Desktop Fax

Administration and Fax Management
User Guide

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Welcome to Desktop Fax

Desktop Fax allows you to send and receive faxes in email format, access your faxes from a mobile device or an email client. With Internet access, Desktop Fax allows you to send faxes without using a fax machine or a second phone line from anywhere in North America.

The Fax Management interface allows the Desktop Fax users to manage their Desktop Fax account. Users are able to send/receive faxes, view queued/archived faxes.

Desktop Fax Management

The Fax Management option allows the Desktop Fax users to send and receive faxes, view queued/archived faxes, add contacts.

Desktop Fax accounts must be created in the WebsiteOS Administration Panel. This is located in WebsiteOS > E-Mail > Desktop Fax. Your administrator must assign your preferred email address to a randomly selected fax number before you may begin using Desktop Fax. Please verify with your Desktop Fax administrator if this has been setup.

Once a Desktop Fax account has been setup, modifications to the email address, and fax number will not be permitted Please ensure that the account information is correct. To update a Desktop Fax plan, contact customer service or sales.

Login to Desktop Fax

1. Navigate to your Desktop Fax Login page at: https://mtsdesktopfax.com.
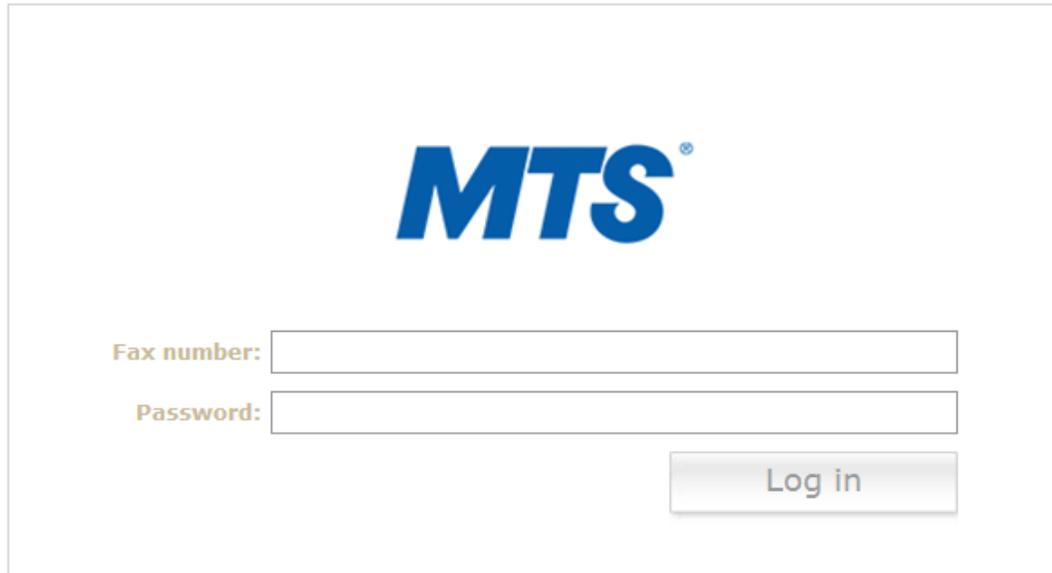
2. Enter in your **Email Address** or **Fax Number**.
3. Enter in your **Desktop Fax password**.
4. Click **Log in**.

Navigation

There are three ways to navigate within the Desktop Fax interface:

- Getting Started with Desktop Fax
- Main Menu
- Sub Menu

Getting Started with Desktop Fax

The "Getting Started with Desktop Fax" screen provides detailed options for Desktop Fax. When you first launch Desktop Fax Fax Management, the "Getting Started with Desktop Fax" screen is loaded as your initial menu. The Main Menu bar remains static throughout all of the Desktop Fax Fax Management and you will be able to navigate to whichever section you wish by clicking on the menu options.
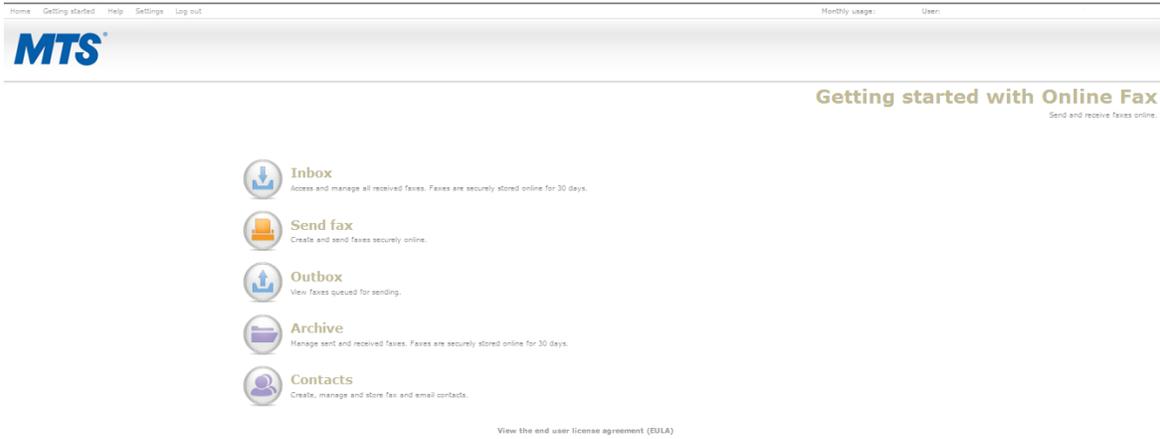
Navigating the Main Menu

When you log in to Desktop Fax, the main menu is listed with details regarding each option. Once you select an option, the main menu moves to the top-right corner of the page. The following options are available: Inbox, Send Fax, Outbox, Archive, Contacts. Please see the table below for more details regarding each menu option.

Main Menu	Description
Inbox	The "Inbox" page allows you to manage received faxes. Each fax is stored in the Inbox for 30 days, during which time, you can view, download as a PDF or TIFF, move to an archive, or delete.
Send Fax	The "Send Fax" page opens a screen that allows you to create and send faxes online.
Outbox	The **Outbox** button opens a screen that allows Desktop Fax users to view the queue of all outbound faxes.

Archive 	The **Archive** button opens a screen that displays faxes that have been archived on our system for 30 days. Desktop Fax users are able to manage sent and received faxes here.
Contacts 	The **Contacts** button allows Desktop Fax users to create, manage and store fax and email contacts.

Navigating the Secondary Menu

The Secondary Menu is located in the top left corner of the Administration Panel of Desktop Fax and consists of the following links: Home, Getting Started, Help and Feedback.

Secondary Menu	Description
Home	The **Home** link directs you to your Inbox
Getting Started	The **Getting Started** link directs you to the "Getting Started with Desktop Fax" screen.
Help	The **Help** link will guide you through managing fax to email.
Settings	The **Settings** link allows you to update your account information: company details, your personal signature.
Logout	The **Logout** link will log you out of the current session of Desktop Fax.

Managing your Desktop Fax Settings

The **Settings** link allows you to update your account information: company details and your personal signature as well as your preferences in terms of your cover letter template and attachment format.

Contact Details

In this section you can edit the contact details that will appear on the cover letter of your fax. The fields that you can edit are: Your name, Company, Location, Phone number, Email signature.
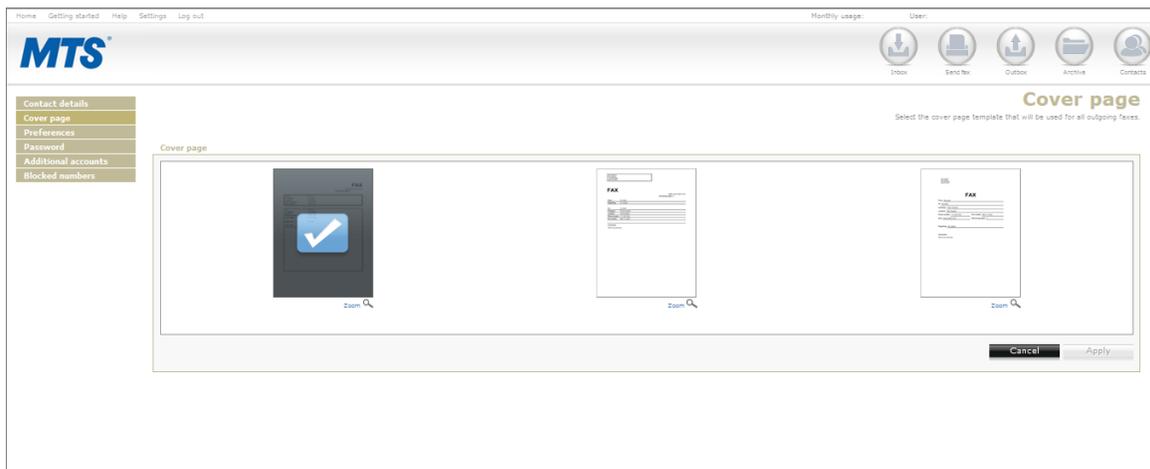

1. Enter your data in the text fields provided.
2. Click **Apply** to save changes or click **Cancel** to dismiss the changes made.

Note: Entering your name is mandatory. You will not be able to edit your email address and fax number.

Cover Page

In this section you can chose a cover page template.

1. Click ![Zoom] to zoom in on a chosen template.
2. Click on the chosen template. As soon as you click on a template it will be displayed with a check mark.
3. Click **Apply** to save the changes or click **Cancel** to dismiss the changes.

Preferences

In this section you can choose the format of the fax attachment as well as the language in which you would like to use the application.
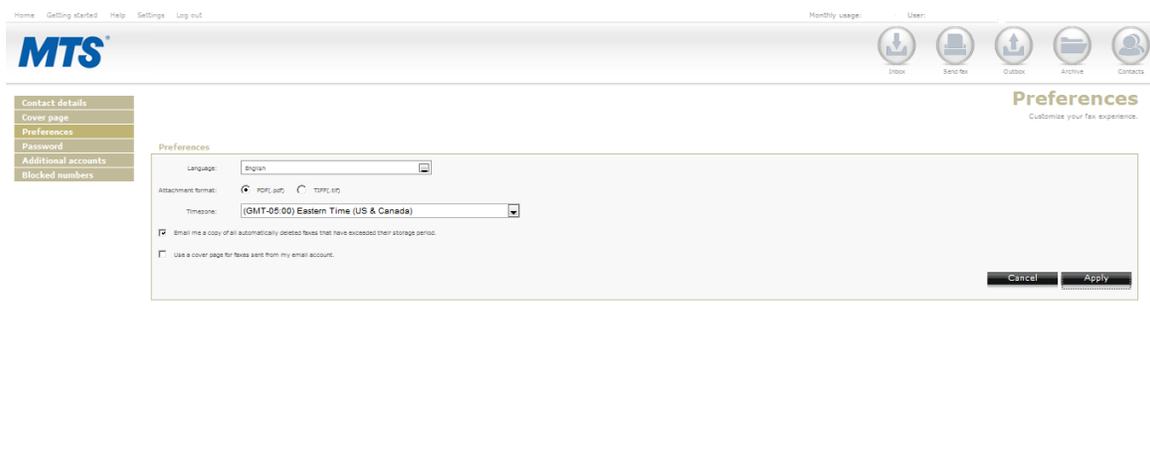
1. Click on the **drop-down menu** to choose the preferred language.
2. Choose the attachment format you wish by clicking on the radio button (**PDF** or **TIFF**).
3. Check off **Email me a copy of all automatically deleted faxes that have exceeded their storage period** if you would like to have the deleted faxes that exceeded their storage period sent to your email.

4. Check off **Use a cover page for faxes sent from my email account** if you would like to use a cover page when sending faxes from your email account.
5. Click **Apply** to save the changes made or click **Cancel** to dismiss the changes.

Password

In this section you can change your current password.

1. Enter your current password in the **Current password** field.
2. Enter a new password in the **New Password** field.
3. Enter your new password again into the **Confirm password** field.
4. Click **Apply** to save the changes made or **Cancel** to dismiss the changes made.

Note: Your password must be between 5-10 characters.

Additional Accounts

In this section you can add up to 5 additional accounts.

Add a New Account

1. Click on **Click to add an additional account** in the "Additional accounts" section.
2. The "Additional accounts details" box on the right will become active.

3. Enter an **Email Address** in the box provided.

   Note: Email address is mandatory.

4. Check off one or both of the functionality that you want to add to your email address: **Receive faxes in my email account** or **Send faxes from my email account**.

   Note: You must choose at least one of the options.

5. Click **Add** to add the newly created account or **Cancel** to dismiss all the changes made.

View an Existing Account

1. Click on 🔍 to view the details of the account.

2. The "Additional accounts details" section on the right will become active and it will display the details of the chosen account.

Delete an Account

1. Click on ⊖ to delete an account.

2. A pop-up will ask you to confirm the deletion of the chosen account.

   The additional account will be permanently deleted.

   Are you sure?

   Yes No
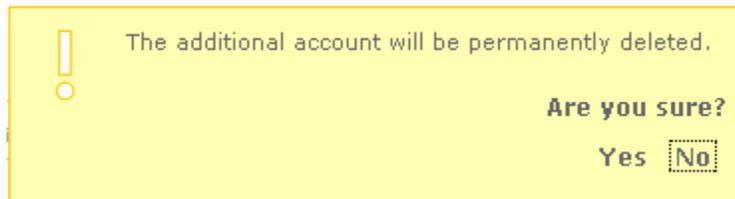
3. Click **Yes** to confirm or **No** to cancel the deletion.

Blocked Numbers

In this section you may block fax number(s).

Search for a Blocked Fax Number

1. Enter a fax number in the **Fax Number** field.

   Note: The proper fax number format includes only numbers and dashes. The area code must be included.

2. Click on **Search**. The results will be displayed within the same page.

   Note: This search will only display blocked fax numbers.

Block a Fax Number

1. Enter a fax number in the **Fax Number** field.

   Note that the proper fax number format includes only numbers and dashes. The area code must be included.

2. Click **Block** in order to block the fax number entered.

Delete a Blocked Fax Number

1. Enter a fax number in the **Fax Number** field.

   Note: The proper fax number format includes only numbers and dashes. The area code must be included.

2. Click on **Search**. The results will be displayed within the same page.

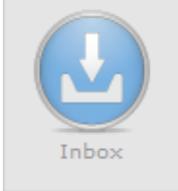   **Note:** This search will only display blocked fax numbers.

3. Click on the ⊖ icon besides each number in order to delete the number.

4. Click **Yes** to confirm the deletion or **No** to cancel the deletion.

Managing the Fax Inbox

The Inbox allows you to manage all received faxes. Faxes are stored in the Inbox for 40 days. All faxes that exceed 40 days will automatically be sent to your email address assigned to your Desktop Fax account in Portable Document Format (PDF) before they are deleted from our system.

The Inbox displays the following information for each fax that you have received:

- Fax Number
- Company Name
- Pages
- Date Received
- Management Utilities (icons)

Management Options

Management options are a series of icons, which provide the ability to store or send your fax contents.

The table below provides a brief description for each icon and a link to the step-by-step instructions.

Utility	Description
Preview Fax ▢	See a thumbnail preview of your fax
View Fax 🔍	View a full-size version of your fax
Rotate Fax ⟳	Rotate your fax to adjust the view
Email fax document ✉	Send a received fax as an email attachment
Download PDF PDF	Download your fax as a PDF document
Download TIFF ⬚	Download your fax as a TIFF document
Move to Archive 📁	Move the fax to your archive folder
Delete ⊖	Permanently delete the selected fax

Preview a Fax

- Click the **Preview Fax** icon. ▢

View a Fax

- Click the **View Fax** icon 🔍 .
  The fax thumbnail is displayed.

Rotate a Fax

- Click the **Rotate Fax** icon. ⟳
  The fax image will rotate 90° clockwise.

Email a Fax as an Attachment

1. Click the **Email fax document** icon. ✉
   The Forward fax via email screen opens.

2. Enter the email address in the **Email Recipients** field.

   Note: Multiple entries must be separated by commas.

   Alternatively, click the **Select contact(s)** link to add a contact from the list of existing contacts
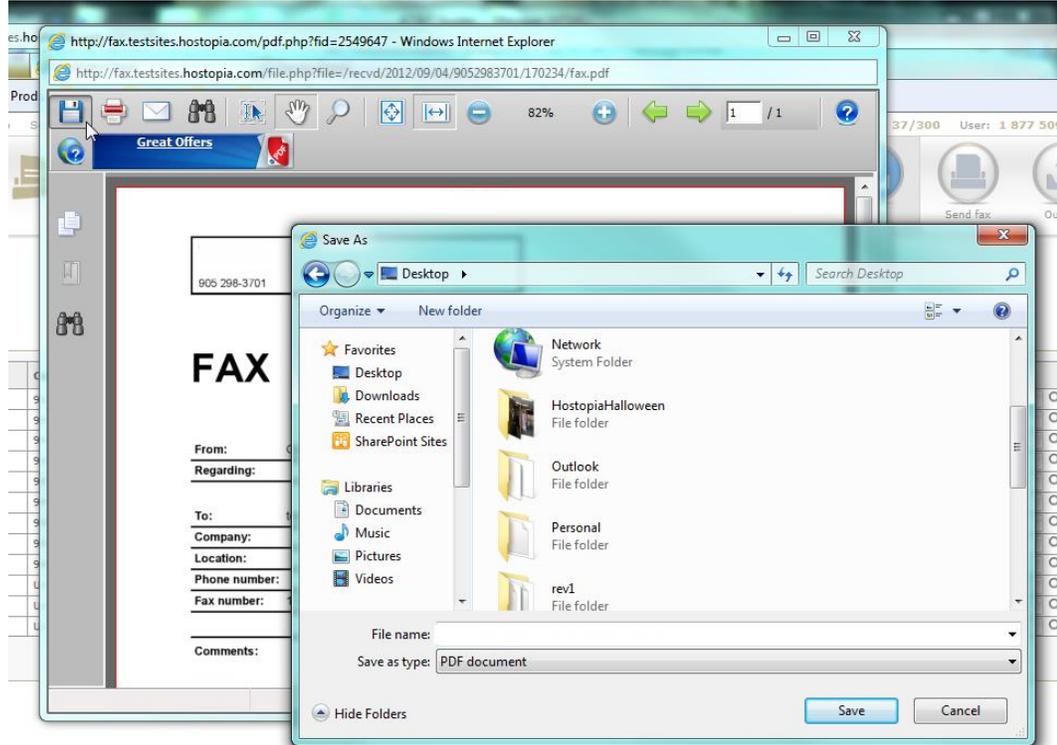

3. Enter the message description in the **Email message** field.

4. Click **Send**.

Download a Fax as a PDF

1. Click the **Download PDF** icon.
   All the fax contents will be converted into a PDF document in a detached window.
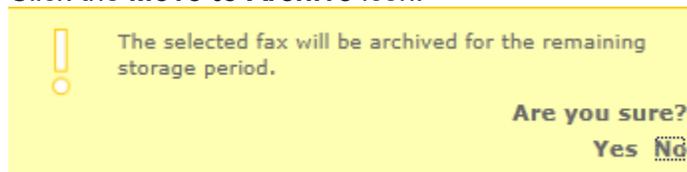

2. Click the **Save** icon.

Download a Fax as a TIFF

- Click the **Download TIFF** icon.
   All the fax contents will be converted into a TIFF document.
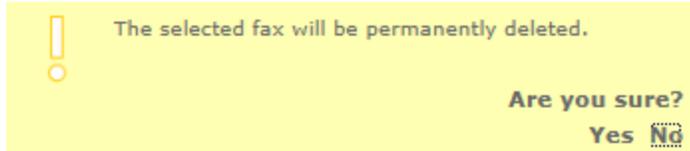

Move a Fax to the Archive

1. Click the **Move to Archive** icon.

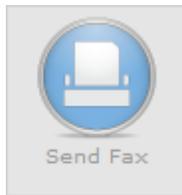2. On the Confirmation dialog, click **Yes**.

Delete a Fax

1. Click the **Delete** icon. ⊖

> ⚠ The selected fax will be permanently deleted.
>
> Are you sure?
> Yes No

2. On the Confirmation dialog, click **Yes**.

Note: Faxes that have been deleted are permanently removed from the system and cannot be restored.

Managing Outgoing Faxes

The "Send Fax" section allows you to create and send files on your computer as faxes; you can also send faxes to multiple recipients simultaneously. Once sent, a fax will be queued in the Outbox for delivery.

When sending a fax, you have the option to include a cover page, include recipients from your contact list, and add multiple attachments.

Send a Fax

1. Enter multiple fax numbers in the **Destination Fax numbers** box.

    Note: If you choose to enter multiple fax numbers please make sure you separate them by semi-colon. You can enter the fax number (s) manually or you can select from among your saved contacts by clicking on **Select contacts**. When you click on **Select contacts** a new window will open where you can add the wanted fax numbers.

2. Select Files to Fax by clicking **Browse**. You may attach up to three files.

3. Select the checkbox if you wish to **Add a Cover Page**.

4. Select from the dropdown box the **Language** you wish the cover page to be in (If more than one language is available).

5. Enter the requested information:

    - **Person** - (To whom will you address this fax)

    - **Company** - (company name)

    - **Location** - (location)

    - **Phone Number** – (phone number)

- **Regarding** - (subject line)

- **Comments** - (message)

If you wish to change the cover page template click on "Change cover page". A new window will open where you will be able to choose a new template as follows:

a. Click on 🔍 to zoom in on a chosen template

b. Click on the **chosen template**. As soon as you click on a template it will be displayed with a check mark.

c. Click **Apply** to save the changes or **Cancel** to dismiss the changes.

6. Click **Send** to queue your fax for delivery or **Cancel** to discard changes. Your fax will be placed in the Outbox with status message indicating success /failure of delivery.
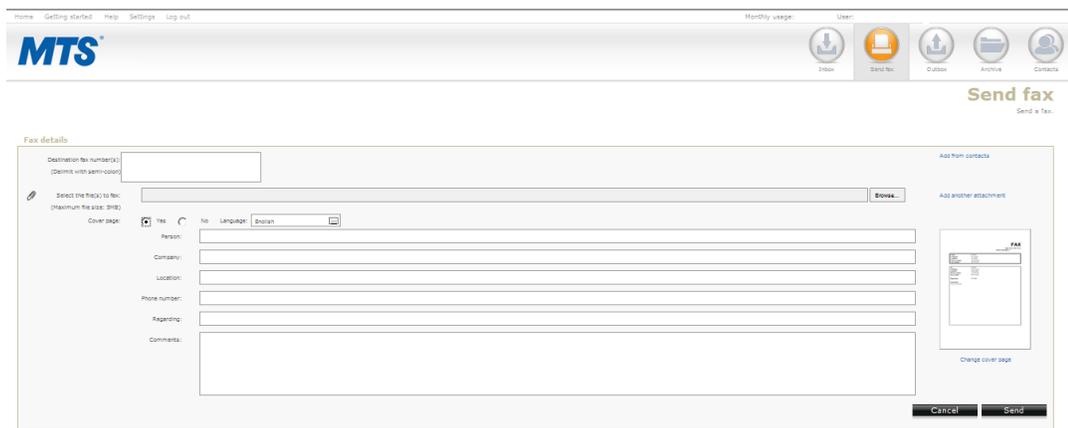
**An attached file cannot exceed 5 MB in size.**

Outbox

The Outbox contains messages that have been queued for sending. A maximum of twenty faxes are queued at any given time (each phone number in a fax with multiple recipients is counted as a separate fax in the queue). The speed at which the queue clears will depend on the complexity of the images being faxed and the length (number of pages) of each fax.

Desktop Fax will make five attempts to send your fax to each recipient. Once a fax has been successfully sent, the fax will be automatically moved from Outbox to your Archive folder; you will also receive a notification by email that the fax was sent successfully.

When a fax is queued in the Outbox it can be removed using the **Delete** icon (⊖) located in the right-hand column.

Archive
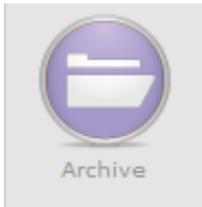
Faxes that have been successfully sent are automatically moved into Archive. In order for Inbox faxes to be moved into Archive, you must click on the **Move to Archive** icon. The Archive provides you with multiple ways to search for sent and received messages. The Management toolbar in Archive uses the same icons and functionality as Management Utilities. Please refer to the "Inbox" section for a full description of the icons.

Search for a Fax in Archive

1. Enter in **keywords** within a fax you wish to search for.

2. From the Company drop-down menu, select the **company name**.

3. From the Sent/Received drop-down menu, specify either **Sent** or **Received** or **Both**.

4. From **Start Date** and **End Date** select the date. This date refers to the time period within which you may have received or sent the fax that you are searching for.

5. Click **Search**.

Contacts

Fax Management allows you to maintain a contact list of fax numbers. Fax contacts may be used when sending or replying to a fax.

Fax Contacts

Creating Fax Contacts List

1. Select the **Fax Contacts** tab.
2. In "Contact list" click on **Add a contact**.
3. Fill in all required information in the "Contact details" section.
4. Click the **Add** button to save changes or **Cancel** to discard the entry.
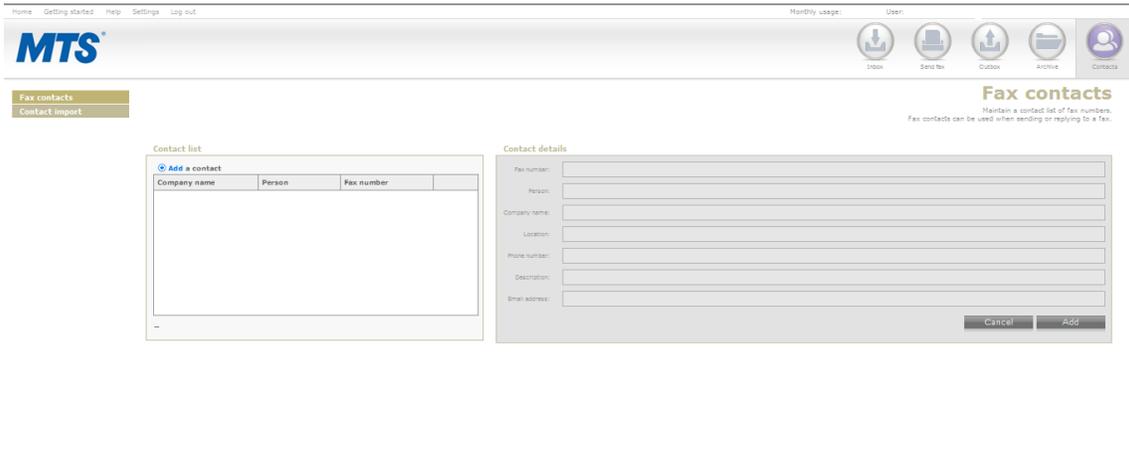
Contact Import

Import Contacts to Fax Management

1. Select the **Contact Import** tab.

2. In "Import Details" specify:

   - **File Name** (Select a CSV File form your computer to import into Fax Management).

   - **Duplicate Contacts** (Ignore or Overwrite).

3. Click the **Import** button to proceed or **Cancel** to discard.
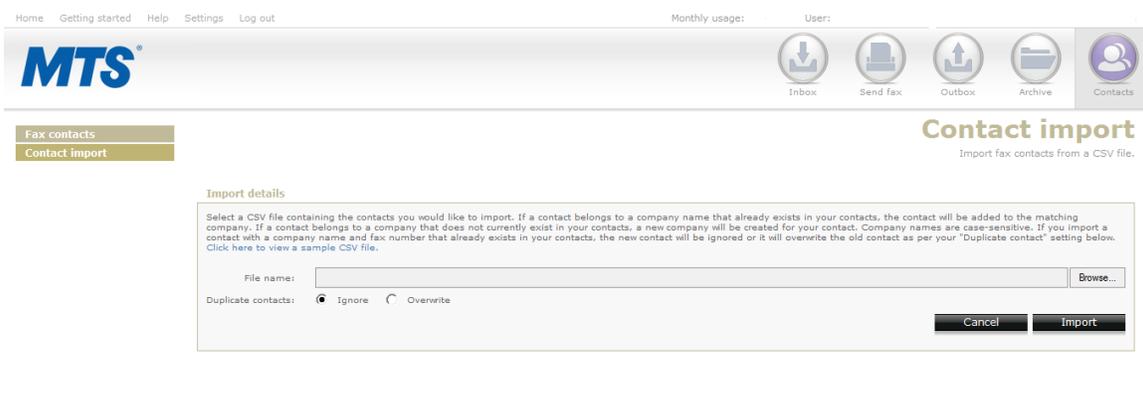
CSV (Comma Separated Value) file must follow a specific format in order to be successfully imported; click the "View a sample CSV file" link located above the "File Name" field.

Usage of Desktop Fax Account

Your Desktop Fax account has a monthly limit. This limit varies by the specific package type you have chosen.

Once an account has exceeded its monthly page quota, the user will be charged on a per-page basis. Quota warnings are emailed to the user at 80%, 90%, and 100%.

Email to Fax

The email to fax feature allows you to send a fax from any of your existing Desktop Fax account numbers. You do not need to log in to the Desktop Fax application to use this feature.

Note: If you have multiple fax numbers associated with your account, you must specify which number you are sending the fax from.

Send Fax from Email

1. From your email account, **create new email**.
2. In the **To** field, enter one of the following:

   - If you only have one fax number associated with your account, enter the "fax number to" followed by @fax.domain.com

     Example:
     5551234567@fax.domain.com

   - If you have more than one number associated with your account, enter the "fax number to" + "fax number from" followed by @fax.domain.com

     Example:
     5551234567+2123134444@fax.domain.com

Note: Do not use spaces or hyphens in the in the subject line. Any unnecessary characters will prevent successful fax transmissions.

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