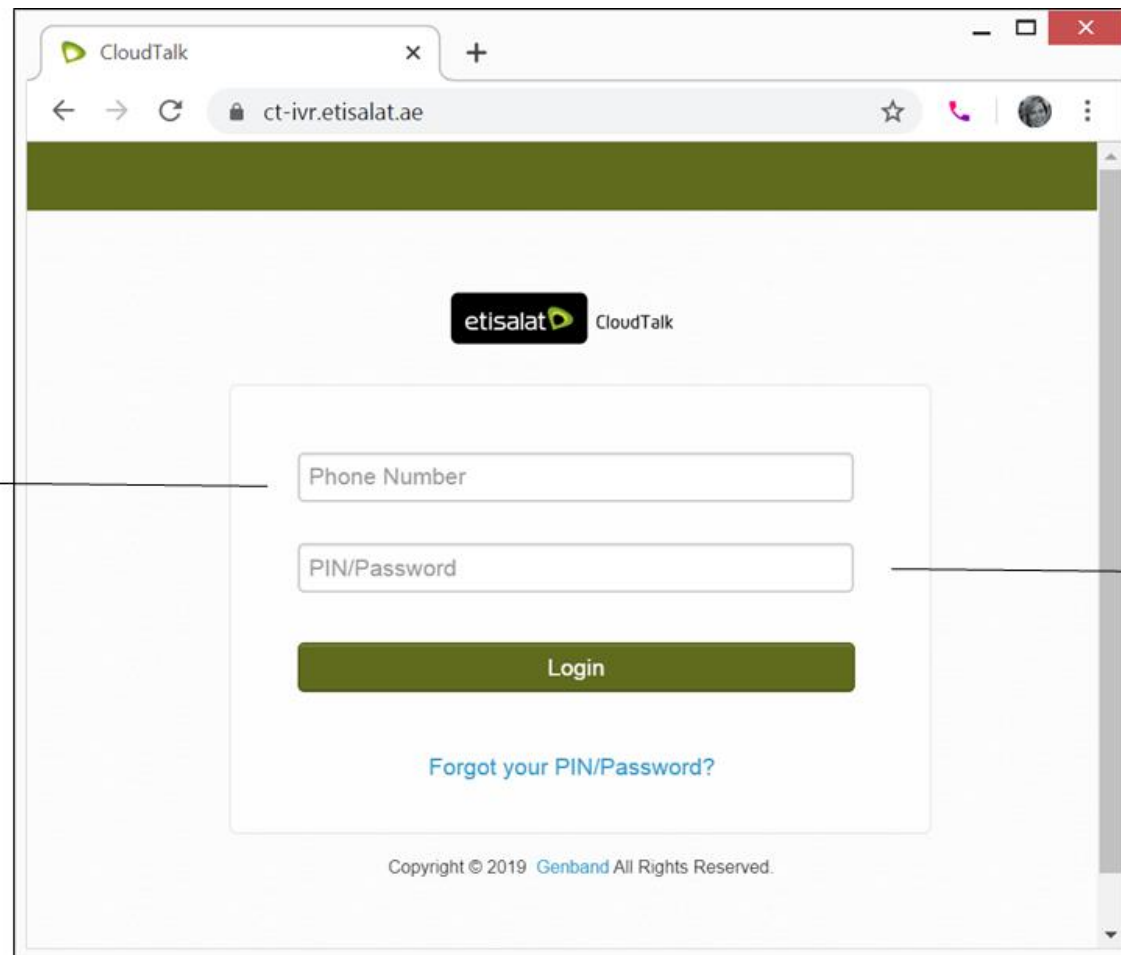# CloudTalk eFax Quick Reference Guide

CloudTalk eFax

Many organizations still heavily rely on faxing as a form of reliable and secure communications – eFax takes the hassle out of sending and receiving faxes. Running in parallel with traditional stand-alone fax machines, eFax eliminates the need to print every document manually to send or view it. It's easy to send and manage most content as electronic documents. Before accessing the eFax service your administrator will need to provide a few fundamental pieces of information:

- The URL for the CloudTalk eFax. service. This may be a custom URL for your organization.
- Your fax number and PIN

Browse to the administrator provided URL. At the login screen enter your fax telephone number and password / PIN and click "Login".

Enter the fax number associated with your account and include the + sign in front of the number.

Enter the PIN number associated with your fax account.

Once you have entered the information click "Login".

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Home Page

Logging into the portal automatically opens the "Home" page. The "Home" page provides quick links to primary functions. It also displays a quick look at the information that is on your fax headers.

Shows quick reference information as well as your cover page defaults.
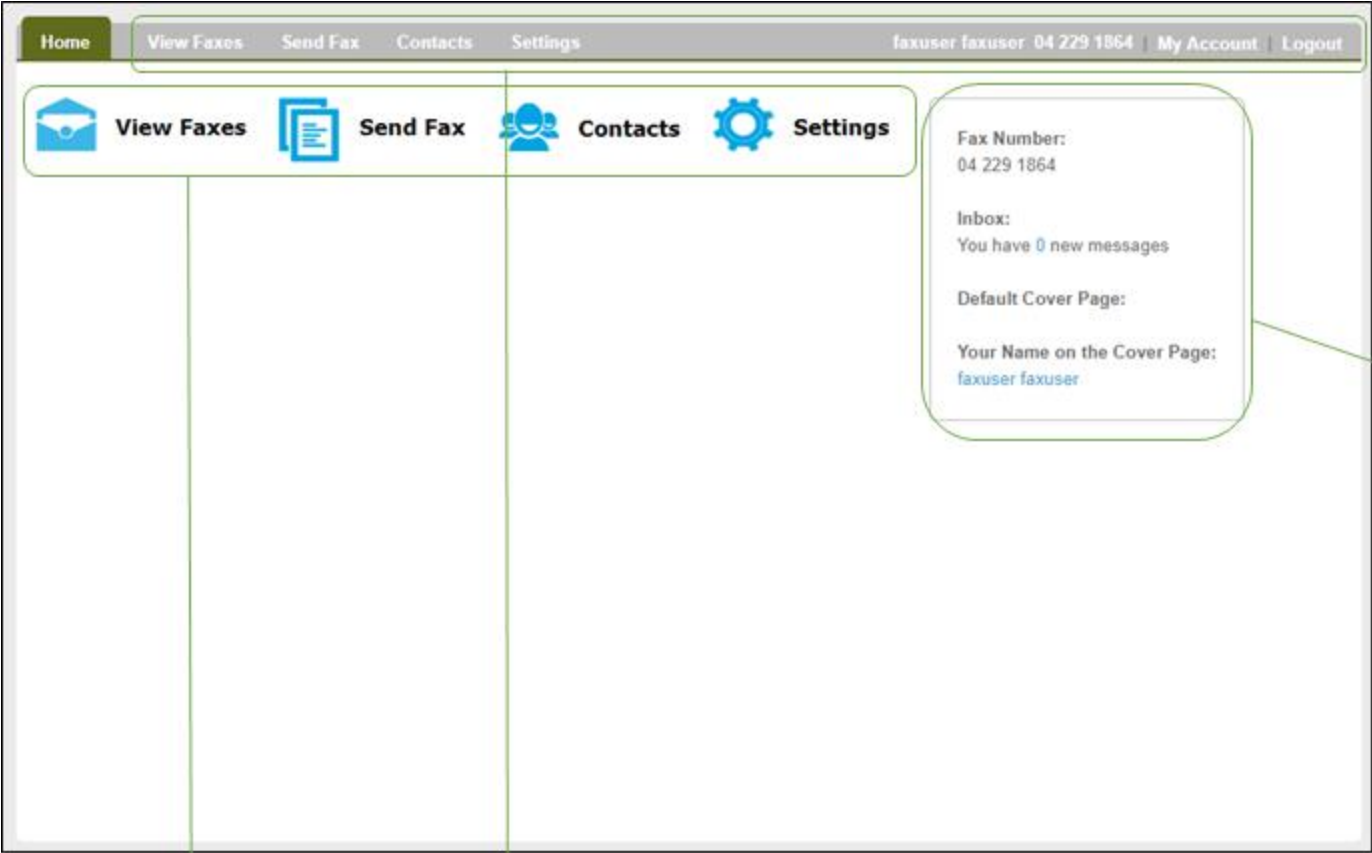
Quick links to the primary functions of the eFax.

Main navigation . This navigation mirrors the quick links allowing you to easily navigate to other sections of eFax from any other pages.
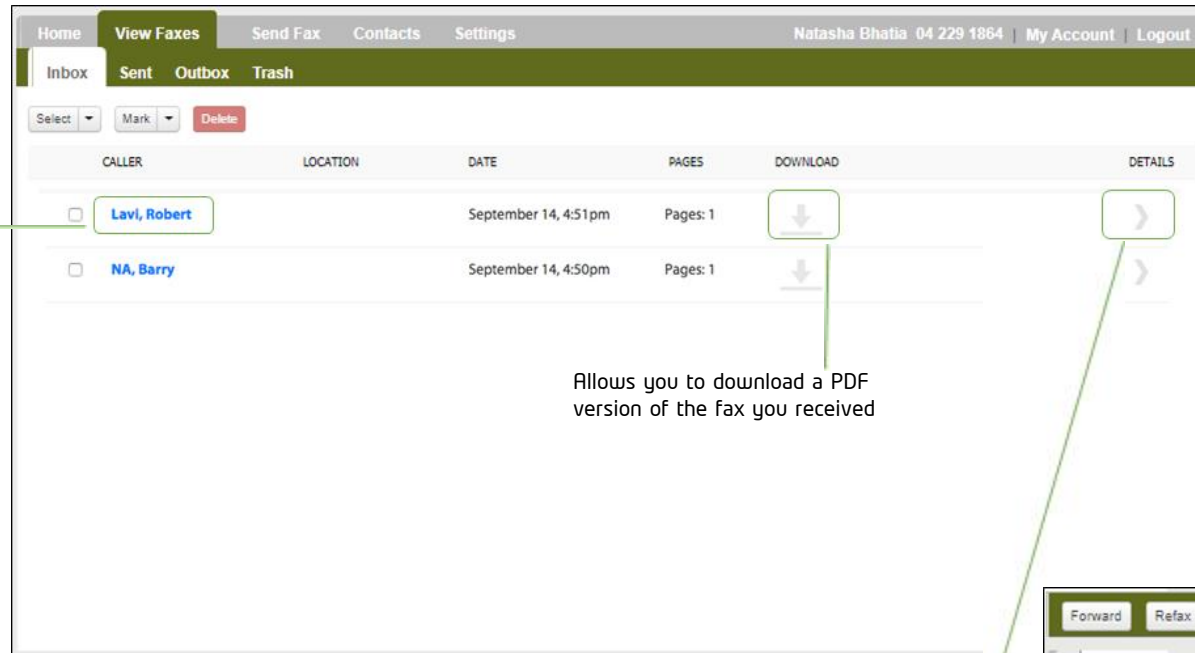
CloudTalk eFax Quick Reference Guide

View Faxes - Inbox

The eFax inbox provides one place to view, download, and manage faxes that you have received.

Show the phone number or name (if the they are in your Contacts list) of the fax sender.

Allows you to download a PDF version of the fax you received

Clicking details provides a group of additional actions you can perform on received faxes.

- Forward: You can forward a received fax to an email address.
- Refax: You can fax a received fax to a new fax number.
- Download: You can download the fax as a file.
- Print: You can print a fax on a printer.
- Mark Not Viewed: Allows you to mark a fax as not viewed. This will make it displayed bold in the Inbox.
- Delete: Moves the fax to the Trash. This does not permanently delete the fax. You must go to the Trash tab to delete it permanently.

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View Faxes - Sent Faxes

eFax gives you the ability to track the status of your sent faxes and choose additional actions.

A "green check mark" means a fax was sent successfully. A "gray check mark" means the fax is pending. Click "Info" to find out more information.

Click the "Details" arrow to show additional functions such as forwarding the fax to an email address, refaxing to a fax number, and downloading, printing, or deleting the fax.

An X means that a fax was sent unsuccessfully. Click " Info" to find out more information and to attempt to " Refax".

Download your sent fax file.

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Sending a Fax
eFax provides a step-by-step process for sending a fax.

Step 1: Choose a Cover Page
You can choose the style of your fax cover. If you have set up a default style for you fax cover page in settings that choice will be automatically highlighted.

Click "Next" to move to the next screen.

You can choose to receive delivery confirmation and a copy of your fax to your e-mail address.

Step 2: Enter Details
Fill out the recipient and sender information. If you have From, Your Fax Number, Your Phone Number, assigned in settings these fields will automatically populate.

Click "Next" to move to the next screen.

Step 3: Attach Documents
Click "Attach Document". Choose the file or files that you wish to fax. Then click "Attach". You can repeat this process to attach more files. When you are done choosing files click "Done".

This will bring you back to the Attach Files screen. You will see the files you attached from the drop down menu. You can delete attachments on this screen by choosing the file from the drop down and clicking "Delete".

Click "Next" to move to the next screen.

Step 4: Preview Fax and Send
You can preview your fax before you send. Click "Preview Fax" to download a PDF version of the fax you are about to send. When you are ready click "Send Fax" or "Schedule for Later" to send it at a different time.

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Contacts

Faxing allows you to create a customer contact list for contacts or organizations that you fax frequently. Adding contacts makes it easier to send faxes to them in the future.

Click "Add Contact" to create a new contact. You can also assign these contacts to a group for easier organization.

Click "Create Group" to create a new contact group. You can then assign several contact to that group. This make it easier to find contact later, and it also allows you send a fax to the entire group.

Click inside the search box. Type all or part of the name of the contact you are searching for and hit the enter/return key. This will create a list of contacts with matching criteria.

Click one of the "Edit" buttons to edit your contact. You can also send a fax directly from the contact listing by clicking " Send Fax". This will take you to the Send Fax screen and will prepopulate your contacts information.

Delete a contact you no longer wish to have in your Contact list by clicking "Delete Contact".

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Settings - Inbound Fax

To get the most of eFax, and provide an extra layer of security, there are a few default settings that can be changed.

Enter the e-mail address that you would like to receive incoming faxes as file attachments.

Choose between PDF and TIFF file formats. If you chose the PDF file format you can also enable encryption. When you turn on encryption you must choose a password and confirm it. This means that only someone with the password will be able to open these fax attachments.

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Settings | Outbound Fax | Setting Fax Cover Defaults

eFax allows you to set defaults for your outbound faxes. This makes sending faxes much faster because eFax will prepopulate these defaults into your outbound faxes so you won't need to repeatedly enter the same information.

Choose a default cover page.

Choose the default information that will be displayed on your cover page.

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Settings - Sending and Receiving Faxes Via E-mail

eFax allows you to e-mail yourself copies of your outgoing faxes, it also allows you to send faxes directly from your e-mail without having to go to the web interface.

Check the box beside your email address if you automatically want to receive e-mail attachments of your outbound faxes.

Enter the email address you will sending faxes from. Then simply send an email with an attachment to: YourFaxNumber@bfax.etisalat.ae

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Settings - Setting Up Default Fax Header
eFax allows you to choose defaults that will always appear on your fax header.

Enter the company name and choose what information your would like to have appear on your fax header.