



# Concord Fax Online Administrator Guide

V. 4.0.0 (2010)

## **Publication Notice**

The contents of this publication and the specifications of this application are subject to change without notice.

Concord reserves the right to make changes without notice to this publication, Concord software, and services, and shall not be responsible for any damages, consequential or otherwise, caused by reliance on the materials presented herein, including typographical errors.

This is the second edition of this publication.

### **Version**

This guide describes the Account Administration Center version 2.2, release date February 20, 2009, and revised May 11, 2010.

# Contents

|  |       |
|--|-------|
| Publication Notice .....   | 2     |
| Version .....  | 2     |
| About Concord Fax Online .....                                       | 4     |
| Audience .....   | 5     |
| Supporting Documentation .....                                       | 5     |
| Administering Concord Fax Online .....                               | 6     |
| Managing User Accounts .....   | 6     |
| Cover Page Control.....  | 7     |
| Creating An Attractive Fax Cover Page .....                          | 8     |
| Customizing Cover Pages and Notification Messages.....               | 10    |
| Example Initial Notification Message.....                            | 11    |
| Example Delivery Notification Message.....                           | 11    |
| Submitting the Files.....  | 11    |
| Call Detail Records .....  | 12    |
| Download Call Detail Records .....                                   | 12    |
| Appendix A - Supported File Formats .....                            | 13    |
| Appendix C - Email-To-Fax Notification Message Data .....            | 15    |
| Appendix D - Fax-to-Email Notification Message Data .....            | 16    |
| Appendix E - Common Error Descriptions .....                         | 17    |
| Appendix F - Frequently Asked Questions.....                         | 18    |
| 1) How do I change the CSID for a User? .....                        | 18    |
| 2) How do I select a cover page by location? .....                   | 18-20 |
| 3) How do I change the address on the cover page? .....              | 22    |
| 4) How do I create departments? .....                                | 23    |
| 5) How do I change a user's sending or receiving email address ..... | 23-23 |
| Appendix G - Concord Fax Online for Microsoft Exchange 2010.....     | 24-26 |

# About Concord Fax Online

**Concord Fax Online** is a bundle of Concord fax services designed to meet the needs of enterprise and mid-sized businesses with individuals and groups who use fax as part of their business process.

Concord Fax Online services include two key components:

**Concord Desktop Faxing - Email to Fax (E2F) and Concord Fax to Email (F2E)** - the business fax service that includes paperless processing of fax documents, automatic cover page generation, customized cover page design, and a variety of fax reception and delivery options. Concord E2F and F2E options can be set independently at the “Company”, “Department”, and “End User” levels of the organization.

**Account Administration Center (AAC)** - the online application for creation and ongoing maintenance of fax user accounts. The AAC provides fax administrators with a full set of controls over the fax functions available to each user. The AAC is described more fully in the “Account Administration Center Administrator’s Guide”.

Available Features:

- ✓ Outgoing faxing from email to fax device, using any email client on any email-capable device
- ✓ Incoming faxing from any fax machine, sent to a personal fax number assigned to the user, and forwarded as email to the users email address
- ✓ Unique sending email address for each personal fax number
- ✓ Multiple receiving email addresses for each personal fax number
- ✓ Automatic cover page generation for any outgoing fax document
- ✓ Unique fax cover pages for the company, department, or the individual user
- ✓ Web Services for integration of fax functions into software applications
- ✓ Fax delivery options for easy integration with document management applications
- ✓ User account creation and management tool
- ✓ User fax activity tracking reports available to the fax administrator and to individual users
- ✓ Downloadable Call Detail Reports, suitable for use in corporate accounting systems, containing records of individual fax user activity

With Concord Fax Online, business organizations are able to streamline their business processes by reducing or totally eliminating paper fax documents. Additional phone lines and fax equipment are also not needed. Overall efficiency is greatly increased.

## Audience

This guide is both an instruction manual and a reference guide that is structured to meet the needs of anyone responsible for setup and maintenance of account information for users of Concord E2F and F2E, the desktop fax service component of the Concord Fax Online.

## Supporting Documentation

Several other guides are available from Concord to supplement the information presented here. Please visit <http://www.concordfax.com/support/userguides.aspx> for the latest versions of Concord instructional material.

**Concord Fax Online User Guide** - Reference information for individual users of Concord Fax Online.

**Account Administration Center Administrator Guide** - Instruction manual for those responsible for setup and maintenance of group user account data using the Account Administration Center (AAC). The document details the functions available to fax administrators.

**Account Administration Center User Guide** - Instruction manual that describes functions available to individual users of the Account Administration Center (AAC).

# Administering Concord Fax Online

## Managing User Accounts

Fax Administrators use the Accounts Administration Center to maintain account data for all Fax Online users in the company. It is the Fax Administrator's role to create user accounts, delete them, and suspend them in accordance with the company policy. Administrators may also modify user profiles, get reports on user fax activity, and control access to email and server domains owned by the company.

When a new fax user account is created, a welcome email message is optionally generated and sent to the new user. The AAC allows user's limited access to their individual account settings. The welcome email message contains the information needed to login to the AAC for the first time. Users are encouraged to log in to their fax accounts, and to set a preferred password on the first login.

In addition the AAC allows the user to monitor their inbound and outbound fax activity by generating activity reports.

The Account Administration Center (in the "My Account" section at [accounts.concordfax.com](http://accounts.concordfax.com)) may be accessed and used from any Internet-accessible location.

Details of account set up and administration using the AAC can be found in the **Account Administration Center Administrator's Guide** and the **Account Administration Center User's Guide**. Both are available in the Support section at [www.concordfax.com](http://www.concordfax.com).

## Cover Page Control

Whenever a fax is sent using the email-to-fax (E2F) feature, you can choose to include an “Automatic” cover page, to have a cover page submitted “On Demand,” or “No Cover Page.”

Blank cover pages, also called cover page *templates*, are stored in a Concord database for each company that uses the Concord fax service. When personnel at the company send a fax, the default template may be retrieved from the database and filled in with fields from the email message.

Cover page templates can be designed by anyone in the company familiar with using Microsoft Word. Typically a cover page template will include a “header” section, which appears at the top of the page. The header section will contain all the relevant information about the fax itself, such as

|                  |  |
|------------------|--|
| To Fax Number:   | the dialed fax number  |
| From:            | the name of the sender   |
| Date:            | date and time at which the fax was sent from the Concord network           |
| Subject:         | text taken from the subject line of the email message, with tokens removed |
| Number of Pages: | the number of pages faxed including the cover page                         |

A footer section can also be created to provide more information about the sender at the end of the cover page. Examples of footer content include promotional messages and company contact information.

## Creating An Attractive Fax Cover Page

The procedure for creating and submitting cover pages to the database:

1. Design a cover page layout using Microsoft Word. The header and footer should be created in separate Word documents. Do not create a single document including the header and footer.
2. Include any text, tables, and graphics you want in the cover page design as long as these are in Black and White. Color and Gray Scale do not translate to faxing without pixilation. Graphics may be embedded in the MS Word document or submitted in separate files (jpeg, max. 200x200 pixels). The design should also include character strings called *tokens*, which will be replaced with actual data when the cover page is processed. Tokens are enclosed in tilde characters (~).
3. Submit the Word document containing the cover page design to Concord Premium Support or to your Concord Account Executive. Premium Support will update the account settings for your company by entering the cover page into the database.

More than one cover page template can be stored for your company. Only the default template can be generated on demand. Contact Concord Premium Support to change the default cover page setting.

See the appendix for information on the tokens that are available for cover pages.



## Cover Page Image

|     |                  |                 |
|-----|------------------|-----------------|
| FAX | FAX TO:          | ~FaxNumber~     |
|     | FROM:            | ~SenderName~    |
|     | CONTACT NUMBER:  | ~SenderCSID~    |
|     | COMPANY:         | ~SenderCompany~ |
|     | SUBJECT:         | ~CoverSubject~  |
|     | DATE:            | ~Date~          |
|     | NUMBER OF PAGES: | ~TotalPages~    |

Figure 2. A sample cover page header with tokens. It could be created as a table in Microsoft Word.



The color image above would need to be converted to all black and dithered (often resulting in looking fuzzy) to approximate the color variations and differences.



The greyscale image above (often referred to as B&W) would need to be converted to **All Black** and dithered (often resulting in looking fuzzy) to approximate the variations in grey.



The above image is **All Black** and would not need to be converted or dithered and should result in a sharp and clear image. This is **All Black** and would not need to be converted or dithered and should result in a sharp and clear image.

## Customizing Cover Pages and Notification Messages

Concord Fax Online allows business to offer fax services to its personnel, or to its customers, with its own corporate branding. Custom branding may occur at several customer touch points.

**Cover pages** - the cover page design can include corporate branding in the header and footer. Cover page creation is discussed above.

**Notification Messages** - these are email messages that result when an outbound fax is sent and when an inbound fax is delivered. A typical notification message is the “successful delivery” message.

Notification messages are created as files in either text or HTML format. Several files are needed for a complete branding exercise, as depicted in the following table.

| Notification Message Type         | Description   | Instructions  |
|-----------------------------------|---|---|
| Initial Notification Message      | Message returned to a sender using email-to-fax. It acknowledges that the fax request has been received.  | Create two files.<br>1. The Subject line of the initial notification email<br>2. The contents of the initial notification email   |
| E2F Delivery Notification Message | Message returned to a sender using email-to-fax. It describes the successful delivery status of the fax.  | Create two files.<br>1. The Subject line of the delivery notification email<br>2. The contents of the delivery notification email. Note that this message type is only for successful fax delivery.   |
| Failure Notification Message      | Message returned to a sender using email-to-fax. It describes any failure that occurs during fax processing and transmission.   | Create two files.<br>1. The Subject line of the failure notification email<br>2. The contents of the failure notification email. Note that this message type is only for unsuccessful fax delivery. A variety of error codes can be included with this type of message. Please contact Concord Premium Support for a list of these codes. |
| F2E Delivery Notification Message | Message delivered to a predetermined user email address when a fax is received (fax-to-email). Note that the email containing the fax attachment is delivered to one address, while this notification message is delivered to a separate address. | Create two files.<br>1. The Subject line of the delivery notification email<br>2. The contents of the delivery notification email. Note that this message type is only for successful fax delivery.   |

See the appendix for information on the kinds of data that can be included in customized notification messages.

The following examples illustrate the two message files that should be created in order to revise the notification messages.

### **Example Initial Notification Message**

Email Subject: Your Fax Request Has Been Received

Email Content: Your fax to 800-777-8888 has been received, and it will be sent shortly.  
Message ID: 111-2233

Notification File: Your fax to `{FaxNumber}` has been received, and it will be sent shortly. `{CRLF}`Message ID: `{MessageID}`

### **Example Delivery Notification Message**

Subject: Your Fax to 800-777-888 has been delivered

Content: Your fax to 800-777-8888 was delivered at May 12, 2007 12:01:08 PT  
Thank you for using Concord fax service. It has been a pleasure to serve you.

Notification File:

Your fax to `{FaxNumber}` was delivered at `{TimeSent}`.`{CRLF}` Thank you for using Concord fax service. It has been a pleasure to serve you.

### **Submitting the Files**

The files that control the behavior of cover pages and notification messages are stored in Concord's database for your company's fax account. Cover pages and notification messages are configured when a new business account is first created, and thereafter, whenever a request is made by the authorized fax administrator for the business fax account.

Whenever a change is desired, please contact Concord Premium Support. Be prepared with the files as described in this document. Concord representatives will instruct you on preferred methods of file transfer, and assist with any questions or support issues related to the files and the desired changes to the fax service.

Upon receipt of the files, Premium Support will proceed with the necessary updates to the Concord databases.

Concord Premium Support can be reached at 1-800-792-0329, or, 206-441-3346.

## Call Detail Records

Concord Fax Online allows our customers to monitor and retrieve all of their inbound and outbound fax activity by a large number of fields from any or all of the prior 6 months, up to the last full day of faxing activity.

Many of the fields that can be retrieved by Call Detail Records are shown in the table below.

|               |                       |                |              |
|---------------|-----------------------|----------------|--------------|
| CompanyID     | CountryCode           | FaxPhoneNumber | TollFreeFlag |
| User ID       | LastName              | FirstName      | EmailAddress |
| PageCount     | Date                  | Time           | TimeZone     |
| FaxDestNumber | EventType Description | Subject        | UserFields   |

## Download Call Detail Records

When you login into the AAC there is a primary field called “Call Detail Records.” This field offers downloadable access to the last 6 months of “Available CDR files.” (See below)

| Available CDR files |
|---------------------|
| Current Month       |
| August              |
| July                |
| June                |
| May                 |
| April               |
| March               |

In order for the “Current Month” to be created you must click on the “Generate Current Month” button. (see below)

**Generate Current Month**

Except for “Current Month,” the records of each month of activity stored in Call Detail Records is found in a single file. The “Current Month” record is stored as a series of files, created every day there is activity. So, depending on which day you look there may be as many as 31 files.

Instructions are also found within the AAC (Call Detail Records/Download CDR).

## Appendix A - Supported File Formats

The following file types can be attached to an email message and converted to a fax by the Concord network. Other file types have not been tested for compatibility. Results may vary if other file types are used.

- Microsoft Word (\*.doc, \*.docx)
- Microsoft Excel (\*.xls, \*.xlsx)
- Microsoft Power Point (\*.ppt, \*.pptx)
- Microsoft Visio (\*.vsd)
- HyperText Markup Language (\*.html, \*.mhtml)
- Adobe Acrobat (\*.pdf)
- JPEG image (\*.jpg)
- TIFF image (\*.tif)
- ASCII Text (\*.txt)
- Rich Text (\*.rtf)

NOTE: Be mindful of the file sizes of the documents you are faxing, particularly if you are sending scanned images, as they can be quite large. While most source documents faxed are usually quite small (less than 200 KB), Concord will limit the maximum size of attached file(s) with either a single file or multiple files. The current limit is: 10,240KB (10MB).

Files exceeding these limits are most always high-resolution, multi-color, scanned images. In addition to exceeding size limits, such images are not typically “fax friendly”. Documents should contain no color, shading, or gray-scale, and never printed as “photo-quality”. Color, or shaded documents do not translate well to fax and will contribute to exceedingly large file sizes and longer transmission times. Documents with graphic art content should be limited to solid black, with no shading, or gray-scale.

## Appendix B - Cover Page Tokens

Cover pages can be created as Microsoft Word files. The following table describes the data that is available for inclusion in cover pages.

The data is represented by variables in the cover page design called *tokens*, which are shown here. Tokens are replaced by the actual value of the corresponding data when the cover page is generated by the Concord network.

Tokens should be positioned in the tables or fields of the cover page design as desired (see figure 2 for an example). Note that the syntax includes the tilde symbol (~) at the ends of the string.

| Token           | Description   | Example           |
|-----------------|---|-------------------|
| Date            | Current Date  | ~Date~            |
| Time            | Current Time  | ~Time~            |
| DateTime        | Date and Time   | ~DateTime~        |
| Subject         | Subject field from email header                                 | ~CoverSubject~    |
| RecptName       | Recipient Name from email header                                | ~RecptName        |
| FaxNumber       | Recipient Number  | ~FaxNumber~       |
| RecptCompany    | Recipient Company Name  | ~RecptCompany~    |
| MessageType     | Indicator of the type of message receive/forwarded (voice, fax) | ~MessageType~     |
| ReceivedTime    | Time at which message was received                              | ~ReceivedTime~    |
| Resolution      | The resolution of the received fax                              | ~Resolution~      |
| SenderCSID      | CSID of the caller sending the fax                              | ~SenderCSID~      |
| Total Pages     | Total number of pages sent in fax, including the cover page     | ~TotalPages~      |
| SenderName      | Sender Name   | ~SenderName~      |
| SenderCompany   | Sender Company  | ~SenderCompany~   |
| SenderAddress1  | Sender Address 1  | ~SenderAddress1~  |
| SenderAddress2  | Sender Address 2  | ~SenderAddress2~  |
| SenderCity      | Sender City   | ~SenderCity~      |
| SenderState     | Sender State  | ~SenderState~     |
| SenderCountry   | Sender Country  | ~SenderCountry~   |
| SenderZip       | Sender Zip  | ~SenderZip~       |
| SenderTelephone | Sender Telephone  | ~SenderTelephone~ |
| SenderFax       | Sender Fax  | ~SenderFax~       |

## Appendix C - Email-To-Fax Notification Message Data

Notification messages are returned to the sender when using email-to-fax. The types of notification messages include the initial notification message, the delivery notification message, and the failure notification message.

Notification messages may be created in text file format. The following table depicts the data that is available for inclusion in notification messages.

The data is represented in the notification message file by the tokens shown here. Tokens are replaced by the actual value of the corresponding data when the notification message is generated by the Concord network.

Tokens should be positioned in the text of the notification message file as desired. Note that the syntax includes the delimiters `%{ }` at the ends of the string.

| Token          | Description   | Example                         |
|----------------|---|---------------------------------|
| CallDuration   | Duration of the call in which fax was delivered<br><i>This token used on delivery confirmation messages only.</i>                                   | <code>%{CallDuration}</code>    |
| CRLF           | New line  | <code>%{CRLF}</code>            |
| MessageID      | Unique message identifier assigned to email submission  | <code>%{MessageID}</code>       |
| NumPages       | Number of pages in the fax.<br><i>This token used on delivery confirmation messages only</i>  | <code>%{NumPages}</code>        |
| PreProcError   | Error details for a job that failed before submission to the fax delivery platform.<br><i>This token used on initial notification messages only</i> | <code>%{PreProcError}</code>    |
| ReferenceID    | User specified identifier assigned to submission  | <code>%{ReferenceID}</code>     |
| Status         | Final Status of the entire submission<br><i>This token used on delivery confirmation messages only.</i>   | <code>%{Status}</code>          |
| Tab            | Tab Character   | <code>%{Tab}</code>             |
| TimeSent       | Date and time when the fax was sent to the recipient.<br><i>This token used on delivery confirmation messages only.</i>                             | <code>%{TimeSent}</code>        |
| FaxNumber      | Fax number to fax to (Destination Fax Number)   | <code>%{FaxNumber}</code>       |
| ErrorCode      | Internal Error Code   | <code>%{ErrorCode}</code>       |
| ErrorClass     | Internal Error Code   | <code>%{ErrorClass}</code>      |
| ErrorExtra     | Additional Error Information  | <code>%{ErrorExtra}</code>      |
| ErrorString    | Detailed Error string   | <code>%{ErrorString}</code>     |
| Subject        | Subject of the original email request   | <code>%{Subject}</code>         |
| OriginalSender | Sender Email [ <i>note space in</i> <code>%{Original Sender}</code> ]   | <code>%{Original Sender}</code> |
| OriginalTime   | Time request was received by the SMTP Gateway   | <code>%{OriginalTime}</code>    |

## Appendix D - Fax-to-Email Notification Message Data

Notification messages are optionally delivered to the email recipient when using fax-to-email (F2E). F2E notification occurs upon successful delivery of the fax, and the notification message is delivered to an email address different from the address where the fax is delivered.

Notification messages may be created in text file format. The following table depicts the data that is available for inclusion in notification messages.

The data is represented in the notification message file by the tokens shown here. Tokens are replaced by the actual value of the corresponding data when the notification message is generated by the Concord network.

Tokens should be positioned in the text of the notification message file as desired. Note that the syntax includes the delimiters %{} at the ends of the string.

| Token        | Description   | Example          |
|--------------|---|------------------|
| Account      | The identifier of the account receiving the fax<br>This value is generally used for internal purposes only, it may have limited benefit for the partner's customers | %{Account}       |
| CalledNumber | The number dialed by the fax sender   | %{Called Number} |
| CallerName   | The name (if available) of the person sending the fax   | %{CallerName}    |
| CallerNumber | The number from which the fax was sent  | %{CallerNumber}  |
| CRLF         | New line  | %{CRLF}          |
| Date         | Date on which message was received  | %{Date}          |
| Duration     | Time taken to transmit the fax from caller with IVR.  | %{Duration}      |
| Email        | Message recipient's email address   | %{Email}         |
| MessageId    | Identifier assigned to the message upon receipt by the IVR  | %{MessageId}     |
| MessageType  | Indicator of the type of message received/forwarded (voice, fax)  | %{MessageType}   |
| ReceivedTime | Time at which message was received  | %{ReceivedTime}  |
| Resolution   | The resolution of the received fax  | %{Resolution}    |
| SenderCSID   | CSID of the caller sending the fax  | %{SenderCSID}    |
| Speed        | The transmission speed of the call on which the fax was sent  | %{Speed}         |
| Tab          | Tab character   | %{Tab}           |
| TimeZone     | The time zone in which the recipient receives and views messages  | %{TimeZone}      |



## Appendix E - Common Error Descriptions

| Error Message                  | Enhanced Error Description   |
|--------------------------------|--|
| <b>Busy</b>                    | "Busy" Indicates that the called number (phone line) is already in use or engaged.   |
| <b>No Answer</b>               | "No Answer" indicates that the line was not picked up (answered) by a fax machine or person before timing out. The timeout is sufficient to ensure at a minimum of 5-8 standard rings.   |
| <b>Not a Fax Machine</b>       | "Not a fax machine" indicates that a fax device has failed to answer the call. Specifically, fax tones or the fax signal from a remote machine has not been detected. This may for a number of reason including but not limited to, a wrong number, a machine not configured to automatically answer, or a device that has stopped answering because it is out of paper or has a paper jam.  |
| <b>Voice Answer</b>            | "Voice Answer" indicates that either a person or voicemail message answered the call.  |
| <b>Fast Busy</b>               | "Fast Busy" indicates that there was no available path to the attempted fax number. This normally indicates that the destination is currently overloaded, or that there is an outage with the specific number or in the area attempted such as that due to a fibre cut. This can also be caused by severe weather conditions in the area of the destination. In most cases Fast Busy conditions are temporary, please verify the fax number you're trying to reach is valid and if so please try again later.  |
| <b>Sit-Tone / Operator Msg</b> | "Sit-Tone / Operator Msg" indicates that the call was intercepted by the special situation information tones followed by an operator message, examples include "The number you have dialed is disconnected or is no longer in service. Please check the listing and try your call again.", "The number you have dialed has been changed...the new number is...XXX-XXX-XXXX", "All circuits are currently busy, please try your call again later". "Operator Msg" indicates the same issue however the special situation information tones were not detected. |
| <b>Negotiation Failed</b>      | "Negotiation Failed" indicates the call was answered by a fax device but during the initial training phase of the call, communication between the fax transmitter and the receiving fax device failed or the two devices could not agree on the parameters to be used for the call. This often indicates a phone line quality issue and may occur at the beginning of the fax transmission, or, during the fax transmission between pages on a multi-page fax.   |
| <b>Transmission Failed</b>     | "Transmission Failed" indicates the receiving fax machine has answered and connected but the fax was not able to be fully and successfully transmitted. This can be caused by line quality issues, fax device issues, the sharing of phone line with other devices such as credit card processing terminals. Temporary conditions such as severe weather conditions in the destination area can also   |

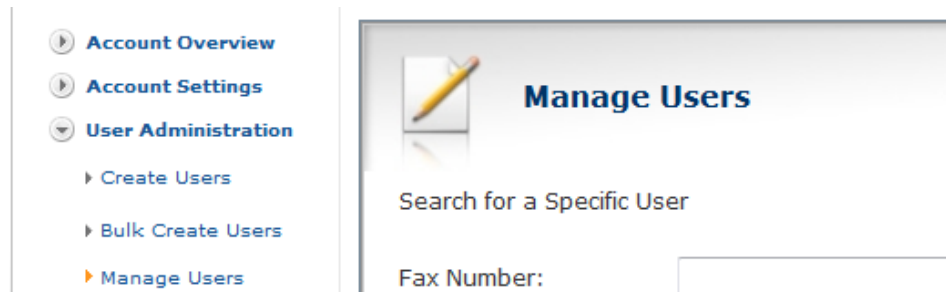
|                                |  |
|--------------------------------|--|
|                                | cause transmissions failures.  |
| <b>Exceeded ECM Retransmit</b> | “Exceeded ECM Retransmit” indicates the call was answered by a fax device and connected using ECM or Error Correction Mode. Due to poor line quality or a poor connection for that specific call attempt the transmission of the fax required an excessive amount of data to be retransmitted to the receiving device to get acknowledgment of successful reception of the fax, the call was aborted to allow a retry or new attempt to get a better connection and to ensure the call duration did not ensure excessive overtime charges. |
| <b>Job Cancelled</b>           | “Job Cancelled” indicates that the job or recipient number was cancelled or the set time for delivery expired.   |
| <b>General Error</b>           | “General Error” indicates that another uncommon error not listed above has occurred resulting in the failure to transmit your fax. Please retry the fax job or recipient again. If you get the same error again please contact Concord customer service for further assistance and investigation.  |
|                                |  |

## Appendix F - Frequently Asked Questions

Below you will see a series of “How do I...?” scenarios that can make use of your Company’s AAC.

### 1) How do I change the CSID for a User?

- Login to your company AAC and go to the User Administration / Manage User field.



- At the bottom of the Manage User Account page click on “Search.”

Custom Field3:

Custom Field4:

Include Cancelled:

- This will take you to the list of Users.

Search Results [New Search](#) [Export](#) EmailAddress - ASC 20 ▼

|                          | Country | Department | Last     | First | Fax Number   | Email                    | Status |
|--------------------------|---------|------------|----------|-------|--------------|--------------------------|--------|
| <input type="checkbox"/> | USA     |            | Concord  | Jonh  | 17865332641  | a@b.c                    | Active |
| <input type="checkbox"/> | USA     |            | Johnson  | Van   | 999955550050 | customer1@abccompany.com | Active |
| <input type="checkbox"/> | USA     |            | Musgrove | John  | 17865332637  | john1@musgrove.net       | Active |

- Select a user and click on “account settings” at the bottom of the page.
- On the User Account Settings page that comes up you will see the following in “Sending Options.”

**Sending Options**

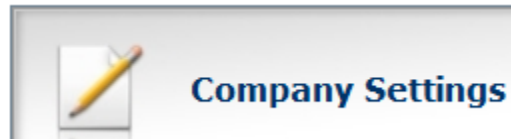
Fax CSID

- As you can see, this user’s Fax CSID is <faxnumber>, the default. This may be edited.
- You may put anything you wish in this CSID field. (20 characters maximum)

Save your changes by clicking on **update** at the bottom of the page.

## 2) How do I select a cover page by location?

- a. Generally, this is done by creating Departments (see item 4 on page 21) and creating a specific Cover Page for each Department.
- b. You may also create specific cover pages for specific users.
- c. You can have multiple Cover Pages in your account, however, the correct cover page must be associated with the appropriate user or Department.
- d. At the Company Level in the AAC there is a Field that allows you to assign Cover Pages.

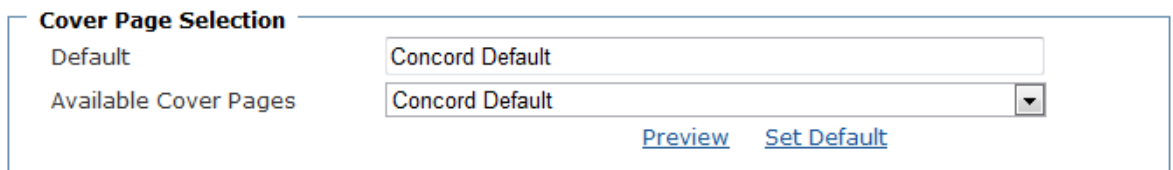


- e. You can do this by going to the Company Settings under Account Settings.
- f. At the top of this field you can choose whether the Cover Pages will be Automatic, On Demand, or, No Cover Pages at all. In the image below On Demand Cover Pages is chosen.

### Feature Options

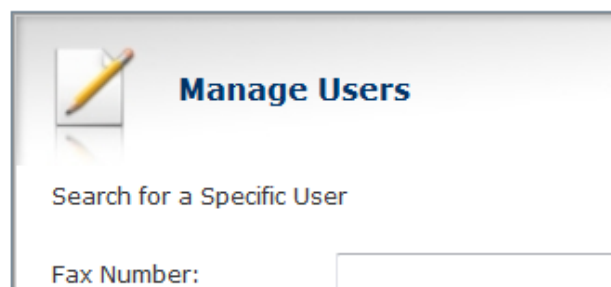
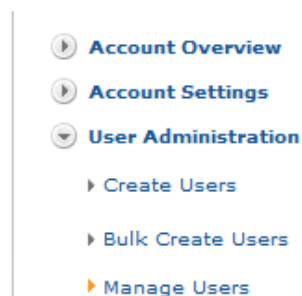
- Automatic Cover Pages
- On Demand Cover Pages
- No Cover Pages
- With Body Text

- g. Towards the bottom of the Company Account Settings screen is the Cover Page Selection field.



The image shows a form section titled 'Cover Page Selection'. It has two rows: 'Default' with a dropdown menu showing 'Concord Default', and 'Available Cover Pages' with a dropdown menu also showing 'Concord Default'. Below the dropdowns are two links: 'Preview' and 'Set Default'.

- h. In this field you can select the Cover Page for the whole company.
- i. There is another option to select Cover Pages at the department and user level.
- j. If you go to "Manage Users" under "User Administration" you will see the following.



- k. When you click on the "Search" button at the bottom of the screen you see the following User List. (image below only a partial list)

Search Results      [New Search](#)      [Export](#)      EmailAddress - ASC      20 ▼

|                          | Country | Department | Last     | First | Fax Number   | Email                    | Status |
|--------------------------|---------|------------|----------|-------|--------------|--------------------------|--------|
| <input type="checkbox"/> | USA     |            | Concord  | Jonh  | 17865332641  | a@b.c                    | Active |
| <input type="checkbox"/> | USA     |            | Johnson  | Van   | 999955550050 | customer1@abccompany.com | Active |
| <input type="checkbox"/> | USA     |            | Musgrove | John  | 17865332637  | john1@musgrove.net       | Active |

- l. When you check a specific user and click on the Account Settings at the bottom of the page you will see the following at the top of the page.

**Feature Options**

- Automatic Cover Pages
- On Demand Cover Pages
- No Cover Pages
- With Body Text

- m. Towards the bottom of the User Account Settings screen is the Cover Page Selection field.

**Cover Page Selection**

User Default     

Available Cover Pages       ▼

[Preview](#)    [Set As Default](#)

- n. This is the location where you could determine which Cover Page a specific User should have.

**3) How to I change the address on the cover page? The cover page we currently have is for only one department? I will need one for another department, as well.**

- a) On Page 8 and 9 of this Concord Fax Online Administrator Guide you will find the following instructions.

**Cover Page Creation**

The procedure for creating and submitting cover pages to the database is:

- 1.Design a cover page layout using Microsoft Word. The header and footer should be created in separate Word documents. Do not create a single document including the header and footer.
- 2.Include any text, tables, and graphics you want in the cover page design. Graphics may be embedded in the Word document or submitted in separate files (jpeg, max 200x200 pixels). The design should also include character strings called tokens, which will be replaced with actual data when the cover page is processed. Tokens are enclosed in tilde characters (~). (In Figure ‘2.’ below you will see the tokens in **bold** on the far right)
- 3.Submit the Word document containing the cover page design to Concord Premium Support or to your Concord Account Executive. Premium Support will update the account settings for your company by entering the cover page into the database.

More than one cover page template can be stored for your company. You may also submit cover pages to be used for each department or user in the company. At each level, a single cover page is defined as the default page for use. The defaults are set by the administrator in the AAC.

See the Appendix for information on the tokens that are available for cover pages.

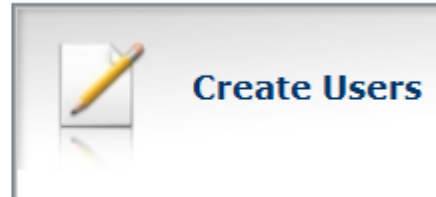
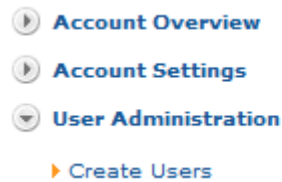
|            |                  |                       |
|------------|------------------|-----------------------|
| <b>FAX</b> | To:              | <b>-RecptName~</b>    |
|            | Fax No:          | <b>-FaxNumber~</b>    |
|            | From:            | <b>-SenderName~</b>   |
|            | Date:            | <b>-Date~</b>         |
|            | Subject:         | <b>-CoverSubject~</b> |
|            | Number of Pages: | <b>-TotalPages~</b>   |

Figure 2. A sample cover page header with tokens. It could be created as a table in Microsoft Word.

- b) Please note that “More than one Cover Page template can be stored for your company.”

#### 4) How do I create departments?

- To create a Department there is a simple step-by-step process.
  - i. In the AAC click on Create users



- ii. Toward the bottom you will see a Department field

Department:  Add New

- iii. Click **Add New** and a field will open allowing you to Add a Department.

Department:  Add New

**Create Department**

Department:  Add Department Cancel

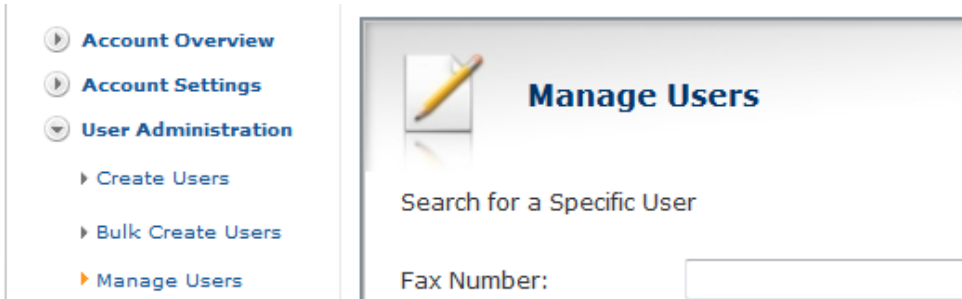
#### 5) How do I change a user's sending or receiving email address

User accounts are unable to edit their sending and receiving email addresses. These can only be edited at the company administrator level, on the AAC.

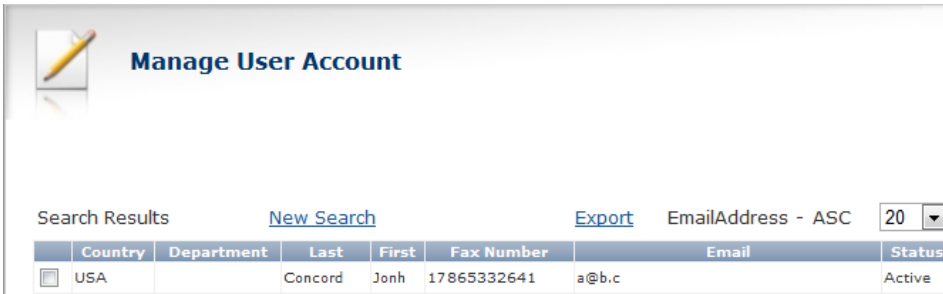
You may have only one sending email address, while having up to five (5) forwarding, or receiving email addresses. *Remember, you will need to always have one (1) sending and at least one (1) receiving email address.*

Here are the steps to make this change using the Company AAC...

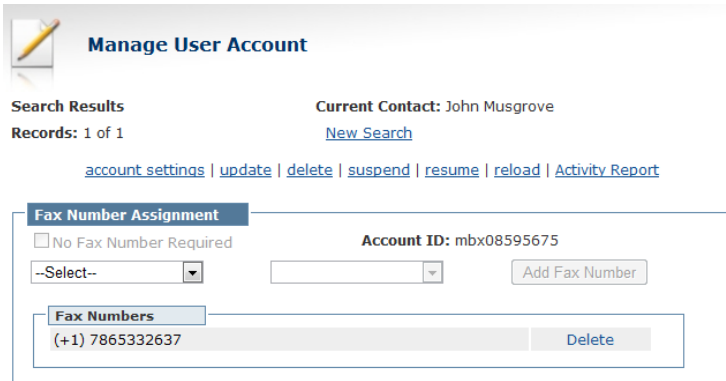
- Log into the AAC and go to User Administration and Manage Users (see image below)



- At the bottom of Manage Users click on the SEARCH button
- This will take you to the Manage user Account screen (see image)



- Put a check mark in the box of the user you wish to edit and click on “user details.”
- This brings you to the Manage User screen for this user. (see image)



- On this page you will see the inbound email addresses field. (see image)



- Once you make the change you can click on “update” at the bottom of this page and the account will be updated with the new information.
- The same process may be used for configuring the sending email address.



## Appendix G: Concord Fax Online for Microsoft Exchange 2010

Your test account has been set up based on the information you have provided in your test application. In order to use Concord Fax Online for Microsoft Exchange, you must Exchange 2010 Unified Messaging installed and enabled . In your UM Policy, you have to enable inbound faxes and you have to specify the URI and setting for testing:

**sip:tsip.concordfax.com:5060;transport=tcp for T38**  
**sip:gsip.concordfax.com:5060;transport=tcp for G711**

Unless you have specifically requested your account to be configured for G711, your account is set for T38. Your media gateway or phone system **MUST** support T38 in that case. If you have problems transmitting a fax, make sure your firewall allows outbound SIP connections to sip1.beta.concordfax.com and that DNS settings allow that name to resolve (You can enter the IP address directly if needed).



This screenshot shows the Exchange UI where you enter the URI listed above, If you find yourself getting voicemails with fax tones, fax tone detection might need to be turned on in Exchange:

Open

<Exch. Server Install>\v14\bin\MSEExchangeUM.config

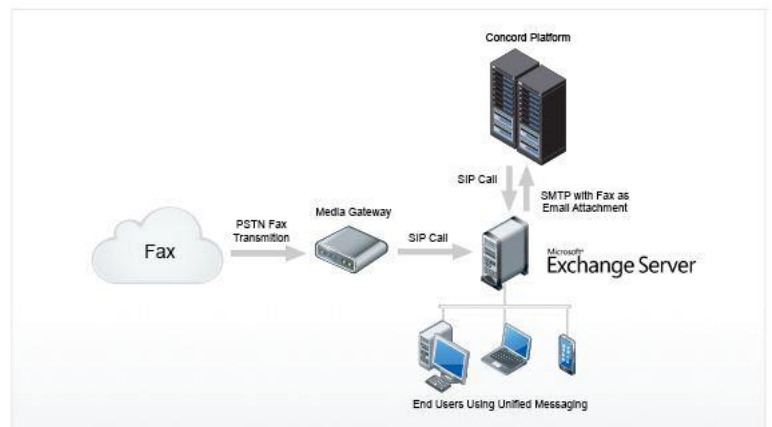
in notepad

Set “EnableInbandFaxDetection” to true.

Restart Unified Messaging service

### Checklist:

- Configure Mailbox policy with URI and allow inbound faxes
- Verify that your gateway or phone system supports the transmission type you selected in your test account request. The default is T38. G711 can ONLY be used if specifically requested
- Verify that your Gateway/Phone System has valid DNS settings and can resolve the Concord URI
- Verify that your gateway/phone system can connect to IP addresses outside your local network



## Tips and Tricks:

### The fax transmission is successful, but no fax is received

Sometimes Concord receives the faxes correctly and the sending fax machine reports a success, but no message is received in the users inbox.

While Microsoft Exchange 2010 is supposed to automatically trust Concord's messages, some customers have reported problems. If that happens to you, you can work around this by creating a receive connector that implicitly trusts Concord's mail servers.

1. From Exchange Management console, click on Microsoft Exchange on premises / Server Configuration / Hub Transport
2. Right click on the receive Connectors window and select 'new Receive Connector' from the popup window.
3. Enter the following
  - a. Name : 'FromConcord'
  - b. Intended Use : Custom
  - c. Remote Network settings, Delete the existing Range and add the following IP addresses
    - i. 216.187.65.179
    - ii. 216.187.65.178
4. Save the connector and click on Properties
  - a. Under authentication Enable only 'Externally Secured'
  - b. Under Permission group, enable all.
  - c. Save the changes.

If you have any existing connectors (Default), remove the two Concord IP addresses from those Connector ranges.

1. Select properties of the Default connector.
2. Under 'Receive mails from these remote servers'
  - a. Remove the default IP range :0.0.0.0-255.255.255.255 and add the following IP ranges
    - i. 0.0.0.0-216.187.65.177
    - ii. 216.187.65.180-255.255.255.255

### Faxes are not answered by the Concord Network

- When Exchange UM detects a fax tone, it issues a REFER to VOIP Gateway with the following SIP Headers set.

REFER-TO: <sip:sip1.beta.concordfax.com.com:5060;transport=tcp>  
REFERRED-BY: XXXXX (String from Exchange which identifies your account and other settings)

The Voip Gateway then tries to initiate a call to Concord (using REFER-TO:). The Voip Gateway needs to pass the SIP Header "REFERRED-BY:" to Concord. Concord requires the REFERRED-BY: header to validate the caller and will not accept the call if it is missing.

Verify that your phone system or gateway is transmitting the REFERRED-BY: header.

- In order for the RTP to flow between the Concord and the Voip Gateway at the customers end, appropriate ports needs to be opened. Normal port ranges are between 20000-30000 UDP or 40000-60000 UDP. However this range depends on the Voip Gateway the customer uses. The port range opened should match what is configured on the Voip Gateway "RTP Port range"

## If it still doesn't work:

Contact Concord Customer Service at [support@concordfax.com](mailto:support@concordfax.com). Note that actual Concord customers have access to priority e-mail support and free telephone support.

When you contact support, it helps to speed up the process if you can provide the following:

- Wireshark traces from exchange UM and Voip Gateway. If you are using SSL, provide us with the decoded traces or you need to provide us with the certificate for decoding.
- UM and VoiP Gateway logs , traces. Also any messages in the event log.
- If you have a fax number externally available routed to UM, Concord will be able to trouble shoot without the need to request customers to send faxes. So if possible, provide us with a number to test
- VOIP gateway (or PBX) make, model and firmware version number.
- Exchange build version number.