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Introduction

About eFax

eFax is a fax and email fast messaging service brought to you by esolutions.

eFax enables you to use your Microsoft Windows-based computer system to send information to wide audiences very quickly and efficiently.

The eFax software enables you to send faxes and emails from any Windows application, at any time, to any recipient, anywhere in the world.

eFax also provides full messaging management facilities including:

Recipient and Broadcast List Maintenance
Reporting; and
Cover Page customisation

esolutions's Service Commitment

eFax Service Centre

All eFax faults should be reported to the eFax Service Centre on 0800 TO EFAX (863329).

The Service Centre is available during normal business hours 7:00am to 7:00pm, Monday to Friday, excluding public holidays.

Service Availability

The eFax service is available to broadcast fax and email documents on a 24 hour/365 day basis.

Delivery Scheduling

Immediate Delivery

Unless requested otherwise, all eFax deliveries will be queued for delivery as they arrive at the eFax Host.

Deferred Delivery

You may choose to defer the broadcast of your message to a specified time in the future. Nominated delivery "go" times of up to three days in advance may be specified.

Delivery Retries

eFax automatically retries all unsuccessful fax delivery attempts up to five times.

Urgent Delivery Delivery

Routine Priority Delivery

esolutions aims to complete delivery of routine fax jobs within two hours of receipt at the eFax Network.

Bulk Delivery

Broadcasts to large numbers of recipients are handled separately from the routine and urgent deliveries.

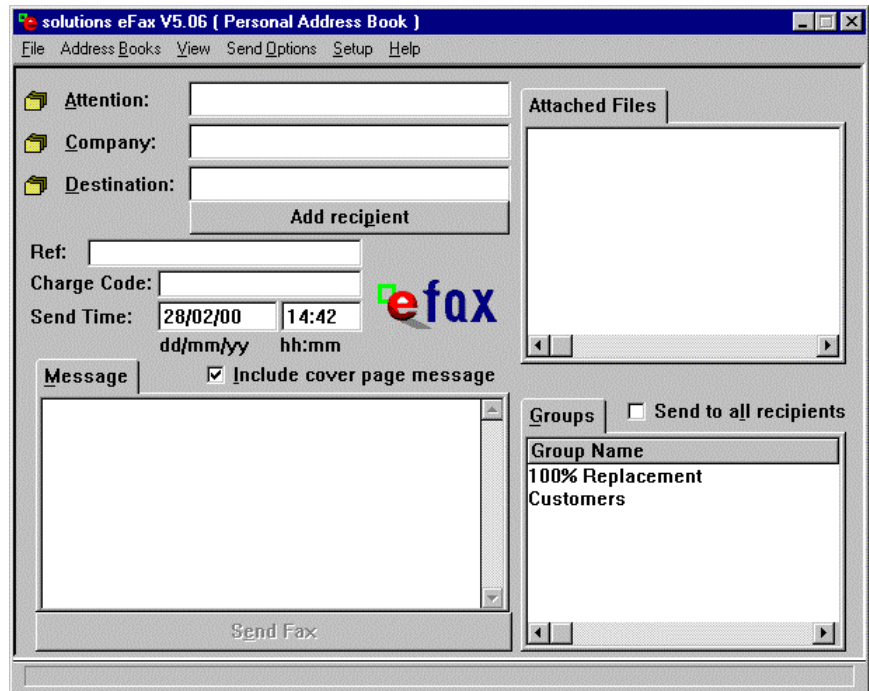
Bulk deliveries are transmitted as and when network capacity allows. This means all urgent and routine deliveries take priority over bulk deliveries.

Bulk deliveries are those fax jobs containing more than 900 pages in total. Deliveries above this threshold are automatically handled as bulk deliveries, regardless of the assigned/requested delivery priority. For example, a fax job containing 5 pages and sent to 200 recipients (1000 fax pages) would be handled by eFax as a bulk delivery.

Using eFax

The eFax Screen

When eFax is launched, the following screen is displayed. The screen consists of several different areas:



Attention, Company and Destination

Buttons

When you move the cursor over **Attention:**, **Company:** or **Destination:**, they will turn into buttons. If you click on any of these buttons, the Address Book appears.

Fields

The **Attention:**, **Company:** and **Destination:** fields allow you to enter individual recipient information. The **Destination** field can be either a fax number or an internet email address.

Add recipient button

If you have entered information into the **Attention:**, **Company:** or **Destination:** fields, you can click the **Add recipient** button to add the recipient to the Address Book.

Reference and Charge Code

The **Ref:** and **Charge Code:** fields allow you to enter a reference and charge code respectively, as part of any message that you send.

The reference will be returned in any reports that you receive for this message.

The charge code will appear on your bill against all fax numbers that you sent this message to.

Send Time

The **Send Time:** field allows you to specify the delivery date and time of your message. You can defer the delivery time of your message by specifying a delivery date and time up to 3 days in the future.

Note: The time must be specified in 24 hour format.

Include cover page message check box

If the **Include cover page message** box is checked, then a message can be typed into the message area. If it is not checked, then the message area will not be available for editing.

Message

The **Message** area is for a message that you want to include as part of any cover page that is sent.

Attached Files

The **Attached Files** area lists all attached files that are to be sent with your message.

To attach files:

1. Move the cursor to the **Attached Files** tab box and click the right mouse button.
2. Select **Add files to attach**.
3. Select the files you want to attach.

Note: Attached files sent to fax recipients will be converted to fax format once they reach the eFax Host.

Send to all recipients check box

If the **Send to all recipients** box is checked, the message that is sent will be delivered to all recipients in the Address Book.

Groups

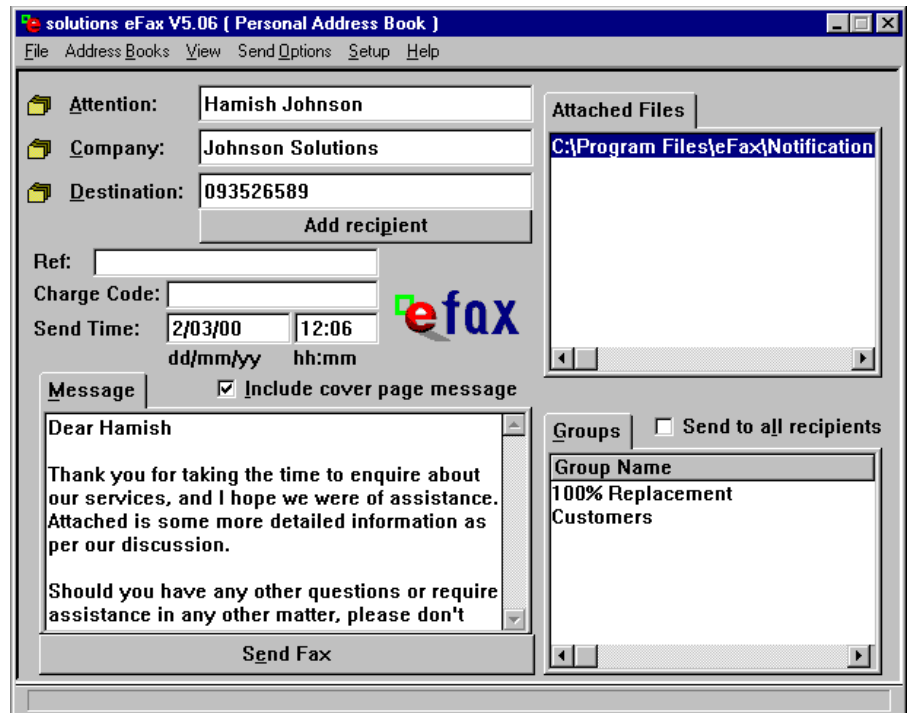
The **Groups** area lists all the groups that are set up in your Address Book.

Sending Messages

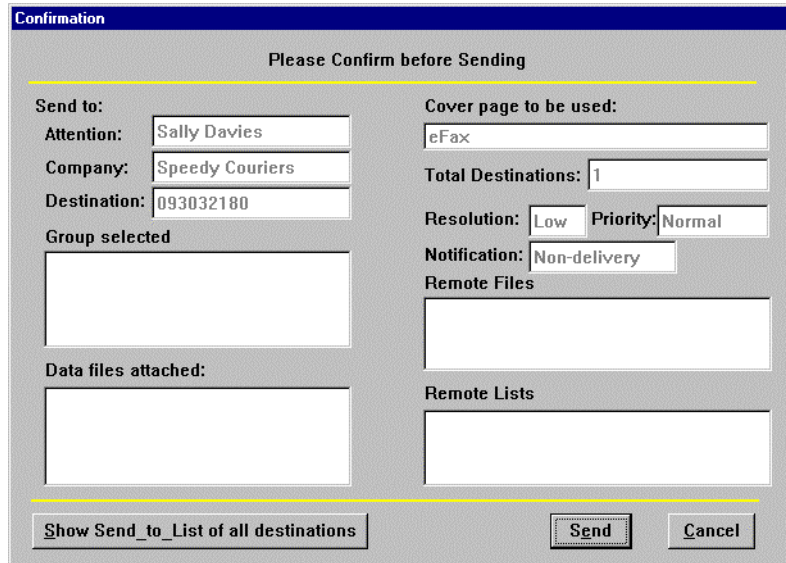
eFax allows you to send messages using a variety of methods, and to either a single recipient or group.

Sending to a Single Recipient

Double click the eFax icon on the desktop to launch eFax.



1. Select or type in the recipient that you want to send the message to in the **Attention:**, **Company:** and **Destination:** fields.
2. Type any reference or charge code information in the **Ref:** and **Charge Code:** fields, if required.
3. Select a send date and time in the **Send Time:** field if you need to defer delivery of your message.
4. If you:
 - Want to send a message with your fax or email:
 - a. Ensure the **Include cover page message** check box is selected.
 - b. Type a message in the **Message** field.
 - Do not want to send a message with your fax or email turn off the **Include cover page message** check box.
5. To attach any files that you want to send with your message:
 - a. Move the cursor to the **Attached Files** tab box and click the right mouse button.
 - b. Select **Add files to attach**.
Note: The attachment must be highlighted within the **Attached Files** tab box for it to be sent.
6. Click the **Send Fax** button

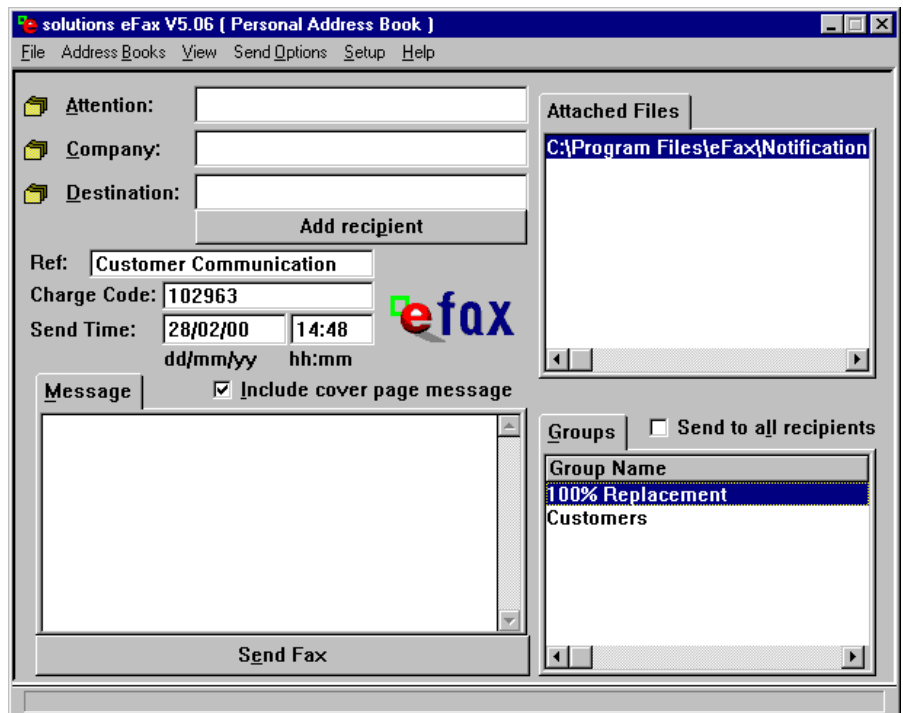


7. The **Confirmation** dialog box allows you to check the details of your message before sending it. Click the **Send** button to send your message.

Sending to a Group

The method for sending to groups is similar to that of sending to a single recipient.

Double click the eFax icon on the desktop to launch eFax.

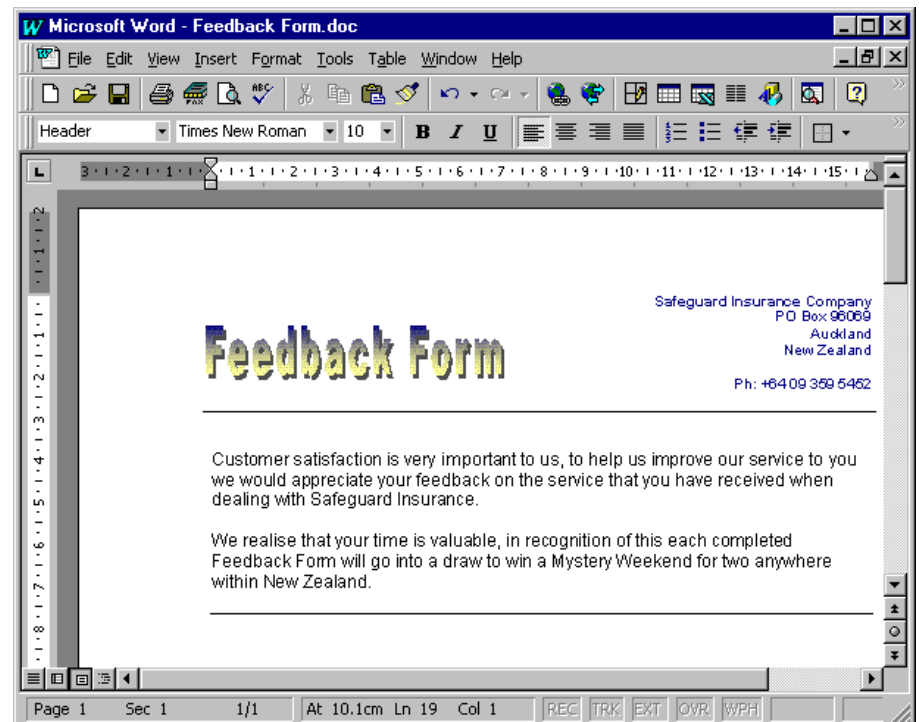



1. Click the required group or groups in the **Groups** tab list box.
Note: The selected groups will be highlighted.
2. Type any reference or charge code information in the **Ref:** and **Charge Code:** fields, if required.
3. Select a send date and time in the **Send Time:** field if you need

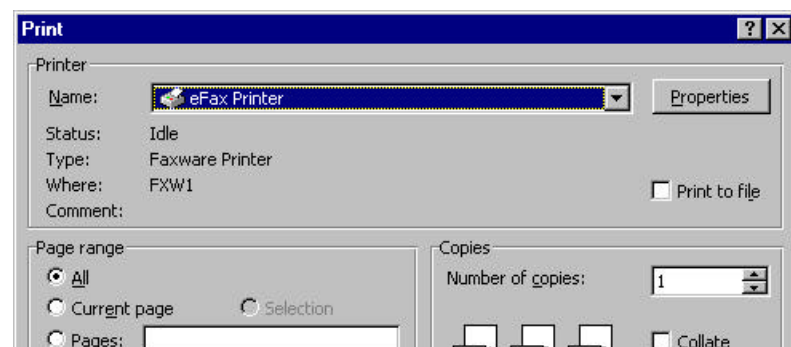
- a. Move the cursor to the **Attached Files** tab box and click the right mouse button.
 - b. Select **Add files to attach**.
Note: The attachment must be highlighted within the **Attached Files** tab box for it to be sent.
6. Click the **Send Fax** button.
 7. The **Confirmation** dialog box allows you to check the details of your message before sending it. Click the **Send** button to send your message.

Sending a Message from within an Application

eFax allows you to send documents from within your application. For example, from within Microsoft Word or Excel. To send a message from within your application you must print to the eFax printer.



In Microsoft Word a fax button  is inserted on the tool bar. Click the fax button to send a fax using eFax. In other applications you must print to the eFax Printer.

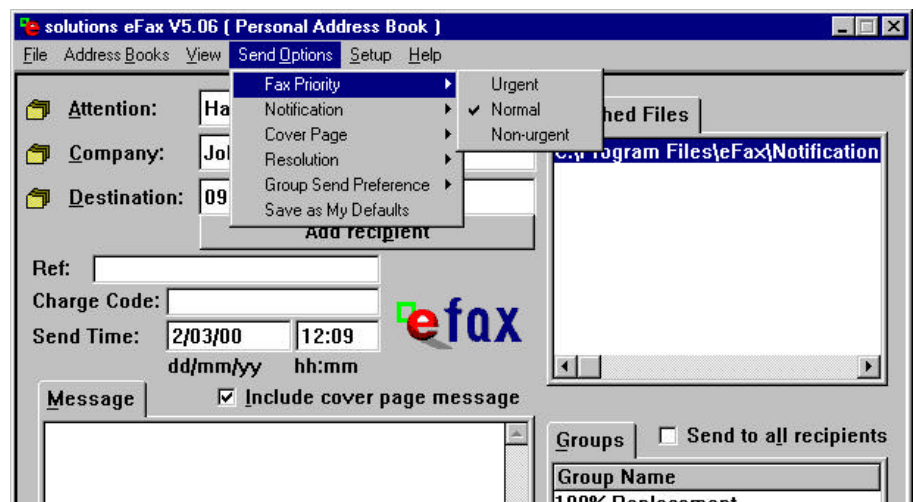


When you print to the eFax printer or click the fax button in Microsoft Word the eFax screen appears. When the eFax screen is displayed:

1. Either:
 - Select or type in the recipient that you want to send the message to in the **Attention:**, **Company:** and **Destination:** fields.Or
 - Click the required group or groups in the **Groups** tab.
Note: The selected groups will be highlighted.
2. Type any reference or charge code information in the **Ref:** and **Charge Code:** fields, if required.
3. Select a send date and time in the **Send Time:** field if you need to defer delivery of your message.
4. Type a message in the **Message** field if you want a cover page to appear on your fax or email.
5. To attach any files that you want to send with your message:
 - a. Move the cursor to the **Attached Files** tab box and click the right mouse button.
 - b. Select **Add files to attach**.
Note: The attachment must be highlighted within the **Attached Files** tab box for it to be sent.
6. Click the **Send Fax** button.
7. Click the **Send** button in the **Confirmation** dialog box to send your message.

Send Options

A number of send options can be set relating to appearance and delivery options for your message. Send options can be set from the *Send Options* menu in eFax.



Fax Priority

You can set fax priority as one of *Urgent*, *Normal* or *Non-urgent*, corresponding to urgent priority delivery, routine priority delivery and bulk delivery as described in resolutions' service commitment.

Notification

You can set notification as one of *Delivery*, *Non-delivery* or *None*. The notification level determines what sort of report is sent back to the sender of the message (via email) in relation to the result of their fax job.

- **Delivery:** returns a report listing all faxes delivered and not delivered.
- **Non-delivery:** returns a report listing only faxes not delivered.
- **None:** no report will be returned.

Cover Page

Allows you to select the cover page that will be sent with your message. The default cover page is eFax.

Resolution

This can be *High* or *Low*.

- Low resolution is the standard setting and is used for most documents.
- High resolution is used for documents with detailed graphics or pictures. High resolution can take up to twice as long as low resolution. High resolution provides a clearer fax result than normal.

Group Send Preference

Group send preference allows you to apply filters to groups within your Address Book.

Option	Description	Email sent	Fax sent
Fax Only	Send only to the recipients in the group who have a fax number.	No	Yes
Email Only	Send only to the recipients in the group who have an email address.	Yes	No
Fax then Email	Send to all the recipients in the group. Where a recipient has both a fax number and email address in the Address Book, the message will be sent to their fax number only.	Only if recipient has no fax	Yes
Fax and Email	Send to all fax and email recipients in the group. If a recipient has both a fax number and email address in the Address Book, the message will be sent to both their fax number and email address.	Yes	Yes
Use Entry Default	Send to the preferred destination for each recipient as specified in the Address Book.	If email is preferred destination	If fax is preferred destination

Fax Number Formats

The eFax network accepts fax numbers in the following format:

Started with a '+', with full STD

For Example (sending from Auckland):

Local: +6493032180
National: +6448024059
International: +6123456789
0800: +64800108208

Started with the STD code

For Example (sending from Auckland):

Local: 09 303-2180
National: 04 802 4059
International: 006123456789
0800: 0800 108 208

Note: Spaces and hyphens are allowed in the fax number.

A Note about Attachments

In some cases when attaching files with the eFax client, the faxed attachment may not appear exactly the same as if it was printed on a printer. For example, Microsoft Excel documents.

To ensure the faxed document is acceptable either:

- Send a test fax to yourself to see if the faxed output is acceptable for that attachment, or
- Send your document from within its application using the eFax printer. Any document you send using this method will be faxed as printed.

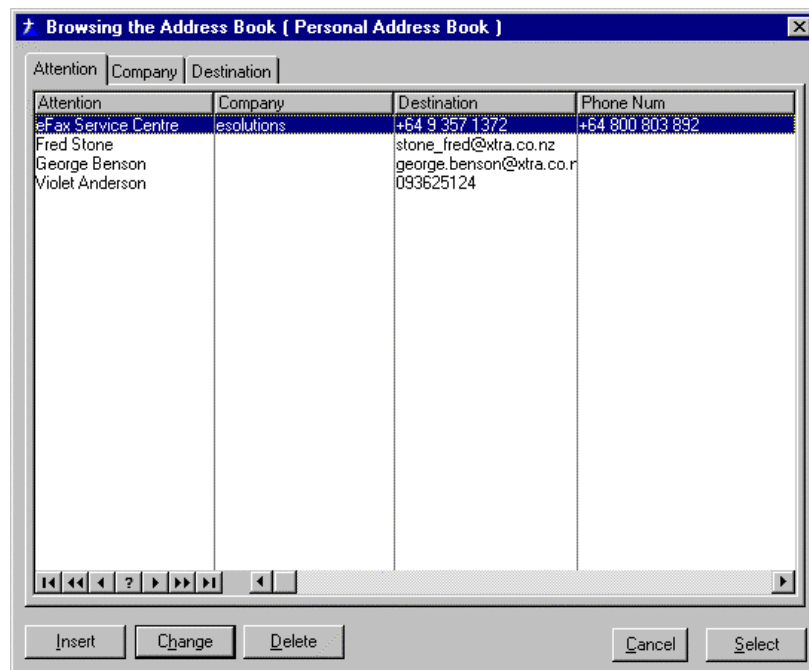
The Address Book

The eFax Address Book can be displayed by clicking on of the **Attention:**, **Company:** or **Destination:** buttons, or by following the menu path *Address Book > View Current Address Book*.

Notes:

eFax lists recipients in Address Books and groups.

- Address Books are lists of recipients. If you have a large number of recipients you may want to have multiple Address Books.
- Groups are a subset of an Address Book. You select recipients from the Address Book to create a Group.
- When sending a fax or email you can select:
 - an individual from an Address Book or
 - a group. The message will be sent to everyone in the group.



If you want to...	Then...
Select a recipient from the Address Book	<ul style="list-style-type: none"> • Double click the recipient or • Select the recipient and click the Select button.
Insert a new recipient into the Address Book	<ol style="list-style-type: none"> 1. Click the Insert button to open the Adding an Address Record dialog box. 2. Type appropriate details in the Company Name:, Contact Person:, Fax Number: and Email Address: fields. 3. Select either Use Fax or Use Email in the Preferred Destination field. 4. Select the type of email files the recipient will receive. The file types are:

	<p>format.</p> <p><u>Note:</u> If you use TIFF or PDF the recipient must have the appropriate software to view the attachment.</p> <ol style="list-style-type: none"> 5. If required move to the Business Address Details and Email Details tabs to complete further recipient details. 6. Click the OK button to save the recipient details.
Delete a recipient	<ol style="list-style-type: none"> 1. Select the recipient. 2. Click the Delete button to open the Confirm Delete dialog box. 3. Click the Yes button to delete the recipient.
Change the details of a recipient	<ol style="list-style-type: none"> 1. Click the Change button to open the Changing an Address Record dialog box. 2. Change details in the General Details, Business Address Details or Email Details tabs as required. <p><u>Notes:</u> There are several file types for email attachments:</p> <ul style="list-style-type: none"> • TIFF: Tagged Image File Format. • FXW: Reserved, do not use. • PDF: Adobe Acrobat PDF format. • RAW: The original file format. <p><u>Note:</u> If you use TIFF or PDF the recipient must have the appropriate software to view the attachment.</p>
Sort recipient details by Attention , Company or Destination	Click the Attention , Company or Destination tabs as required.

Adding an Address Record

General Details | Business Address Details | Email Details

Company Name:

Contact Person:

Fax Number:

Email Address:

Preferred Destination:

Use Fax

Use Email

Preferred Email Attachment Type:

RAW

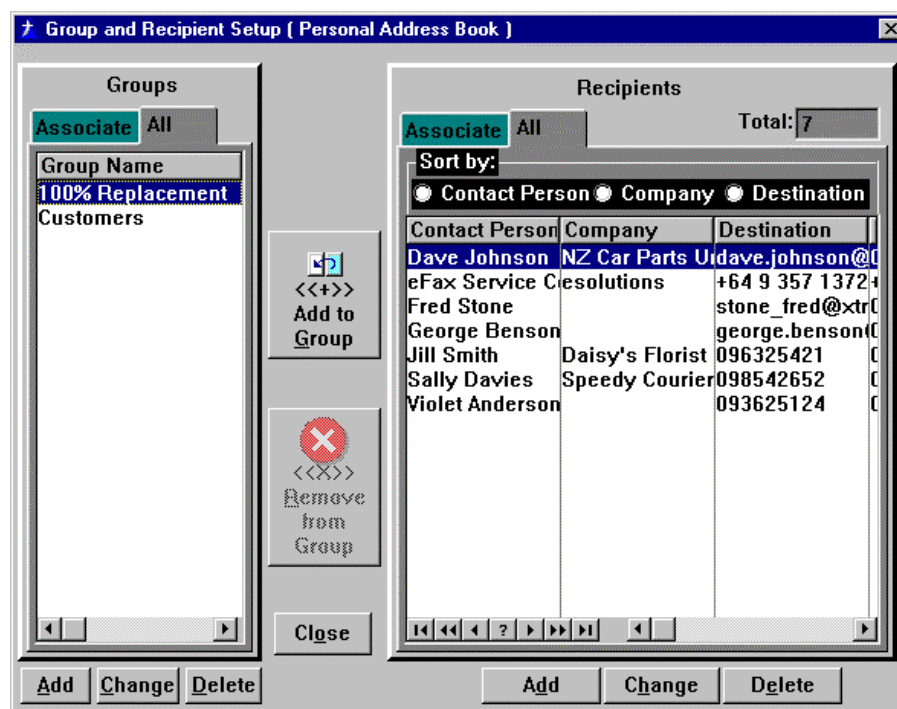
Default Charge Code:

Other Address Book features

Button	Description
⌂	Return to the top of the list
⏪	Move up one page
⏩	Move to the previous recipient in the list
?	This button is not active at present
⏴	Move to the next recipient
⏵	Move down one page
⏴⏵	Move to the end of the list

Creating Groups

Groups can be created in the Address Book by following the menu path *Address Book > Group Setup*. This will display the **Group and Recipient Setup** dialog box.



The **Group and Recipient Setup** dialog box has two main areas. On the left side of the dialog box, the list of groups, and on the right side of the dialog box the list of recipients. The dialog box initially displays all groups and all recipients.

If you want to...	Then...
Add a new group to the Address Book	Click the Add button in the Groups area.
Change the name of a group	Select the group and click the Change button in the Groups area.
Delete a group	<ol style="list-style-type: none"> 1. Select the group. 2. Click the Delete button in the Groups area to open the Confirm Delete dialog box. 3. Click the Yes button to delete the group.

	<p>Email Address: fields.</p> <ol style="list-style-type: none"> 3. Select either Use Fax or Use Email in the Preferred Destination field. 4. Select the type of email files the recipient will receive. The file types are: <ul style="list-style-type: none"> • TIFF: Tagged Image File Format. • FXW: Reserved, do not use. • PDF: Adobe Acrobat PDF format. • RAW: The original file format. <p><u>Note:</u> If you use TIFF or PDF the recipient must have the appropriate software to view the attachment.</p> 5. If required move to the Business Address Details and Email Details tabs to complete further recipient details. 6. Click OK to save the recipient.
Change recipient details	Select the recipient and click the Change button in the Recipients area.
Delete a recipient from the Address Book	<ol style="list-style-type: none"> 1. Select the recipient 2. Click the Delete button in the Recipients area to open the Confirm Delete dialog box. 3. Click the Yes button to remove the delete from the Address Book.

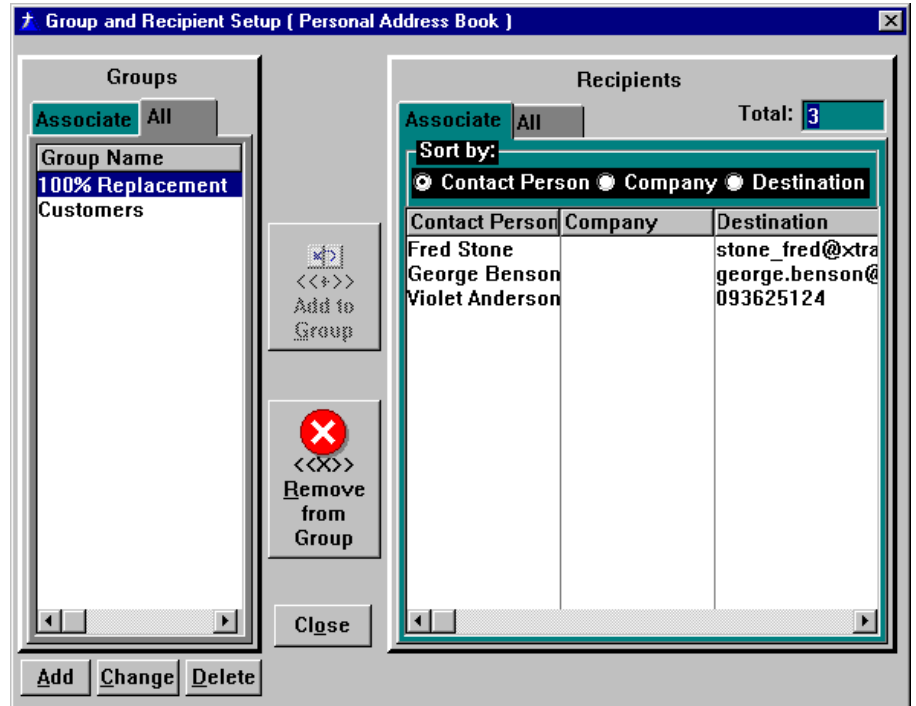
Adding Recipients to Groups

Recipients can be added to groups as follows:

1. Ensure the **All** tab in the **Groups** area, and the **All** tab in the **Recipients** area are selected.
2. Select the group you want to add the recipient to.
3. Select the recipient you want to add to the group.
4. Click the **Add to Group** button.

Removing Recipients from Groups

Recipients can be removed from groups as follows:



1. Ensure the **All** tab in the **Groups** area, and the **Associate** tab in the **Recipient** area are selected.
2. Select the group you want to remove the recipient from.
3. Select the recipient you want to remove from the group.
4. Click the **Remove from Group** button.

Viewing Members of Groups

To display members of a group:

1. Ensure the **All** tab in the **Groups** area and the **Associate** tab in the **Recipient** are selected.
2. Click on a group in the **Groups All** tab to view its members in the **Recipients Associate** tab.

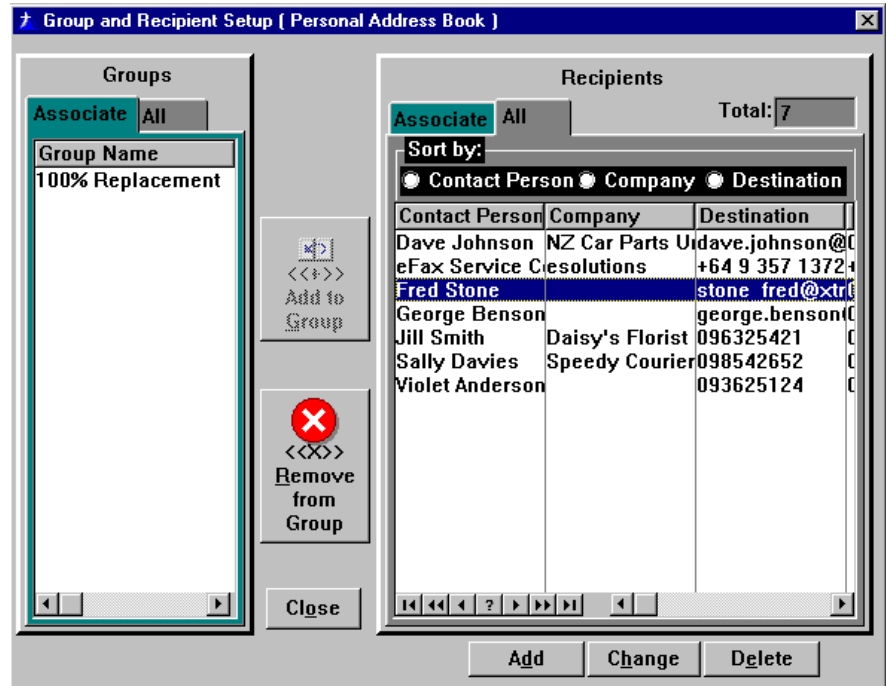
This can be seen in the above dialog box. The group 100% Replacement contains 3 members – Fred Stone, George Benson and Violet Anderson.

Viewing Group Membership

To display all groups that a recipient belongs to:

1. Ensure the **Associate** tab in the **Groups** area and the **All** tab in the **Recipients** area are selected.
2. Click on a recipient to view all groups that the recipient is a member of.

This can be seen in the following dialog box. Fred Stone is a member of the group 100%Replacement.

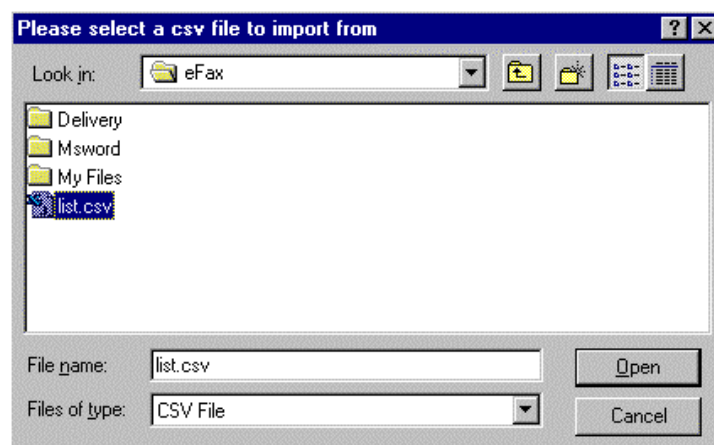


Importing Recipients into an Address Book

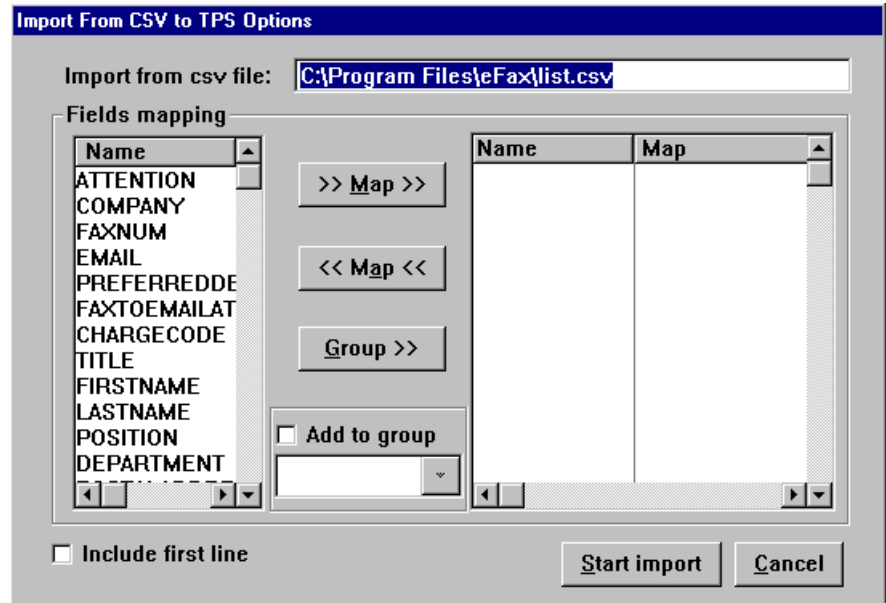
eFax allows you to import a list of recipients into an Address Book from a file in CSV (Comma Separated Variable) format. CSV files can be generated from most spreadsheet and database programs. For example, from Microsoft Excel.

The process for importing recipients into an Address Book is as follows:

1. Follow the menu path **File > Import File**. The **Please select a csv file to import from** dialog box is displayed.



2. Select the CSV file that contains the recipients you want to import.
3. Click the **Open** button to open the **Import From CSV to TPS Options** dialog box.



4. In the **Import From CSV to TPS Options** dialog box the fields in your CSV file are displayed on the right of the dialog box. The fields on the left side of the dialog box are the fields available in eFax.
To map the fields in the CSV file with the appropriate fields in eFax:
 - a. Select a field from the left side of the dialog box and the appropriate field on the right side of the dialog box.
 - b. Click the **>> Map >>** button.
 - c. Repeat steps a and b to map all required fields.
Note: To unmap a field click the **<< Map <<** button.

6. Check the **Include first line** box if you want to import the first line of your CSV file.

7. Check the **Add to group** box and select a group if you want the recipients in your CSV file to be imported into an existing group.
Note: If you do not select the **Add to group** option the recipients will be added to the Address Book only.

8. Click the **Start import** button.

Note:

Adding recipients into groups:

- You can map a field in your CSV file to a group by using the **Group >>** button. This allows you to specify in your CSV file a group for each recipient to belong to. When imported, that recipient will become a member of the specified group in the Address Book.
- If the group already exists, the recipient will become part of it. If the group does not exist, eFax will create it.

Example CSV File Format

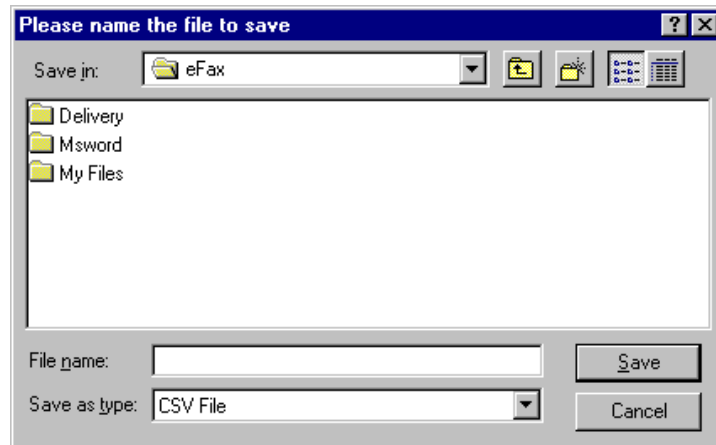
```
Faxnumber,Attention,Company
093032180.Robvyn Williams.Svsdoc Ltd
```

Exporting the Address Book

eFax allows you to export the entire Address Book to a file in CSV format. Once this has been done, you can read the exported file using a spreadsheet or database program.

The process for exporting the Address Book is as follows:

1. Follow the menu path **File > Select Export File**. The **Please name the file to save** dialog box will be displayed.



2. Select the required directory and type the name of the file in the **File name:** field.
3. Click the **Save** button to save the file.

Exporting Groups

eFax also allows you to export groups to a file in CSV format. The exported file can be read using a spreadsheet or database program.

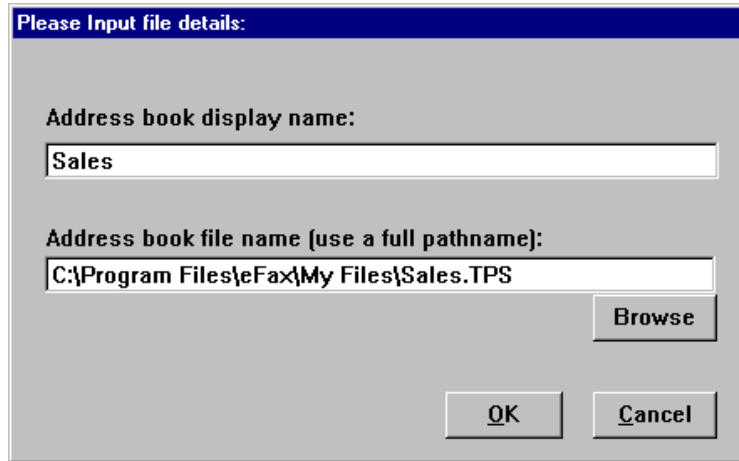
To export a group to a file:

1. Select the group or groups that you want to export.
2. Follow the menu path **File > Export Groups** to open the **Please name the file to save** dialog box.
3. Select the required directory file and type the name of the file in the **File name:** field.
4. Click the **Save** button to save the file.

Creating Multiple Address Books

With eFax you are able to create multiple Address Books. This allows you to organise your address lists into separate files. It may be useful if your address list contains a large number of recipients.

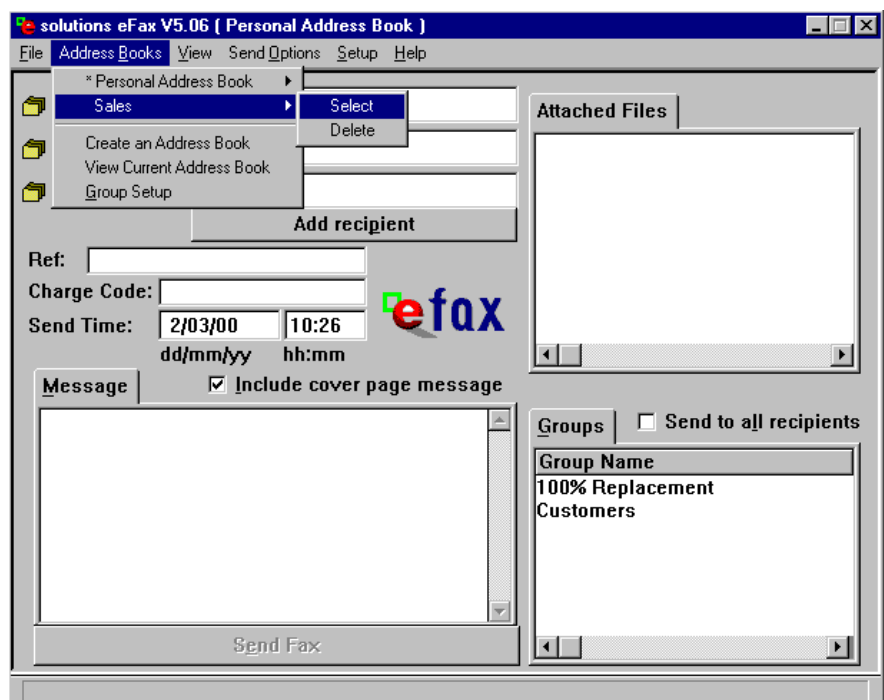
New Address Books can be added or created as follows:



1. Follow the menu path **Address Books > Create an Address Book** to open the **Please Input file details** dialog box.
2. Enter a name for the Address Book in the **Address book display name:** field.
3. Type or select the path and file name of the Address Book in the **Address book file name (use full pathname):** field.
Note: Click the **Browse** button to select the path and name of a pre-existing Address Book, if required.
4. Click the **OK** button to create or add the Address Book.

Selecting an Address Book

If you have multiple Address Books, only one Address Book can be viewed (or be active) at any one time.



The currently selected Address Book is shown with an asterisk (*) in front of it. To select a different Address Book:

Deleting an Address Book

Address Books can be deleted in a similar fashion to the selecting of Address Books:

1. From the **Address Books** menu, select the Address Book that you want to delete.
2. Select **Delete** from the pop-up menu that appears.

Notes:

- You cannot delete the currently selected Address Book. Before you can delete a selected Address Book you must first make another Address Book the active Address Book.
- When you delete an Address Book from eFax you are only disconnecting the Address Book file from the application. The actual Address Book file is not deleted from the computer's disk drive. If you want to delete the Address Book file, you must delete it using Windows Explorer.

Sharing Address Books

eFax Address Books can be shared between more than one user. This means that only one Address Book needs to be maintained for common addresses.

To share an Address Book:


1. Create a new Address Book on, or put an already created Address Book into a shared network directory.
2. For each user that requires access to the shared Address Book, ensure that they have appropriate permission to access the shared network directory, and add this Address Book to their eFax Client. For information on adding Address Books see **Creating Multiple Address Books**.

Cover Pages

eFax allows you to create your own cover pages to be used with any messages that you send.

eFax cover pages consist of four separate parts:

- image
- address block
- message
- signature block

	Image
Attention: Rick Smith Company: RS Holdings Destination:093555178 Date: Wed, Jan 19, 2000 From: Joe Bloggs	Address Block
Rick, The equipment you purchased is on its way to NZ via Australia. Delivery is expected within the next 2 weeks and once we have received the shipment, we will assemble ready for installation at your manufacturing plant. The current project plan is proceeding according to schedule and we expect completion of the project in 2 months. Regards Joe Bloggs Project Manager	Message
	Signature Block

Image

The image is usually a company logo containing company phone and address details, and is stored on the eFax Host. Each time a cover page is sent, the eFax software overlays the image onto the cover page.

Address Block

The address block usually contains recipient and personalised sender information. It is totally configurable by the user, and held locally on the user's PC as a Rich Text Format (RTF) file.

Message

The message is the message that you want to appear on your cover page, and is entered in the message area of the eFax main window.

Signature Block

The signature block is similar to the address block, and usually contains the name and position details of the sender. Scanned signatures can be part of the signature block if you require a hand written signature on your message. The signature block is also held

Creating a Cover Page

Creating a cover page requires:

- Sending an image to the eFax Host.
- Setting up address and signature block.

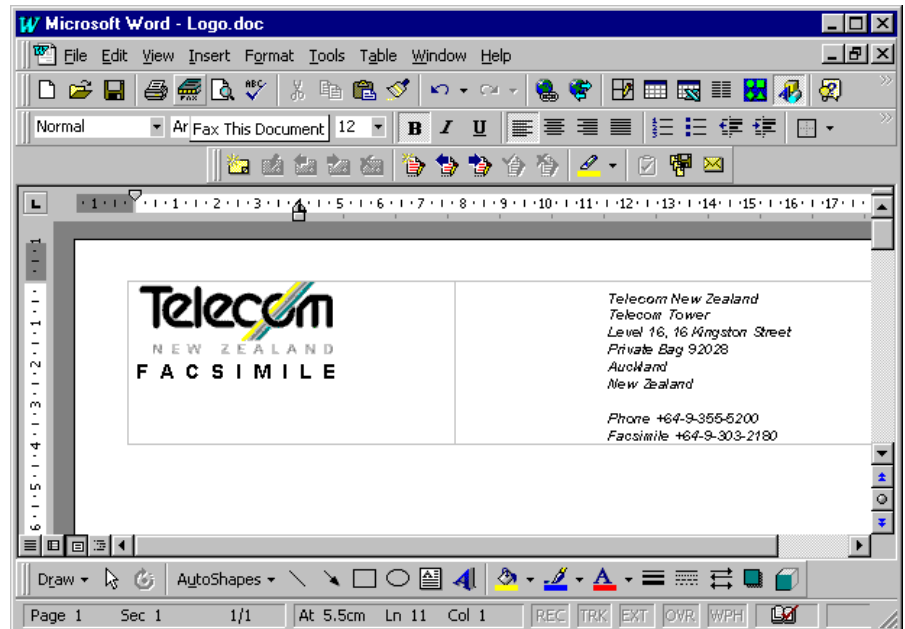
Send Image to eFax Host

The first part of creating a cover page is to send the cover page image to the eFax Host.

1. Load the image into your application. For example, Microsoft Word.
2. Print it to the eFax printer.

Notes:

- In most Windows applications this is done by following the menu path **File > Print**.
- If you are using Word, you can click the Fax button.



3. The eFax screen will be displayed. Follow the menu path **Setup > Create a Cover Page**. The **Please Input file details:** dialog box will appear.

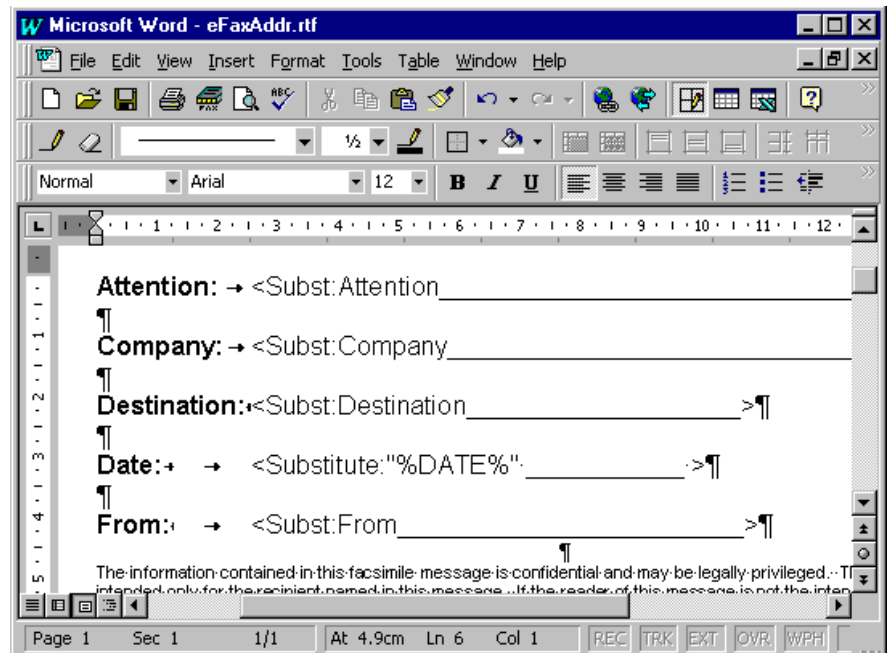
A screenshot of a dialog box titled "Please Input file details:". The dialog box has a blue title bar. It contains two text input fields. The first field is labeled "Cover page name:" and contains the text "Telecom". The second field is labeled "Cover page description:" and contains the text "Telecom Logo Kingston St Akl". At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

4. Enter a name and description for your cover page in the **Cover**

7. Click the **Send** button in the **Confirmation** dialog box to send.

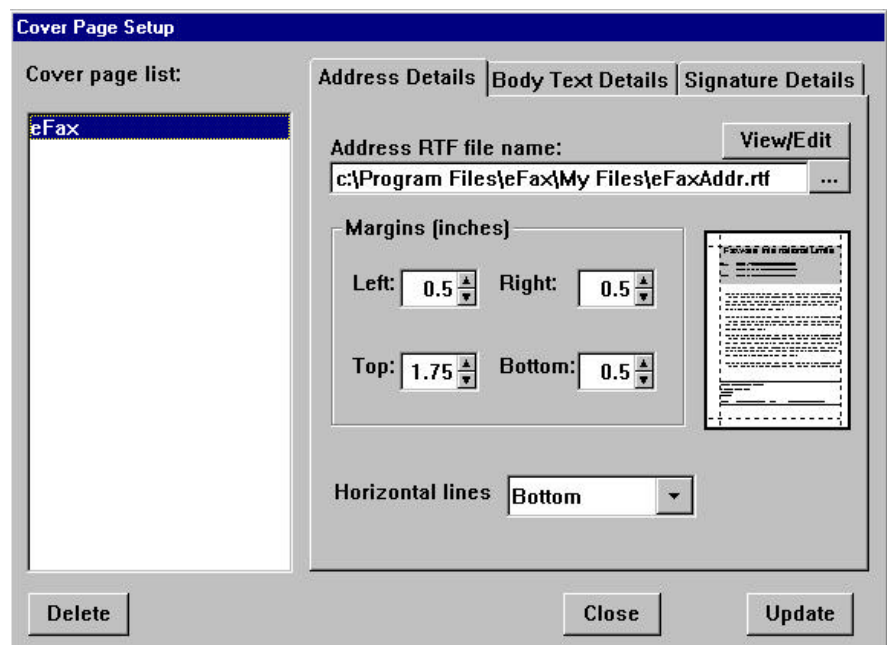
Set up Address and Signature Blocks

The second part of creating a cover page involves configuring the address and signature blocks. The address and signature blocks are RTF files that are stored locally on a users PC or network server. The default address block supplied with eFax looks as follows:



The *Subst* mail merge command is used in the address block to enable personalisation of messages. For more information on mail merge see Mail Merge.

The address and signature block files can be modified as desired, and are configured in eFax from the **Cover Page Setup** dialog box. To display this dialog box, follow the menu path *Setup > Cover Page*.



- **Body Text Details** for modification of the message
- **Signature Details** for modification to the signature block.

On each tab:

- **Margins** settings are available to set the position of each block on the cover page. Set the margins as required.
Note: The top margin for the address block is the gap between the top of the page and the start of the address block. This needs to be set large enough so that the address block is placed below any images overlaid at the top of the page.
- **Horizontal lines** drop down box is available if horizontal lines are required to mark the top and/or bottom of each block. Set the horizontal lines as required.

On the **Address Details** and **Signature Details** tabs you can:

- Edit RTF files by clicking the **View/Edit** button
- Select RTF files by clicking the ellipsis (...) button
- Edit or select new address and signature block files as desired

If you make any changes to the **Address Details**, **Body Text Details** or **Signature Details** tabs, click the **Update** button to save the changes.

Selecting a Cover Page

If you have more than one cover page, you can to select a cover page to send with your message. To do this:

1. Follow the menu path **Send Options > Cover Page**. A pop up menu containing the list of cover pages will be displayed.
2. Select the cover page you want to use.
Note: The currently selected cover page will have an asterisk (*) next to it.

Note: If you want to make this cover page your default cover page, follow the menu path **Send > Save as My Defaults**.

Deleting a Cover Page

To delete a cover page:

1. Follow the menu path **Setup > Cover Page Setup** to display the **Cover Page Setup** dialog box.
2. Select the cover page you want to delete and click the **Delete** button.

Remote Files

With eFax you are able to upload files to be stored as images on the eFax Host. These are called remote files. Remote files are useful if you have a requirement to frequently send files that don't change very often e.g. terms and conditions, application forms. This feature allows easier and more efficient sending of files using eFax.

The **Remote Files** tab is not displayed on the eFax main window by default, and must be turned on. To do this:

1. Follow the menu path *Setup > Display Remote Files*. A pop up menu will be displayed.
2. Select *Yes* to display the **Remote Files** tab. The tab will appear next to the **Attached Files** tab on the eFax main window.

Sending a Remote File to the eFax Host

To send a Remote File to the eFax Host:

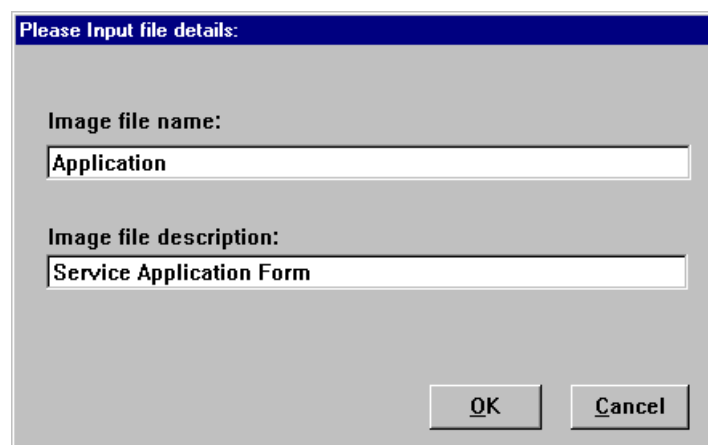
1. Load the file you want to send to eFax into your application. For example, Microsoft Word.

2. Print it to the eFax printer.

Notes:

- In most Windows applications this is done by following the menu path *File > Print*.
- If you are using Word, you can click the Fax button.

3. Follow the menu path *Setup > Create a Remote File*. The **Please Input file details:** dialog box will appear.



3. Enter a name and description for your remote image file and click the **OK** button. The **Send Fax** button on the eFax main window will change to **Send to the Server**.
4. Click the **Send to the Server** button.
5. Click the **Send** button in the **Confirmation** dialog box to send.

The remote file will now be listed in the **Remote Files** tab on the

Deleting a Remote File

To delete remote files:

1. Move the cursor over the appropriate file and click the right mouse button.
2. Select *Delete selected remote files* from the pop-up menu.

Note: Deleting remote files deletes the remote file from both the eFax Client and the eFax Host.

Disconnecting a Remote File

To disconnect remote files:

1. Move the cursor over the appropriate file and click the right mouse button.
2. Select *Disconnect selected remote files* from the pop-up menu.

Note: Disconnecting remote files deletes the remote file from the eFax Client only. The remote file on the eFax Host **is not** deleted.

Autotext Files

Cover page messages can be automatically loaded into the message area of the eFax main window using Autotext files. Using Autotext files saves time, particularly when you need to repeatedly send commonly used cover page messages.

To load an Autotext file into the message area:

1. Click on the eFax logo in the middle of the screen. A pop up menu will appear containing the list of available Autotext files.

2. Select an Autotext file.

Note: The message area of the eFax main window will be populated with the contents of the Autotext file.

Creating an Autotext File

Autotext files are text files that are stored on a computer's disk drive. This could be a:

- Hard drive
- Floppy drive
- Network drive

The content of the text file is loaded into the eFax cover page message when the Autotext file is selected.

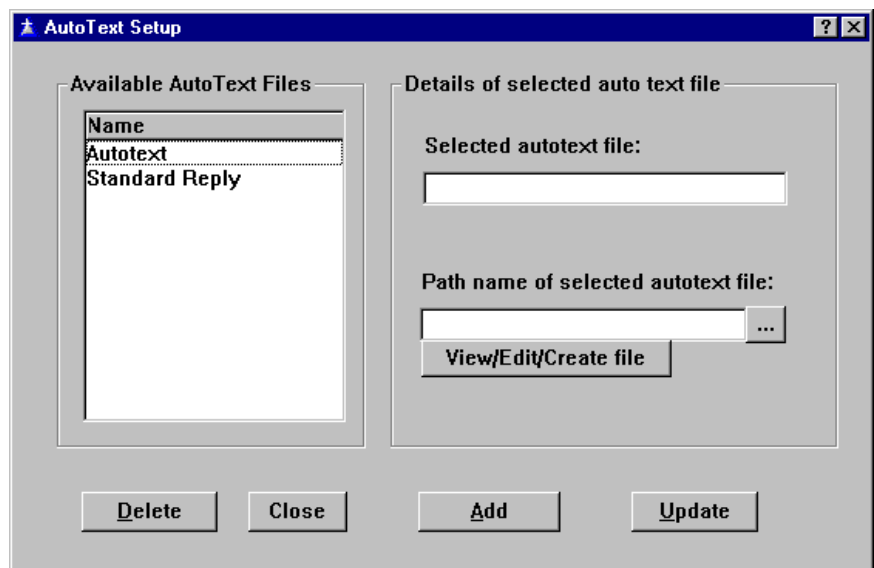
To create an Autotext file:

1. Create and save a text file containing the message you want loaded as Autotext.

Note: Files can be saved to a:

- Hard drive
- Floppy drive
- Network drive

2. From the eFax main window, follow the menu path **Setup > AutoText Setup**. The **AutoText Setup** dialog box will be displayed.



Modifying an Autotext File

Autotext files can be modified from the **AutoText Setup** dialog box.

To modify an Autotext file:

1. From the eFax main window follow the menu **Setup > AutoText setup**. The **AutoText Setup** dialog box is displayed.
2. Select the Autotext file that you want to modify from the **Available AutoText Files** list. The Autotext name and path will be displayed.
3. Modify the name of the Autotext file by editing the **Selected AutoText File** field.
4. Modify the contents of the Autotext file by clicking the **View/Edit/Create File** button, or select a new Autotext file by clicking the ellipsis (...) button.
5. Follow the menu path **File > Save** to save the changes to the autotext file.
6. Follow the menu path **File > Exit** to exit the editing window.
7. Click the **Update** button to save changes.
8. Click **Close** to return to the eFax window.

Note: If you have inserted an autotext file into the **Message** section and then go through the above procedure to make changes to the autotext file you will need to re-insert the autotext into the **Message** section to see the update.

Deleting an Autotext File

Autotext files can be deleted from the **AutoText Setup** dialog box.

To delete an Autotext file:

1. From the eFax main window, follow the menu path **Setup > AutoText Setup** to display the **AutoText Setup** dialog box.
2. Select the Autotext file that you want to delete from the **Available AutoText Files** list.
3. Click the **Delete** button to delete the Autotext file.
4. Click the **Update** button to update eFax.

Note: When you delete an Autotext file from eFax you are only disconnecting the Autotext file from the application. The actual file containing the Autotext contents **does not** get deleted. If you want to delete this file, you must delete it using Windows Explorer.

The Send Log

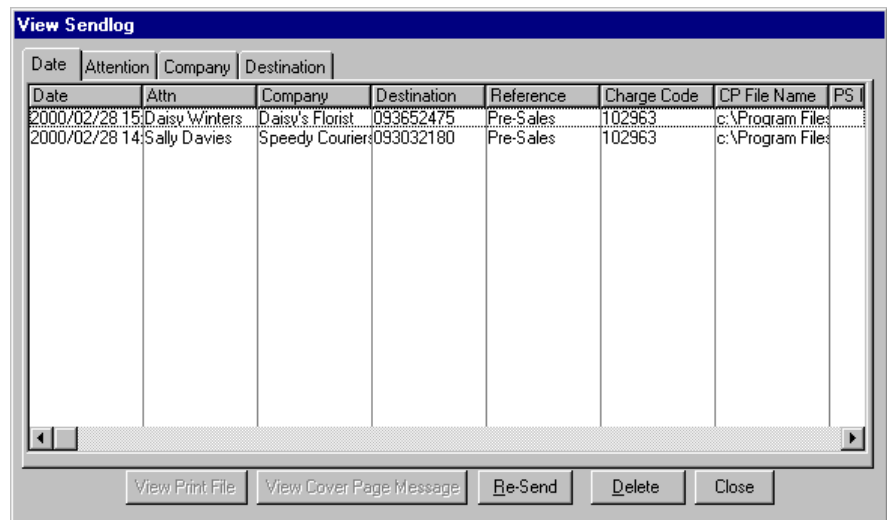
The Send Log is used to keep a record of messages that have been sent from eFax. This feature can be turned on or off.

The Send Log is turned off by default. To enable it:

1. From the eFax main window follow the menu path **View > Send Log**. A pop up menu will be displayed.
2. Select **Yes** to enable the Send Log.

Viewing the Send Log

The Send Log can be viewed from the eFax main window by following the menu path **View > ViewSendLog**.



If you want to...	Then...
Resend a message	<ol style="list-style-type: none"> 1. Select the message. 2. Click the Re-Send button. <p><u>Note:</u> The eFax main window will now be populated with the original message details.</p> <ol style="list-style-type: none"> 3. Click the Send Fax button to resend the message.
Delete a message	<ol style="list-style-type: none"> 1. Select the message. 2. Click the Delete button.
View the cover page	<ol style="list-style-type: none"> 1. Select the message. 2. Click the View Cover Page Message button.
View the print file raw code from a message send via an application, for example, from Microsoft Word	<ol style="list-style-type: none"> 1. Select the message. 2. Click the View Print File button. <p><u>Note:</u> To view a print file as an image you must set up a program which can view postscript files – to do this see Setting up a Postscript Viewer.</p>

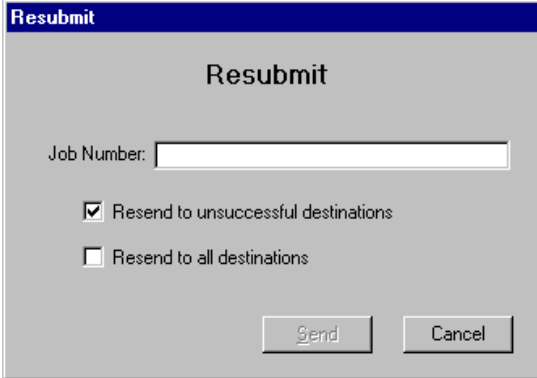
Notes:

- The **View Cover Page Message** and **View Print File** buttons will only be enabled if the selected message has a cover page

Resending Unsuccessful Faxes

eFax allows you to resend a message to all unsuccessful fax recipients. You are able to tell that your message had failures from any delivery or non-delivery reports you receive from the eFax service. To resend an unsuccessful fax:

1. Follow the menu path **File > Resubmit** to open the **Resubmit** dialog box.



The image shows a screenshot of a software dialog box titled "Resubmit". The dialog has a blue title bar with the word "Resubmit" in white. The main area is light gray and contains the following elements: a label "Resubmit" centered at the top; a label "Job Number:" followed by a white text input field; two checkboxes: "Resend to unsuccessful destinations" (checked) and "Resend to all destinations" (unchecked); and two buttons at the bottom right: "Send" and "Cancel".

2. Type the job number of the message that you want resent in the **Job Number:** field.
Note: The job number is returned in the delivery or non-delivery report you receive for your message.
3. If you want to:
 - Resend to unsuccessful recipients only, check the **Resend to unsuccessful destinations** field.
 - Resend to all recipients, check the **Resend to all destinations** field.
4. Click the **Send** button.

Mail Merge

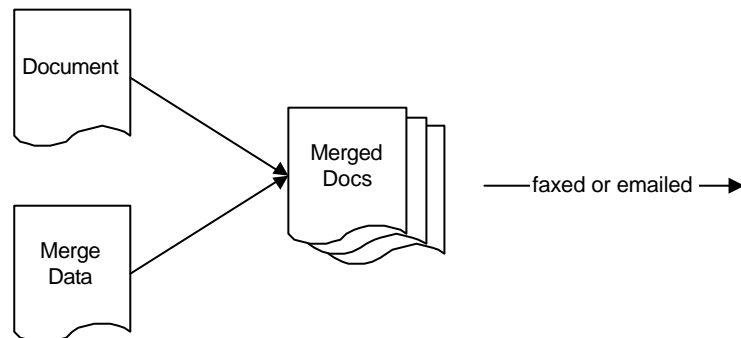
The eFax software allows you to send documents that can be mail merged by the eFax Host.

The eFax Client contains nine default fields that can be mail merged into your documents. They are the **Attention, Company, Destination, Title, Firstname, Lastname, From, Chargecode** and **Reference** fields. In addition you can also merge the system fields **Current Date, Page Number, and Page Count** into your document.

Creating Mail Merge Documents

Mail merge documents are created by placing *Substitute* indocument commands within your document. An example of its use can be seen in the Address Block for Cover Pages. When creating a mail merge document, you are in effect creating a template into which different information can be placed.

When the eFax Host receives a document with mail merge commands for processing, it merges the document with the merge data, and creates a separate document to send for each recipient.



The syntax for the substitute command is as follows:

```
<subst:Field_____>
```

This is interpreted by the eFax Host, which inserts the value of *Field* into the document starting at the “<” and ending at the “>”. The underscores () define the size of the field.

The syntax for substituting system fields is as follows:

```
<subst:"%Field%"_____>
```

You can also use the *Subl, Subc* and *Subr* indocument commands (for Substitute Left, Substitute Centre, and Substitute Right) to align the merged data within the field between the < and >.

The default merge fields you can use with eFax client are:

ATTENTION	The attention details
COMPANY	The company name
DESTINATION	The fax number or email address

REFERENCE The reference

The system merge fields you can use are:

%DATE% The current date
%PAGE% Page number of the current page
%PGC% The total page count

For example, your document could contain the following substitute commands:

TO: <subst:ATTENTION_____>
COMPANY: <subst:COMPANY_____>
DESTINATION: <subst:DESTINATION_____>

DATE: <subl:"%DATE%"____> <subr:"Page %PAGE% of
%PGC%">
FROM: <subst:FROM_____>

Sending Mail Merge Documents

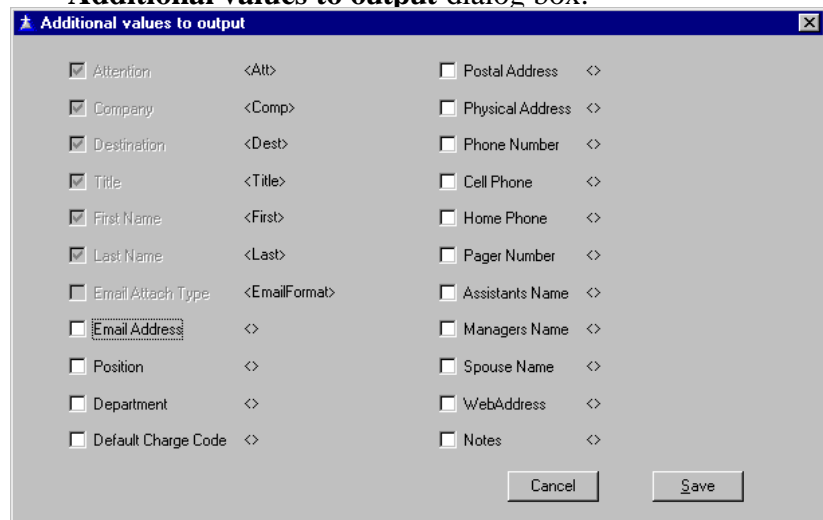
Mail merge documents are sent as normal using the eFax Client. That is, by attaching them as files or by printing them to the eFax printer. For more information on sending messages see Sending Messages.

When merging fields, make sure that the recipients you are sending to actually have data in the merge fields. For example, if you want the FIRSTNAME field merged into your document, each recipient must have a **First Name** in the Address Book.

Other Mail Merge Fields

Other fields in the eFax Address Book can be used for mail merge. By default there are not used, but can be set for use as follows:

1. Follow the menu path *Setup > Mailmerge Fields* to open the **Additional values to output** dialog box.



2. Check each field the Address Book that you want to use for mail merge.

Personal Details

You can also mail merge personal details into your documents. This is useful in multiuser environments when using shared cover pages. Being able to merge personal details allows you to create a common signature block for every user. For more information on sharing cover pages [Sharing Cover Pages](#).

Three fields are supplied for personal details. They are:

- Direct Dial In (DDI) Number
- Fax Number
- Email Address

To enter personal details:

1. Follow the menu path *Setup > Personal Details* to open the **Personal Details** dialog box.
2. Type appropriate details in the **DDI**, **Fax Number** and **Email Address** fields.
3. Click the **Save** button to save the details.

The substitute merge fields for personal details are:

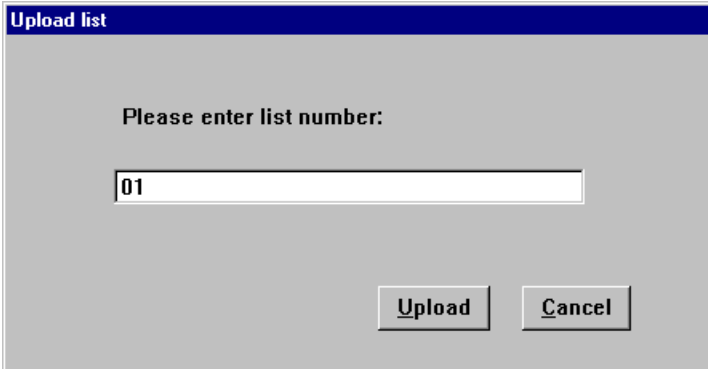
PD_DDI	Personal DDI.
PD_FAXNUM	Personal fax number.
PD_EMAILADDR	Email address.

Uploading Lists

With eFax you are able to upload lists to the eFax Host. This is only necessary if you are also using the eFax SWIFT service to send hardcopy fax broadcasts.

To upload lists to the eFax Host:

1. From the eFax main window, select the group in the **Groups** tab that you want to upload as a list to the eFax Host.
2. Follow the menu path **File > Upload List** to open the **Upload list** dialog box.



The screenshot shows a dialog box titled "Upload list". Inside the dialog, the text "Please enter list number:" is displayed above a text input field. The input field contains the number "01". At the bottom right of the dialog, there are two buttons: "Upload" and "Cancel".

3. Enter a list number.
Note: This must be a number from 00-89, or 100-899.
4. Click the **Upload** button.

A report from the eFax service will be returned via email when the list has been successfully loaded onto the eFax Host. When the report is received, the uploaded list will be available for use with the eFax SWIFT service.

Reports

Report Types

When a user sends a message to the eFax service, a report is typically returned to the user via email. The type of report returned can differ depending on what notification the user has requested, and what sort of message the user sent to eFax.

Note: All reports, except the Group Upload report, return information containing the eFax:

- Job number
- Submission date and time
- Reference field

Delivery Report

The Delivery Report lists all faxes delivered and not delivered, sent on job completion by the eFax Host. This report is returned if the user has requested delivery notification.

Delivery reports are also returned when cover page images or a remote file images have been successfully uploaded to the eFax Host.

Non-delivery Report

The Non-delivery Report lists only faxes not delivered, sent on job completion by the eFax Host. This report is returned if the user has requested non-delivery notification, and only when there have been failed deliveries.

Note: The Non-delivery Report is sometimes called the exception report.

Submission Report

The Submission Report states that a message has been received by the eFax Host and is being processed. This report is returned if the message has been sent to five or more recipients, and is in addition to any delivery or non-delivery reports that have been requested.

Deferred Delivery Report

The Deferred Delivery Report states that a message has been received by the eFax Host, and is being held for delivery at the specified send date and time. This report is returned if the message has a specified send time more than an hour ahead of the current time. This report is in addition to any delivery or non-delivery reports that have been requested.

Error Report

The Error Report states that there was an error with the message that was sent.

Unsupported Attachment Report

The Unsupported Attachment Report states that an attachment sent to the eFax Host is not supported.

Advanced Features

eFax.ini File

Some of the advanced features covered in this section require manipulation of the eFax.ini file. This file is used by the eFax application for its configuration, and can be found in the directory where eFax was installed. It is a text file and can be modified with any text editor.

Sharing Cover Pages

Cover pages can be shared if more than one user wants to use the same cover page. Generally when cover pages are shared, the cover page image file is the same, but the address and signature blocks for each user are different.

To share cover pages you must edit the *GlobalCoverPages* entry in the *eFax.ini* file.

The entry must be changed:

From: GlobalCoverPages=<install path>\eFax.ini
To: GlobalCoverPages=<shared network path>\FXWGlobal.ini

Note: If you chose Network Installation when you installed eFax this will already be set up.

This change will mean that eFax will look for its cover pages in the FXWGlobal.ini file on a shared network directory. The FXWGlobal.ini file has entries describing cover page settings. An example FXWGlobal.ini file looks as follows:

```
[AvailableCoverPages]
CompanyLogo=CompanyLogo

[CompanyLogo]
AddressHeader=0.5,0.5,1.75,0.5
AddressHeaderLines=Bottom
AddressHeaderFilename=C:\CovPage\Addr.rtf
MessageBody=0.5,0.5,0.5,0.5
MessageBodyLines=None
MessageBodyFontname=Arial
MessageBodyFontSize=12
Signature=0.5,0.5,0.5,0.5
SignatureLines=None
SignatureFilename=C:\CovPage\Sign.rtf
```

The above FXWGlobal.ini file describes the cover page CompanyLogo. Each user of this cover page will share the CompanyLogo image stored on the eFax Host, but will have their own personalised Address and Signature blocks, located on their PC hard drive (as indicated by *AddressHeaderFilename* and *SignatureFilename*).

AddressHeader, *MessageBody* and *Signature* describe the margins for each block. Margins settings are in the order Left, Right, Top, Bottom. In the preceding example, the address header has a left margin of 0.5, a right margin of 0.5, a top margin of 1.75 and a bottom margin of 0.5 (units in inches).

Sharing Remote Files

Remote files, like cover pages can be shared if more than one user want to use the same remote file.

To share remote files you must edit the *ImageFiles* entry in the *eFax.ini* file.

The entry must be changed:

From: ImageFiles=<install path>\eFax.ini
To: ImageFiles=<shared network path>\ImageFiles.ini

Note: If you chose Network Installation when you installed eFax this will already be set up.

This change will mean that eFax will look for its remote files in the ImageFiles.ini file on a shared network directory. This ImageFiles.ini file describes what remote image files are available. An example ImageFiles.ini file looks as follows:

```
[ImageFiles]
Application=Service Application Form
TermsAndConditions=Terms and Conditions
```

The above ImageFiles.ini file contains two remote files – Application and TermsAndConditions.

The format for Remote File entries in the ini file is:

```
<Remote File Name>=<Remote File Description>
```

Setting up a Postscript Viewer

Before you can view print files on screen as images you must install a program that can view postscript files. For example, Ghostscript GSView software. This is freely available from the web site www.cs.wisc.edu/~ghost

To set up a postscript viewer for eFax:

1. Install the postscript viewing program on your PC.
2. Edit the eFax.ini file. Change the *ViewPSCCommand* entry. This must be changed.

From: ViewPSCCommand=notepad
To: ViewPSCCommand=<postscript viewer program>

Sending to a group using a Targets.csv file

With eFax Client, it is possible to send to a group (or list) by attaching a file containing the list of recipients to your message, along with any documents that you want to send.

The list you attach **must** be a file named **TARGETS.CSV** in the following CSV format:

```
Destination,Attention,Company  
093032180,Robyn Williams,Sysdoc Ltd  
rwilliams@sysdoc.co.nz,Robyn Williams,Sysdoc Ltd  
033892445,Dorothy Lang,Wyle E Coyote Inc  
006124603455,Jim Fletcher,Road Runner  
044601254,John Duck,Acme Inc
```

Note: The first line of the CSV file describes the eFax fields.

Using a list in CSV format means you don't have to use the Address Book to store your groups. You can extract lists from a different database as required.

To send a message using a targets.csv file:

1. Create a file named TARGETS.CSV in the correct CSV format for eFax.
2. Start eFax.
3. Fill in any reference or charge code information that you require in the **Ref:** and **Charge Code:** fields.
4. Set a send time and date in the **Send Time:** fields, if you need to defer delivery of your message.
5. Type in a message in the **Message** field, if you want a cover page to appear on your fax or email.
6. Attach any files that you want to send with your message.
7. Attach the TARGETS.CSV file to your message.
8. Click the **Send Fax** button.
9. Click the **Send** button in the **Confirmation** dialog box to send.

Appendix One – Supported Attachments

eFax supports the following list of attachments:

Note: In some cases, the attachment when faxed may not appear exactly as if the attachment was printed on a printer. Send a test fax to yourself to check if the faxed output is acceptable for that attachment.

□ ACS

Microsoft Access 1.0
Microsoft Access 2.0

□ AMI

Ami Pro
Ami
Professional Write Plus

□ BDR

Microsoft Office Binder

□ BMP

Windows Bitmap
OS/2 Bitmap
OS/2 Warp Bitmap
Windows Cursor
Windows Icon
Corel Draw 2.0
Corel Draw 3.0
Corel Draw 4.0
Corel Draw 5.0

□ CGM

Computer Graphics Metafile

□ DBS

DBase III
DBase IV
DBase V

□ DEZ

DataEase 4.x

□ DIF

Navy DIF

□ DRW

Micrografx drawing products

□ DX

DEC DX 3.0 and below
DEC DX 3.1
DEC DX 4.x

□ DXF

AutoCad Interchange ASCII
AutoCad Interchange Binary

□ EN4

Enable word processor 4.x

□ ENS

Enable Spreadsheet

□ ENW

Enable word processor 3.0

□ EXE2

DOS Executable
Windows Executable or DLL

□ FAX

□ FFT

IBM DCA/FFT

□ FLW

Freelance 1.0 & 2.0 for
Windows
Freelance 96 for Windows 95
Freelance 1.0 & 2.0 for OS/2

□ FWK

Framework III

□ GIF

Compuserve GIF

□ HGS

Harvard Graphics DOS 3.0
Chart
Harvard Graphics DOS 2.0
Chart
Harvard Graphics DOS 3.0
Present.

□ HTML

Internet HyperText Markup
Language

□ IMG

GEM Image

□ IWP

Wang IWP

□ JW

JustWrite 1.0
JustWrite 2.0
Q&A Write 3

□ LEG

Legacy
Wordstar for Windows

□ LZH

LZH Compress
LZA Self Extracting Compress

□ M11

Mass 11

□ MANU

Lotus Manuscript 1.0
Lotus Manuscript 2.0

□ MCW

MacWrite II

□ MM

MultiMate 3.6
MultiMate Advantage 2

□ MM4

MultiMate 4.0

□ MSW

Microsoft Word 4.x
Microsoft Word 5.x
Microsoft Word 6.x
Microsoft Word 8.x
Windows Write

□ MWKD

Mac Works 2.0 Database

□ MWKS

Mac Works 2.0 Spreadsheet

□ MWP2

Mac WordPerfect 2.0
Mac WordPerfect 3.0

□ MWPF

Mac WordPerfect 1.x

□ MWRK

Mac Works 2.0 WP

□ OMF - OS/2 Only

OS/2 Metafile

□ OW

OfficeWriter

□ PCL

PC File 5.0 Doc

□ PCX

Paintbrush
DCX (multipage PCX)

□ PDX

Paradox 2 & 3
Paradox 3.5
Paradox 4
Paradox for Windows

□ PDF

Adobe Acrobat PDF 1.0
Adobe Acrobat PDF 1.1
Adobe Acrobat PDF 1.2

□ PFS

PFS: Write A
PFS: Write B
Professional Write 1
Professional Write 2
IBM Writing Assistant
First Choice word processor
First Choice 3 word processor

□ PGL

HP Graphics Language

□ PIC

Lotus PIC

□ PICT

□ PNTG
MacPaint

□ PP2
PowerPoint 3.0 for Windows
PowerPoint 4.0 for Windows
PowerPoint 4.0 for Macintosh

□ PP7
PowerPoint 7.0 for Windows
95

□ PPL
PFS: Plan

□ QA
Q&A Write

□ QAD
Q&A Database

□ QP6
Quattro Pro 5.0 for Windows
Quattro Pro 6.0 for Windows
Quattro Pro 7.0 for Windows

□ RBS
R:Base System V
R:Base 5000

□ RFT
IBM DCA/RFT

□ RFX
Reflex

□ RTF
Rich Text Format

□ SAM
Samna

□ SC5
SuperCalc 5

□ SDW
Ami Draw

□ SHW3
Novell Presentations 3.0

□ SMD
Smart DataBase

□ SMS
Smart Spreadsheet

□ SMT
SmartWare II

□ SNAP
Lotus Snapshot

□ TAZ
UNIX Compress
UNIX Tar

□ TEXT
Text - DOS character set
Text - ANSI character set
Text - Macintosh character set
Text - Unicode character set
UUEncode

□ TGA
Targa

□ TIF6
Tagged Image File Format
EPS (TIFF header only)
CCITT Group 3 Fax
CCITT Group 4 Fax
JPEG
JFIF (JPEG not in TIFF format)

□ TW
Total Word

□ TXT
IBM DisplayWrite 2 or 3
IBM DisplayWrite 4
IBM DisplayWrite 5

□ VW3
Volkswriter

□ W6
Microsoft Word 6.0 for Windows
Microsoft Word 7.0 for Windows 95
Microsoft WordPad

□ WG2
Lotus 123 for OS/2 release 2

□ WK4
Lotus 1-2-3 3.0
Lotus 1-2-3 4.0
Lotus 1-2-3 5.0

□ WKS
Lotus 1-2-3 1.0
Lotus 1-2-3 2.0
Symphony
Microsoft Works SS
Microsoft Works DB
VP-Planner
Mosaic Twin
Quattro (DOS)
Quattro Pro (DOS)
Generic WKS
Windows Works Spreadsheet
Windows Works Database

□ WORD
Word for Windows 1.x
Word for Windows 2.0
Word for Macintosh 4.0
Word for Macintosh 5.0

□ WORK
Microsoft Works DOS 1.0 WP
Microsoft Works DOS 2.0 WP
Microsoft Works Win 3.0 WP
Microsoft Works Win 4.0 WP

□ WP5
WordPerfect 5.x

□ WP6
WordPerfect 6.0
WordPerfect 6.1
WordPerfect 7.0

□ WPF
WordPerfect 4.2

□ WPG
WordPerfect Graphic 1.0

□ WPG2
WordPerfect Graphic 2.0
WordPerfect Presentations

□ WPW
Novell PerfectWorks 2.0 word processor
Novell PerfectWorks 2.0 draw
Novell PerfectWorks 2.0 spreadsheet

□ WS
Wordstar 3.0
Wordstar 4.0
Wordstar 5.0
Wordstar 6.0
Wordstar 7.0

□ WS2
Wordstar 2000

□ XL5
Microsoft Excel 2.x
Microsoft Excel 3.0
Microsoft Excel 4.0
Microsoft Excel 5.0
Microsoft Excel 7.0
Microsoft Excel 2.x Chart
Microsoft Excel 3.0 Chart
Microsoft Excel 4.0 Chart
Microsoft Excel 5.0 Chart
Microsoft Excel 7.0 Chart

□ XY
XyWrite / Nota Bene
Signature

□ ZIB

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