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.


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.
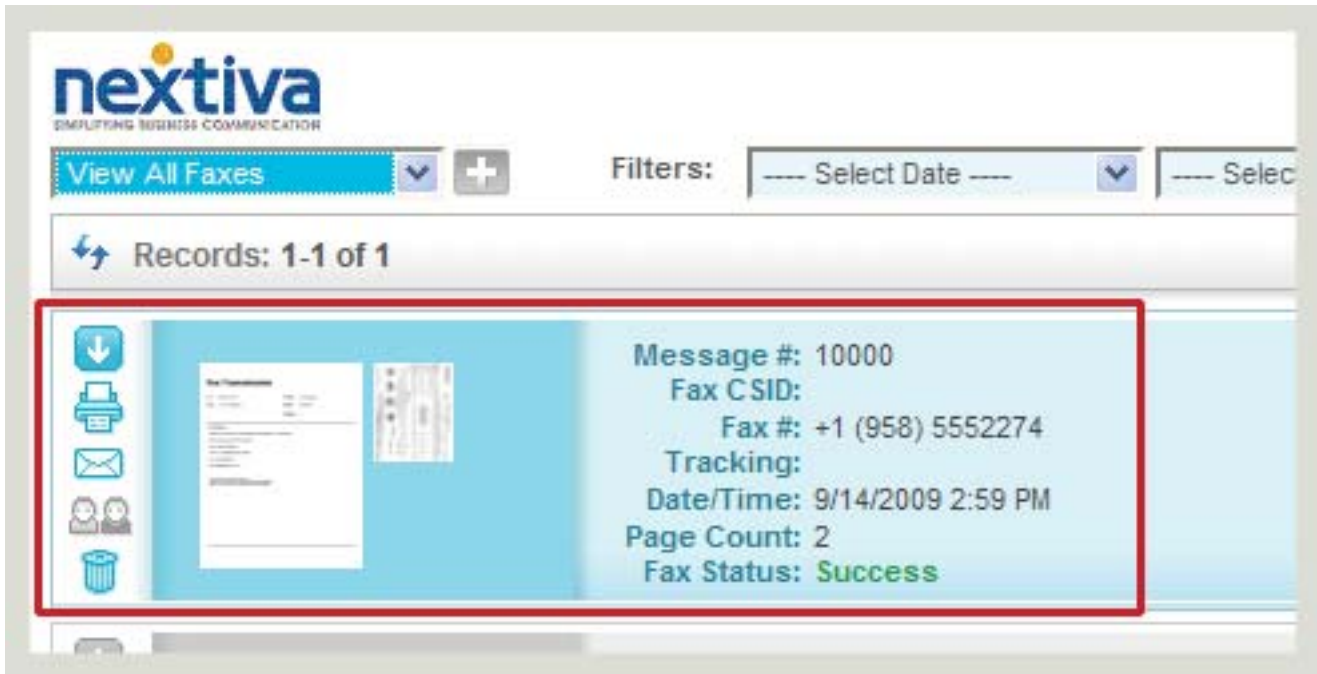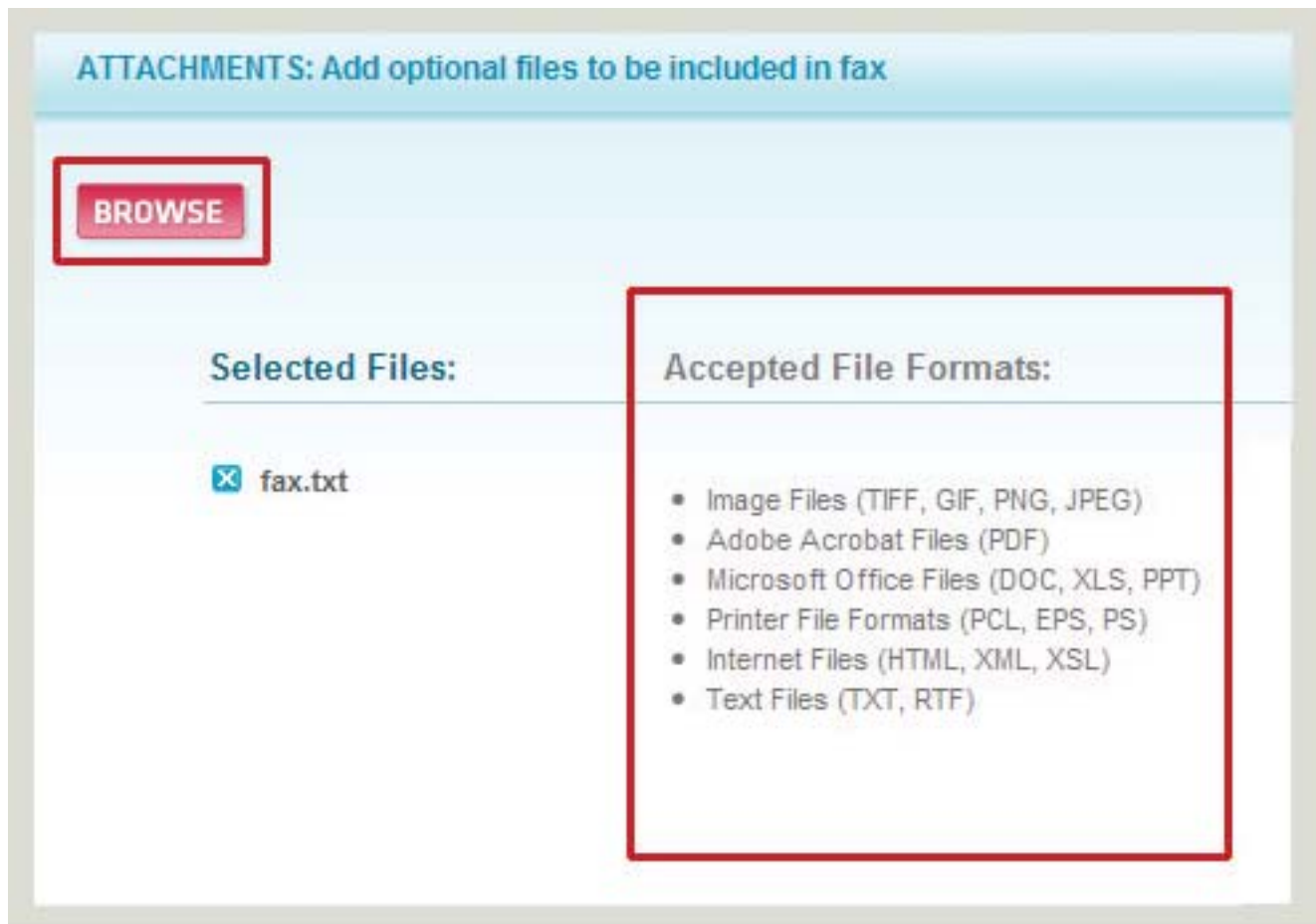
Step 3　**Sending Faxes**

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.
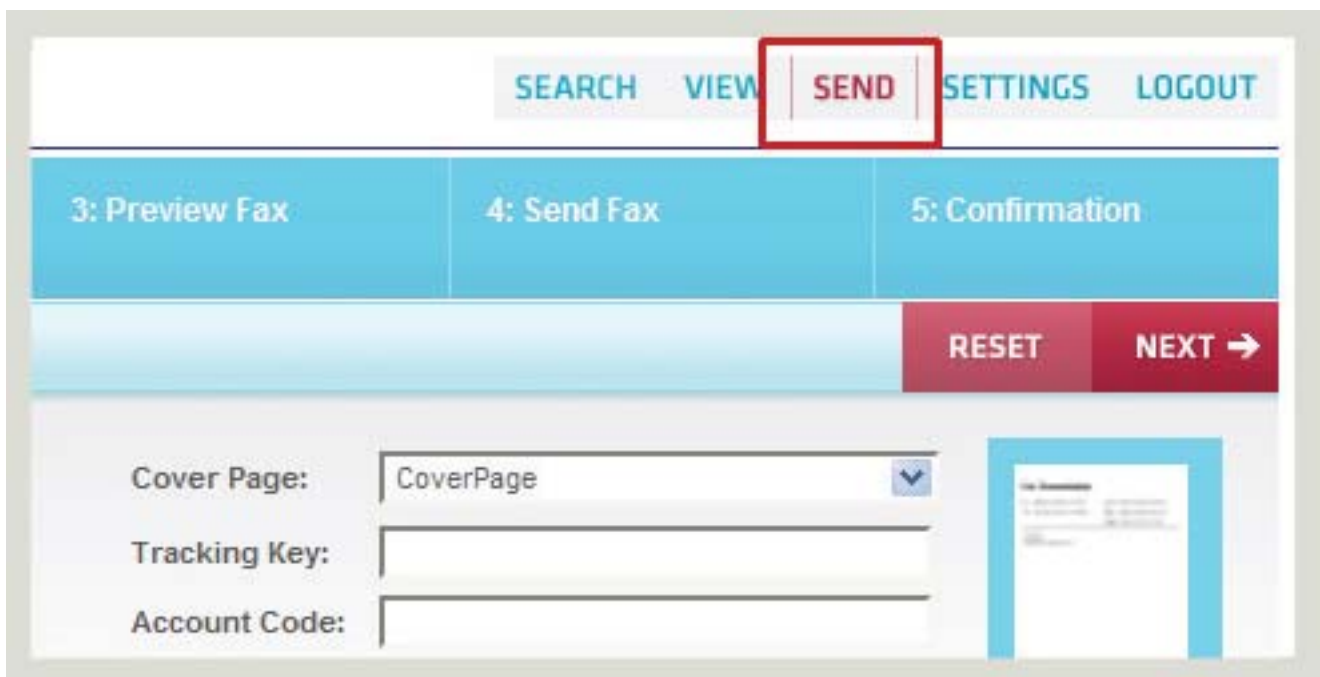
Step 4   **Uploading Your Fax Document**

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.

Step 5   **Fax Transmission Detail**

This screen will give you a preview of the fax thats 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.

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 ove
modify filter options. Your fax send session will not be reset.

Type: ---- Select Type ----

Folder: ---- Select Folder ----

Note:

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

Step 7 **Fax Confrimation**

The fax confirmation page display 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.
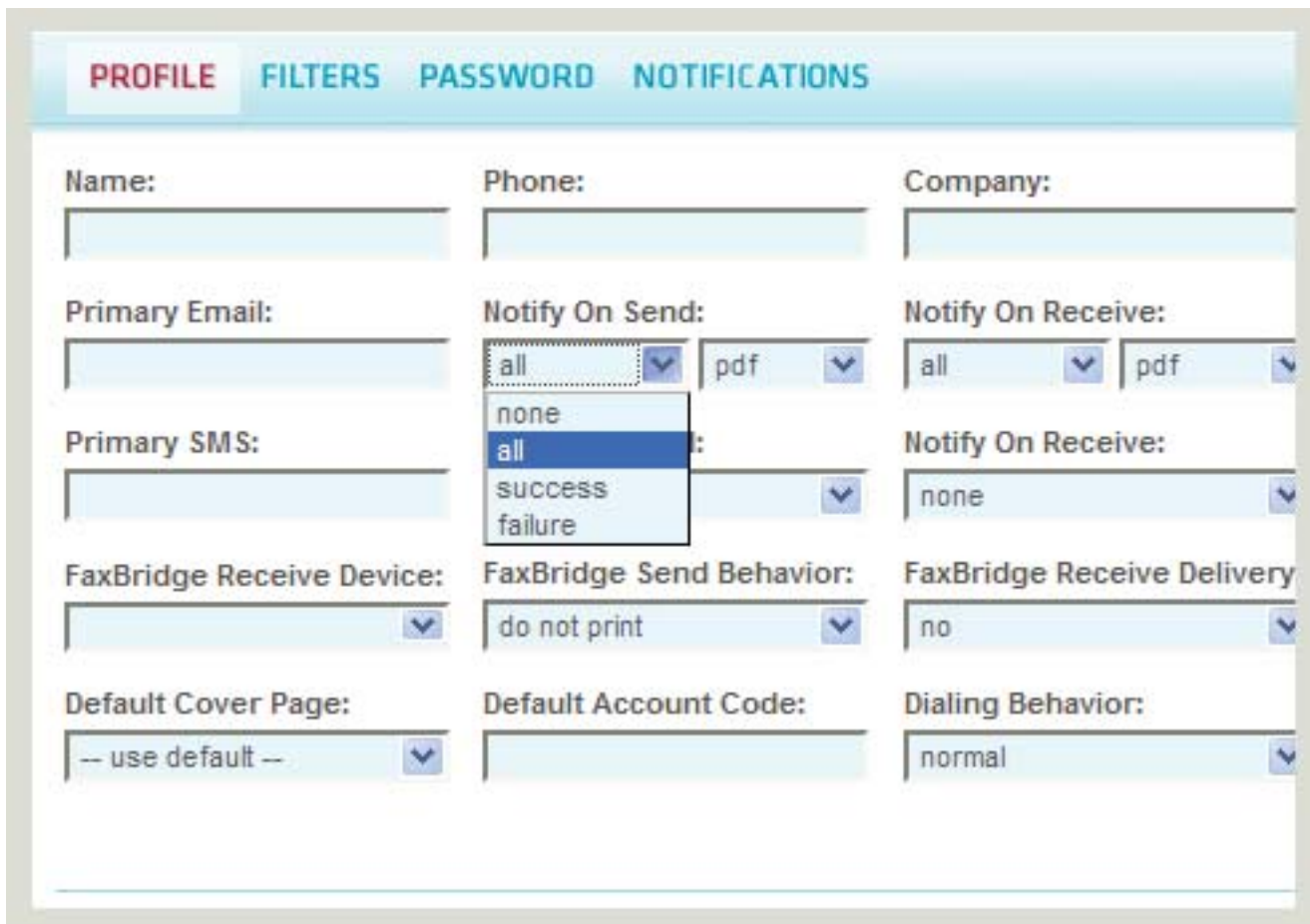
MESSAGE:

⚠ Fax queued for delivery to: +1 (555) 5555555

📄 Message #: 1006735

MORE OPTIONS:

➕ Send a new fax

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 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.

PROFILE	FILTERS	PASSWORD	NOTIFICATIONS

MANAGE TYPES:

✉ Types

MANAGE FOLDERS:

📁 Folders
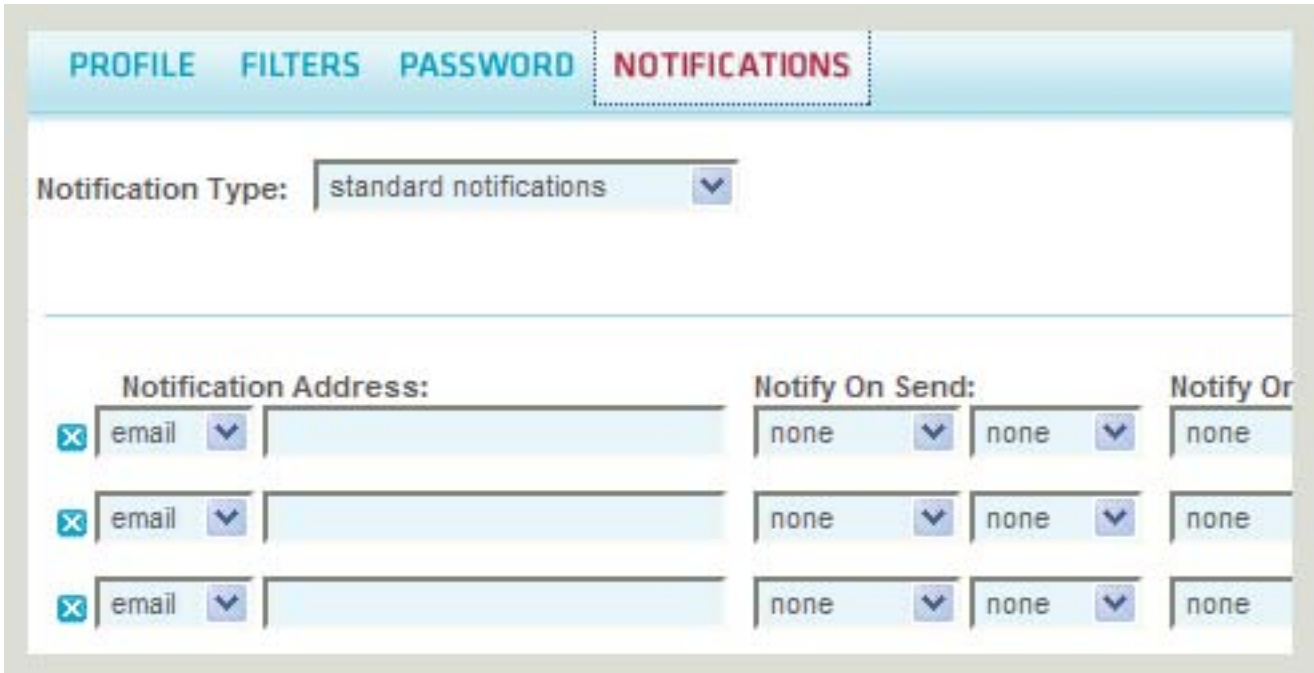
The Password Tab:

Change your password for the login into this portal

PROFILE	FILTERS	PASSWORD	NOTIFICATIONS

Old Password:

Please enter your old password above

New Password:

Confirm Password:

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