "Personal" (or any other category you want to created) and saved in "New" or "Old" folders.
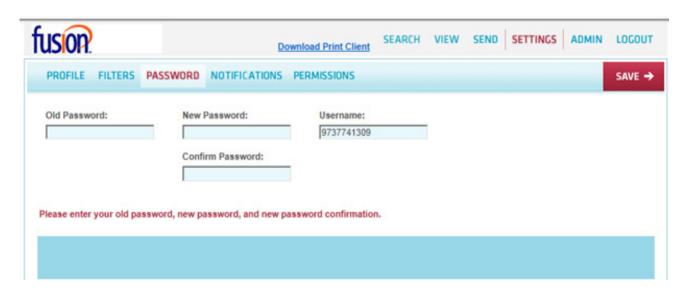
You can change, delete or add items in each of these categories by using the "+" and "-" buttons along the bottom of the page.
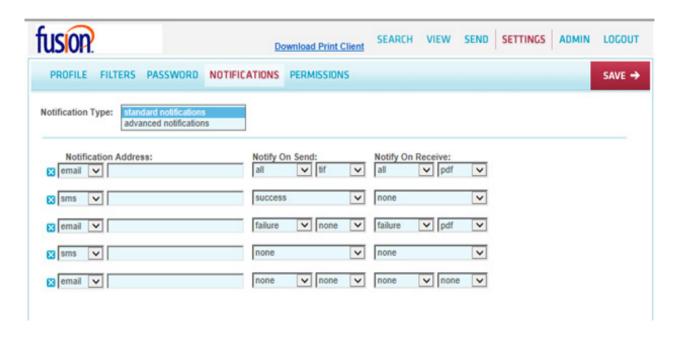
Password Section

The PASSWORD section of the SETTINGS tab will allow the user to change their login password at any time. Your original login is set by Fusion, but once the portal is accessed for the first time, the user can change it to his or her own liking to ensure a higher level of security.
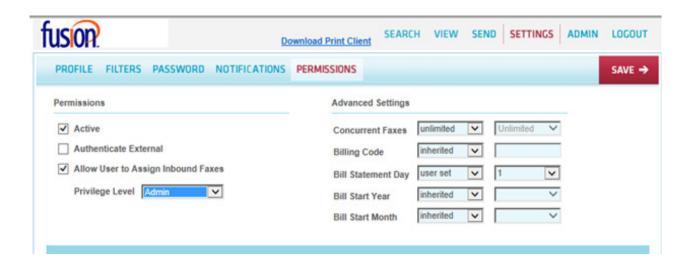
Notifications Section

Notifications are used to let the User know the status of a message. As previously shown in the PROFILE section of the SETTINGS tab, a user can be notified (on Send and/or Receive) by print or e-mail. E-mail notifications can be sent as a message link only, or as a message link as well as with the actual faxed document attached.

Permissions Section

Permissions enables the user to activate, authenticate or allow certain security features based on privilege levels. There are also several advanced settings related to concurrent faxes and billing issues that should be set by your administrator.
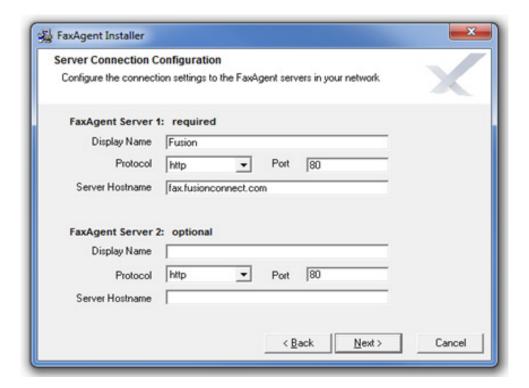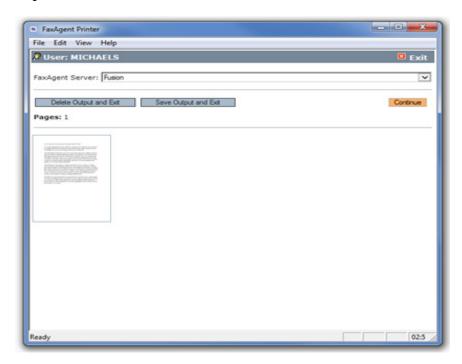
Send Fax Via Print Driver

Print Driver Option

Fusion's Fax Service also has the ability to send a fax directly from any Windows application with a Print Driver function. Simply install the Client Print Driver on your machine so that you can invoke the "FaxAgent" print function from the Fax Service. To download the driver look for the "Download Print Client" link on the top of each page within the Fusion Fax service. When installing make sure in the "Server Connection Configuration" pane you list the Fusion Fax URL in the "Server Hostname" box (enter "fax.fusionconnect.com" in that box if it is not already there).
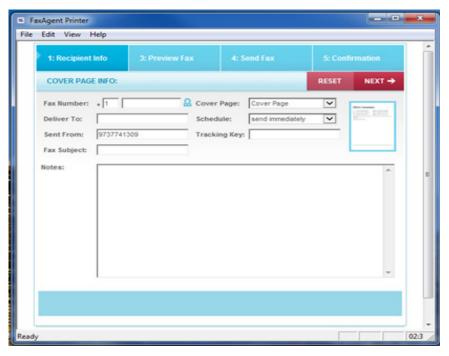
Once installed open any document you wish to fax and simply choose to "Print" the document using the "FaxAgent" driver as your selected printer. The document will be sent to the Fusion Fax queue and a preview of the page you wish to send will appear in the FaxAgent Printer window.

Press "Continue" and the Fusion Fax Service page will automatically pop up (within the Send section) with the Recipient Info ready to be filled in.
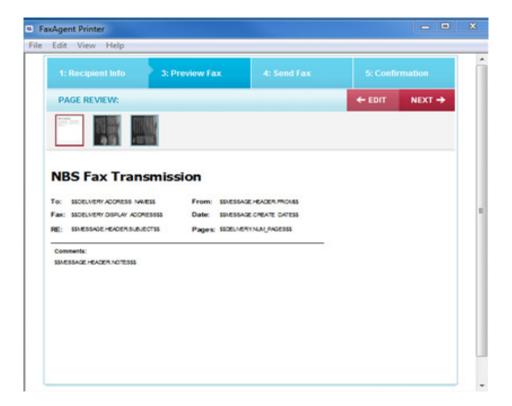
Once that information is completed you would just press "Next" to see the Page Review just like in the Fax Preview section previously mentioned in this guide
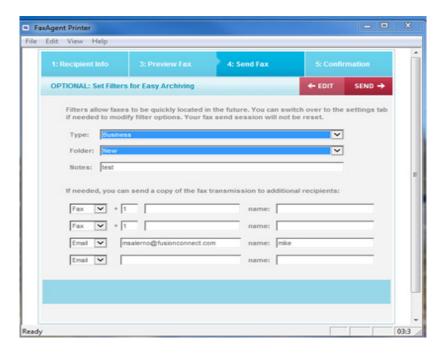
Fax Preview Section

Once again the PREVIEW FAX section displays a "Page Review" that shows you a small image of the Cover Page and a small image of any page or pages from the document you chose to print with the FaxAgent printer option.
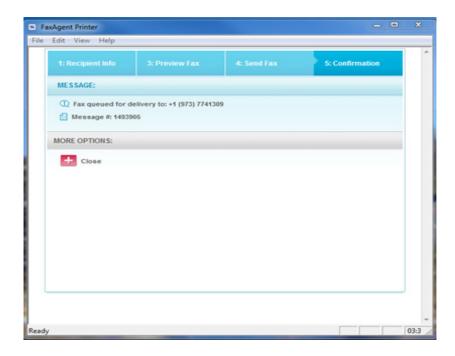

Send Fax Section

Before sending the fax the Optional Set Filters page will display. Filters allow you to categorize and label these faxed documents so that they can be quickly located in the future. There are also options here for you to add additional recipients either by fax or email.

Confirmation Section

At this point the user would press the "SEND" button. Once "SEND" is clicked the document will be sent to the Fusion Fax Service client queue and a confirmation message (stating "Fax queued for delivery" with a tracking number) will appear. You can also check the status of the fax by going to the Fusion Fax Service Web Portal and clicking on the SEARCH tab. If the fax does not immediately appear click your browser's REFRESH button and you will see it listed with the Fax Status and all other relevant details.

Your Fax has now been sent, recorded and archived for later search and retrieval.

SEND FAX VIA E-MAIL

Fusion Fax Service also supports outgoing faxes sent directly from an outlook/mail client.

In this scenario the user would send an email to: faxnumber@fax.fusionconnect.com (i.e.: 9738129661@fax.fusionconnect.com). Any attachments to this e-mail message would be sent as a fax via our Fusion Fax Service.

Please note that the email MUST come from the primary email address listed as the username in the fax server. This is how the fax server determines what user the fax is coming from. At this point only one primary email address can be defined on the fax server (no matter the user).

Additional questions about Fusion Fax Service? Contact Fusion Technical Support at 1-888-301-1721 (option 2).