RightFax FaxUtil

Quick reference guide to getting started

Contents

RightFax FaxUtil 2
Creating and Sending Faxes 3
Create a New Fax 3
Send a Fax via Email Address or SMS Number 4
Add a Cover Sheet 5
Attach Library Documents 7
Assign Billing Codes 9
Adding Entries to Your Phonebook 10
Create an Individual Phonebook Entry 10
Use Your Phonebook 12
Forward a Fax to other Users or Fax Numbers 14
Routing a Fax to Another User 15
Viewing A Fax's History 16

OPENTEXT™

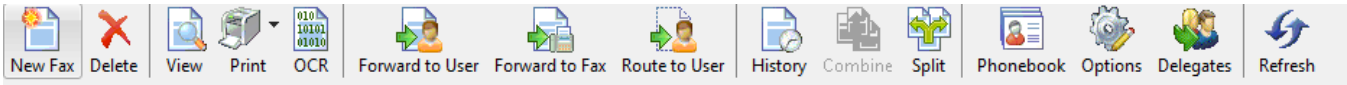
RightFax

RightFax FaxUtil

RightFax FaxUtil is a comprehensive desktop application for users of OpenText RightFax.

Within RightFax FaxUtil, users can create, view, edit, and print faxes, along with a number of other useful features for managing fax traffic.

The RightFax toolbar provides quick access to the most used features for RightFax users.



Let's get started and see how you can use RightFax FaxUtil to quickly and easily fax right from the desktop!

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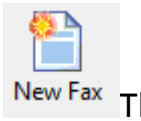
RightFax

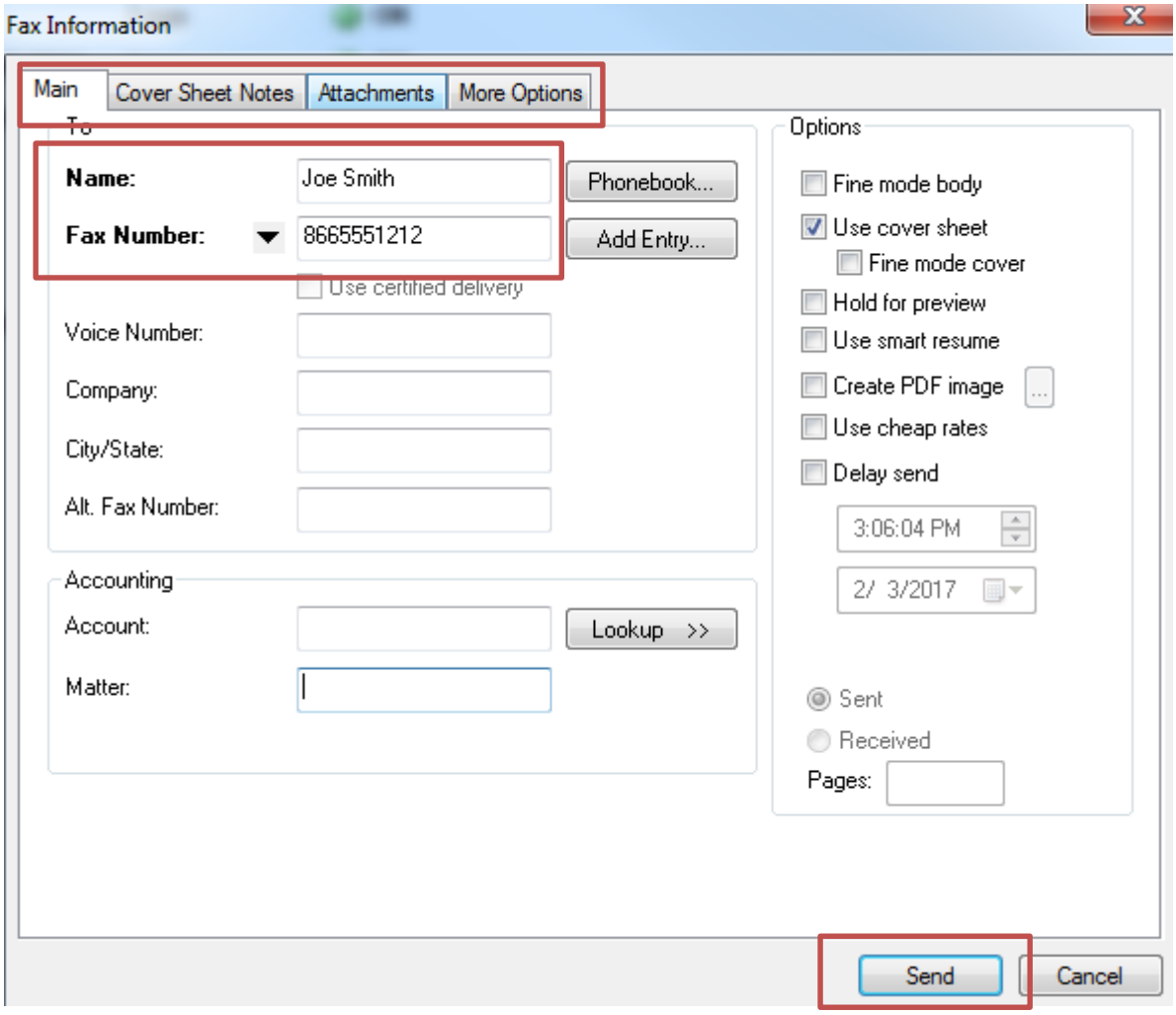
Creating and Sending Faxes

Create a New Fax

RightFax FaxUtil can be used to create new faxes with a variety of attachments types and destination options.

1. Click the **New Fax** button. 

This opens the Fax Information dialog box.
2. In the Fax Information dialog box, add one fax recipients. Specify your cover sheet notes and options, add attachments, and specify other sending preferences.

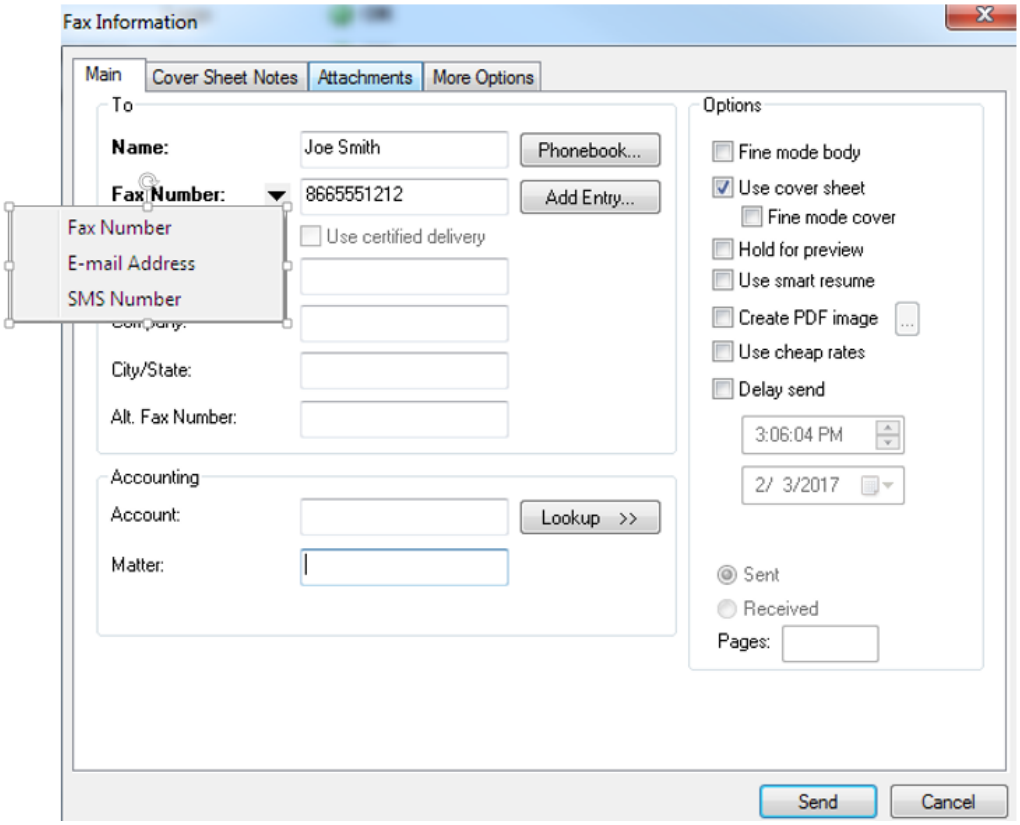


3. Click **Send** to send the fax.

Send a Fax via Email Address or SMS Number

FaxUtil will also allow sending faxes as emails or as text messages (SMS). With email, the entire fax will be sent as an attachment. With SMS, only the cover sheet notes will be transmitted.

1. In the Fax Information dialog box, go to the **Main** tab.
2. Click the arrow next to the Fax Number field and select **Email Address** or **SMS Number**.
3. Enter the Email Address or SMS Number as well as any other required information (bold fields).

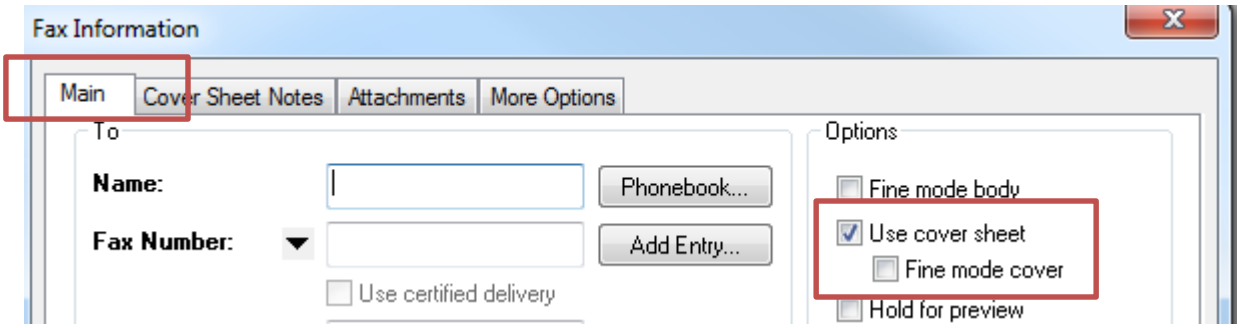


4. For SMS messages, you must enter your message in the Cover Sheet Notes. This message has a 160 byte limit.
5. Click **Send** to send the fax.

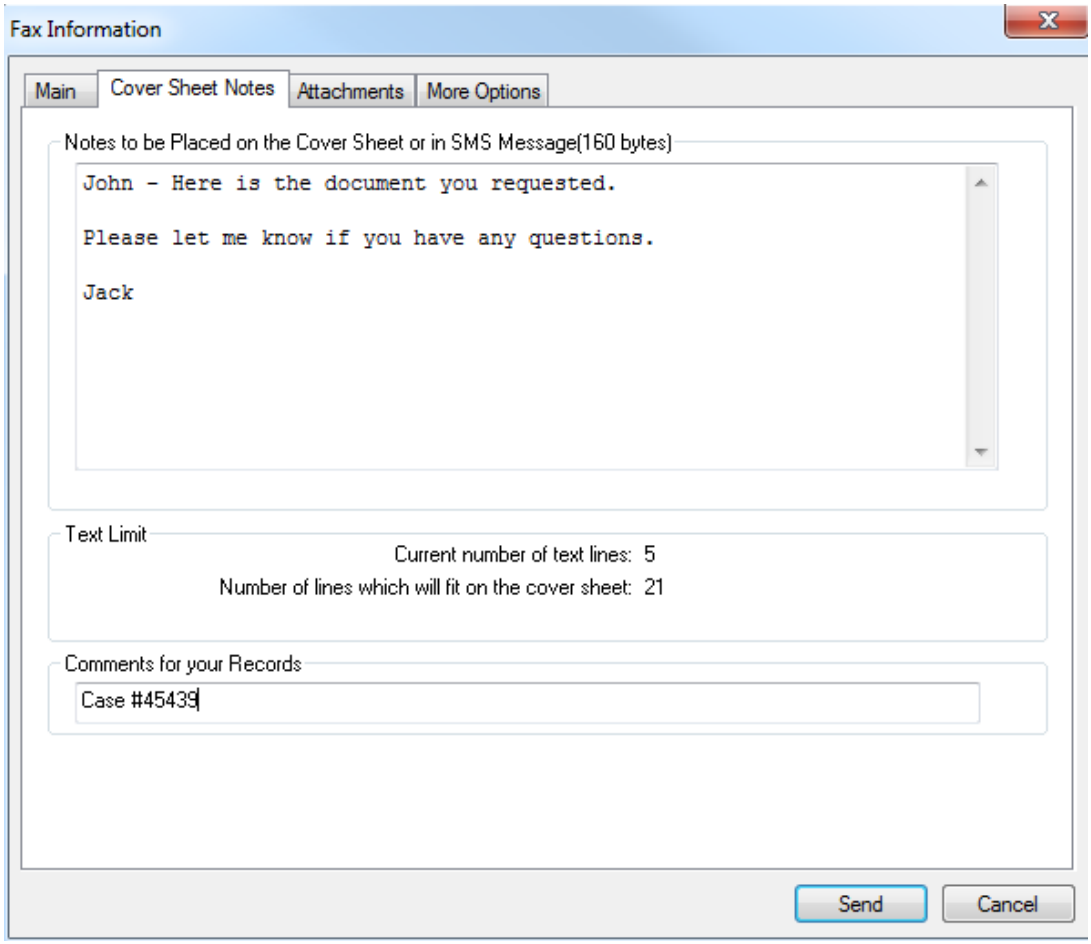
Add a Cover Sheet

Cover sheets are optional for every fax sent from RightFax. The cover sheet can contain additional notes intended for the recipient.

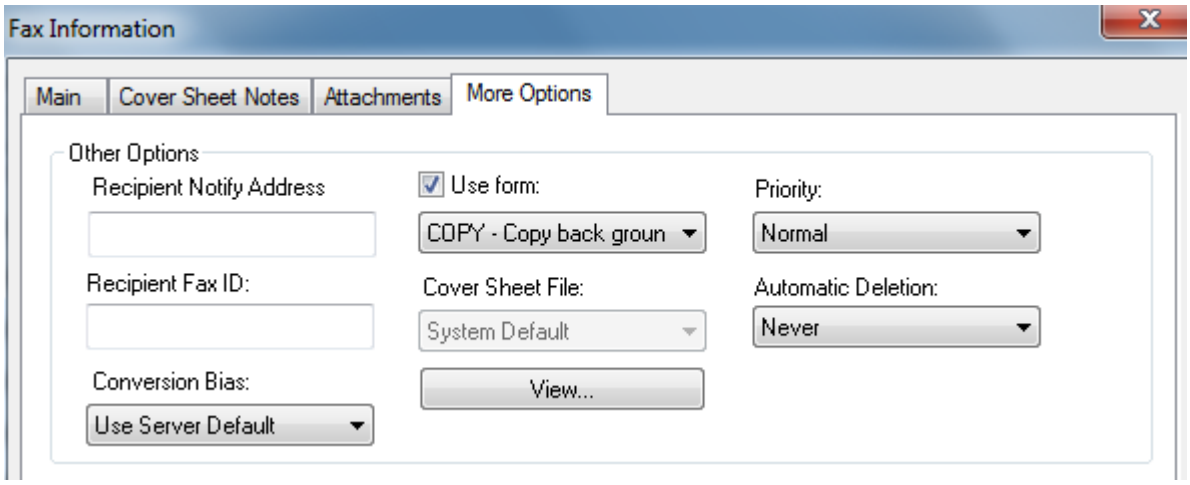
1. In the Fax Information dialog box, go to the **Main** tab. Under the **Options** section in the Main tab, select the **Use cover sheet** option.



2. Fill out the recipient's information and go to the **Cover Sheet Notes** tab.
3. Type the cover sheet notes in to the **Notes to be Placed on the Cover Sheet** box (up to 21 lines).



4. Note: You can also use the “Comments for your Records” field to include information about the fax that will not appear on the cover sheet. This field becomes searchable content, in the event that you want to reference the fax to an event, such as a case number, invoice number or account name.
5. Go to the **More Options** tab and select a cover sheet from the Cover Sheet File box.

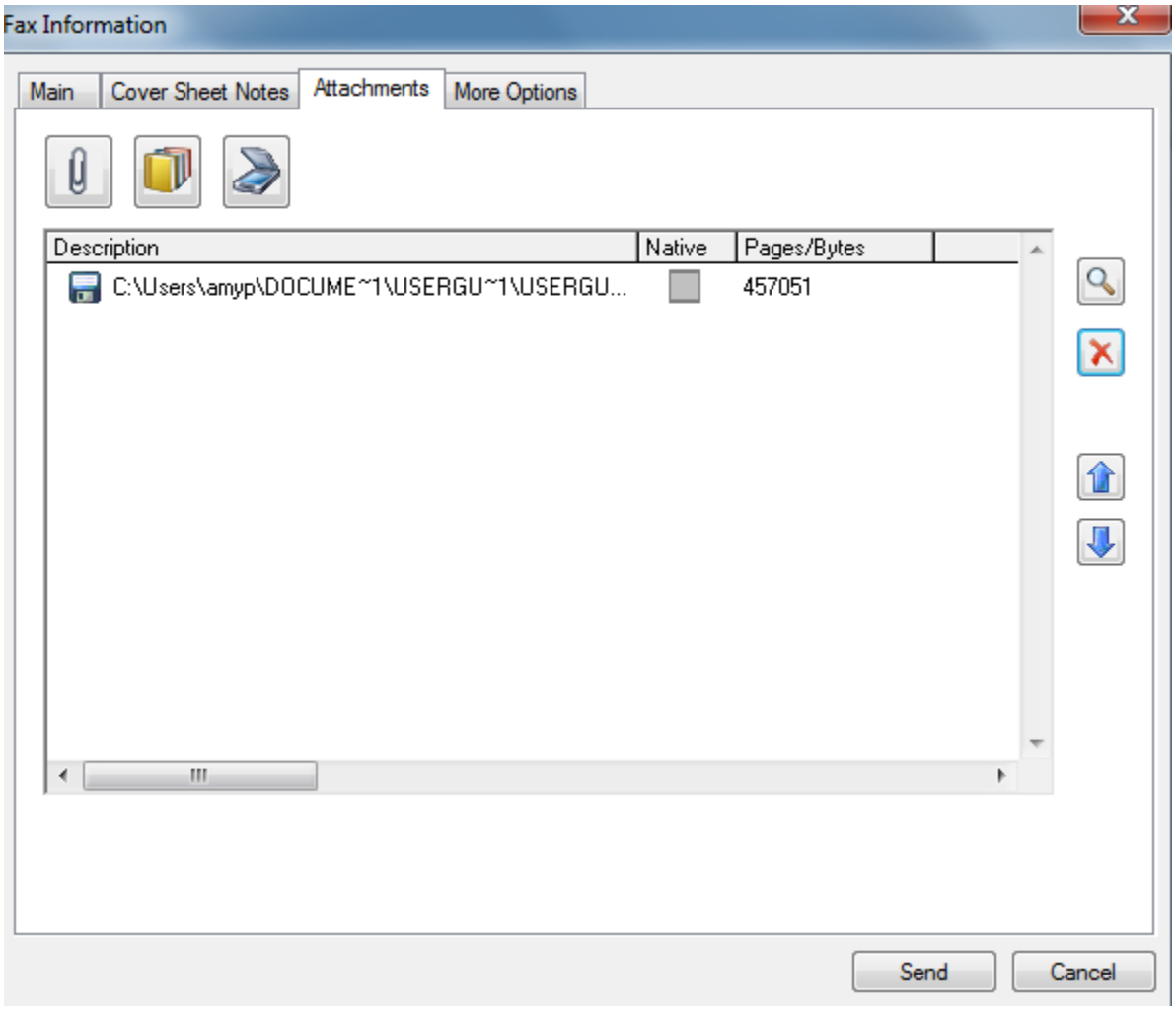


6. Optional: Enter the sender’s contact information in the **From** section fields and click **Send** to send the fax.

Attach Library Documents

Library Documents are frequently used documents that can be added to faxes. Your administrator can add these to the **Attachments** tab in the **Available Attachments** section.

1. In the Fax Information dialog box, go to the **Attachments** tab.
2. To add an attachment from the **Available Attachments** library, click each library document required for this fax. The documents will be added to the end of the fax, in the order they are selected.



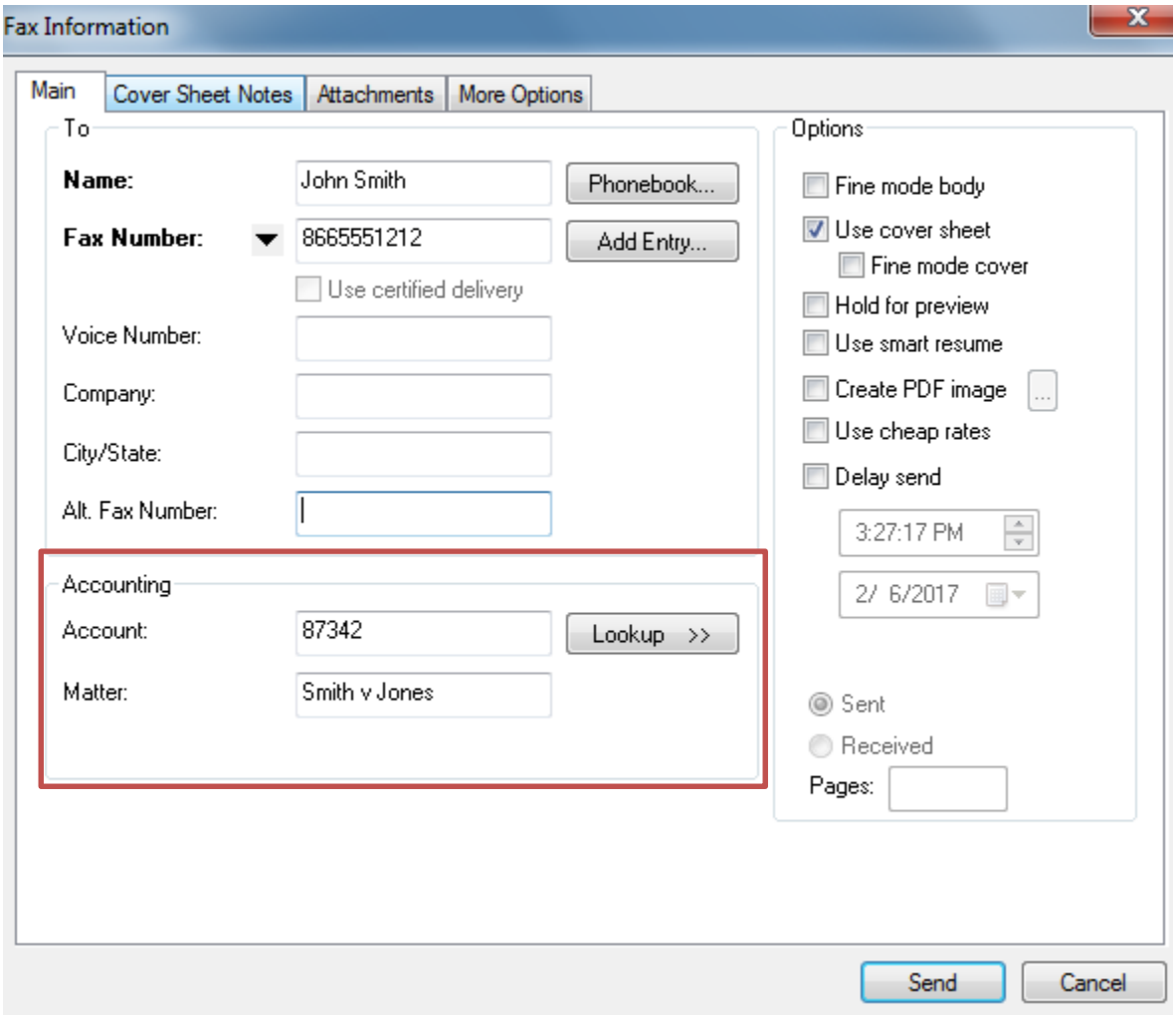
TIP: Click on the Paperclip to search for files on your computer to attach. Click on the File Folder icon to attached documents from a shared or personal file library. Click on the Scanner icon to pull documents that have been scanned.

The attached document(s) will appear in the section with a description and location of the document. You can view each attachment by double-clicking on the file. You can delete a Selected Attachment by highlighting the attachment and clicking the delete button.

Assign Billing Codes

Billing codes allow an administrator to identify a fax by the sender, the recipient or the content of the fax for reporting purposes.

1. In the Fax Information dialog box, go to the **Main** tab.
2. Under **Accounting**, enter one or two billing codes, or click Lookup to select from a list of available billing codes which can be customized for your company.

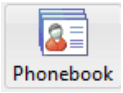


Adding Entries to Your Phonebook

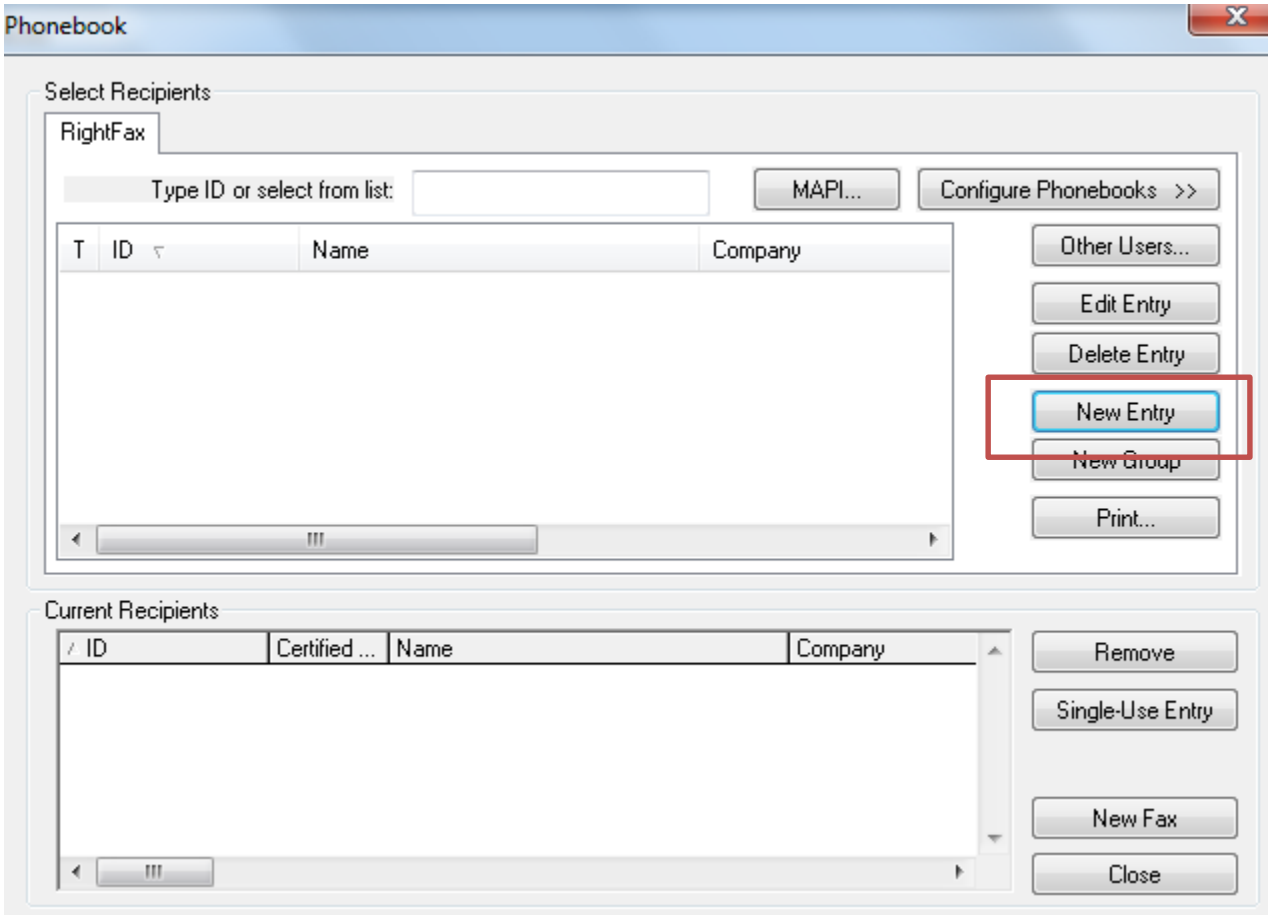
FaxUtil lets you create a personal phonebook of fax contacts. You can add individual contacts to your phonebook for frequently faxed numbers. You can also create group contacts that let you easily send one document to multiple members of the same group.

Create an Individual Phonebook Entry

Entries can be added to the phonebook individually for quick access to frequently used contacts.

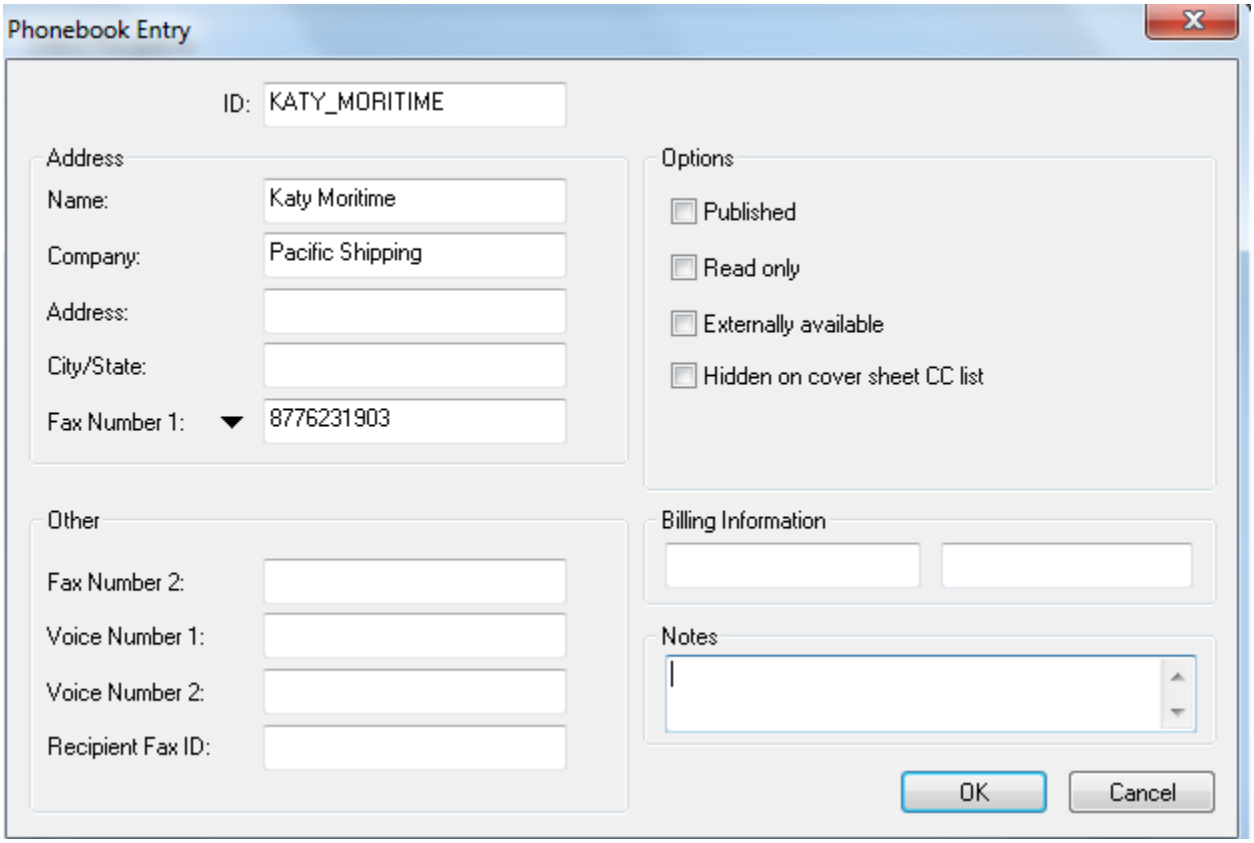
1. Click the **Phonebook** button 

in the FaxUtil toolbar and click **New Entry**



2. Enter a contact name in the **ID** box.

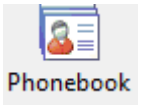
3. Enter the fax number in the **Fax Number 1** box and fill in any other contact information you prefer to save for the contact.



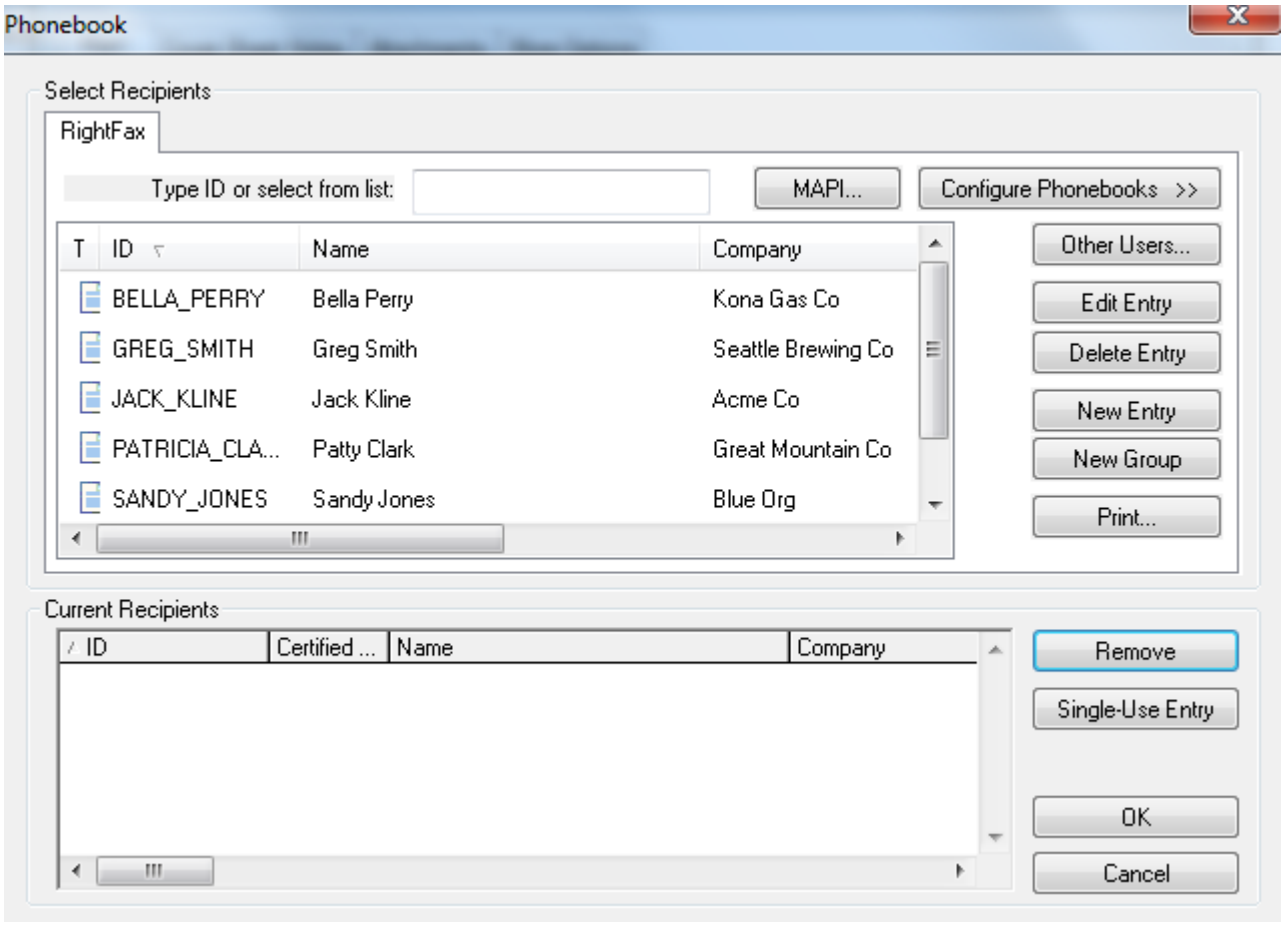
4. Click **OK**.

Use Your Phonebook

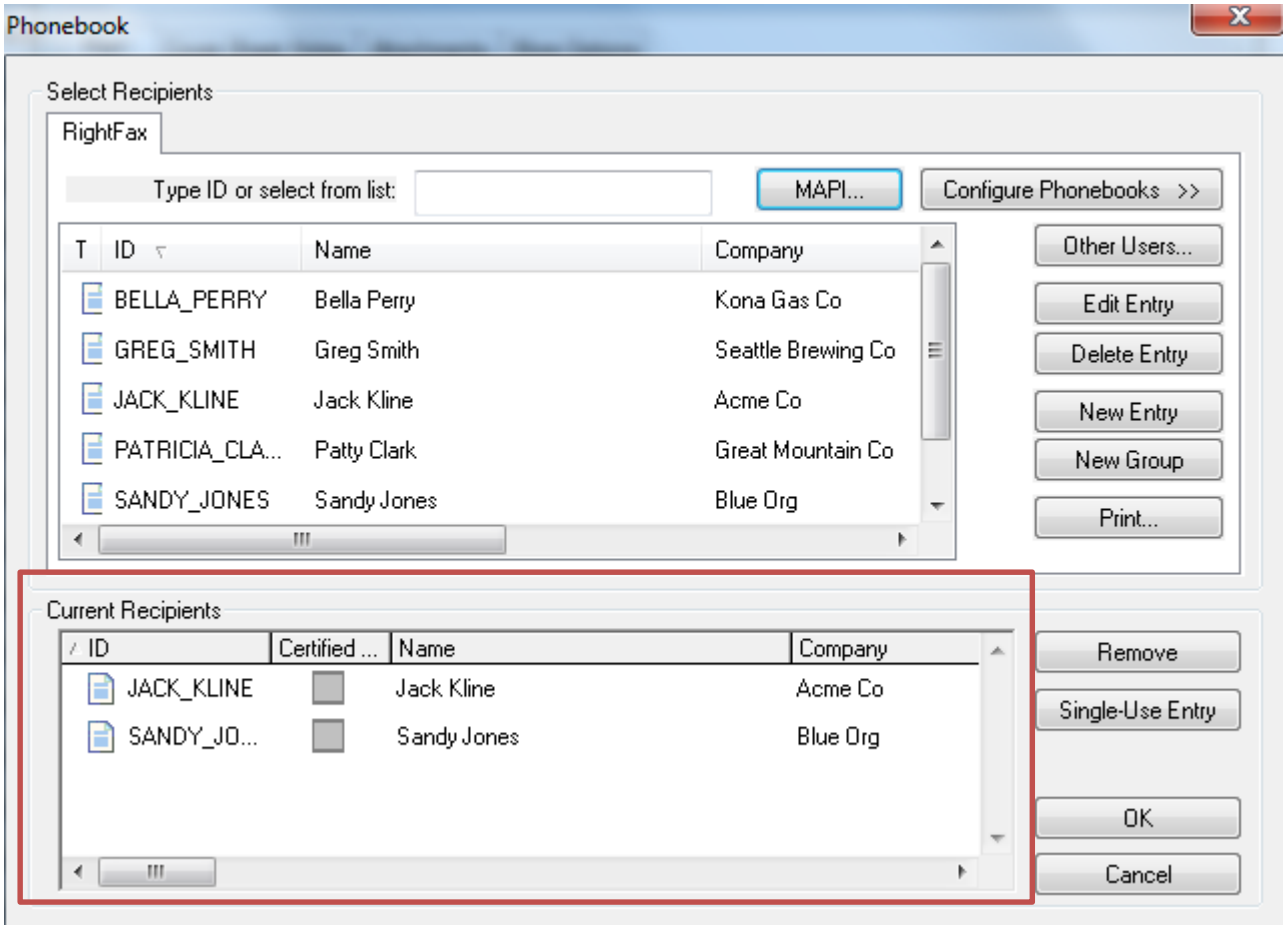
It is possible to easily add multiple recipients to one fax by using the RightFax Phonebook.

1. In the Fax Information dialog box, go to the **Main** tab.
2. Click the **Phonebook** icon 

to display all of the contacts in your RightFax phonebook.



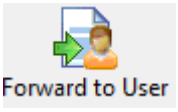
3. Double-click each contact that needs to receive this document. Their name will appear in the **Current Recipients** list.



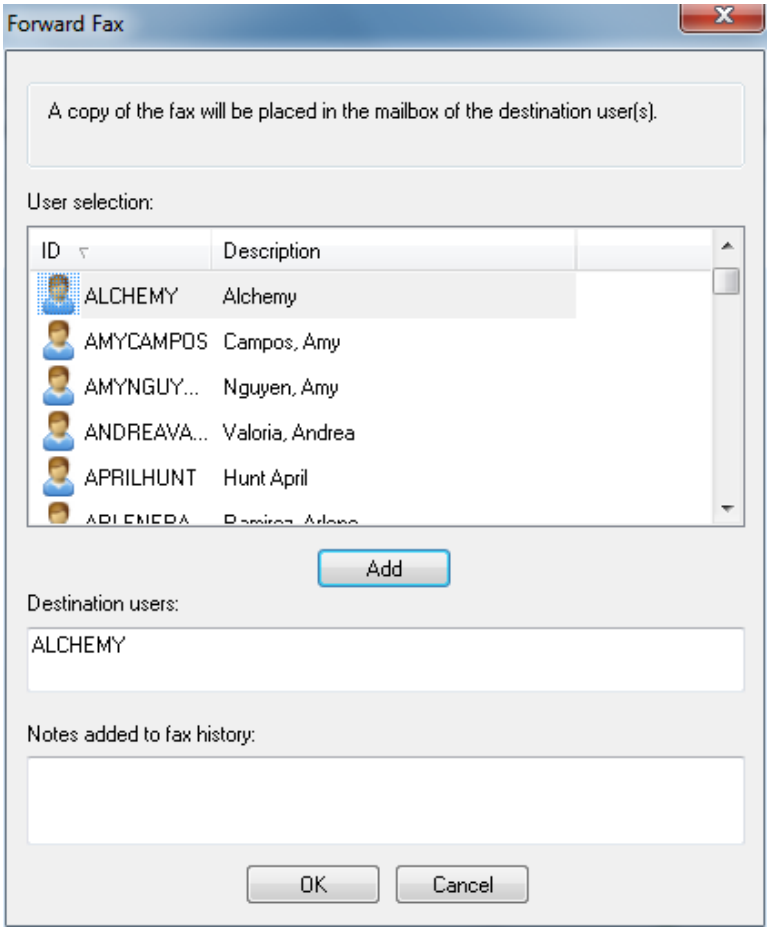
4. Click **OK** on the Phonebook to return to the Fax Information dialog. Then fill out the required (bold) fields, add any attachments, and click **Send**.

Forward a Fax to other Users or Fax Numbers

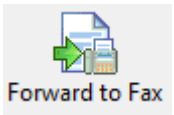
You can quickly and easily forward a fax to another RightFax user who is registered on your RightFax server. This feature will place a **copy** of the fax in the inbox of the destination user's account and will be noted in the history of the fax.

1. Click on the **Forward to User** button 

on the toolbar. You can select the user, group or application to forward a copy of the fax and **Add** them to the Destination Users section.



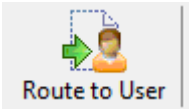
2. Click **OK** to send a copy of the fax to one or multiple recipients.

3. You can also click on the **Forward to Fax** button 

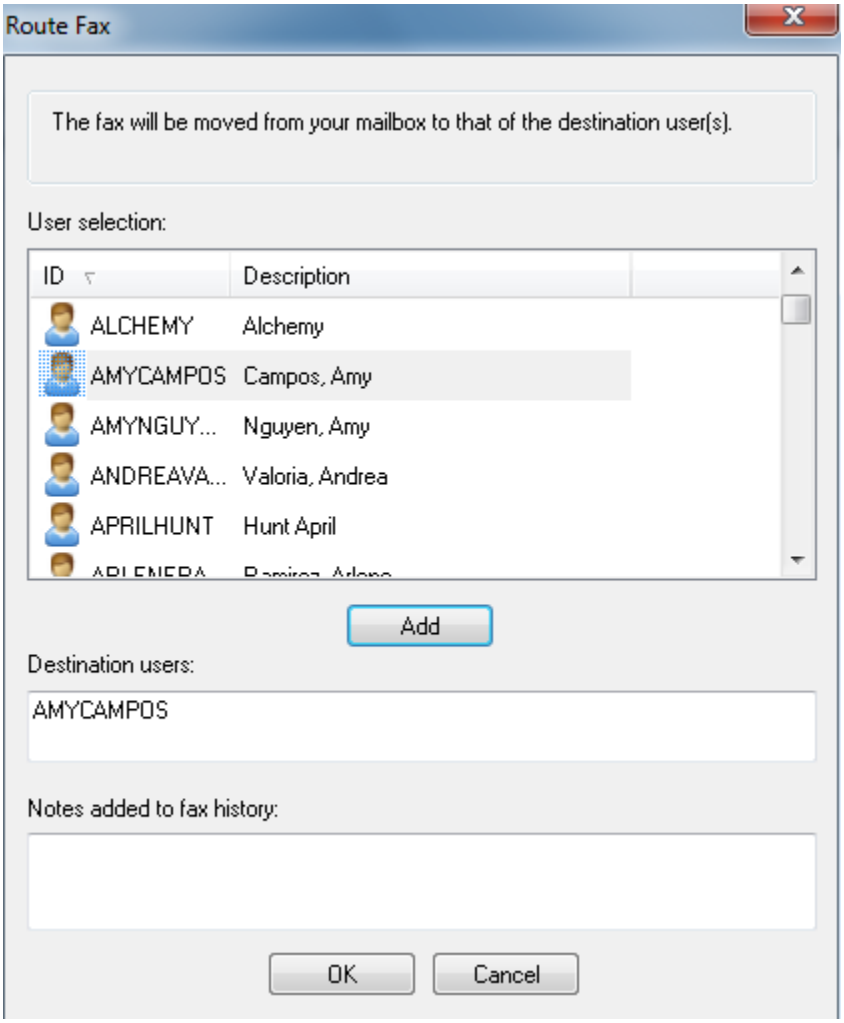
to send a fax as a fax to another recipient.

Routing a Fax to Another User

You can quickly and easily forward a fax to another RightFax user who is registered on your RightFax server. This feature will **move** the fax from its current location to the fax in the inbox of the destination user's account and will be noted in the history of the fax.

1. Click on the **Route to User** button 

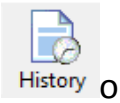
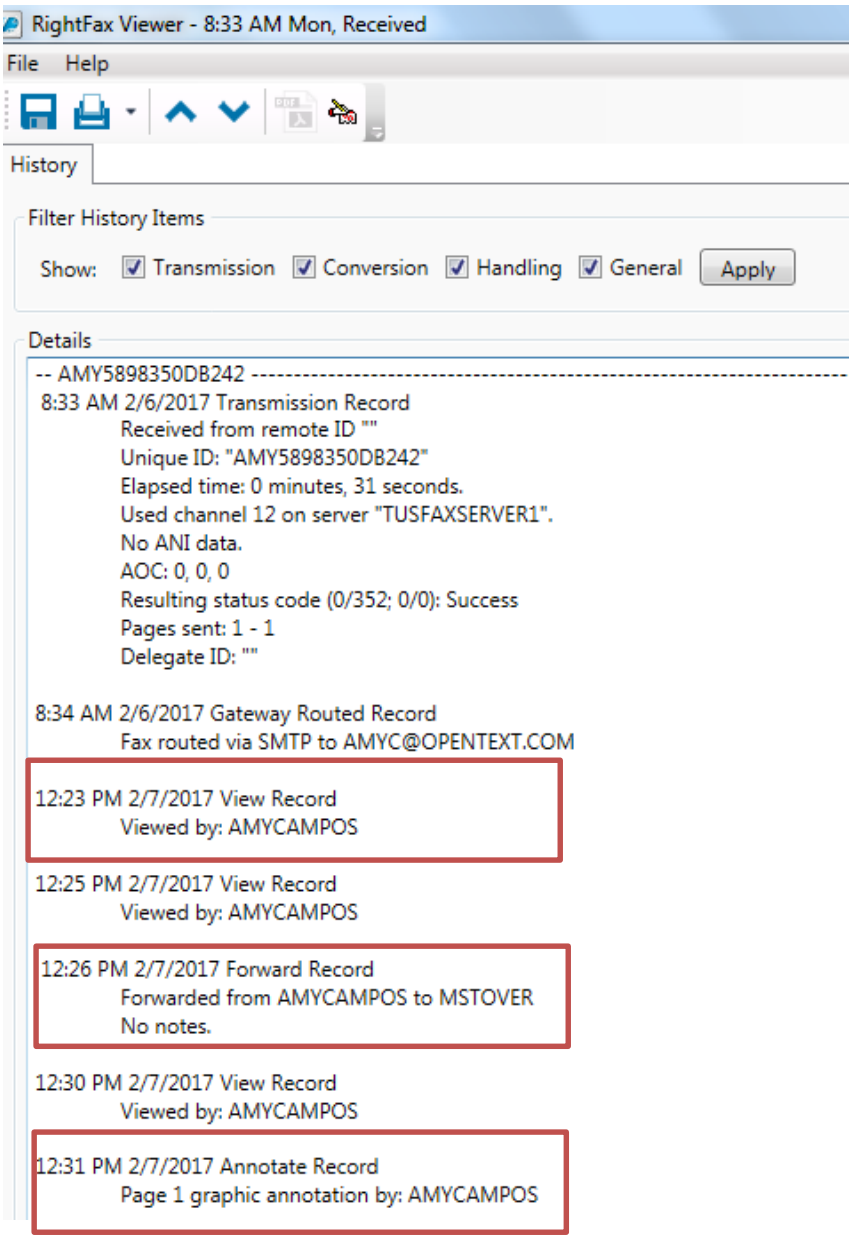
on the toolbar. You can select the user, group or application to forward a copy of the fax and **Add** them to the Destination Users section.



2. Click **OK** to move the fax to one or multiple recipients.

Viewing A Fax's History

You can view a detailed audit trail of the history of a fax, which will include detail such as when it was delivered, viewed and by whom, if it was routed or forwarded and to whom, if it was edited/annotated, and other important details.

1. Select the fax in your fax inbox for which you would like to view a detailed audit trail. Then select the **History** icon 

on the toolbar.