

CloudTalk eFax Quick Reference Guide

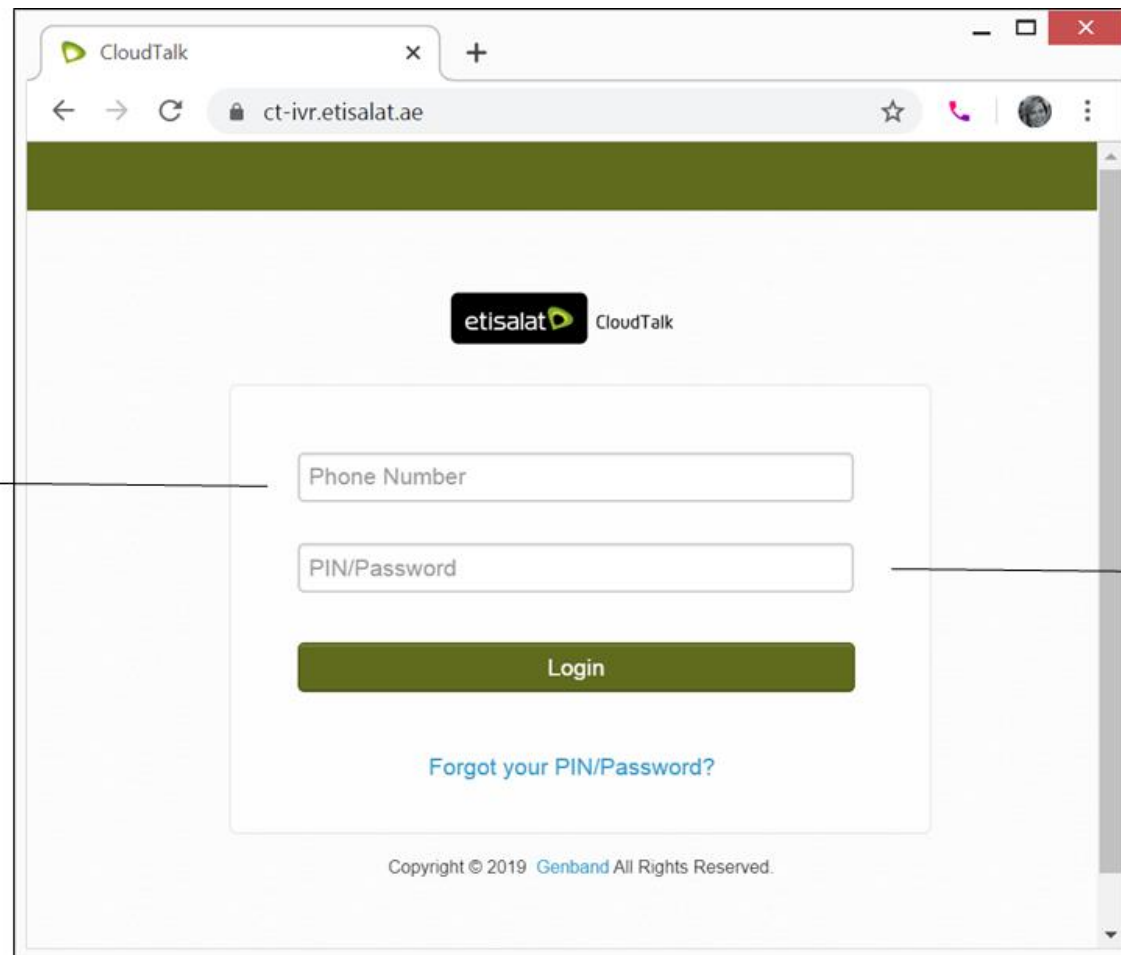
CloudTalk eFax

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.



The screenshot shows a web browser window with the address bar displaying "ct-ivr.etisalat.ae". The page features the etisalat CloudTalk logo at the top. Below the logo is a login form with two input fields: "Phone Number" and "PIN/Password". A green "Login" button is positioned below these fields. A link labeled "Forgot your PIN/Password?" is located below the "Login" button. The footer of the page reads "Copyright © 2019 Genband All Rights Reserved."

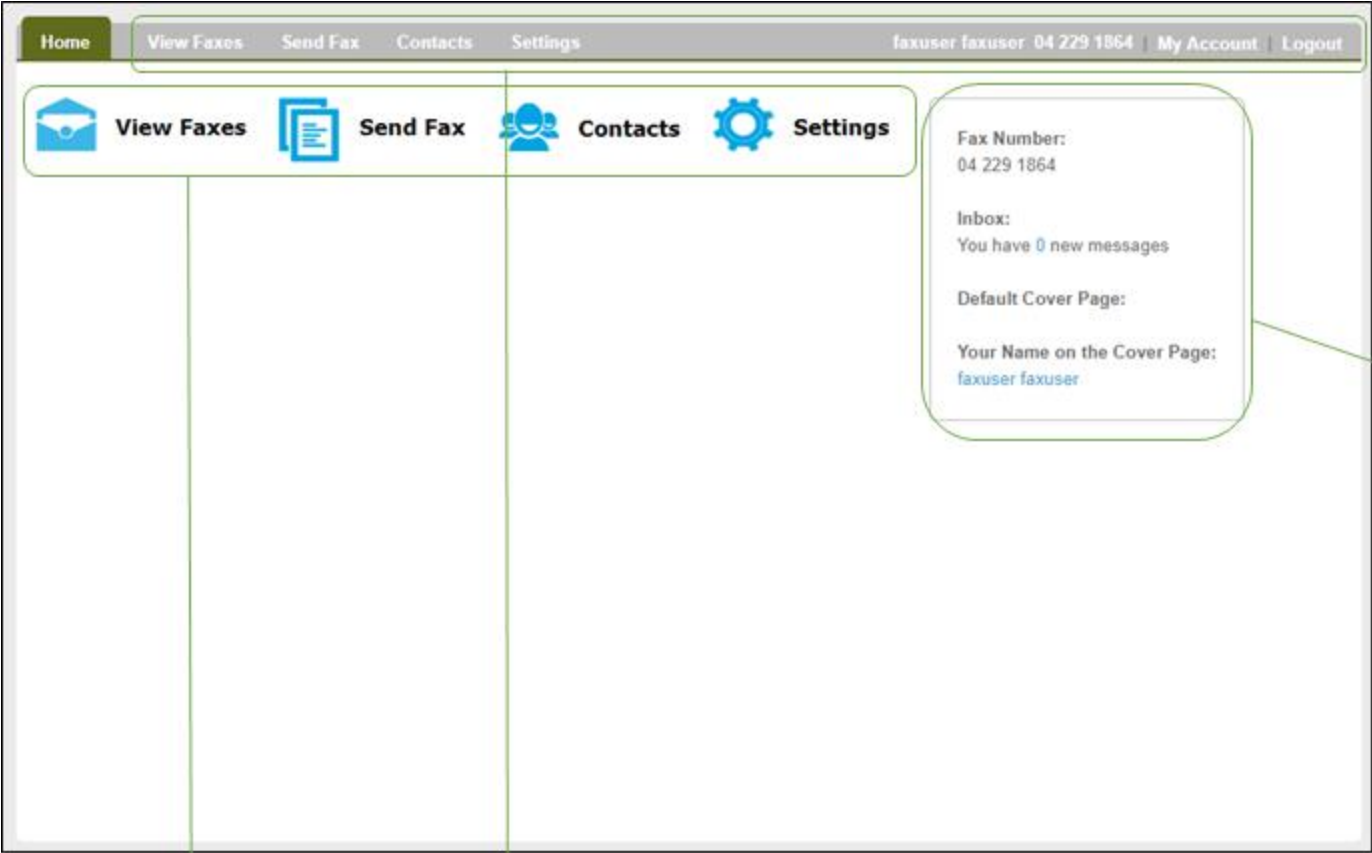
Enter the PIN number associated with your fax account.

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.



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.

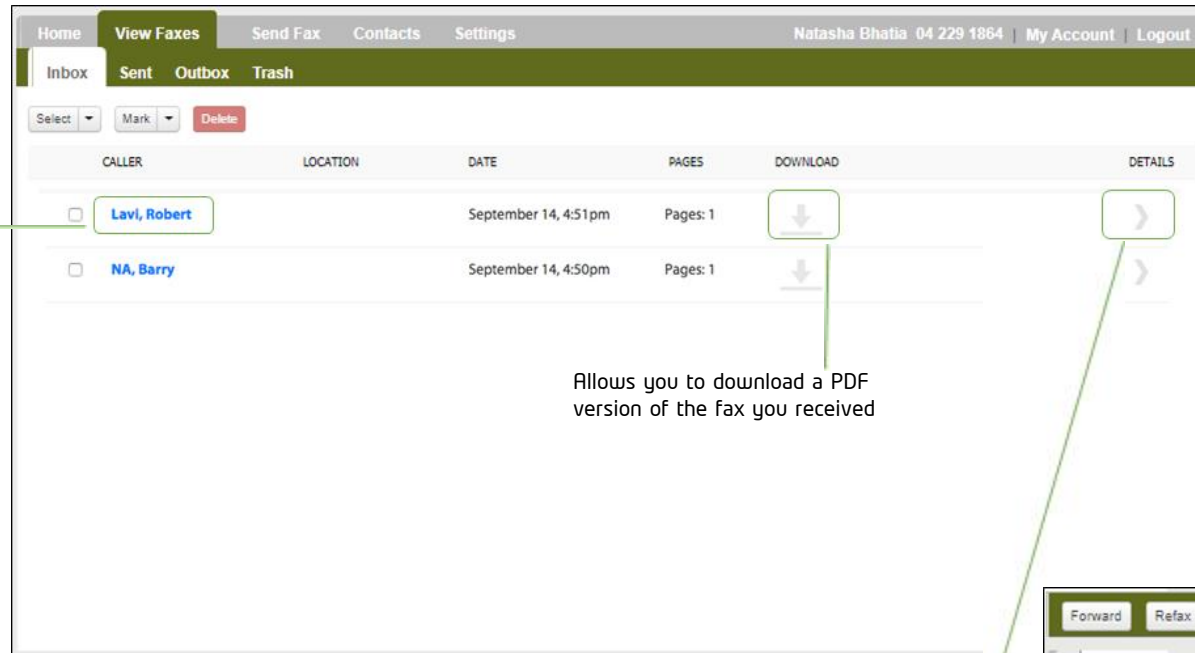
Shows quick reference information as well as your cover page defaults.

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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 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.

Home

View Faxes

Send Fax

Contacts

Settings

faxuser faxuser 04 229 1864

My Account

Logout

Inbox

Sent

Outbox

Trash

Select

Delete

RECIPIENT	STATUS	DATE SENT	PAGES	DOWNLOAD	DETAILS
04 772 1419	<div>✓ Info</div>	January 9, 9:13pm	Pages: 1	<div>↓</div>	<div>></div>
04 772 1419	<div>✓ Info</div>	January 9, 9:05pm	Pages: 1	<div>↓</div>	<div>></div>
04 772 1419	<div>✓ Info</div>	Dec 27 2018, 11:17am	Pages: 1	<div>↓</div>	<div>></div>
04 772 1419	<div>✓ Info</div>	Dec 11 2018, 2:17am	Pages: 2	<div>↓</div>	<div>></div>
04 772 1419	<div>✓ Info</div>	Dec 11 2018, 2:16am	Pages: 2	<div>↓</div>	<div>></div>
04 772 1419	<div>! Info</div>	Dec 11 2018, 2:03am	Pages: 2	<div>↓</div>	<div>></div>

Forward

Refax

Download

Print

Delete

Fax Job: refax

Recipient Outcome

04 772 1419 ✓ Pending

Fax Job: intra-smb test

Recipient Outcome

04 772 1419 ✓ Sent Successfully

More Details

Fax Job: intra-smb test

Recipient Outcome

04 772 1419 ✗ Transmit Failure

More Details

Refax

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.

Home View Faxes Send Fax Contacts Settings faxuser faxuser

Select Cover Page Enter Details Attach Files Preview Fax

Select Fax Cover Page

Professional Elegant Contemporary No Cover Page

Next

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.

Home View Faxes Send Fax Contacts Settings

Select Cover Page Enter Details Attach Files Preview Fax

Fax Recipients

Select recipients from contacts or enter phone numbers to send the fax. International numbers should be entered with a '+'.
Separate multiple recipients with a comma

Recipient Number: +19172632900 Contacts

Cover Page Information

Recipient's Name: Sara Hughes
From: Natasha Bhatia
Your Fax Number: 04 229 1864
Your Phone Number: +971 4 353 8759
Date: 10 November 2019
Subject: Please review for accuracy *Subject is also used as the
Comments: Sara please review this press release for accuracy before we send for approval and launch.

Next

Home View Faxes Send Fax Contacts Settings

Select Cover Page Enter Details Attach Files Preview Fax

Attach Fax Document

Attach Document

Etisalat_DS_introducing clou... Delete

Next

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.

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

Home View Faxes Send Fax Contacts Settings

Select Cover Page Enter Details Attach Files Preview Fax

Preview Your Fax

Preview Fax

☒ Send confirmation when delivered (we always send if fax not deliverable)
☒ Send copy to Natasha@marketingstrategies.ae

Send Fax Schedule for Later

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.

The screenshot shows the CloudTalk eFax web interface. At the top is a navigation bar with tabs: Home, View Faxes, Send Fax, **Contacts**, and Settings. On the right of the navigation bar, it displays 'faxuser faxuser 04 229 1864 | My Account | Logout'. Below the navigation bar is a sub-header with three buttons: 'Add Contact', 'Add Group', and 'Search Contacts'. The main content area is divided into two sections. The left section, titled 'All Contacts', contains a list of contacts: 'Gupta, Sameer', 'Hughes, Sara', and 'Lavi, Robert'. The right section, titled 'About Them', displays details for 'Lavi, Robert', including 'First name: Robert', 'Last name: Lavi', 'Company: Avrum Group', 'Business Fax: 047721419', 'Primary Email: robert.lavi@avrumgroup.ae', and 'Business: 123 MyStreet, Dubai, UAE'. At the bottom of the 'About Them' section are buttons for 'Delete Contact', 'Send Fax', and 'Edit'. Five callout boxes with green lines point to specific elements: 1. 'Add Contact' button: 'Click "Add Contact " to create a new contact. You can also assign these contacts to a group for easier organization.' 2. 'Add Group' button: '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.' 3. 'Search Contacts' button: '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.' 4. 'Edit' button (top right of 'About Them' section): '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.' 5. 'Delete Contact' button: '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.

Home View Faxes Send Fax Contacts **Settings** faxuser faxuser 04 229 1864 My Account Logout

Inbound Fax Outbound Fax

Delivery Email Address

Enter the email addresses where you want all incoming faxes delivered. ⓘ

Email Address:

natasha.bhatia@marketingstrategies.ae

File Type and Security

Select whether you'd like the fax attached to the email as a PDF document or as a TIFF image file. ⓘ

☒ **PDF**
Optionally encrypt and password protect the PDF fax files delivered in email.

☐ **Encryption On**

Password:

Enter 4-6 characters

Confirm Password:

Enter Again

☐ **TIFF**

Save Cancel

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.

The screenshot shows the 'Settings' tab in the CloudTalk eFax interface, specifically the 'Outbound Fax' section. Under the 'Default Cover' sub-tab, there is a 'Select Fax Cover Page' dialog. It displays four options: 'Professional' (highlighted with a blue border), 'Elegant', 'Contemporary', and 'No Cover Page' (represented by a box with an 'X'). At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Choose a default cover page.

The screenshot shows the 'Settings' tab in the CloudTalk eFax interface, specifically the 'Outbound Fax' section. Under the 'Cover Details' sub-tab, there is a 'Cover Page Information' form. It contains three input fields: 'First Name' (filled with 'Natasha'), 'Last Name' (filled with 'Bhatia'), and 'Phone Number' (filled with '04 353 8759'). At the bottom of the form are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Settings' tab in the CloudTalk eFax interface. Under the 'Outbound Fax' section, the 'Send Copy to Email' option is highlighted. The page title is 'Send Copy of Outgoing Fax'. Below the title, there is a message: 'You may choose to receive an email copy of each fax sent.' followed by a checkbox and the email address 'natasha.bhatia@marketingstrategies.ae'. At the bottom, there are 'Save' and 'Cancel' buttons.

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

The screenshot shows the 'Send Fax by Email' settings page. The page title is 'Send Fax by Email'. Below the title, there is a message: 'Use your email to send a fax to any fax machine.' followed by a list of instructions: 1. Enter your email address below (with two email addresses entered: 'natasha.bhatia@marketingstrategies.ae' and 'sales@marketingstrategies.ae'), 2. Whenever you want to send a fax, (with sub-points: 'Email the documents as attachments', 'Add the Fax Number to which you're sending to the @fax address, like this: FaxNumber@bfax.etisalat.ae', and 'We will add your default cover page'). At the bottom, there are 'Save' and 'Cancel' buttons. To the right, there is a sample email titled 'You send this email to Business Fax'. The email header shows 'To: 12013551212@bfax.etisalat.ae', 'Subject: Proposal', and 'Attached: Proposal.pdf (542 KB)'. The email body says 'Jeanne, Here is the proposal that we discussed'. Below the email, there is a blue arrow pointing down to a sample fax cover sheet titled 'We'll send this fax for you'. The fax cover sheet shows 'To: 12013551212', 'From: (Your Name)', 'Date: (Today's Date)', 'Fax: (Fax Number)', 'Phone: (Phone)', and 'Comments: Jeanne, Here is the proposal that we discussed'.

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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.

Home

View Faxes

Send Fax

Contacts

Settings

faxuser faxuser 04 229 1864 | My Account | Logout

Inbound Fax

Outbound Fax

Default Cover

Cover Details

Send Copy to Email

Send Fax by Email

Fax Header

Fax Header

Enter information that is displayed at the top of each fax page sent. ⓘ

Company Name:

Marketing Strategies Inc

☒ Show the Date (e.g. "Dec 25 2013 04:14pm ET")

☒ Show your Business Fax Phone Number (e.g. "732-555-1212")

☒ Show the Page Number (e.g. "1/3")

Save

Cancel

Dec 25 2013 04:14pm ET Company 732-555-1212 PAGE 1/3

Date

Your Company

Your Fax Phone

Pages

Fax

To: Jonathan Smith

From: Mike

Date: 29 March 2013

Fax: (201) 204-2000

Pages: 3

Phone: (732) 555-1212

No: Document

• Comments:

Hi Jonathan,

Here is the document you requested.

Please call as soon as you get a chance to review it.

Thanks,

Mike