C&T
technologies

vFAX Guide

Version 3.4

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Product Summary

CT Cloud vFax is an online fax service that allows Users to send and receive virtual faxes using their computer or mobile device. Send and receive faxes via the CT Cloud vFax portal, email, or traditional fax machine (requires the purchase of the CT Cloud vFax Fax Bridge device).

Benefits

CT Cloud vFax enables a new level of flexibility and mobility that will change the way any business operates.

- Always-On, Never Busy: No dialing means no busy signal. We send faxes over the internet and store them for up to six months. Never miss a fax again!
- Access Anywhere: All faxes are stored electronically and sent via email so that Users can access them online from anywhere.
- No Computer Required: Use a PC, tablet, mobile device, or fax machine to send and receive faxes.
- Fax Machine Support: Using the CT Cloud Fax Bridge, Users can use a fax machine to send and receive paper faxes.

Features

Gone are the days of worrying about missing faxes due to the fax machine being jammed, out of paper, or busy.

- Online Portal: Send and receive faxes, view previous faxes, and configure account settings, all from the CT Cloud vFax portal.
- Fax by Email: Quickly send faxes via email by attaching a file.
- Fax with a Mobile Device: Send and receive faxes instantly from a mobile device via email or the CT Cloud vFax portal.
- Secure Transmission and Storage: Faxes are sent via encrypted data transfer and stored in maximum-security data centers. Every fax sent or received uses 256-bit SSL encryption to keep sensitive information secure.
- Multiple Recipients: Send a single fax to up to six recipients at one time from the CT Cloud vFax portal and up to five recipients via email.

HIPAA vFAX

The Health Insurance Portability and Accountability Act (HIPAA) is designed to protect patient medical records and other health information provided to health care providers. CT Cloud highly values the privacy of every customer and offers in-depth security with the additional monitoring required by HIPAA. To maintain HIPAA compliance, HIPAA vFAX Users cannot send faxes via email or receive faxes as an attachment via email. HIPAA vFAX Users can receive email notifications notifying them of a sent or received fax, but they must log in to the CT Cloud vFax portal to view the fax.

Logging In

After purchasing the CT Cloud vFax service, customers will receive their login information via email. Users can access the CT Cloud vFax portal by logging in at fax.nextiva.com.

vFAX Login

CT Cloud vFax Dashboard

From the CT Cloud vFax Dashboard, Users can view the most recent faxes sent and received, general account information, and activity summary details. Users can also quickly perform the following actions from the CT Cloud vFax Dashboard:

- Search faxes within the past six months.
- Send a Fax in five easy steps.
- Manage Fax Settings such as Password, Filters, and Notifications.
- Update Profile details, including Cover Page details and Caller ID.
- Check Billing to view usage details.
- Access Support resources.

CT Cloud vFax Dashboard

Viewing Faxes

Click Search to view all faxes sent and received within the past six months. After six months, all fax data is purged from our servers and cannot be restored. To view a fax, simply double-click on the desired fax. Users can also perform the following actions:

A. Filter faxes and access audit logs by clicking on the View All Faxes drop-down menu on the top-left corner.
B. Download, Print, Forward, and Delete faxes using the icons in the Actions column.
C. To update the time zone displayed in the portal, click the Time Zone drop-down menu at the bottom of the screen and select the desired time zone.

Search View

Fax Settings

Click Fax Settings from the Dashboard or Settings from the left panel to access the vFAX settings.

Profile Settings

Profile

Manage cover page details, the primary email address to send faxes from, notification preferences, and more under the Profile tab.

Row One

- Display Name: The name that will appear on the cover page.
- Phone: The phone number that will appear on the email notifications.
- Company: The name of the business that will appear on the email notifications.
- Fax CSID: The name that will appear on the receiving caller ID. To update the CSID, click the Inherited drop-down menu and select User Set, then enter the desired ID to be displayed on the Caller ID.

Row Two

- Primary Email: The primary email address to send faxes from.
- Notify on Send/Notify on Receive: Email: Choose to be notified at the primary email on file for all, only successful, or only failed fax transmissions for both sent and received faxes. The email notifications will include a link to the CT Cloud vFax portal, where Users can view the fax. To receive faxes as a PDF file attached to the email notifications, make sure Notify On Send/Notify on Receive is set to include an Attachment.
- Caller ID: The fax number that will appear on the receiving caller ID. By default, the caller ID will display the primary fax number assigned to the account and cannot be changed.

Row Three

- Primary SMS: Set up text notifications for both sent and received faxes. To receive text notifications, add a cell phone number followed by the cell phone provider's SMS address in the Primary SMS field. Here are some common ones:
  - ○ ATT: phonenumber@txt.att.net
  - ○ T-Mobile: phonenumber@tmomail.net
  - ○ Sprint: phonenumber@messaging.sprintpcs.com
  - ○ Verizon: phonenumber@vtext.com
- Notify on Send/Notify on Receive: SMS: Choose to receive text notifications for all, only successful, only failed fax transmissions for both sent and received faxes.
- Area Code: This is for routing purposes only and is not visible on any of the faxes. By default, it is set to "480."

Row Four

- Fax Bridge Receive Device: This field is used when assigning a CT Cloud vFax Fax Bridge to the User.
- Fax Bridge Send Behavior: Set the Fax Bridge to print confirmations for all outbound faxes automatically.
- Fax Bridge Receive Delivery: Set the Fax Bridge to print all inbound faxes to the fax machine automatically. Users can also set a schedule for specific days and times to automatically print all incoming faxes.

Row Five

- Email Attachment Format: By default, all email attachments are sent as a .pdf file.
- Fax Time Zone: Set the preferred time zone displayed in the portal and the timestamp on all outgoing faxes.

Row Six

- Cover Page: Enable or disable the cover page. By default, the cover page will be included with all outbound faxes.
- Primary Fax Number: The fax number displayed on the Caller ID and the header on each page.
- Privacy Control: Allow permission to view the fax data when contacting CT Cloud vFax support.

Filters

Create Types or Folders for easy archiving and organization of faxes under the Filters tab. Users can assign faxes to specific Types or Folders and easily filter faxes in the portal to only show faxes assigned to a particular Type or Folder.
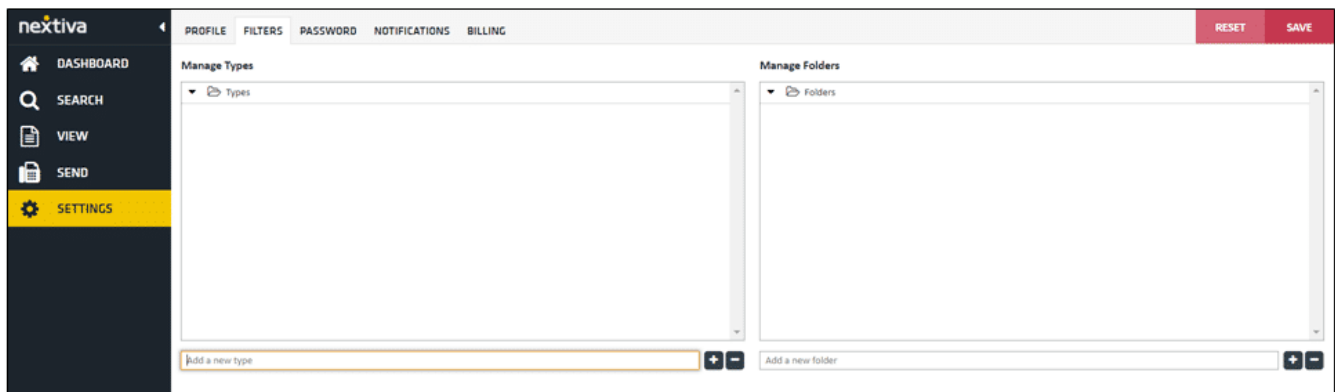
Filters Tab

Password

Every CT Cloud vFax user receives a unique username and temporary password upon sign-up. The **Password** tab is available for password changes.
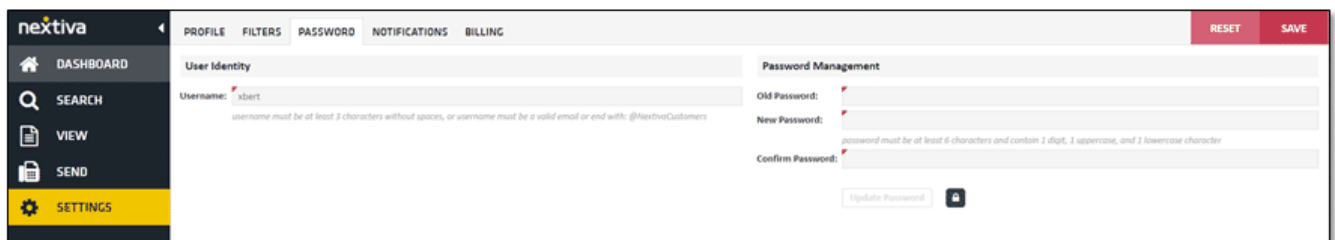
Password Tab

Notifications

Add up to five additional email addresses or SMS-enabled phone numbers to receive notifications for all inbound or outbound faxes under the Notifications tab.

Notifications Tab

Sending Faxes

Send faxes virtually anywhere via email, from the vFAX portal, or even through a traditional fax machine (requires the purchase of the CT Cloud vFax Fax Bridge device).

- Include up to 10 attachments (5 MB max) per fax.
- Send up to six faxes at once from the vFAX portal and five via email.
- A variety of file types are accepted:
    - Microsoft Office (.doc, .docx, .xls, .xlsx, .ppt, .pptx)
    - Printer (.pcl, .eps, .ps)
    - Text (.txt, .rtf, .xml)
    - Adobe Acrobat (.pdf)
    - Image (.tiff, .gif, .png, .jpeg)

Sending Faxes From the vFAX Portal

Step 1: Enter recipient info

Enter the required information in the blank fields: Fax Number (recipient's fax number), Deliver To (name of the recipient), Sent From (sender's name), Fax Subject, and Notes. From here, Users also have the option to include or remove the Cover Page and Schedule faxes to be sent on a specific date. Click Next to proceed to the next step.

> NOTE: CT Cloud vFax does not support international faxing.

Recipient Info

Step 2: Upload Attachments

Upload one or more files by clicking Browse (up to 10 attachments per fax/5 MB max). A list of accepted file formats is listed on the right-hand side for easy reference. The file(s) selected will display in the Selected Files area once they have been successfully attached. Click Next to proceed to the next step.
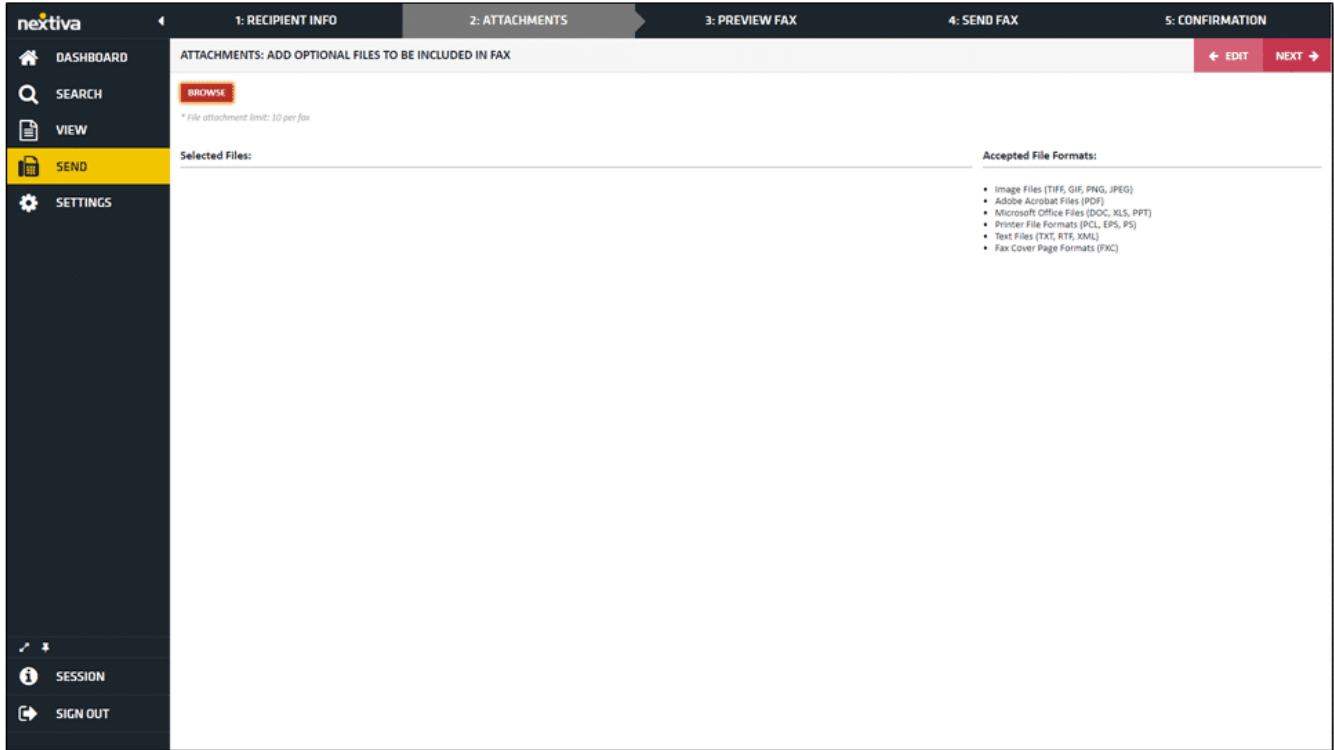
Attachments

Step 3: Preview Fax

This screen will display a preview of the default cover page if enabled. Don't worry about the code in the fields of the cover page, as this is just a preview of the cover page format. These fields are filled in based on what was included in the Recipient Info section from Step 1. If these fields were not filled out, those sections would be blank on the recipient's side. Click Next to proceed to the next step.
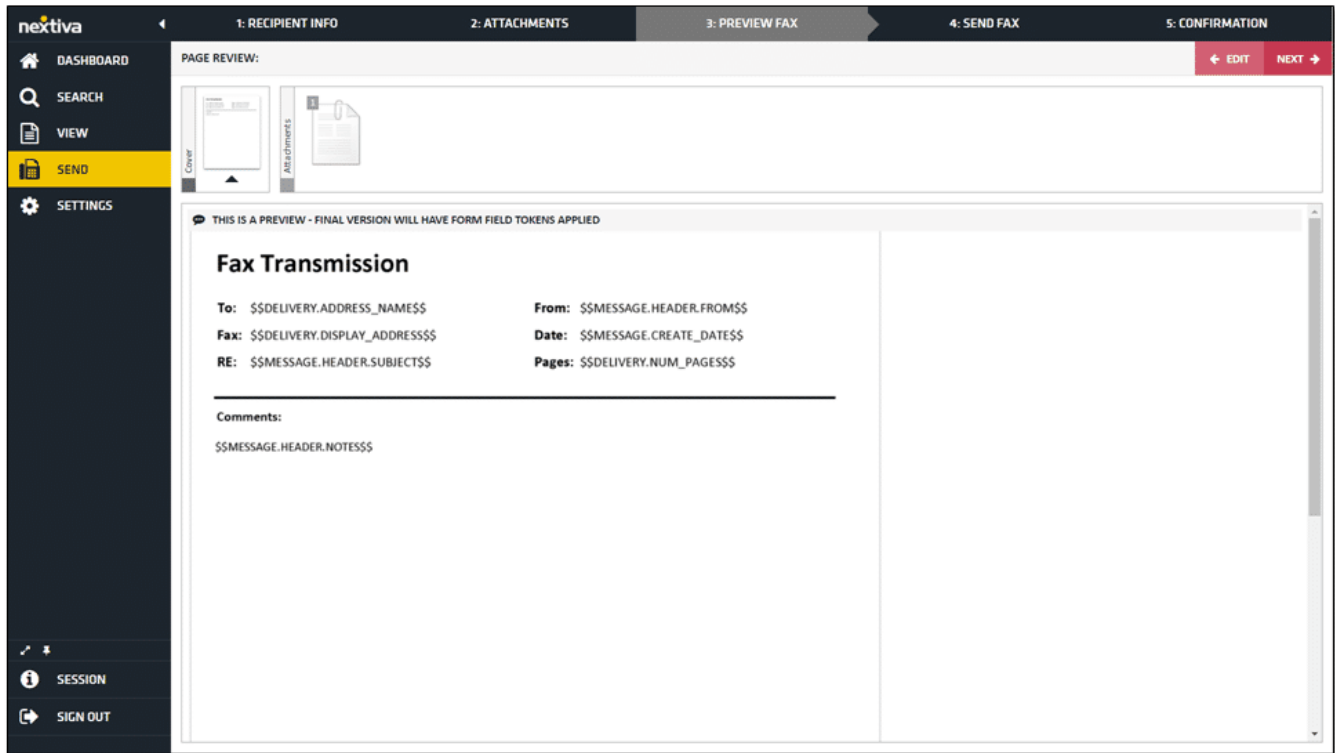
Preview Fax

Step 4: Send Fax

Before sending the fax, Users can select filters and enter notes to help keep faxes organized. They can also include up to five additional fax numbers or email addresses to send the fax to. When ready, click Send.
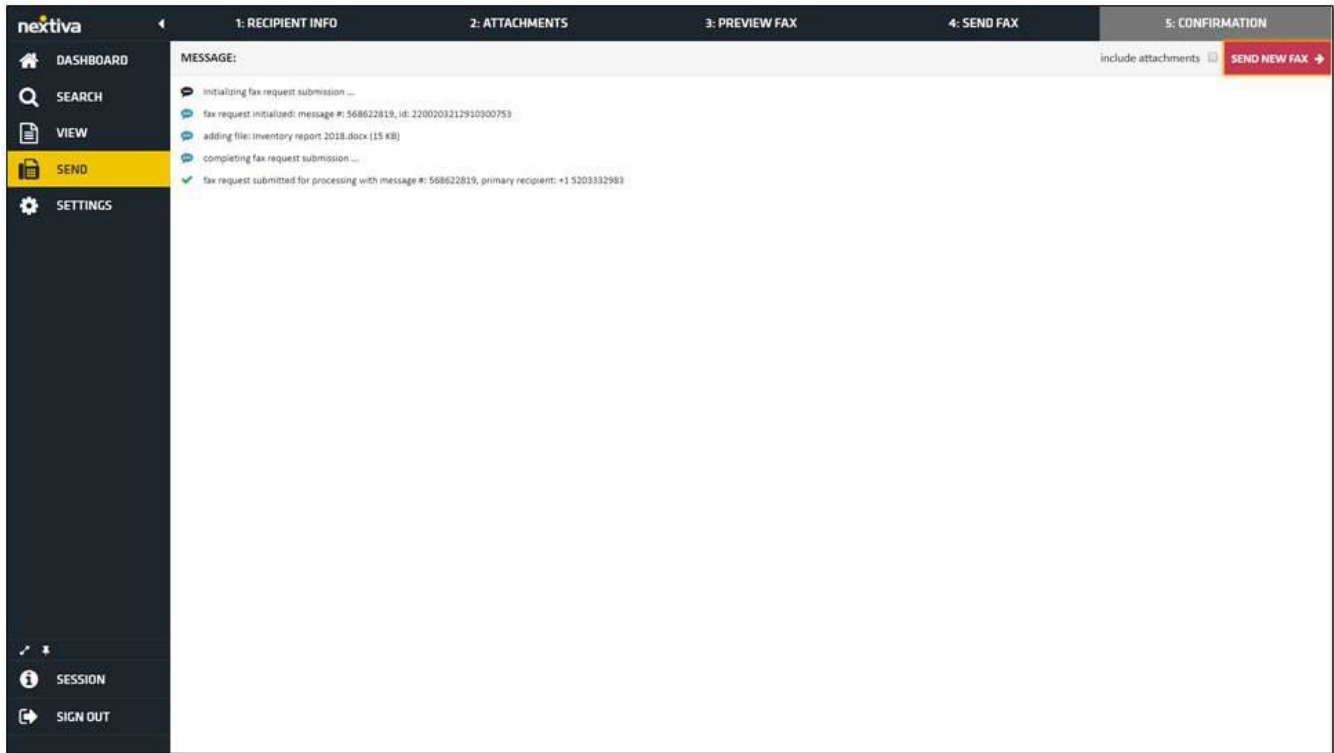
Send Fax

Step 5: Fax Confirmation

The Confirmation page displays details about the fax transmission. Click Search in the left panel to view the status of the fax.

Fax Confirmation

Sending Faxes via Email

Each vFAX line allows one primary email address for sending and receiving faxes via email. To send a fax via email, compose a new email from the primary email account registered to the CT Cloud vFax account. In the address bar (the To field) enter 1, the 10-digit fax number, @nextivafax.com (for example, 1xxxxxxxxxx@nextivafax.com). Users can include up to five recipients in the To field per fax. Then attach all documents (up to 10 attachments per fax/5 MB max), and press Send.

> NOTE: To maintain HIPAA compliance, Users cannot send faxes via email.

Receiving Faxes

Receive faxes virtually anywhere via email, from the vFAX portal, or even through a traditional fax machine (requires the purchase of the CT Cloud vFax Fax Bridge device). Each vFAX line is allowed to add up to six email or SMS addresses for receiving notifications of received faxes. Non-HIPAA Users can choose to include PDF attachments for email notifications, enabling quick access to view faxes from their email.