

# 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

# 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!

OPENTEXT™  
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.

 A screenshot of the 'Fax Information' dialog box. The dialog has a title bar with a close button (X) and a tabbed interface with 'Main', 'Cover Sheet Notes', 'Attachments', and 'More Options'. The 'Main' tab is active. The 'To' section contains fields for 'Name' (Joe Smith), 'Fax Number' (8665551212), 'Voice Number', 'Company', 'City/State', and 'Alt. Fax Number'. There are 'Phonebook...' and 'Add Entry...' buttons. An 'Accounting' section has 'Account' and 'Matter' fields with a 'Lookup >>' button. The 'Options' section on the right includes checkboxes for 'Fine mode body', 'Use cover sheet' (checked), 'Fine mode cover', 'Hold for preview', 'Use smart resume', 'Create PDF image', 'Use cheap rates', and 'Delay send'. It also has time and date pickers (3:06:04 PM, 2/ 3/2017) and radio buttons for 'Sent' (selected) and 'Received'. A 'Pages' field is at the bottom. At the bottom right, there are 'Send' and 'Cancel' buttons. Red boxes highlight the 'New Fax' button, the 'To' section, and the 'Send' button.

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).

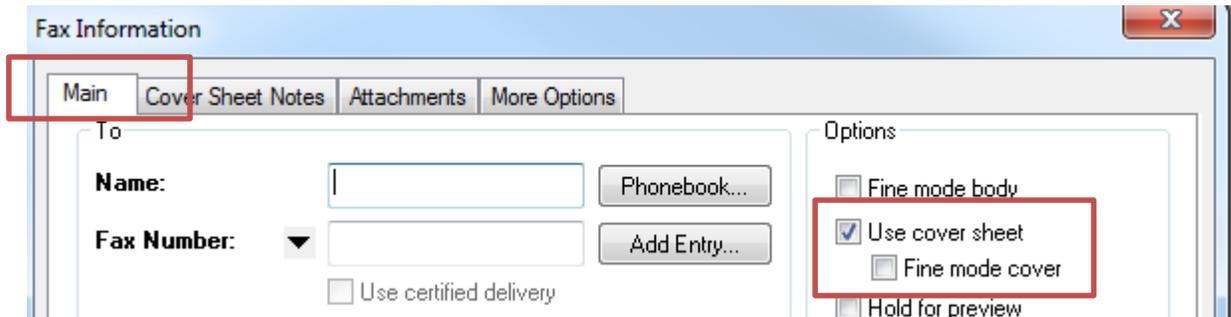
The screenshot shows the 'Fax Information' dialog box with the 'Main' tab selected. The 'To' section includes fields for Name (Joe Smith), Fax Number (8665551212), E-mail Address, and SMS Number. A dropdown menu is open next to the Fax Number field, showing options: Fax Number, E-mail Address, and SMS Number. The 'Options' section includes checkboxes for Fine mode body, Use cover sheet (checked), Fine mode cover, Hold for preview, Use smart resume, Create PDF image, Use cheap rates, and Delay send. There are also fields for time (3:06:04 PM) and date (2/ 3/2017). The 'Accounting' section has fields for Account and Matter. At the bottom are 'Send' and 'Cancel' buttons.

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.

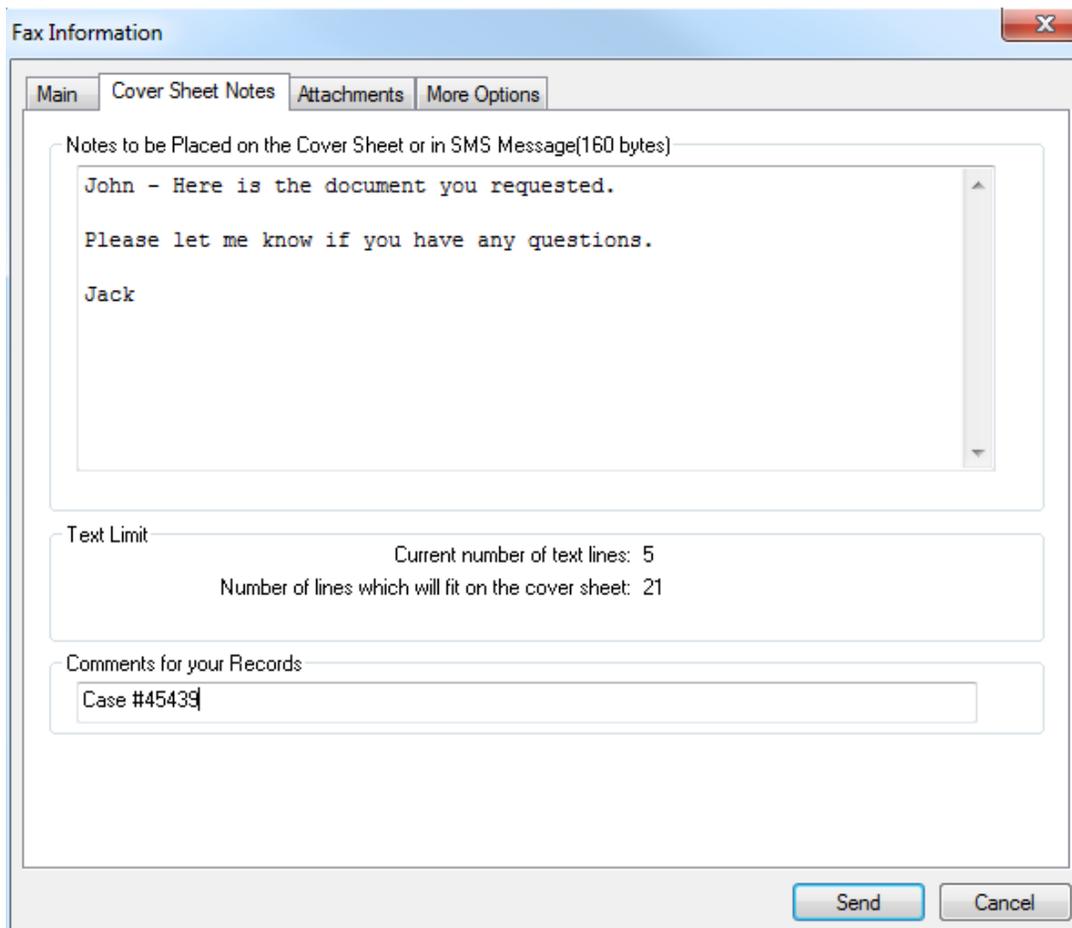
## Add a Cover Sheet

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

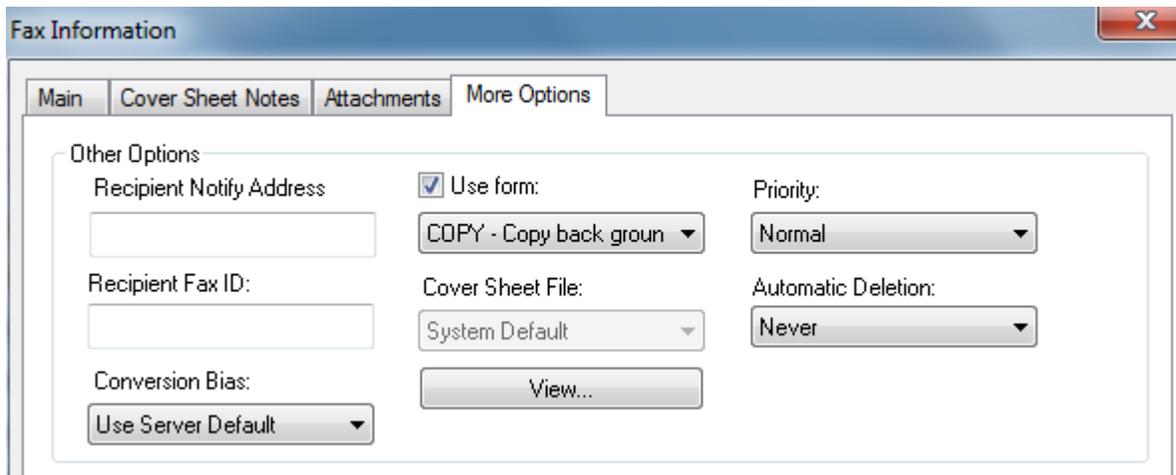
1. In the Fax Information dialog box, go to the **Main** tab. Under the **Options** section in the Main tab, select the **Use cover sheet** option.



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).



- 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.
- Go to the **More Options** tab and select a cover sheet from the Cover Sheet File box.



The screenshot shows the 'Fax Information' dialog box with the 'More Options' tab selected. The dialog has four tabs: 'Main', 'Cover Sheet Notes', 'Attachments', and 'More Options'. The 'More Options' tab contains the following fields and controls:

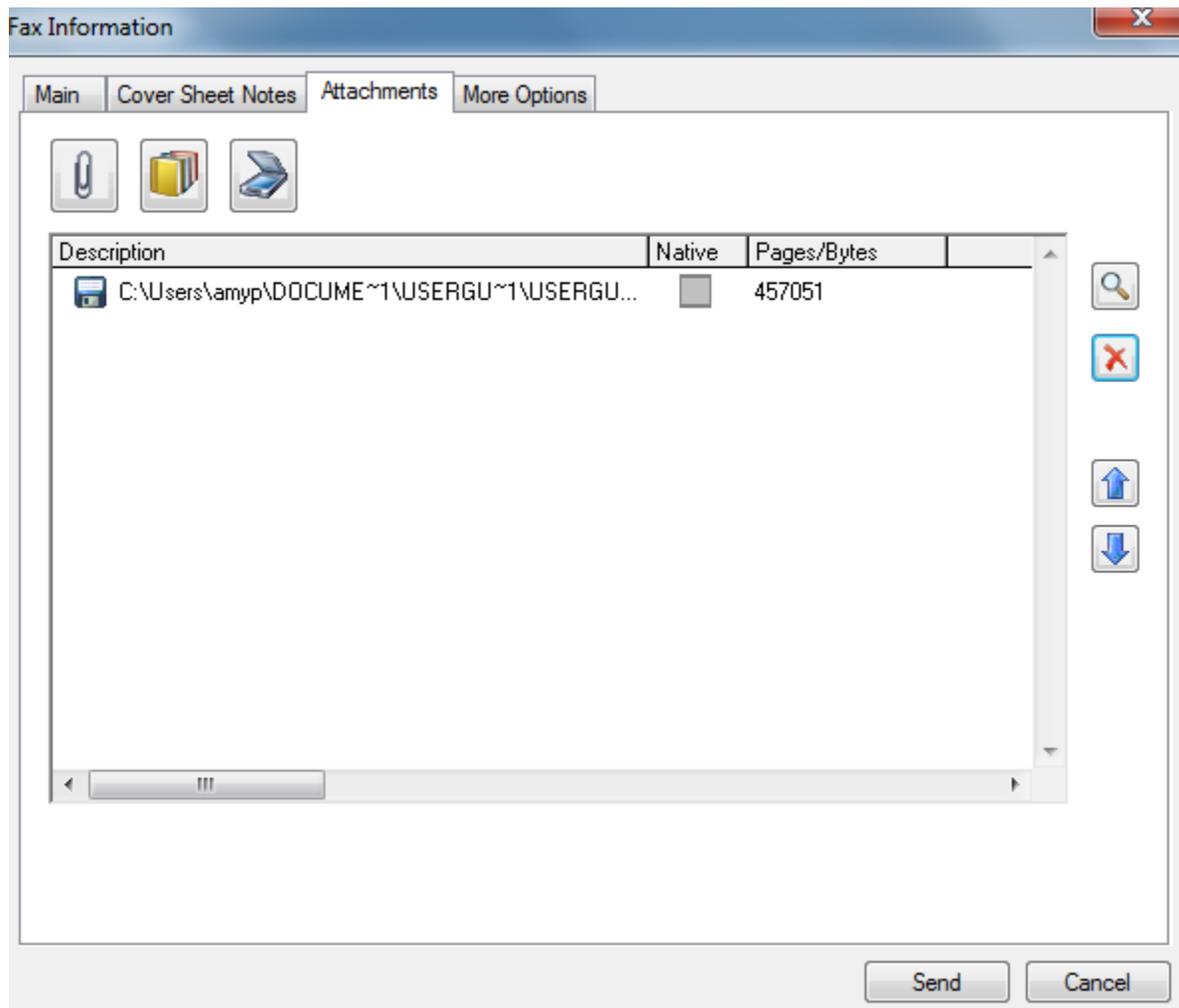
- Other Options** (grouped header)
- Recipient Notify Address**: A text input field.
- Use form:** A checked checkbox next to a dropdown menu showing 'COPY - Copy back grou...'. Below it is a 'View...' button.
- Priority:** A dropdown menu set to 'Normal'.
- Recipient Fax ID:** A text input field.
- Cover Sheet File:** A dropdown menu set to 'System Default'.
- Automatic Deletion:** A dropdown menu set to 'Never'.
- Conversion Bias:** A dropdown menu set to 'Use Server Default'.

- 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.

The screenshot shows the 'Fax Information' dialog box with the 'Main' tab selected. The 'Accounting' section is highlighted with a red box. The 'To' section contains fields for Name (John Smith), Fax Number (8665551212), Voice Number, Company, City/State, and Alt. Fax Number. The 'Options' section includes checkboxes for 'Fine mode body', 'Use cover sheet' (checked), 'Fine mode cover', 'Hold for preview', 'Use smart resume', 'Create PDF image', 'Use cheap rates', and 'Delay send'. There are also time and date pickers, radio buttons for 'Sent' and 'Received', and a 'Pages' field. The 'Send' and 'Cancel' buttons are at the bottom.

Field	Value
Name	John Smith
Fax Number	8665551212
Voice Number	
Company	
City/State	
Alt. Fax Number	
Accounting Account	87342
Accounting Matter	Smith v Jones

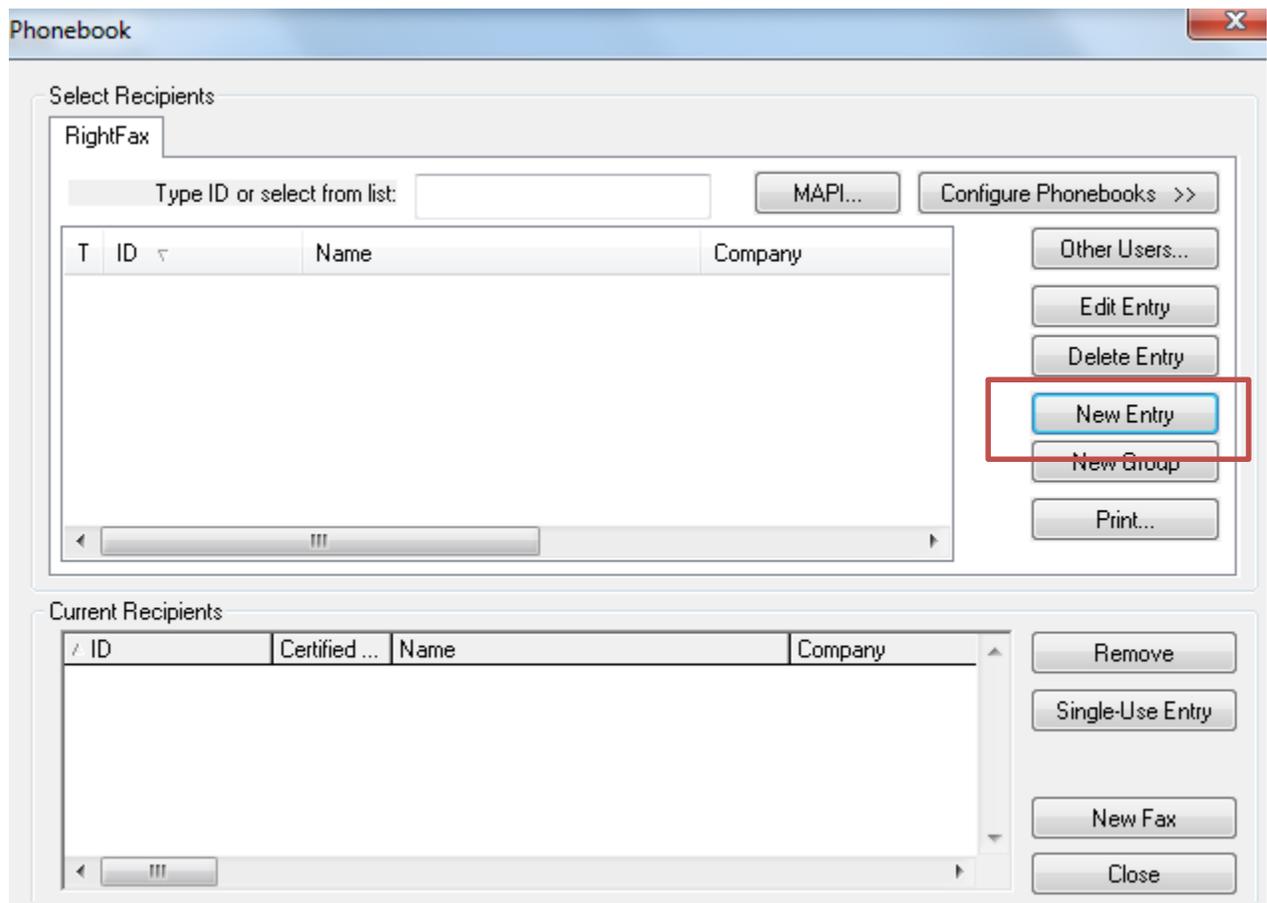
## Adding Entries to Your Phonebook

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.

The screenshot shows a 'Phonebook Entry' dialog box with the following fields and options:

- ID: KATY\_MORITIME
- Address section:
  - Name: Katy Moritime
  - Company: Pacific Shipping
  - Address: [empty]
  - City/State: [empty]
  - Fax Number 1: 8776231903
- Options section:
  - Published
  - Read only
  - Externally available
  - Hidden on cover sheet CC list
- Other section:
  - Fax Number 2: [empty]
  - Voice Number 1: [empty]
  - Voice Number 2: [empty]
  - Recipient Fax ID: [empty]
- Billing Information: [empty]
- Notes: [empty text area]

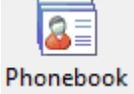
Buttons: OK, Cancel

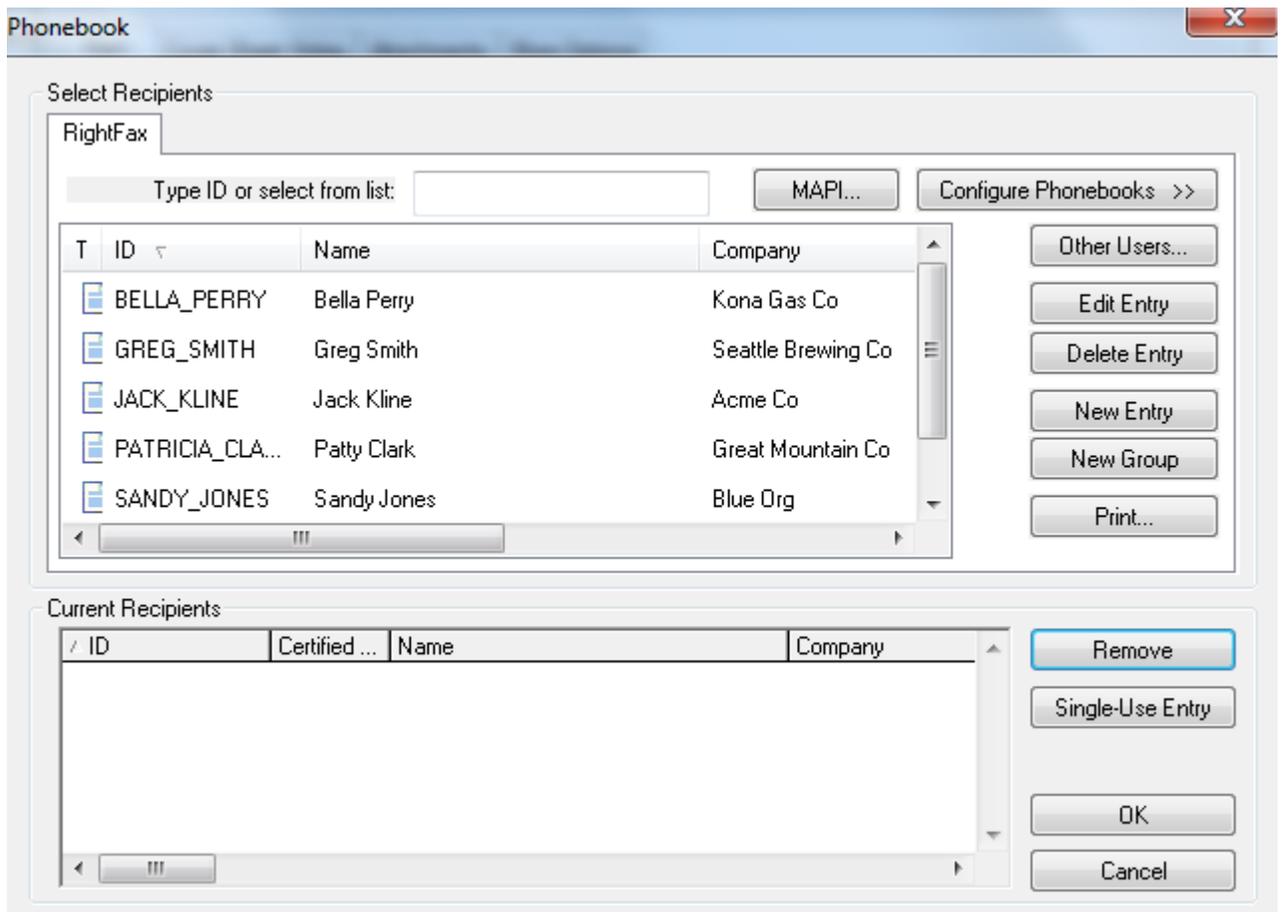
4. Click **OK**.

## Use Your Phonebook

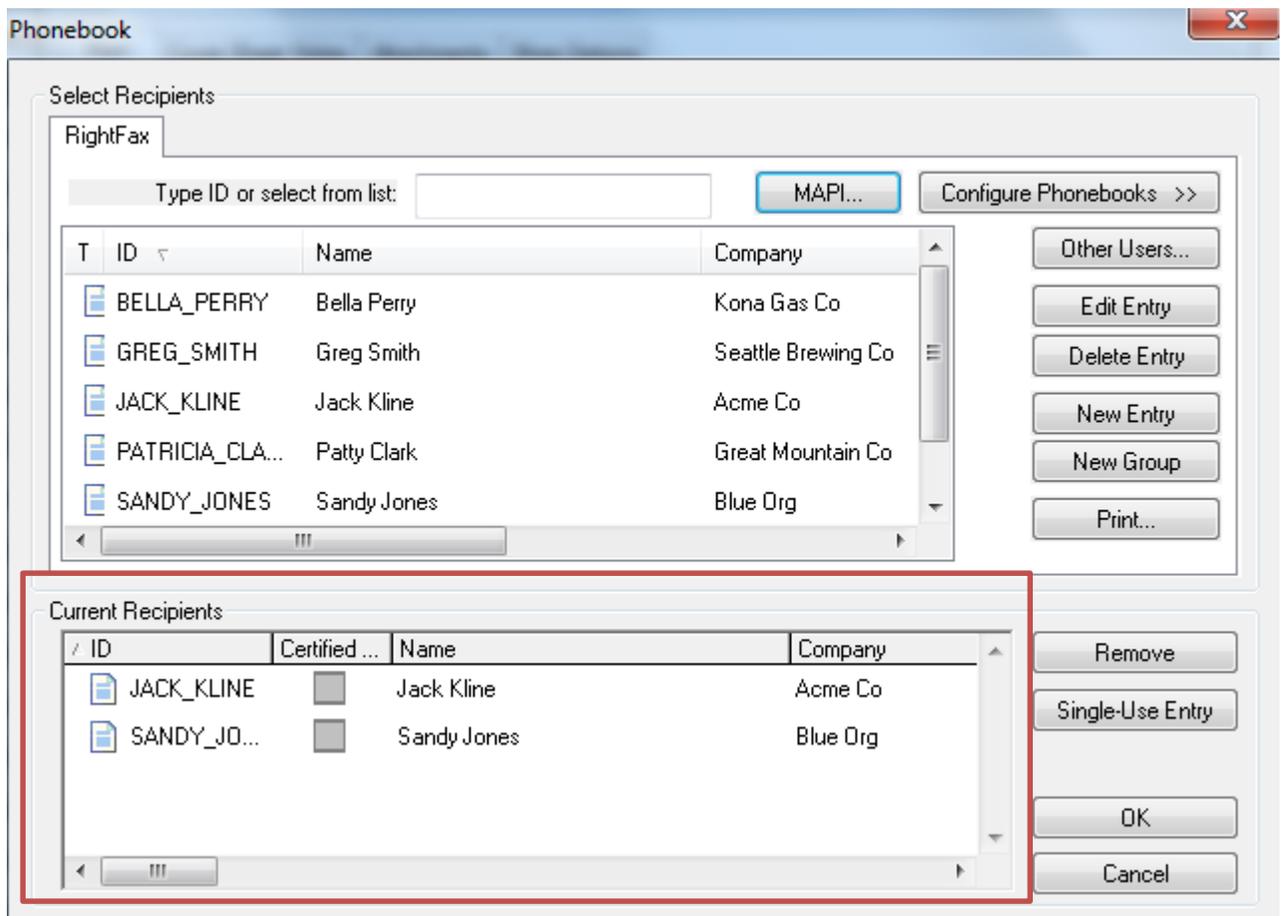
It is possible to easily add multiple recipients to one fax by using the RightFax Phonebook.

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.



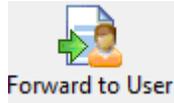
3. Double-click each contact that needs to receive this document. Their name will appear in the **Current Recipients** list.

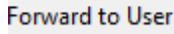


4. Click **OK** on the Phonebook to return to the Fax Information dialog. Then fill out the required (bold) fields, add any attachments, and click **Send**.

## 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.

Forward Fax

A copy of the fax will be placed in the mailbox of the destination user(s).

User selection:

ID	Description
ALCHEMY	Alchemy
AMYCAMPPOS	Campos, Amy
AMYNGUY...	Nguyen, Amy
ANDREAVA...	Valoria, Andrea
APRILHUNT	Hunt April
ABLEMERA	Barnes, Alexa

Add

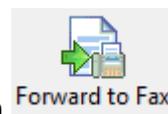
Destination users:

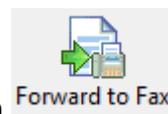
ALCHEMY

Notes added to fax history:

OK Cancel

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



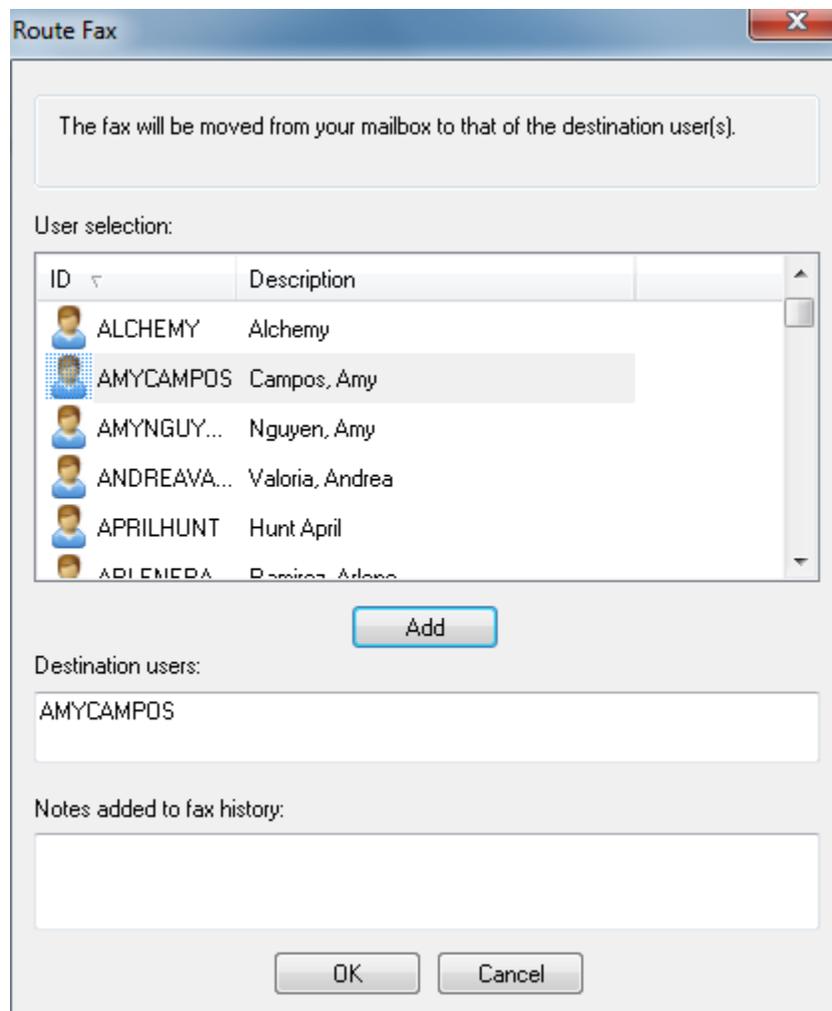
3. You can also click on the **Forward to Fax** button  to send a fax as a fax to another recipient.

## 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.



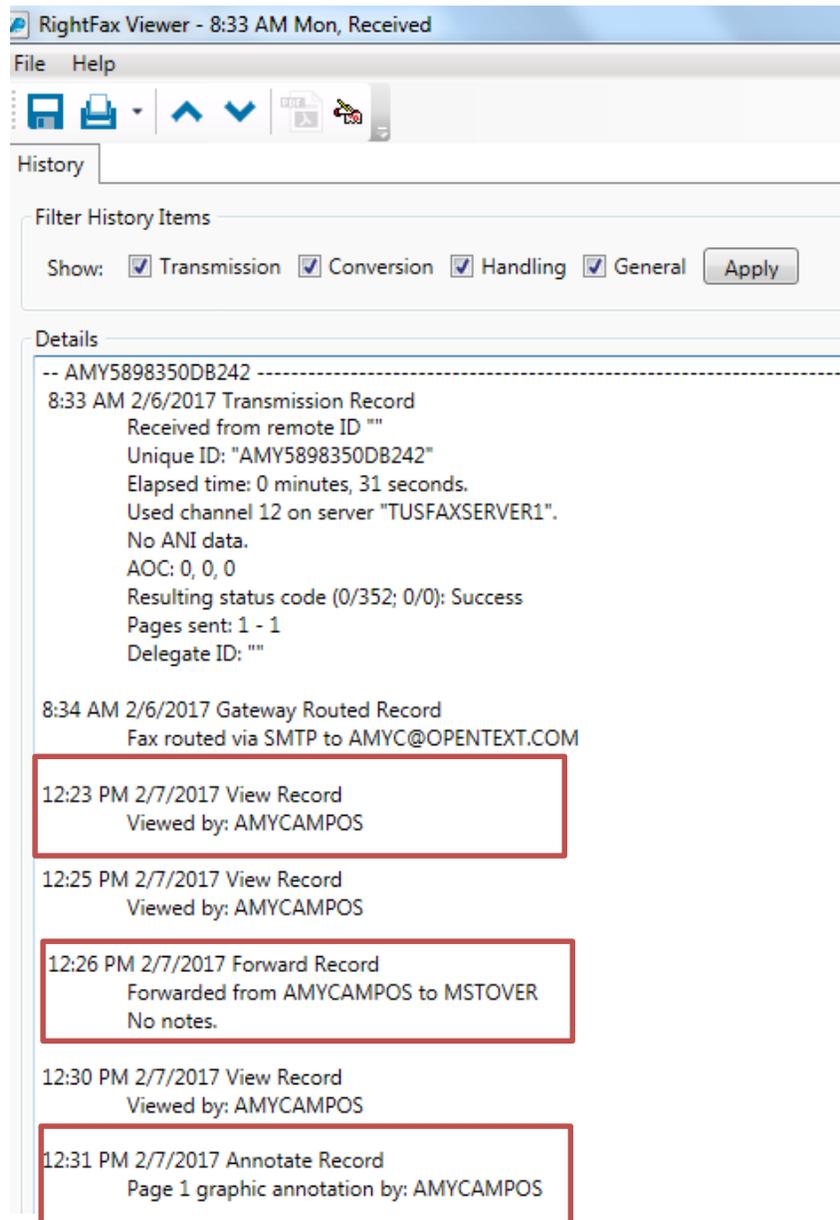
2. Click **OK** to move the fax to one or multiple recipients.

## 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.



RightFax Viewer - 8:33 AM Mon, Received

File Help

History

Filter History Items

Show:  Transmission  Conversion  Handling  General

Details

-- AMY5898350DB242 -----

8:33 AM 2/6/2017 Transmission Record  
 Received from remote ID ""  
 Unique ID: "AMY5898350DB242"  
 Elapsed time: 0 minutes, 31 seconds.  
 Used channel 12 on server "TUSFAXSERVER1".  
 No ANI data.  
 AOC: 0, 0, 0  
 Resulting status code (0/352; 0/0): Success  
 Pages sent: 1 - 1  
 Delegate ID: ""

8:34 AM 2/6/2017 Gateway Routed Record  
 Fax routed via SMTP to AMYC@OPENTEXT.COM

12:23 PM 2/7/2017 View Record  
 Viewed by: AMYCAMPOS

12:25 PM 2/7/2017 View Record  
 Viewed by: AMYCAMPOS

12:26 PM 2/7/2017 Forward Record  
 Forwarded from AMYCAMPOS to MSTOVER  
 No notes.

12:30 PM 2/7/2017 View Record  
 Viewed by: AMYCAMPOS

12:31 PM 2/7/2017 Annotate Record  
 Page 1 graphic annotation by: AMYCAMPOS