

USER GUIDE

FusionFAX Admin User Guide



About FusionFax

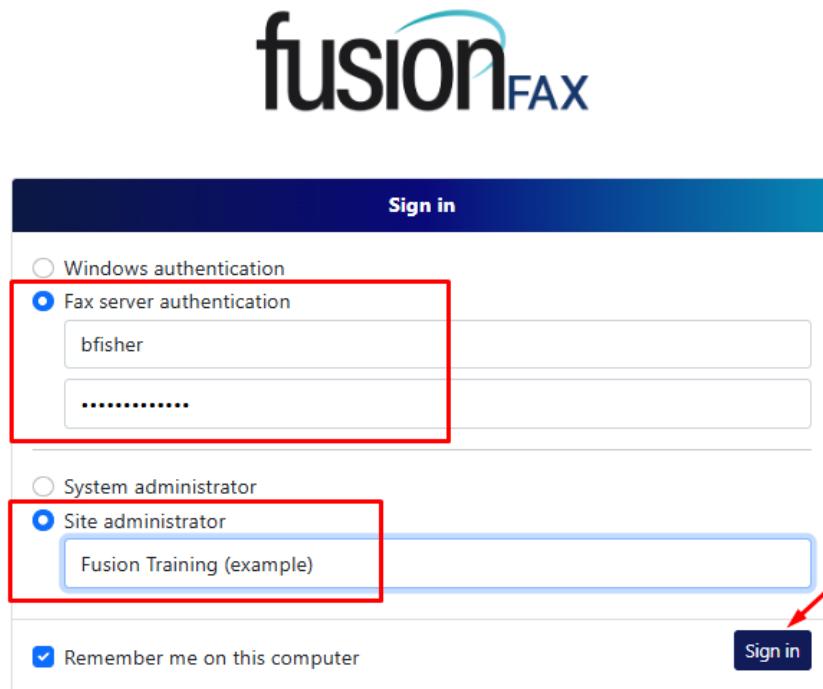
FusionFax allows users to manage, send, and receive faxes from an *authorized user's Email address* or through the *FusionFax User Portal*.

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>

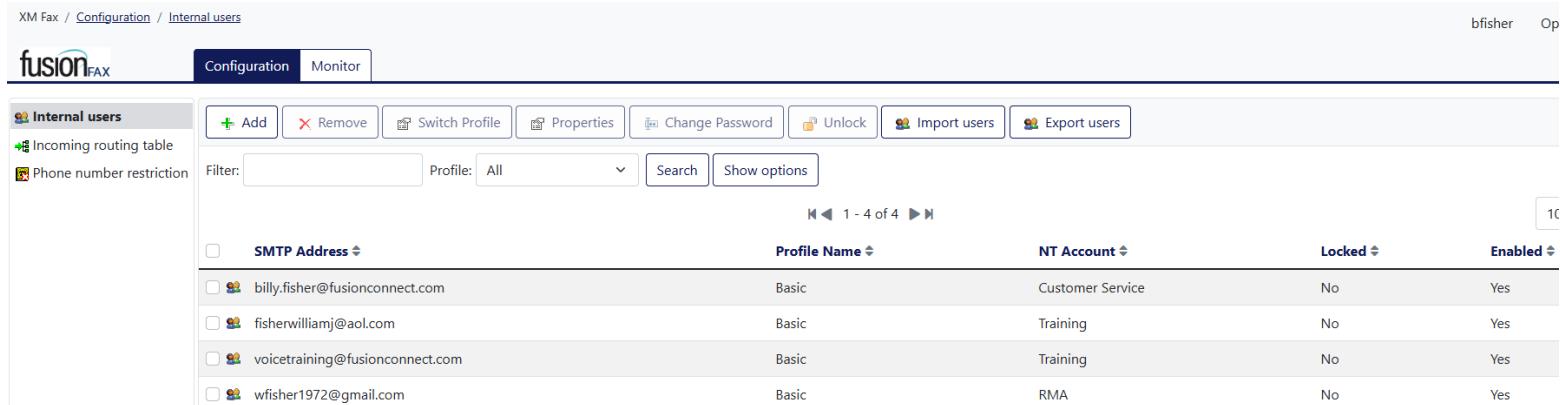


The screenshot shows the 'Sign in' page of the fusionFAX web interface. It features a 'Sign in' button at the top. Below it are two authentication sections. The first section, 'Fax server authentication', has a radio button selected and a red box around it. It contains a text input field with 'bfisher' and a password input field with '.....'. The second section, 'Site administrator', also has a radio button selected and a red box around it. It contains a text input field with 'Fusion Training (example)'. At the bottom left is a 'Remember me on this computer' checkbox, and at the bottom right is a 'Sign in' button with a blue arrow pointing to it.

- 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:



The screenshot shows the 'Internal users' page within the XM Fax configuration. At the top, there are buttons for 'Add', 'Remove', 'Switch Profile', 'Properties', 'Change Password', 'Unlock', 'Import users', and 'Export users'. Below this is a filter section with 'Filter:', 'Profile: All', 'Search', and 'Show options' buttons. The main area is a table with the following data:

SMTP Address	Profile Name	NT Account	Locked	Enabled
billy.fisher@fusionconnect.com	Basic	Customer Service	No	Yes
fisherwilliamj@aol.com	Basic	Training	No	Yes
voicetraining@fusionconnect.com	Basic	Training	No	Yes
wfisher1972@gmail.com	Basic	RMA	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 section 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  on the top of the page. You will then be presented with the following screen:

User Properties

User	Personal Information
User	
<input checked="" type="checkbox"/> Enabled	
SMTP Address: <input type="text"/>	
Profile Name: <input type="text" value="Basic"/>	
NT Account: <input type="text"/>	
Password	
<input checked="" type="radio"/> Auto-generate a password	
<input type="radio"/> Use this password	
Password: <input type="text"/>	
Confirm Password: <input type="text"/>	
<input checked="" type="checkbox"/> Send the password by email	
<input checked="" type="checkbox"/> User must change password at next logon	
<input type="checkbox"/> Password never expires	
Time Zone	
Time Zone <input type="text" value="United States (New York)"/> <input type="button" value="▼"/>	
<input type="button" value="OK"/> <input type="button" value="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:

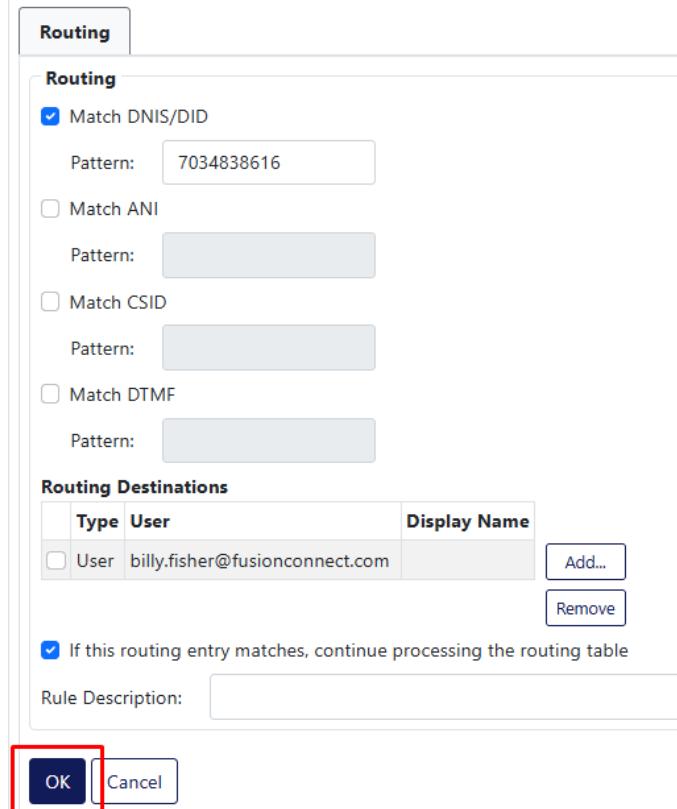
XM Fax > Configuration > Incoming Routing Table



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...**



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

If this routing entry matches, continue processing the routing table

Rule Description:

OK **Cancel**

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

The screenshot shows the fusion FAX software interface. The top navigation bar includes 'fusion FAX', 'Configuration' (which is selected), and 'Monitor'. The left sidebar has three options: 'Internal users', 'Incoming routing table', and 'Phone number restriction', with 'Phone number restriction' highlighted by a red box. The main content area is titled 'Number Restriction Group Properties' and contains a sub-section 'Number Restriction Group'. It shows a 'Group Name' field set to 'SPAM FAXES'. Below this is a 'Number Restrictions' section with two radio button options: 'Forbid these numbers' (selected) and 'Allow only these numbers'. A 'Numbers' table lists three entries: '7044512222', '7039991212', and '7065551212', each with a 'Condition' of 'At least 1 digit'. To the right of the table are three buttons: 'Add' (highlighted with a red box), 'Remove', and 'Properties'. At the bottom are 'OK' and 'Cancel' buttons.

	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

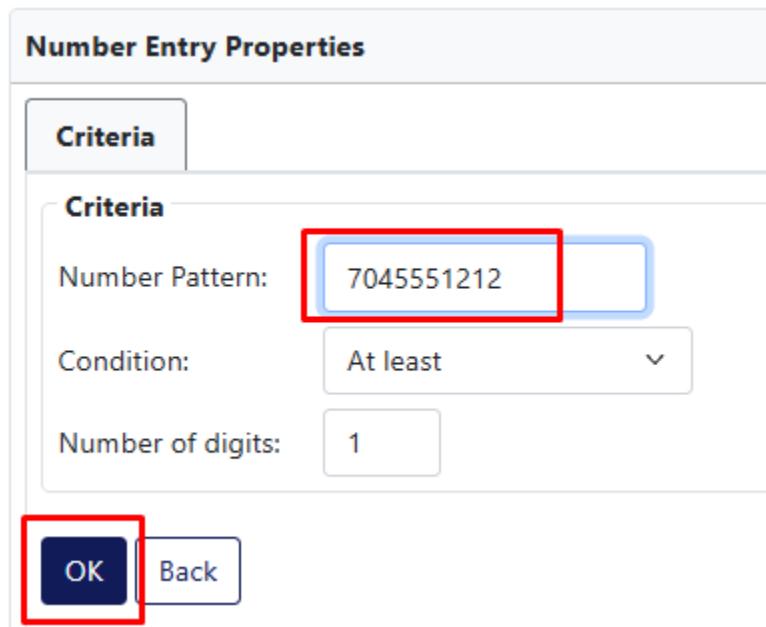
Criteria

Number Pattern: 7045551212

Condition:

Number of digits:

OK **Back**



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

Number Restriction Group

Group Name

Group Name:

Number Restrictions

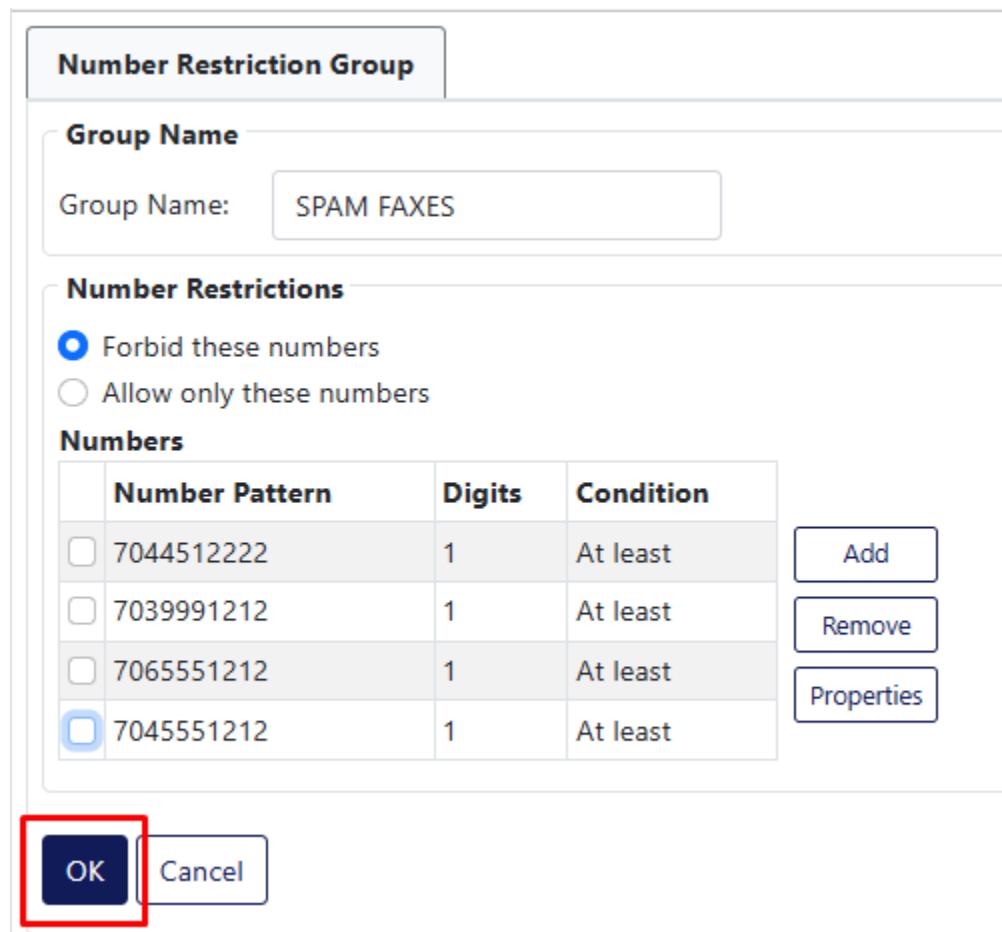
Forbid these numbers
 Allow only these numbers

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
<input checked="" type="checkbox"/>	7045551212	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*).