



## SRFax User Guide

# My Account

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### Account Summary

The account summary page is an overview of the status of your account. Your current balance, SRFax fax number and page usage details are given. You can also Refer a Friend from this screen for which you will receive a credit on your account if the referee signs up for our service. There are no input fields on this screen.

### Billing Details:

The company, contact name and address details you enter here will be reflected on your monthly invoice.

### Credit Card Details:

You can change the credit card number we have on file from here.

### Billing Notifications:

If you need to copy another Email address on your monthly invoice and credit card transaction details. You can enter multiple email addresses in this field.

### Past Invoices:

Select from the drop down the month you wish to view. We keep a history for the past year.

### Transaction History:

This is a table showing the financial history of your account for the past year.

### Login Email / Password

In this section you can alter the login Email address and your password for SRFax. The Login Email address is also the primary email address.

### Closing your account

If in the unlikely event that you wish to close your account you can do so from this screen. We appreciate your feedback as to why you wish to close your account.



# Settings

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## General Settings

### Screen Display Mode:

Select "Portrait" where only main menu is visible at the top and sub menus are displayed when your cursor is held over the main menu item. Select "Landscape" for menus to be shown on the left of your screen.

### Email Format:

Select "Plain Text" if you do not want any graphics on the email notifications. Plain text will also be less likely to be deemed as spam by spam filters. Select "HTML & Plain Text" to have the best of our graphical interface.

### Preferred File Format:

Select PDF or TIF.

### Months to keep Faxes:

Enter the number of months you wish to keep faxes, received and sent, on-line (min of 1 month and a max of 360 months)

### Login Landing Page:

Select the page you want to be taken to when you login to your account.

### Time Zone:

Select the time zone you are in. This will make the system timestamp all your faxes in your own time zone.

### Mobile Settings:

If you wish to receive a small text message notifying you of a sent or received fax enter your mobile number and service provider here. You can then select if you want a notification for sent or received faxes in the settings for those sections.

## Settings for Sending Faxes



### **Notification Settings:**

Set the radio button to the fax status you wish to be notified on and then enter all the Email addresses to notify. You can also select if the fax is to be attached to the Email notification and if you want a preview of the first page. Mobile notifications can also be selected.

### **Authorized Users:**

You can have up to 9 Email addresses registered to your account for sending a fax by Email

### **Password protection:**

To further increase security select this option and then you will need to place your password on the subject line of the email. The password must be entered on the subject line as follows: "pass=yourpassword" (without the quotes)

## **Settings for Receiving Faxes**

### **Notification Settings:**

Set the radio button to On or Off and then enter all the Email addresses to notify. You can also select if the fax is to be attached to the Email notification and if you want a preview of the first page. Mobile notifications can also be selected.

### **Junk Fax Settings:**

Select the options under which we are to assume a fax is junk and we will automatically move this to your Junk Fax folder without any notification to your Email. Junk Faxes will remain in your account for 30 days unless you move them back to your Received Faxes folder.

### **Blocked Senders:**

Whenever you mark a fax as Junk the Caller ID and the Remote ID are then added to the Blocked Senders list. There may be a reason for you to remove a number from the Blocked Senders list from here.

## **Cover pages**

### **Cover Page Defaults:**

Select the cover page you want as your default. You have 4 to choose from. You can override the default when sending a fax by Email by specifying the cover page to




use. You can change the text shown at the very top of each page faxed by entering the text in the Fax Header field. If you have a disclaimer, place the text in the disclaimer box and it will be placed on ALL cover pages. You can also select the font and font size to use for the disclaimer text.

#### Cover Page Customization:

You can customize each of the 3 cover pages Standard, Company and Personal. In the Company and Personal cover pages you can upload a logo which will automatically be placed on the cover page. Again, fonts and font sizes can be selected for the Title, Address and Body of each cover page.

## Using SRFax

#### Send a fax Online

The screen is self explanatory. You can select a fax number from the address book by clicking of the  button. When sending a single fax you will only be able to select one number from any of the groups in your address book. When sending a broadcast fax you will be able to select multiple numbers or Groups by holding the shift key down when selecting numbers. You can broadcast to a maximum of 50 fax numbers at a time.

You can only select a Cover Page when sending a single fax.

You can select up to 5 attachments and they will be faxed in the numbered order.

You can schedule a fax to be sent at a later time.

#### Send a fax by Email

You are able to send a fax to a single number or broadcast a fax to a maximum of **50** fax numbers. When sending a single fax you can send a fax with or without a cover page. When sending a fax to a single number simply send an email to the fax number followed by "@srfax" (e.g. 14165551212@srfax.com). If you have set the password as required in the settings for "Sending Faxes", then it is mandatory to enter your password on the subject line so that it can be verified. **It is also preferable to send the Email as a "Plain Text" email and not HTML** to ensure maximum compatibility.

#### Sending a Fax without a Cover Page

To send a fax without cover page fields, enter the fax number followed by "@srfax" in the "To:" address field. Note that you will have to attach a file to be faxed and remember to place your password in the subject line as shown below.

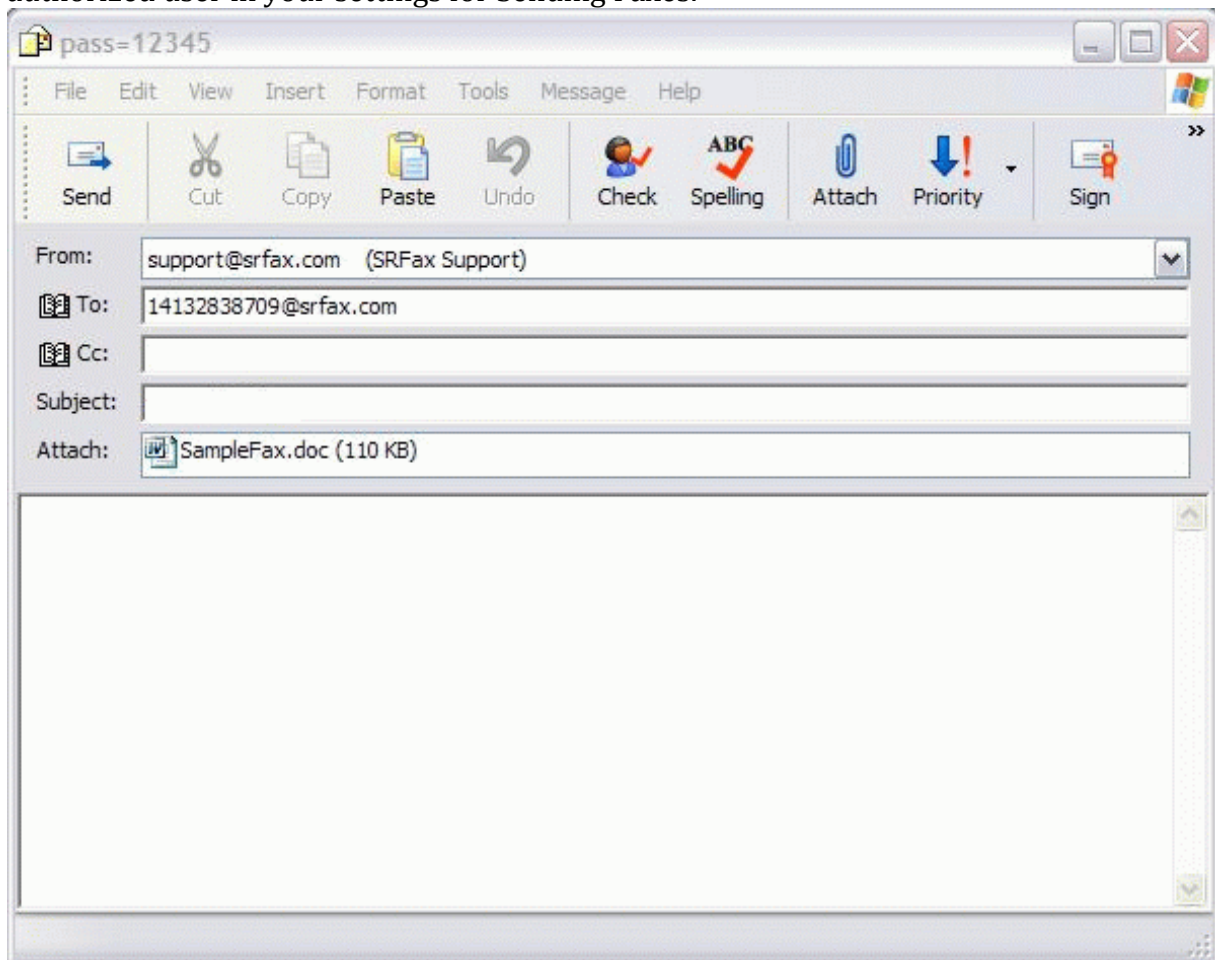
Example:

A. Send a fax to 1-413-283-8709 without cover page fields.



14132838709@srfax.com

**SRFax** will only accept email messages destined for outgoing faxes from valid **SRFax** users. The *from* field of the e-mail message must match an email address specified as an authorized user in your settings for Sending Faxes.



The message body will be ignored when sending a fax without a cover page.

To check on the status of the fax, go to the Faxes Outbox folder. An e-mail with the final status of the fax will be sent to the Email addresses entered in the settings for Sending Faxes.

### **Sending a Fax with a Cover Page**

If a name is assigned to the email address you are sending to (If a name is allocated to a fax number the email address will be displayed as follows "Joe Black <2165551212@srfax.com>") then the system will automatically place that name in the "To" field, the subject line of the Email will automatically be placed in the "Subject" field of the cover page and the body of the Email will be placed in the "Comments" of the cover page.



To override the default settings you can use the following parameters to send a fax with a cover page which will populate the selected cover page:

**To**=NameOfPerson

**Co**=CompanyName

**CP**=B,S,C or P (Blank, Standard, Company or Personal

**AC**=Account or Billing Code

**Retries**=Number of times we are to retry sending the fax - 0 - 6 times (default is 6)

**Pass**=YourPassword

**Sub**=SubjectOfYourFax

**The cover page parameter fields MUST be separated by a forward slash /.**

Specify only the parameters you need.

Examples:

A. Send a fax to 1-413-283-8709 with the subject field of the cover page and no password filled.

Send Email To: 14132838709@srfax.com

Subject Line: Information as requested

B. Send a fax to John Smith at 1-413-283-8709 with no password

Send Email To: 14132838709@srfax.com

Subject Line: To=John Smith / sub=Information as requested

C. Send a fax to John Smith of ABC Inc, at 1-413-283-8709 with a billing code and a password

Send Email To: 14132838709@srfax.com

Subject Line: Co=ABC Inc. / Pass=123456 / To=John Smith / ac=1234 / sub=Information as requested

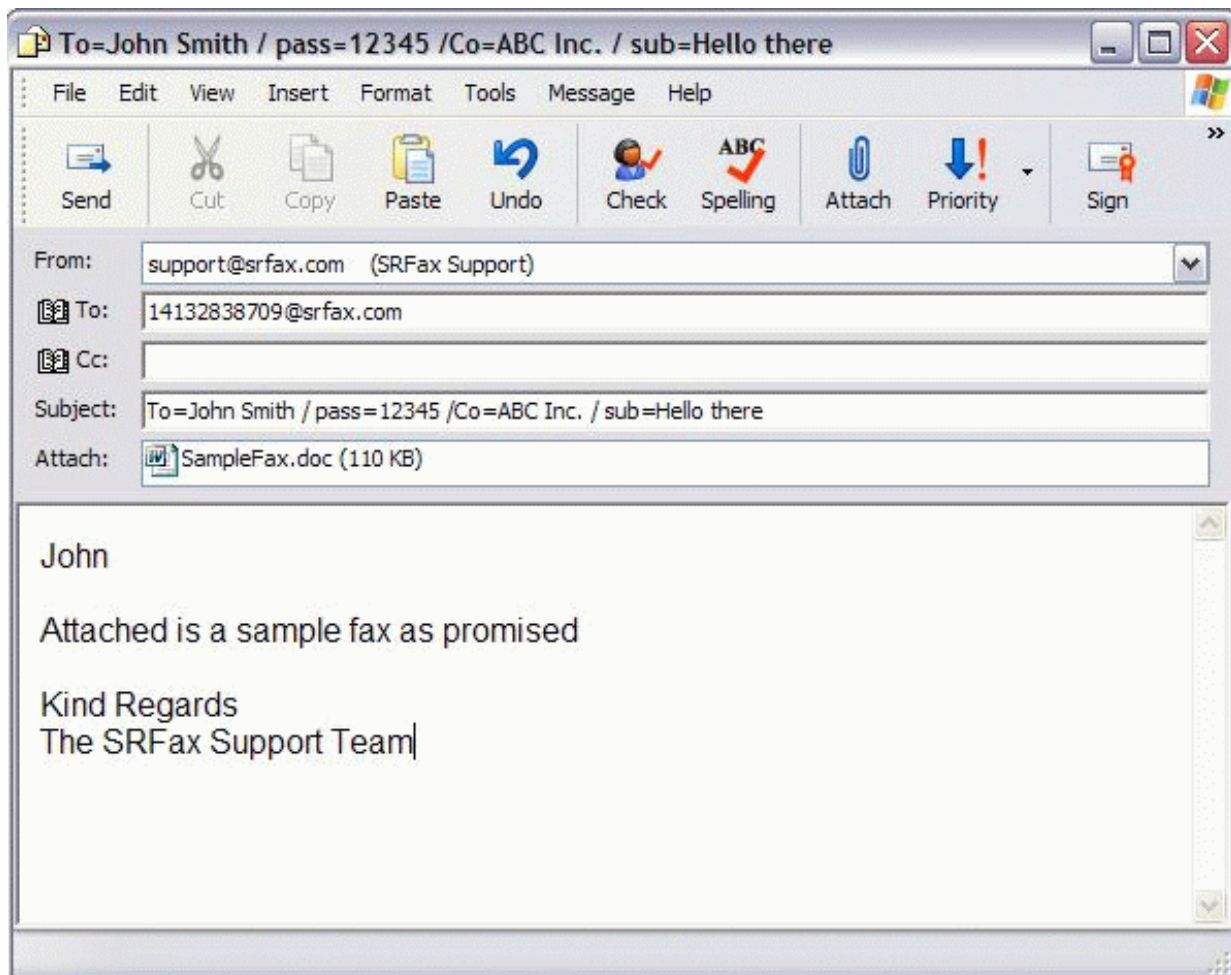
D. Send a fax to John Smith of ABC Inc, at 1-413-283-8709 using the Company cover page.

Send Email To: 14132838709@srfax.com

Subject Line: Co=ABC Inc. / To=John Smith / cp=c / sub=Information as requested

Notice that the you can put the cover page fields in any order and the field names are not case sensitive. You must however split each field with a forward slash "/".

**SRFax** will only accept email messages from authorized users specified in the settings for Sending Faxes.



The message body will be placed in the comments of the fax cover page and can be plain or HTML text, with or without attachments.

To check on the status of the fax, go to the Faxes Outbox folder. You will also receive an e-mail with the final status of the fax.

### **Sending a Fax to Multiple Fax Numbers**

To send a fax to multiple fax numbers just place multiple faxnumber@SRFax.com fax numbers. You can send to a maximum of 50 email addresses (fax numbers) at a time. Since the fax is going to more than one number, **no cover page will be sent.**

Examples:

A. Send a fax to the following numbers: 413-283-8709 515-352-9028 428-523-9932

Send Email To: 14132838709@srfax.com; 15153529028@srfax.com;

14285239932@srfax.com

Subject Line:

**SRFax** will only accept email messages from authorized users specified in the settings for Sending Faxes.



To check on the status of the fax, go to the Faxes Outbox folder. You will also receive an e-mail with the final status of the fax.

## Faxes Received

Screen shows a list of all faxes received for the past year. Select from the drop box which month you would like to view.

Functions available for each fax are as follows:



- Click on this icon to rename the fax to a more meaningful description.



- Click on this icon to view the fax.



- Click on this icon to forward the fax to another fax number.



- Click on this icon to move the fax to Junk Faxes box and block the sender from sending future faxes.



- Click on this icon to delete the fax.

You are also able to select multiple faxes and then either delete the selected faxes or Email the selected faxes.

## Faxes Sent

Screen shows a list of all faxes sent for the past year. Select from the drop box which month you would like to view.

Functions available for each fax are as follows:



- Click on this icon to rename the fax to a more meaningful description.



- Click on this icon to view the fax.



- Click on this icon to view the fax transmission details.



- Click on this icon to re-send the fax to the same fax number.



- Click on this icon to forward the fax to another fax number.



- Click on this icon to delete the fax.

You are also able to select multiple faxes and then either delete the selected faxes or Email the selected faxes.





## Junk Faxes

Screen shows a list of Junk Faxes received within the past 30 days.

Functions available for each fax are as follows:



- Click on this icon to view the fax.



- Click on this icon to remove the fax from the Junk Faxes and return it to the Faxes Received folder.



- Click on this icon to delete the fax.

Faxes in the Junk Faxes folder will remain here for a period of 30 days and then they will automatically be removed.

## Faxes in the Outbox

Screen shows a list of all faxes that have been scheduled to be sent. The different status values be as follows:

**Processing** - The documents submitted are in the process of being converted to fax format.

**Scheduled** - Fax is in the queue and scheduled to be sent at the time shown.

**Queued** - The fax is in the queue and will be sent in the order it was placed in the queue.

**Sending** - Fax is in the process of being sent.

**Retrying** - The fax failed on a previous attempt and will be retied 6 times before failing.

**Failed** - The fax failed and will be transferred to your Sent Faxes box and you will be notified by Email.

## Editing your Address Book

You have one address book but you can have multiple Groups. You can add groups by clicking on the "Add a Group" button and then giving it a name. Once the Group is added it will be displayed for you to select on the left of the screen. Select the Group you wish to work with and then you can Import numbers into that group or you can add individual numbers to that group.

To import numbers create a comma separated file (.csv) containing one Fax number and Name per line. For Example:

```
Joe Black,16047136699  
Mary White,12065551212  
Barry Blue,12125552424  
etc.
```



## **Reporting - Call Log**

Select the time period you wish the report for and then you can also select the fax status you want reported on. You can also request that the report show only specific numbers or parts of numbers. Once the report has generated you can then download it as an Excel spreadsheet for further manipulation.