

# Getting Started with Nextiva Virtual Fax

## Step 1 Accessing Your Account

After you have purchased Nextiva's Virtual Fax Service, it takes approximately 24 hours to activate. After it has fully activated, you will receive login information for the Virtual Fax portal at [www.nextivafax.com](http://www.nextivafax.com).

Welcome

Username:  
[Text Input Field]

Password:  
[Text Input Field]

Remember My Username

Log Me In Automatically

[SUBMIT](#)

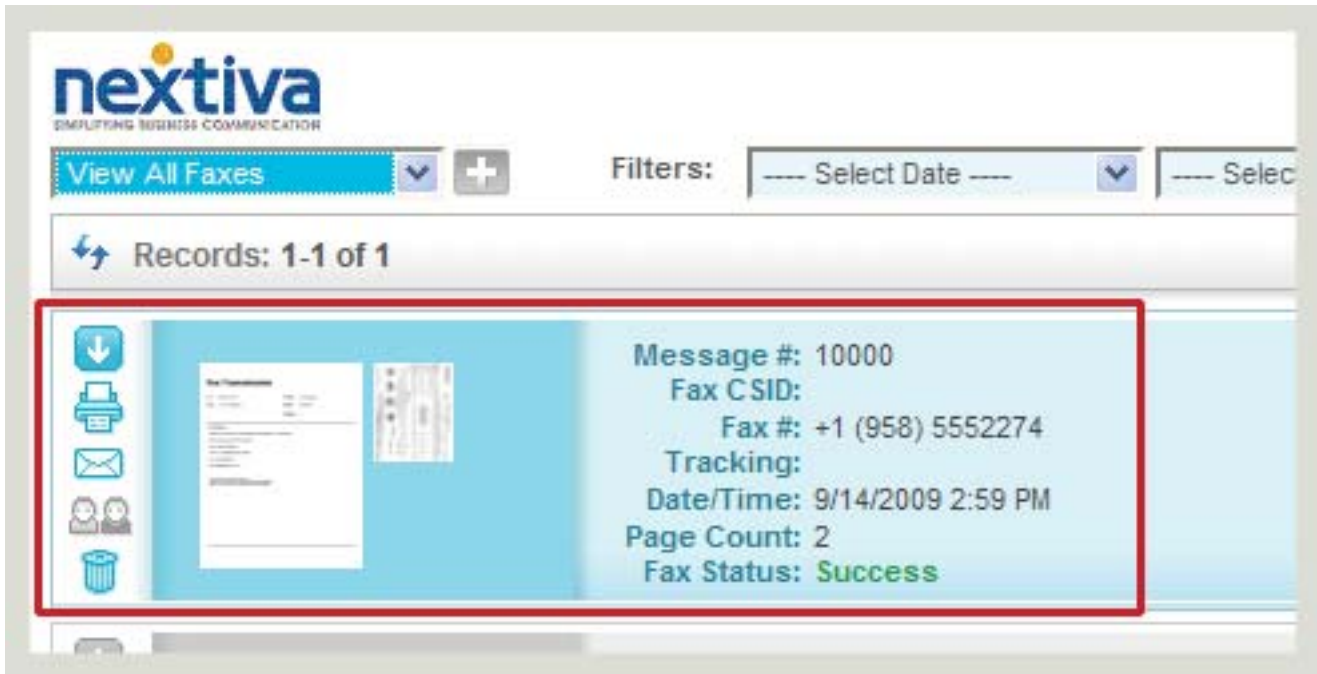
Password Recovery

Welcome  
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email int

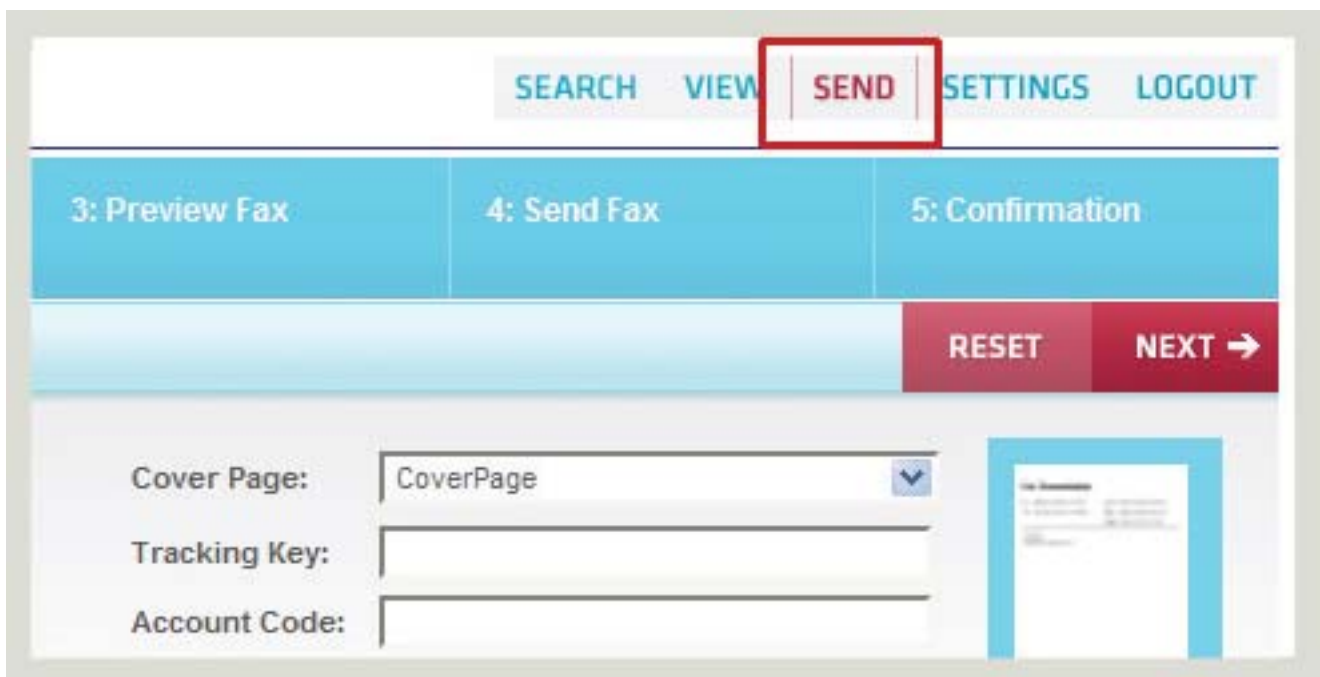
## Step 2 Organize Your Portal Screen

Once successfully logged in, you will be presented with the main portal screen. On this screen you will see any recent faxes. Both sent and received. On this screen you can organize all of your faxes by type, and organizational folders that you can create through the settings area.



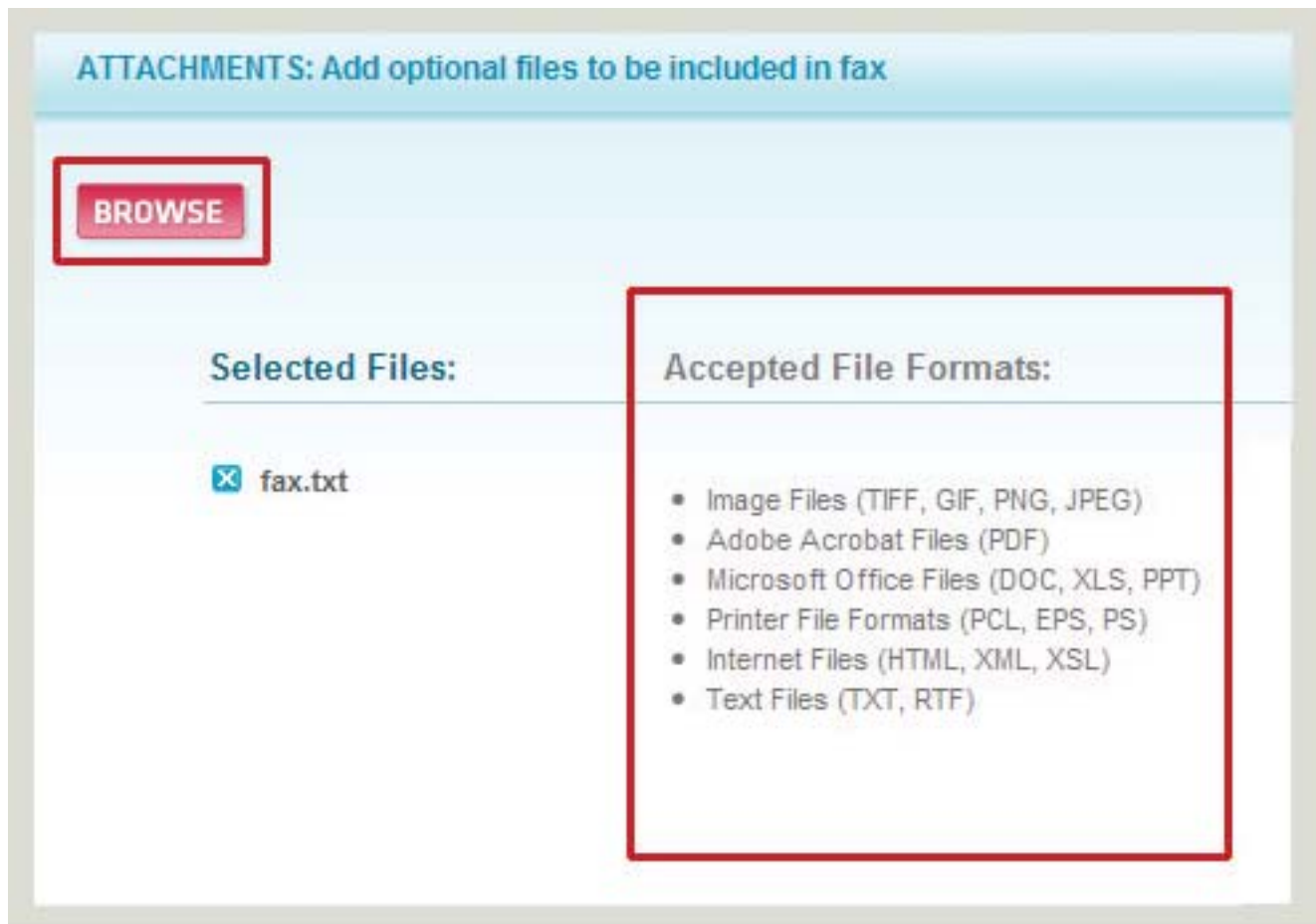
### Step 3 Sending Faxes

To send a fax, click 'Send' from the menu at the top of the page. Most of the settings on this page are pretty straight forward. The only required field, is the phone number. The rest of the fields are completely optional based on how the receiver wants the fax to be sent. Click 'Next' once you have filled in the desired fields.



## Step 4 Uploading Your Fax Document

On the next screen is where you will choose the file you want to send. As you can see from the “Accepted file list’ it can accept most standard media. Simply click ‘Browse’, then select the file you wish to send from your computer. Please also note that you can attach as many files as you wish, you are not limited to one file per fax. Once done, click next.



**ATTACHMENTS: Add optional files to be included in fax**

**BROWSE**

**Selected Files:**

- ✕ fax.txt

**Accepted File Formats:**

- Image Files (TIFF, GIF, PNG, JPEG)
- Adobe Acrobat Files (PDF)
- Microsoft Office Files (DOC, XLS, PPT)
- Printer File Formats (PCL, EPS, PS)
- Internet Files (HTML, XML, XSL)
- Text Files (TXT, RTF)

## Step 5 Fax Transmission Detail

This screen will give you a preview of the fax that's being sent, along with the header. Don't worry about the code in the fields of the header page. Those are filled in based on what you included in Section 1 of the send fax wizard. If you did not fill in those areas, the code will be blank on the recipients side. Also note that not all of your attachments will be viewable when you click on them for a preview.

COVER PAGE REVIEW:

← EDIT

NEXT →



# Fax Transmission

**To:** \$\$MESSAGE.HEADER.SUBJECT\$\$

**Fax:** \$\$DELIVERY.DISPLAY\_ADDRESS\$\$

## Step 6 Filter Settings

Settings filters helps to keep your faxes organized. Once you have setup Folders, and other ogranizational rules, you can quickly select them before sending the fax. This will make it easier to find and organize your fax later. The options on this screen are completely optional. If you do not use them, click next to proceed to send your fax.

### OPTIONAL: Set Filters for Easy Archiving

Filters allow faxes to be quickly located in the future. You can switch over modify filter options. Your fax send session will not be reset.

Type:

Folder:

Note:

If needed, you can send a copy of the fax transmission to the following re

## Step 7 Fax Confirmation

The fax confirmation page displays details about the fax transmission. It will let you know that the fax has been processed and is now currently trying to transmit to the recipient. From the menu at the top of the page, you can click the 'View' tab, and view the status of faxes to make sure they were sent successfully, or if there were any errors.

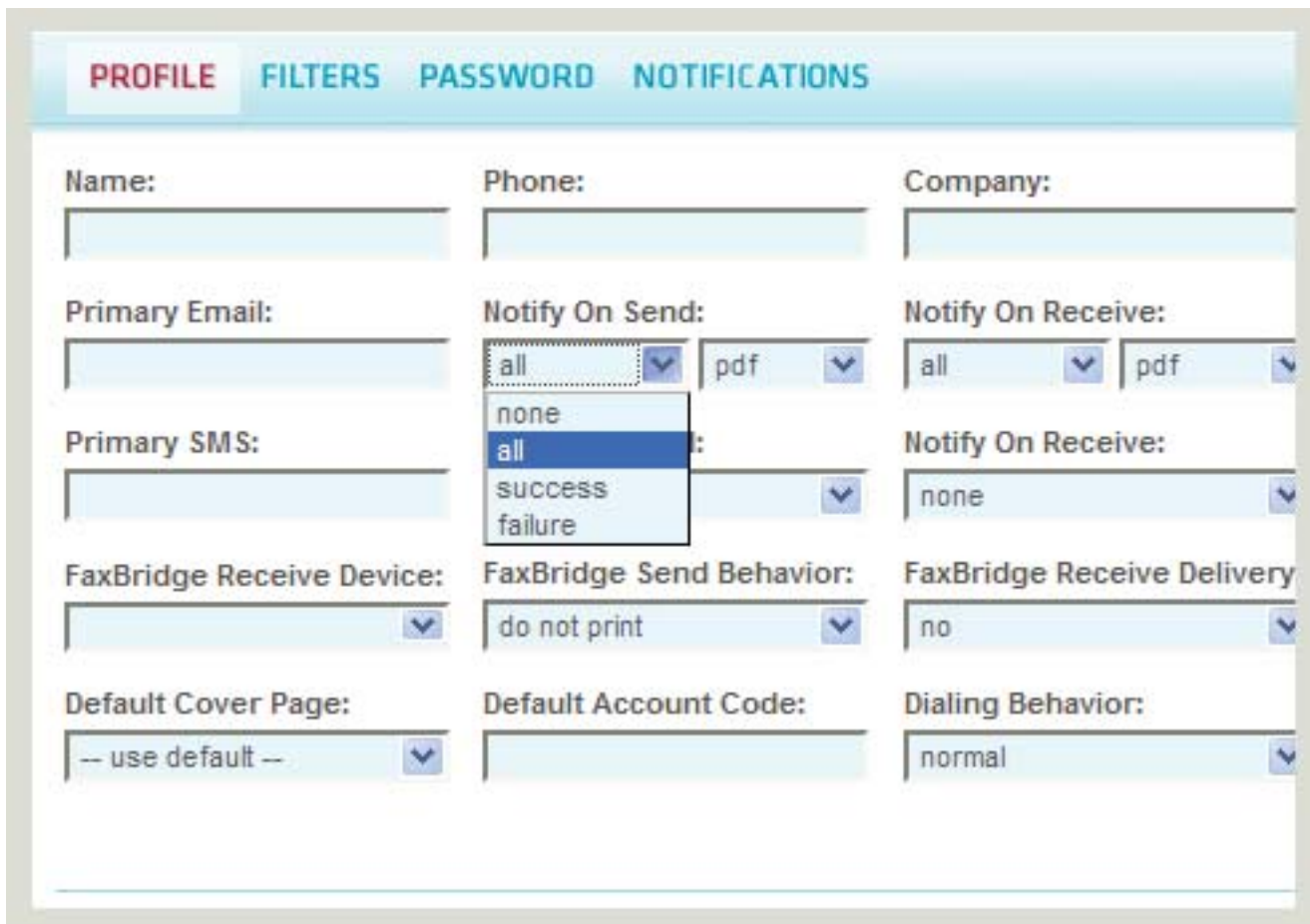


## Account Settings

The settings page is where you can drill down and get the exact type of notifications and organization that you want with your Virtual fax account.

### The Profile Tab

This is where you enter your name, phone, company and primary email address that you want fax notifications to be sent to. This is also where you can choose how you want to be notified. Such as on all faxes, only on successful or only on failed fax transmissions. Also you can choose if you want the notifications to be as a .tiff file, a .pdf, or no attachment at all. You can do these notifications for both sent and received faxes. You can also add your cellphone number so that you can be notified of faxes while your out in the field.



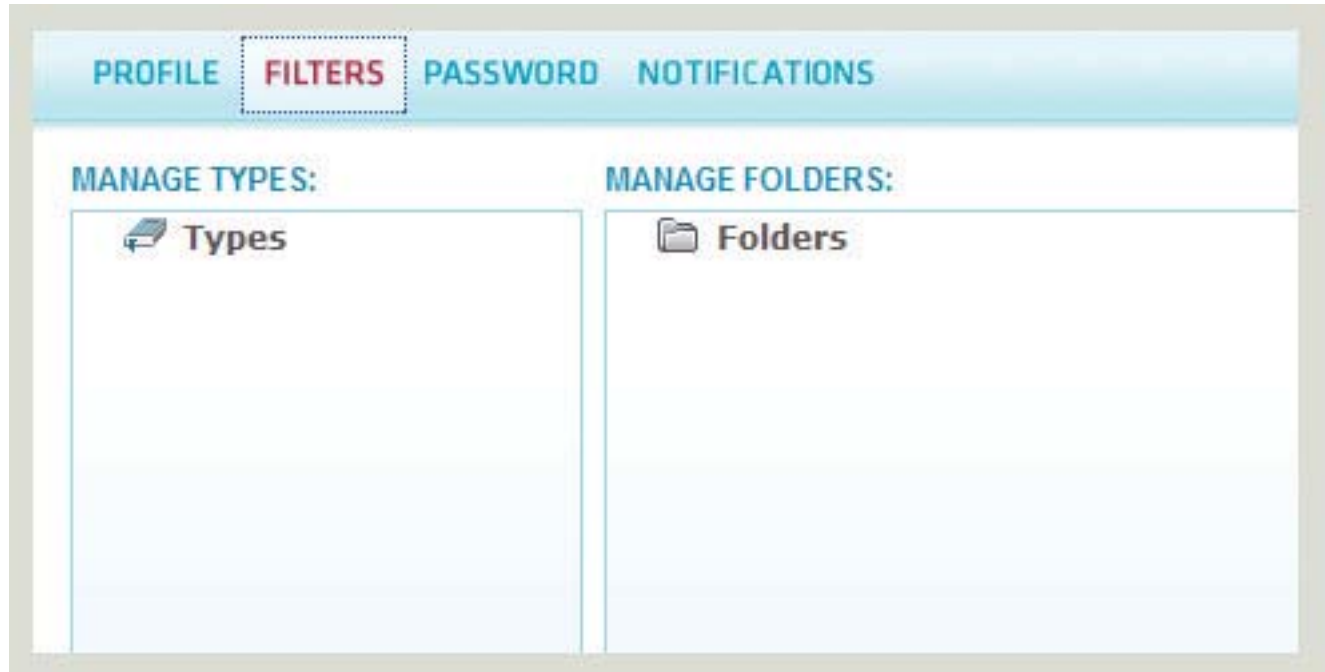
The image shows a screenshot of the 'PROFILE' tab in an account settings interface. The interface has a light blue header with four tabs: 'PROFILE' (selected), 'FILTERS', 'PASSWORD', and 'NOTIFICATIONS'. Below the header, there are several input fields and dropdown menus arranged in a grid. The 'Name', 'Phone', and 'Company' fields are empty text boxes. The 'Primary Email' field is also empty. The 'Primary SMS' field is empty. The 'FaxBridge Receive Device' dropdown is set to 'no'. The 'Default Cover Page' dropdown is set to '-- use default --'. The 'Notify On Send' dropdown is set to 'all', and its menu is open, showing options: 'all', 'none', 'success', and 'failure'. The 'FaxBridge Send Behavior' dropdown is set to 'do not print'. The 'Default Account Code' field is empty. The 'Notify On Receive' dropdown is set to 'all', and its menu is open, showing options: 'all' and 'pdf'. The 'FaxBridge Receive Delivery' dropdown is set to 'no'. The 'Dialing Behavior' dropdown is set to 'normal'.

PROFILE	FILTERS	PASSWORD	NOTIFICATIONS
Name:	Phone:	Company:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Primary Email:	Notify On Send:	Notify On Receive:	
<input type="text"/>	all <input type="button" value="v"/> none all success <input type="button" value="v"/> failure	all <input type="button" value="v"/> pdf <input type="button" value="v"/>	
Primary SMS:		Notify On Receive:	
<input type="text"/>		none <input type="button" value="v"/>	
FaxBridge Receive Device:	FaxBridge Send Behavior:	FaxBridge Receive Delivery	
<input type="button" value="v"/>	do not print <input type="button" value="v"/>	no <input type="button" value="v"/>	
Default Cover Page:	Default Account Code:	Dialing Behavior:	
-- use default -- <input type="button" value="v"/>	<input type="text"/>	normal <input type="button" value="v"/>	



## The Filters Tab

The filter tab is where you can create the organizational rules for your faxes. You can create type rules such as 'Personal' and 'Business' or 'Follow up' and folders that can further those organizational types.



The screenshot shows a user interface with a light blue header bar containing four tabs: 'PROFILE', 'FILTERS', 'PASSWORD', and 'NOTIFICATIONS'. The 'FILTERS' tab is highlighted with a red dashed border. Below the header, there are two main sections: 'MANAGE TYPES:' on the left and 'MANAGE FOLDERS:' on the right. Each section contains a large, empty light blue box with a folder icon and the text 'Types' or 'Folders' respectively.

## The Password Tab:

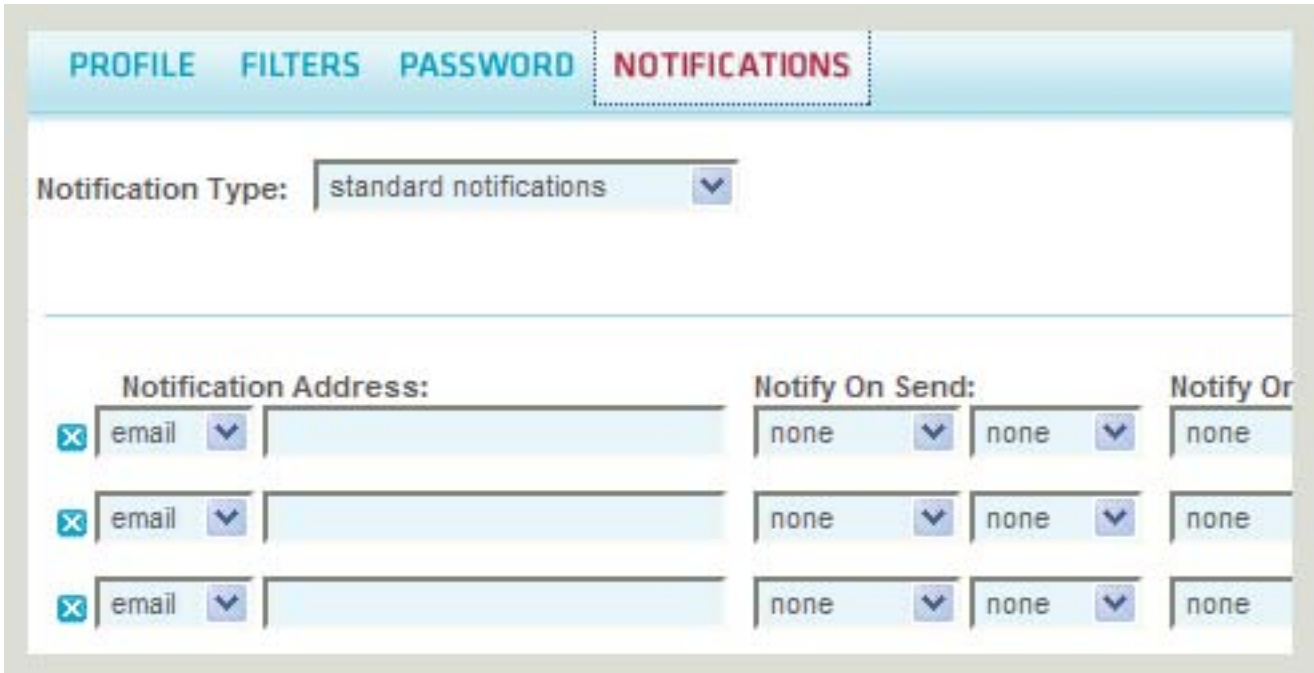
Change your password for the login into this portal



The screenshot shows a user interface with a light blue header bar containing four tabs: 'PROFILE', 'FILTERS', 'PASSWORD', and 'NOTIFICATIONS'. The 'PASSWORD' tab is highlighted with a red dashed border. Below the header, there are three input fields for password management. The first field is labeled 'Old Password:' and has a red error message below it that says 'Please enter your old password above'. The second field is labeled 'New Password:' and the third field is labeled 'Confirm Password:'. All fields are currently empty.

## The Notifications Tab

This is where you can specify additional SMS or e-mail addresses if you want multiple people listed on the notifications



The screenshot shows a user profile interface with a navigation bar at the top containing 'PROFILE', 'FILTERS', 'PASSWORD', and 'NOTIFICATIONS'. The 'NOTIFICATIONS' tab is selected and highlighted with a red border. Below the navigation bar, there is a 'Notification Type:' dropdown menu currently set to 'standard notifications'. Below this, there is a table for adding notification addresses. The table has three columns: 'Notification Address:', 'Notify On Send:', and 'Notify On'. There are three rows, each with a blue 'x' icon in a box, a dropdown menu set to 'email', an empty text input field, and two dropdown menus set to 'none'.

Notification Address:	Notify On Send:	Notify On
<input type="checkbox"/> email <input type="text"/>	none <input type="text"/>	none <input type="text"/>
<input type="checkbox"/> email <input type="text"/>	none <input type="text"/>	none <input type="text"/>
<input type="checkbox"/> email <input type="text"/>	none <input type="text"/>	none <input type="text"/>