

Enterprise RightFax for Microsoft Outlook

Quick Reference Guide

Using the RightFax Form

To Create, Address, and Format Fax Messages:

1. In the Outlook toolbar, click the button: **New Fax to Contact**.
2. Enter recipient name(s) and fax number(s) into the **Quick Fax Address** dialog box.
3. After all fax recipients have been added, click: **Done**.
4. The RightFax form opens.

NOTE: The RightFax form will automatically use fax addresses for selected contacts if you select them in your Outlook Contacts folder prior to clicking: **New Fax to Contact**. You have the option to add both fax addresses and email addresses to your recipient list using the RightFax Form.

To Send a Document:

1. Select the **Message** tab.
2. Add fax addresses and/or e-mail addresses in the **To:** and **Cc:** fields.
3. Complete the **Subject** box. Your subject line will appear in the **Notes** section of your fax cover sheet.
4. Type the body of your message.
5. Attach any desired file attachments. File attachments will be converted to graphic images and automatically appended to the end of the document in the order they appear in the message.
6. Click the **Advanced Faxing Options** tab. Add any desired library documents or overlay forms, and select any transmission options you want.
7. Send your fax by clicking the **Send** button.

Addressing Fax Documents

Faxes can be addressed using one of the two different supported address formats in the RightFax form: FAX format and RFX format. You may also address a fax from your Outlook Contacts List.

To Send a Document using the FAX Addressing Format:

1. In the **To:** or **Cc:** box of a new message, specify a destination name and fax number within enclosing brackets: [FAX:Name@FaxNumber].
2. Separate multiple FAX addresses with semicolons.

To Send a Document using the RFX Addressing Format:

1. In the **To:** or **Cc:** box of a new message, specify a destination name and fax number within enclosing brackets: [RFX:Name@/FN=FaxNumber]. The name and fax numbers are required. You can also add other parameters for display on the fax cover sheet:
 - /SMS=Number (the SMS Number replaces /FN for a fax number)
 - /CI=City, State (City and state)
 - /CO=Company (Company)
 - /VN=Number (Voice phone number)
2. Separate multiple RFX addresses with semicolons.

To Send a Document using your Outlook Contacts List:

1. Click the **To:** button to open the **Select Names** dialog box.
2. Select one or more Business Fax or Home Fax from your Contacts list.
3. Alternatively, you can select one or more contacts from your Contacts folder and then click the **New Fax to Contact** button in the Outlook toolbar.

Adding a Cover Sheet

Enterprise RightFax will automatically detect the user's agency and add the agency's approved default cover sheet.

To Add a Fax Cover Sheet That Is Different From Your Agency's Default Cover Sheet:

1. Click the tab on the RightFax form: **Advanced Faxing Options**
2. Select the option to **Use cover sheet**.
3. In the **Cover Sheet File** box, select your cover sheet file from the list.
4. In the **From** group box, enter your name, fax number, voice number, and your organization's fax number.

Attaching Library Documents

To Attach Library Documents:

1. Click the tab on the RightFax form: **Advanced Faxing Options**.
2. Open a list of library documents on your network by clicking the button: **Show the Select Library Document Dialog**.
3. Attach library documents by double-clicking on each document to add it to the list of **Selected Attachments** in the order you want them to appear at the end of your fax document.

Adding Overlay Forms

To Add an Overlay Form (merges an image file with your document, such as company letterhead):

1. Click the tab: **Advanced Faxing Options**.
2. Select the option: **Use Form**.
3. Select the overlay form you want from the list.

Viewing Fax Documents

The RightFax fax viewer displays received fax documents. :

1. Open the Outlook message.
2. The fax will be displayed automatically.