

# **ITS Fax User Guide**

Use this guide for step by step instructions on how to use the ITS Fax solution. This includes the installation of the print driver, how to use PC to fax, web to fax and email to fax, and how to receive faxes. Please note: With this guide you were provided with vital information such as your ITS Fax phone number, make sure to retain this information for your records.

#### ITS Fax User Guide Version 5.0 – 10/19/2011



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#### Installation

\*IMPORTANT NOTE\* This information is to INSTALL THE PRINT DRIVER onto your computer, <u>NOT</u> to access your ITS Fax web portal. To access the <u>ITS Fax web portal</u> (with the log-in information provided to you in the email received at time of purchase) please visit: <u>www.itsfax.com</u>.

- 1. Visit www.itstelecom.com/its\_fax\_download.htm
- 2. Click on the **Download** button.
- 3. Open the downloaded file "ITS\_Fax.zip"
- 4. If you have a 32 bit version of Windows, drag the folder "32-Bit" to your desktop. If you have a 64 bit version of Windows, drag the folder "64-Bit" to your desktop. If you do not know which version you have:
  - a. Click start
  - b. Right Click "My Computer" and click "Properties"



c. In the "System" section you will see an item called "System Type". It will say either 32-Bit or 64-Bit

| System                  |   |
|-------------------------|---|
| Rating:                 | 5.2 Windows Experience Index                        |
| Processor:              | Intel(R) Core(TM)2 Duo CPU E6550 @ 2.33GHz 2.33 GHz |
| Installed memory (RAM): | 3.00 GB   |
| System type:            | 32-bit Operating System                             |
| Pen and Touch:          | No Pen or Touch Input is available for this Display |

- 5. Open the folder you unzipped to the desktop.
- 6. Run "setup.exe"





- 7. If you get an Open File Security Warning Click Run
- 8. In the "Select Setup Language" window, select the language you want and click "OK"



9. In the new window that pops up click Next.

| Setup - InternetFax |   |
|---------------------|---|
|                     | Welcome to the InternetFax<br>Setup Wizard<br>This will install InternetFax on your computer.                                     |
|                     | It is recommended that you close all other applications before<br>continuing.<br>Click Next to continue, or Cancel to exit Setup. |
|                     |   |
|                     | Next > Cancel   |

10. In the Next window, keep the default folder location and click Next.

| 15 Setup - InternetFax   | J |
|--|---|
| Select Destination Location<br>Where should InternetFax be installed?                  |   |
| Setup will install InternetFax into the following folder.                              |   |
| To continue, click Next. If you would like to select a different folder, click Browse. |   |
| C:\Program Files\InternetFax V7.6 Browse   |   |
|  |   |
| At least 9.6 MB of free disk space is required.  |   |
| < Back Next > Cancel   |   |



11. In the Next window, keep the default folder name and click Next.



12. In the next window, click Install.

| j] Setup - InternetFax   | - <b>- x</b> |
|--|--------------|
| Ready to Install<br>Setup is now ready to begin installing InternetFax on your computer.                     |              |
| Click Install to continue with the installation, or click Back if you want to review<br>change any settings. | or           |
| Destination location:<br>C.\Program Files\InternetFax V7.6<br>Start Menu folder:<br>InternetFax              | *            |
| •  | •            |
| < Back Install   | Cancel       |

13. Click OK in the pop up that appears.





14. Click OK in the second pop up that appears.



15. Click Finish in the Install window.



16. Find the little white globe in the system tray. The system tray is the area with icons next to the clock in the start menu. Right click the white globe and click show.





17. In the Fax File Cabinet window click the Settings button.

| Fax File Cabinet | $\frown$      | -       | x    |
|------------------|---------------|---------|------|
|                  |               |         |      |
| Status           | То            | Subject | Date |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         |      |
|                  |               |         | •    |
|                  | <u>C</u> lose |         |      |
|                  |               |         |      |

- 18. Fill out the new window EXACTLY as it was filled out for you on the email you received from ITS.
  - a. Populate the top section with your Name, Company, Email Address and Fax number. This information will be displayed on any cover page if you choose to add one to an outgoing fax.
  - b. In the Authorization section, enter your account information that was given to you when you signed up for the ITS Fax service. (Username and Password in email from ITS) Then click the save button.

| Settings This information will be used on the |
|---|
| cover page, if you use one                    |
| Full Name Crystal Smith                       |
| Company ITS                                   |
| Your Email Address csmith@itstelecom.com      |
| Your Fax Number 8055207030                    |
| Authorization                                 |
| User Name csmith@itstelecom.com               |
| Password ******                               |
| This is your account information              |
| Save Close                                    |

- 19. Close the Fax File Cabinet window.
- 20. If you had to disable an Anti-virus or Anti-malware application to get the drivers installed, please make sure to re-enable these applications



#### Print to Fax

\*IMPORTANT NOTE\* The ITS Print to Fax function is not compatible with Mac computers, only PC's.

1. From the application that you've created the document that you want to fax, select File-> Print

| Printer<br>Name:  | ()its-srv2\Lounge Co   | pier                                | Properties           |
|---|--|-------------------------------------|----------------------|
| Status:<br>Type:<br>Where:<br>Comment:  | Idle<br>RICOH Aficio MP C3300 PCL 6<br>Employee Lounge   |                                     | Fin <u>d</u> Printer |
| Page range  | e<br>It page 💿 Selection   | Copies<br>Number of <u>c</u> opies: | 1                    |
| Pages:<br>Type p<br>ranges<br>from t<br>section<br>or p1s                           | bage numbers and/or page<br>separated by commas counting<br>he start of the document or the<br>h. For example, type 1, 3, 5–12<br>1, p1s2, p1s3–p8s3                                   |                                     | [☑] Colla <u>t</u> e |
| Pages:<br>Type p<br>ranges<br>from ti<br>section<br>or p1s Print what:              | bage numbers and/or page<br>separated by commas counting<br>ne start of the document or the<br>n. For example, type 1, 3, 5–12<br>1, p1s2, p1s3-p8s3<br>Document                       | ▼ Zoom                              | ☑ Collate            |
| Pages:<br>Type p<br>ranges<br>from ti<br>section<br>or p1s<br>Print what:<br>Print: | bage numbers and/or page<br>separated by commas counting<br>ne start of the document or the<br>n. For example, type 1, 3, 5–12<br>1, p1s2, p1s3–p8s3<br>Document<br>All pages in range | Zoom<br>Pages per sheet:            | ♥ Collate            |

2. Select the Internet Fax printer from the list of printers



- 3. Select OK to print the document
- 4. Enter in the recipient information



#### 5. Click Add Recipient

| InternetFax V 7.6 |          |                        |          |                 |
|-------------------|----------|------------------------|----------|-----------------|
|                   | To:      | Jane Doe               | Save     | 🙈 Address       |
|                   | Subject: | Executed Contract from | ABC Corp |                 |
| A stable          | Country: | USA - 1                |          | <b>~</b>        |
| 4 7               | Fax #:   | 805 - 5559999          |          | Add Recipient   |
|                   |          |                        |          | Load List       |
|                   |          |                        |          | Delete Selected |
| Enter Number w    | ithout [ | Dashes                 |          | Delete All      |
| Click 'Add Re     | cipient  | t' after entering n    | umber    |                 |
|                   | _        |                        |          |                 |
| Cover Page        |          |                        |          | 1               |
| Config            |          | Send                   | Close    |                 |

6. After you click Add Recipient, your recipient will be added to the list. (The "1" will automatically be added to the phone number after adding recipient to the list)

| InternetFax V 7.6  |                 |
|--|-----------------|
| To: Jane Doe 🗌 🗍 Save  | Address         |
| Subject: Executed Contract from ABC Corp                           |                 |
| Country: USA - 1   | •               |
| Fax #: -   | Add Recipient   |
| 18055559999@Jane Doe   | Load List       |
|  | Delete Selected |
| Your recipient will show up here<br>when you click 'Add Recipient' | Delete All      |
| ,  |                 |
|  |                 |
| Cover Page   |                 |
| Config   |                 |



- 7. Add another if you want by entering info for another recipient and clicking Add Recipient
- 8. Add a cover page by clicking the 'Cover Page' button.

| InternetFax V 7.6 |          |                                 | 23              |
|-------------------|----------|---------------------------------|-----------------|
|                   | To:      | Jane Doe 🗌 🗌 Save               | Address         |
|                   | Subject: | Executed Contract from ABC Corp |                 |
| the second        | Country: | USA - 1                         | •               |
| <b>*</b>          | Fax #:   | -                               | Add Recipient   |
|                   | 18055    | 559999@Jane Doe                 | Load List       |
|                   |          |                                 | Delete Selected |
| Cli               | ck the ' | Cover Page' Button              | Delete All      |
|                   |          |                                 |                 |
| Cover Page        |          |                                 |                 |
| Config            |          | <u>S</u> end <u>C</u> lose      |                 |

- 9. Select one of the 3 cover page types.
  - a. Click on 'Text On Coverpage' to fill out data for cover page

| Click on 'Text on Coverpage' to fill   |
|--|
| Cover Page Out data on coverpage Out data on |



- 10. Input information that you want to be put on the cover page.
  - a. Click on the OK button to save



11. To send your fax, click 'Send'.

| InternetFax V 7.6 |          |                        |               |                 |
|-------------------|----------|------------------------|---------------|-----------------|
|                   | To:      | Jane Doe               | Save          | Address         |
|                   | Subject: | Executed Contract from | ABC Corp      |                 |
|                   | Country: | USA - 1                |               | •               |
| 4 7               | Fax #:   | -                      |               | Add Recipient   |
|                   | 180555   | 559999@Jane Doe        |               | Load List       |
|                   | Clic     | k 'Send' to send       |               | Delete Selected |
|                   |          | your fax               |               | Delete All      |
| Cover Page        |          | Send                   | <u>C</u> lose |                 |

12. Note this screen which confirms that the system has received your fax and is attempting to send.



13. To see your fax file cabinet (queue of faxes), click on the world icon on your computer's tool bar.





14. This shows your fax waiting to be sent. You can keep this open to see when your fax is successfully sent by the system to your recipient, or you can close it and wait for your email confirmation.



15. This screen confirms your fax was successfully sent. You will also receive an email confirmation.

| Fax File Cabinet |                      |                   | 23                   |
|------------------|----------------------|-------------------|----------------------|
| 🕑   🗙 😢   🖶      | 2   🖉 🔓   🎟          |                   |                      |
| Status           | То                   | Subject           | Date                 |
| 🖉 No Answer      | 18055559999@Jane Doe | Executed Contract | 3/9/2011 1:59:28 PM  |
| 🖉 No Answer      | 18055559999@Jane Doe | Executed Contract | 3/9/2011 12:00:56 PM |
| ✓ Success        | 18055207030@Crystal  | Test              | 2/16/2011 3:42:33 PM |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  |                      |                   |                      |
|                  | 델이                   | se                |                      |

16. The queue screen also shows that the fax was successfully sent

| ✓ Success 14088898199@Fax Recipient example fax 5/2/2007 12: | :26:35 PM |
|--|-----------|
|  |           |
|  |           |
|  |           |
|  |           |
|  |           |
|  |           |
|  |           |
|  |           |
|  |           |
|  |           |



## Web to Fax

- 1. When registering for ITS Fax you will receive an email with your login information. Save this email/information.
- 2. Go to the ITS Fax Web Portal and log-in <u>www.itsfax.com</u>

| Integrated  |
|---|
| Password Telemanagement   |
| i cicinanagemente   |
| Services, Inc.  |
| Complete Communications Since 1990  |
| Welcome to the ITS Fax web portal log-in page   |
| weiter ind to the the fux web portal log in page.   |
|   |
|   |
| Login (Username)  |
| Password  |
| Submit  |
|   |
| Please contact an ITS representative at (800) 876-4ITS (4487) or (805) 520-7020 with any questions or concerns. |
| Home  |

3. To send Web to Fax, click the 'Web to Fax' button

| Click on Web to Fa | x to send |            |                 |  |
|--------------------|-----------|------------|-----------------|--|
|                    |           |            |                 |  |
|                    |           | Report     | Account Balance |  |
|                    |           | Web to Fax | My Account info |  |
|                    |           | Lo         | gout            |  |
|                    |           |            |                 |  |

- 4. From this screen, you can send an outbound fax, think of this as your cover page to the fax.
- 5. You must fill out: **To, Fax Subject, Fax Number (s), Message and attach the file prior** to submitting your fax.

| Gose Web To F | av. |                          |  |
|---------------|-----|--------------------------|--|
| To (Name):    |     |                          |  |
| Fax Subject:  |     |                          |  |
| ax Number(s): | ~   | Format Example to USA: 1 | 1503XXXXXXX (1, area code, local number)   |
|               | -   | Help                     | Make sure to put a "1" in front o each fax number's area code.                             |
| lessage:      |     |                          | If you are sending multiple faxes<br>please separate each fax numbe<br>with a comma (","). |
|               |     |                          | × ×  |
| Kach:         |     | Browee                   | 1  |

6. Make sure that, after you've filled out the information, that you **attach** the file that you want faxed.

| To (Name):                        | Jane Doe         |              |                         |  |
|-----------------------------------|------------------|--------------|-------------------------|--|
| Fax Subject:                      | Finance Report   |              |                         |  |
| Fax Number(s):                    | 18636475192      | Form         | nat Example to USA: 150 | 3XXXXXXXX (1, area code, local number)   |
|                                   |                  |              |                         |  |
| Message:<br>ase review            | the following sp | readsheet a  | and stats for           | You are able to Browse for the<br>document that you want faxed.  |
| Message:<br>ase review            | the following sp | preadsheet a | and stats for           | You are able to Browse for the<br>document that you want faxed.<br>Make certain that this field is<br>filled out prior to sending fax! |
| Message:<br>ase review<br>Attach: | the following sp | preadsheet ( | and stats for Browse    | You are able to Browse for the<br>document that you want faxed.<br>Make certain that this field is<br>filled out prior to sending fax! |



7. After sending, you will receive a confirmation message letting you know that your outbound fax is successful with further instructions.



8. You can also view the status by going back to the **Main** screen and clicking on **Report**.

| Welcome John Doe                      | in a state of the |                 | î |
|---------------------------------------|---|-----------------|---|
| Click on Report to view daily status. |   |                 |   |
|                                       | Report  | Account Balance |   |
|                                       | Web to Fax  | My Account Info |   |
|                                       |   | ogout           |   |

9. The **Report** screen allows you to do a search of your fax statuses. You may either view them on screen or download them as an Excel file.



10. After choosing your options, click on **Show Report** to view your results.

|              | Report Option | Detailed Report | ~    |        |   |
|--------------|---------------|-----------------|------|--------|---|
|              | Date Period   | Today 💊         | 1    |        |   |
| Start Date 2 | ✓ 20 ✓ 200    | 08 💌 End Date 2 | ✓ 20 | ✓ 2008 | ~ |
|              | Call Status   | All Faxes       |      |        |   |
|              | Rows on page  | 60 💌            |      |        |   |
|              | Report Type   | Show on screen  |      |        |   |
|              |               |                 |      |        |   |
|              | Show R        | Report Close    |      |        |   |

11. The **Results** page shows your fax transactions.

|               | << Prev Page    | Nex       | t Page >> | Rows    | 60 💌 Refre                  | esh Now 2/20/2008  | 9:2 | 7:45 AM    |          |      |
|---------------|-----------------|-----------|-----------|---------|-----------------------------|--------------------|-----|------------|----------|------|
|               |                 | Total cos | t = 0.07  | Total p | bages = <mark>3</mark> Tota | al minutes = 0     |     |            |          |      |
| Status Fax ID | Destination No. | Country   | Sending F | ax ID   | Subject                     | Time               |     | Rate Pages | Dur.     | Cost |
| SUCCESS 88025 | 18635552251     | USA       | 104875    |         | Finance_Report              | 2/20/2008 11:46:27 | AM  | 0.103      | 00:00:42 | 0.07 |
| 1 found.      |                 |           |           |         |                             |                    |     |            |          |      |
|               |                 |           |           |         |                             |                    |     |            |          |      |

12. <u>Successful</u> faxes can be resent by clicking on the **Fax ID** number. Otherwise, click on **Close**.

## Email to Fax

\*IMPORTANT NOTE\* ITS Email to Fax is only available for use by the original email address which the ITS Fax was purchased/registered with.

- 1. Open a new email
- 2. Send to <u>"Destination number"@itsfax.com</u> (Destination number should be 10 digit number that includes a "1" and area code.
- 3. In the Subject field enter the word "pass" a space and then your password.
- 4. Body of email will act like the cover page to an attachment, or will serve as the fax if no attachment is added.



#### 5. Press send to send fax

| Send Bcc       | 18055207030@itsfax.com   |
|----------------|--|
| Subjec         | pass PASSWORD  |
| Marketing Spec | This area will serve either as the body of your fax, or as the cover letter to an attachment you are faxing. |
| Navigating     | Change for 20 Years  |

6. Fax Confirmation will be sent in an email and will look like this:

#### FAX SUCCESS TO 18055207030

technicaloperations [technicaloperations@itstelecom.com] Sent: Tue 3/15/2011 2:55 PM To: Crystal [\_\_\_\_] Dear Crystal [\_\_\_]

The following are the results for Fax Subject:0

MessageID : 1542521 Creation Time : 3/15/2011 2:46:18 PM Number : 18055207030 Pages Sent : 1 Fax Status : S : USA Country Rate / Page : 0.10 🗲 Rate Duration : 0:30 # of min-n/a w ITS Cost : 0.05 🐂 # pages sent X rate

Thank you for using ITS eFax service.

If you have any comments on our service, please contact us at:

Support@itstelecom.com



## **Receiving Fax**

- 1. Faxes will be delivered to your inbox as an attachment, allows for
  - a. Greater privacy
  - b. Improved method of storing and tracking faxes