Concord Fax Online
for
Microsoft Office
User Guide

Version 2.2
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Introduction

Welcome to Concord Fax Online for Microsoft Office. This User Guide will provide you with information and instructions on how to use your Concord Fax Online for Microsoft Office service. This service is a simple and cost effective way to send all of your faxes directly from Microsoft Office 2003/2007 applications and receive them in Outlook 2003/2007.

Please be aware of the fact that you *must* have both Microsoft Outlook 2003/2007 and Microsoft Office 2003/2007 in order for the Microsoft Internet Fax feature to work.

This User Guide explains:

- How to send and receive faxes using the Internet Fax for Microsoft Office service.
- How to adjust your outbound fax settings.
- How to configure your notification settings.
- Customer Support options.

Getting Started: Enabling Concord Fax Online for Microsoft Office

During the signup process for an Internet Fax for Microsoft Office service, you were prompted to run the activation file by clicking on **Download Activation Tokens** (**see Figure 1**).   These security token prepare Microsoft Outlook and all Microsoft Office applications to use the Concord Internet Fax feature.

Activate Account
In order for you to use your Concord Internet Fax account, Fax Security tokens have to be installed to protect you against abuse of your account. You cannot use the fax sending feature until you download and install those security features

Simply click the "Download Security Tokens" button below, select run to activate your account.

Download Security Tokens

Figure 1: Account activation and downloading of security tokens.

After downloading these Security Tokens, you are automatically forwarded to the Concord Account Administration Center (AAC). This section will enable you to establish your inbound and outbound user preferences, change your password, as well as perform other administrative tasks.

Establishing User Preferences

Before you start faxing, you will need to confirm your User Preferences. You will have been automatically forwarded to this section, but the Concord Account Administration Center is also accessible by visiting the Concord website (www.concordfax.com) and clicking on the **"My Account"** tab.

Enter your assigned fax number and password in order to login. If you have forgotten your password, you may recover by clicking on the "**Forgot Password?**" link on the login page. Follow the prompts and your password will be sent to the email address recorded for your account.
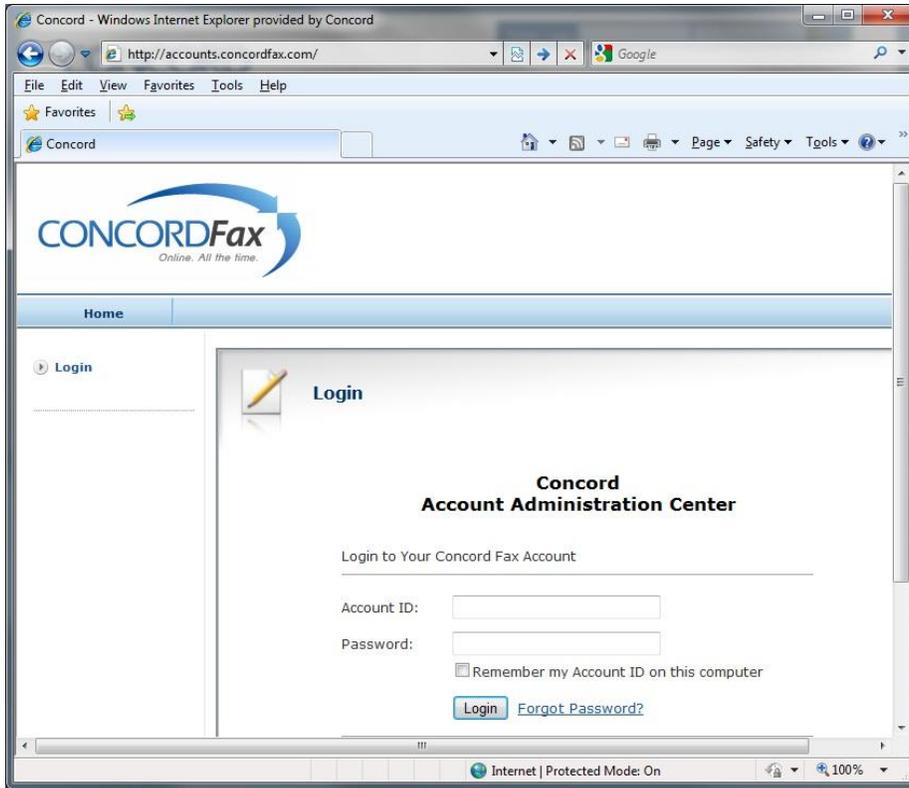

Figure 2: The AAC login page. The forgotten password recovery mechanism will send a new password to the email account registered for the fax number provided.

Profile – Customer Contact

After logging in, the completed **Customer Contact** page under the **Profile** area will be displayed. (See Figure 3). By default, you are greeted by the **Customer Contact** page under the **Profile** area when you log in.

Figure 3: This screen displays your contact information.

On the **Customer Contact** page you can edit your name, address, and other contact information. Please confirm that all of the information in the **Customer Contact** section is accurate.

You may also navigate to this area by selecting **Contact Info** under **Profile** in the menu bar located in the left-hand margin of the AAC.

If you wish to verify or change your Password, please navigate to the **Password** option under **Profile** in the menu bar located in the left-hand margin of the AAC. Otherwise, please click on **Preferences,** also located in the left-hand margin.

Password

From this screen, you may verify and change the Password, or PIN that was issued to you. (See Figure 4) To change your password, enter the password originally assigned to you (**"Current Password"**) and then type in your new password in the **"New Password"** and **"Verify Password"** fields. After this, click on the **'Submit'** button to initiate the change. Passwords must be numeric and between 4 and 10 characters in length.

Figure 4: Verify and change your password here.

Preferences

To edit your preferred settings for your Internet Fax for Microsoft Office, please click on **Preferences** in the menu area in the left hand margin of the screen. There are 6 choices to select from in the **Preferences** area: **Options**, **Display Options**, **Receiving Email**, **Sending Email**, **Activate PC,** and **Phone Numbers**.
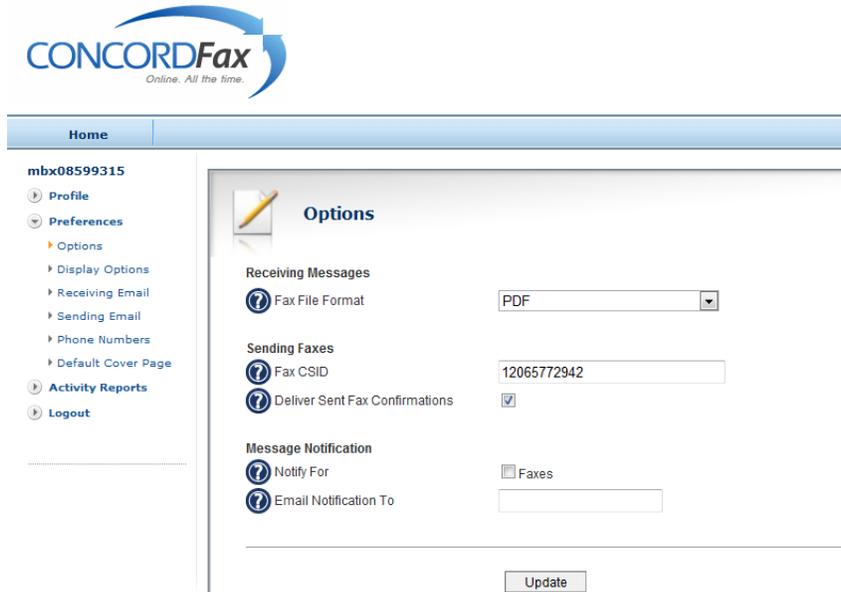
Figure 5: Administrative options under "Profile"

Options

Under **Sending Faxes,** you may change the Fax CSID (Call Subscriber ID). Your fax number is recommended, though some people choose to use the name of their business, or full name. It is unlawful to send a fax without a CSID. The CSID field in a fax transmission identifies the calling party and is a requirement for every fax.

Below the **Fax CSID** field, there is a box to check if you would like to be notified, when your faxes are sent.

The **Message Notification** area allows you to designate the email address to use for notification. The sent fax notification address need not be the same address you use for sending and receiving messages.

Be sure to press **Update** to implement your changes.

Display Options

The Display Options area provides you with the ability to change your time zone designation as well as the format for the date and time information that is printed on your fax header. These tools allow you to customize the look and feel of your outbound fax messages.

A sample of the date and time formats are displayed and you may choose from the corresponding drop-down menus.

Be sure to press **Update** to implement your changes.

Receiving Email

This section is for adding, removing, and editing email addresses used for receiving fax messages. Your Concord Fax Online for Microsoft Office account allows you to forward your inbound faxes to up to five (5) email addresses. Be advised, it can take up to two (2) minutes to add each additional email address.

Sending Email

This section is for adding, removing, and editing email addresses used for sending fax messages. After each new sending email address is added, a validation request is generated and emailed back to you at that address. In order to activate each new sending address, you will need to open this email and click on the appropriate hyper-link in the email of the body of the validation request. Only addresses that have been validated will be able to successfully send a fax message. You may select up to three (3) sending email addresses per account.

Activate PC

During the sign up process, you were asked to download an Activation file. Your Concord Fax Online for Microsoft Office service will only work on a computer that has had the Activation file successfully installed onto it. You will need to have administrative privileges on the PC to ensure that this is done. When installing Concord Internet Fax for Microsoft Office on another computer, please repeat the following process from this section of the Account Administration Center:

- ➢ Close all Microsoft Office applications
- ➢ Press the button that says **Download Activation File** to Activate your PC
- ➢ Open Outlook – Click File – New – Internet Fax
    - ○ If, after the Activation has run a screen opens prompting the user to select a Fax service provider, you will need to contact Customer Service to discover what problem is occurring
    - ○ If a Fax screen opens then the activation file has successfully loaded onto your PC
- ➢ Refer to the two images at the top of page 9

If you plan on using a PC that you do not own (libraries, internet cafés, etc.), an alternate Concord service may be a better fit for you. Please contact Customer Service for more information.

Activity Reports

While your Internet Fax for Microsoft Office service has now been configured, here are some additional features of your Account Administration Center.

By clicking and expanding on **Activity Reports** in your online account you will be able to access activity reports for both received (**Received logs**) and sent (**Sent logs**) activity. By default, your "Received Logs" is displayed first. Select the time period you would like displayed and a report will automatically be generated. (See 'A Sample of the Sent Log' at the top of page 10)

A sample of a Sent Log

If there are no messages sent or received in the period, the message "**No Records Found**" will be displayed in red print. (See "A sample of a 'Received' Log" below)

A sample of a 'Received' Log

Messages found in the queried period will display the date and time the message was sent or received, the destination or origin, the number of pages in the message, the status of the transmission, and a Message ID which uniquely identifies each specific message. Account activity for the last 1, 7, 14, 30, 45, and 60 days are all options when the down arrow in the "Show Last:" field is clicked on. (In the sample above it is set to 60).

Should you require access to this information, remember to return to the Account Administration Center to access your sent and received log information.

# Sending a Fax Using Microsoft Office Applications

Now that you are set up, you can send faxes directly from any Microsoft Office application!

If you are in Microsoft Word 2003, for example, simply click on File / Send To / Recipient Using Internet Fax and the Internet Fax tool will open with your Word Document attached and ready to send as a fax. (With MS Office **2007** just click on the '**Office Button**,' choose '**Send**,' and then select the '**Internet Fax**' option). (With MS **Office 2010** go to "**File**" and then "**Save & Send**" and select "**Send as Internet Fax**" option). The same steps would be followed within Microsoft Excel, Access, Publisher, and PowerPoint. With Internet Fax for Microsoft Office, the programs in Microsoft Office Suite are now available for you to easily and efficiently send faxes.

MS Word Application 2003   **MS Word Application 2007**
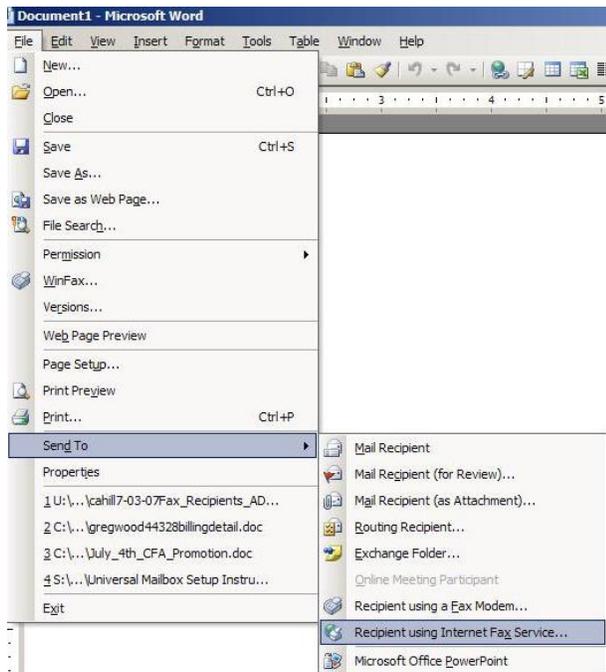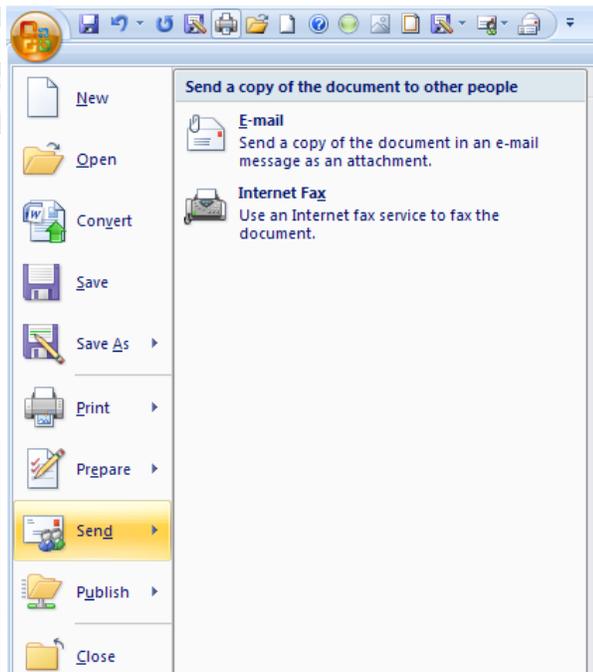
MS Word Application 2010
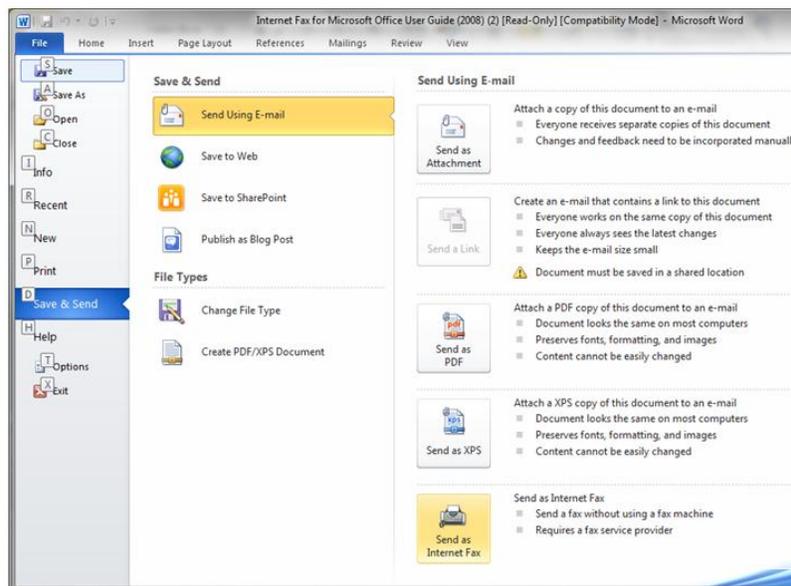
Using Concord Internet Fax for Microsoft Office, you can send a single fax to up to five (5) different fax numbers. To send the same fax to more than 5 fax numbers, you will need to send the first fax that has the five (5) fax numbers added, and, open Microsoft's Internet Fax tool and send an additional fax. The limit, per fax event, is five (5) recipients.

COVER SHEETS

After designating your Microsoft Office document to be sent via Internet Fax, you will see that you have the option to use a cover sheet. A check box determines whether or not a cover sheet will be used, and a drop-down menu allows you to select the desired cover sheet.

You may select from the cover sheet template section (For example: With Microsoft Office 2003, the Standard Fax, Personal Fax, or Business Fax), or you may custom design your own cover sheet.

You can also choose to have 'no' cover sheet at all by un-checking the **'Use cover sheet'** box. (See the MS Office 2003 example below).
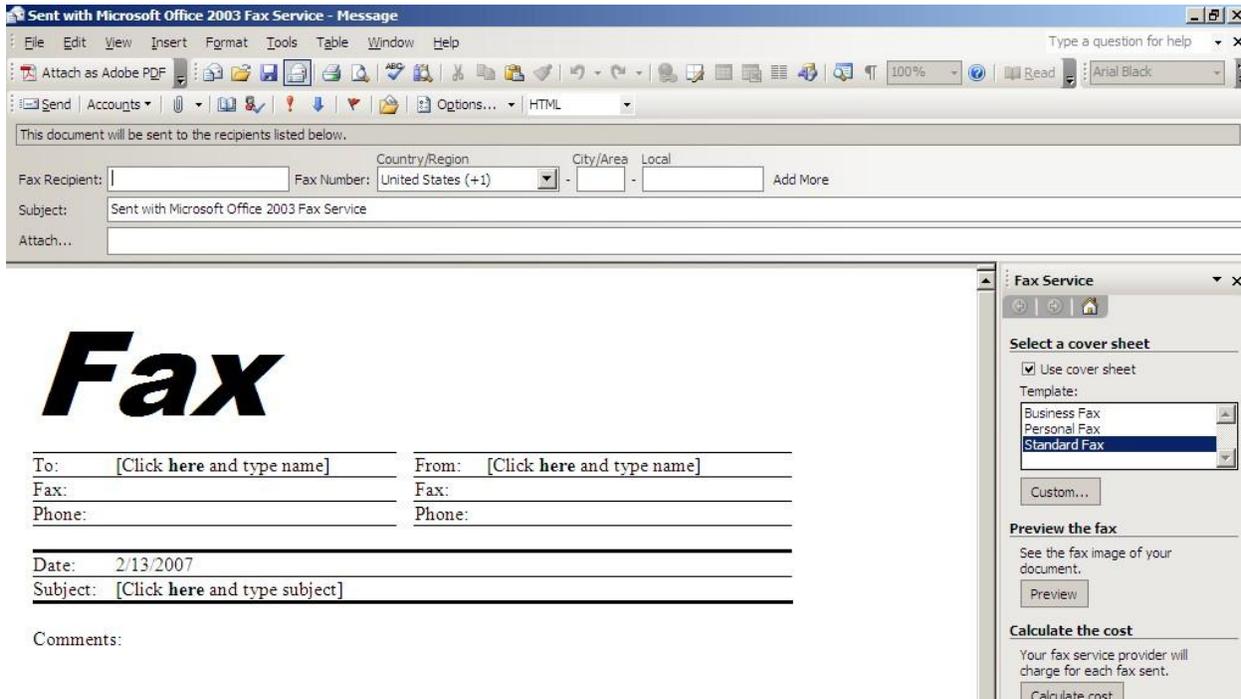
With Office 2007 & 2010 there are additional fax cover sheet options such as the Equity Fax, Median Fax, Oriel Fax, Origin Fax, and Urban Fax cover sheets. Of course, you will also have the option to use your own cover sheet, or use 'no' coversheet at all. (See the MS Office 2007 & 2010 example on page 15)

MS Office 2007
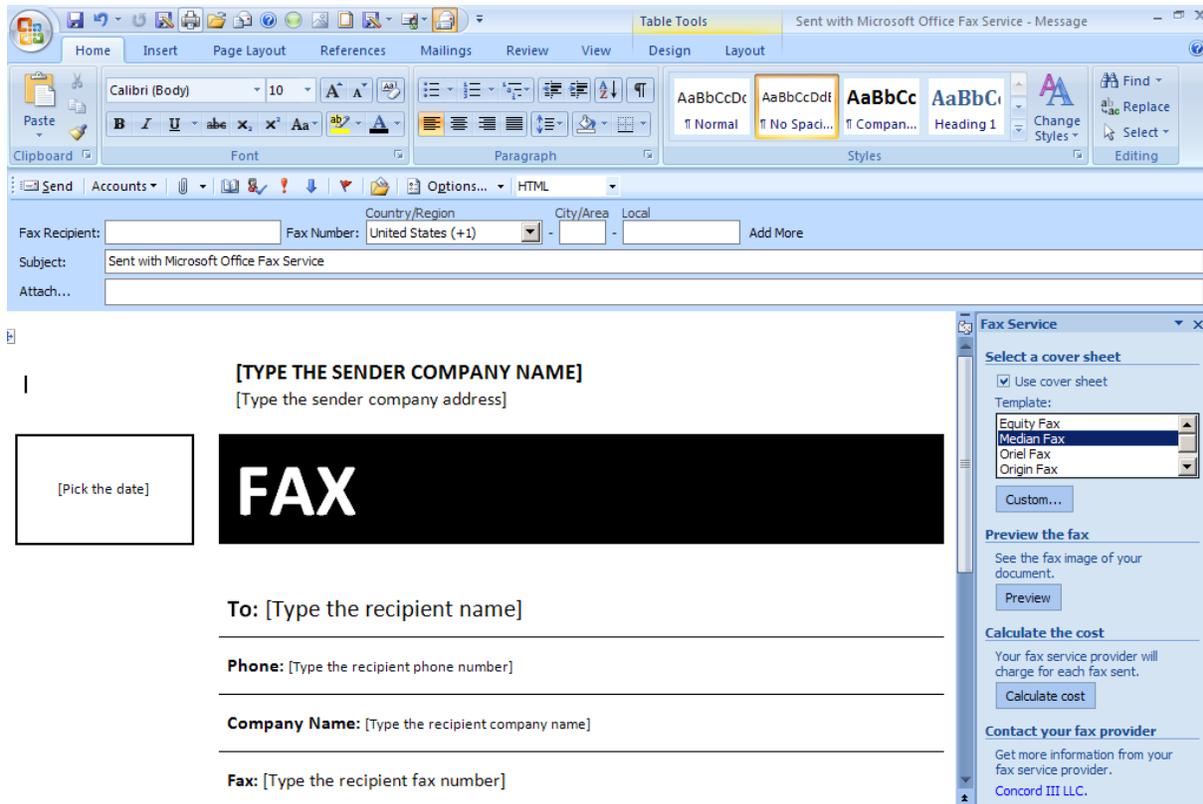
MS Office 2010
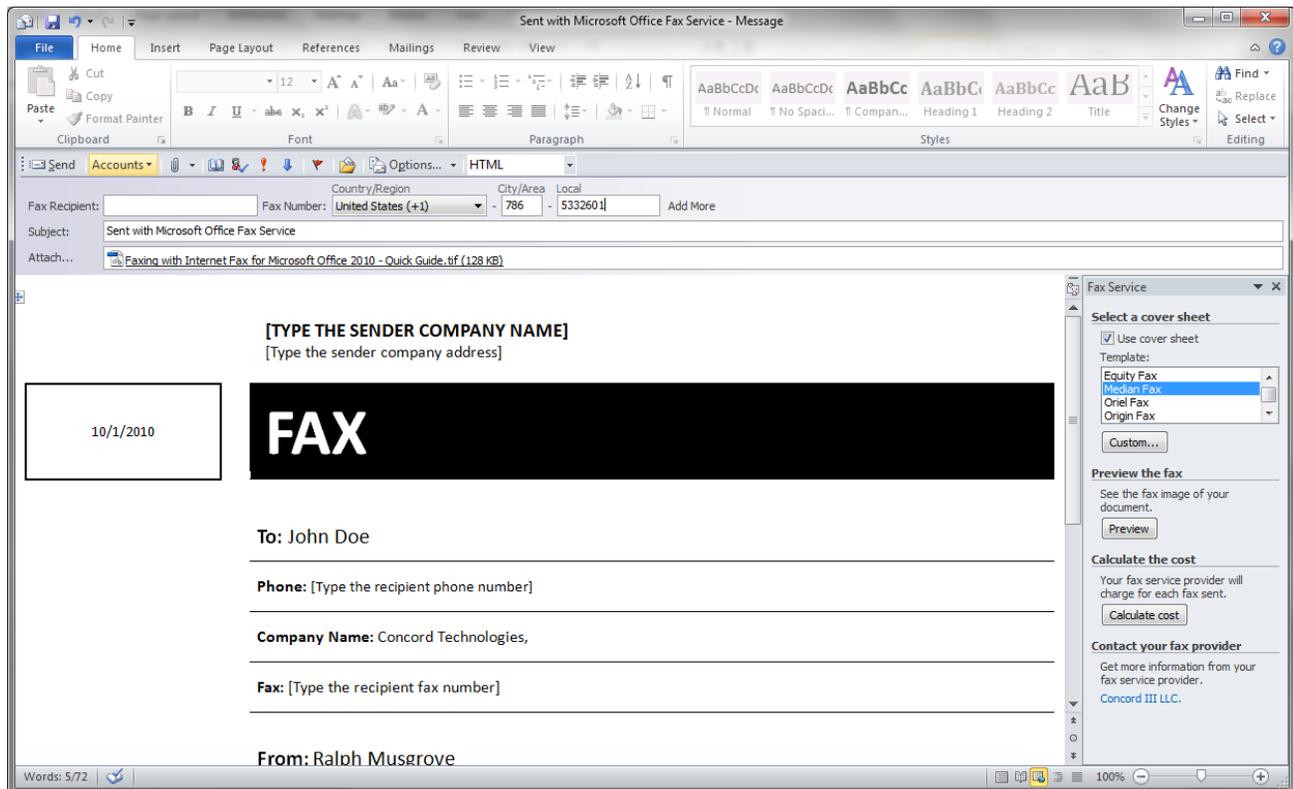
Addressing Your Internet Fax

If you are using a cover sheet, populate the sender and recipient information as indicated on the cover sheet. There are, in addition, "Subject" and "Comment" fields that you may wish to populate. This is optional.

In the "Fax Recipient" field, type in the name of the recipient. There are three boxes that need to be populated for the "Fax Number". The first box is for "Country/Region". A drop-down menu is provided for your reference. The second box is for the "City/Area" code. The last box is for the local number (this number is 7-digits long in the US and Canada). To add additional recipients, click on the "**Add More**" text directly following the local number text box.

The screen below shows what occurs after "Add More" is clicked...

You may populate the "Subject:" as you wish. The default is "Sent with Microsoft Office {2003} Fax Service."

If you wish to attach an additional Office 2003, 2007 or 2010 document, simply click on the "**attach**" icon ( ) and browse to the Microsoft Office file that you wish to fax. The name of the file will appear in the attachment field within Outlook. Only the following approved Microsoft Office file formats will be accepted as allowable attachments:

The following file types are supported:
- .TIF/TIFF (Tagged Image File Format)
- .TXT (Plain Text)
- .HTML(Hypertext Markup Language)
- .RTF (Rich Text Format)
- .DOC, DOCX (Microsoft Word Windows v.97, 2000, XP, 2003, 2007, 2010) (shown in the example above)
- .XLS, XLSX (Microsoft Excel Windows v.97, 2000, XP, 2003, 2007, 2010)
- .PPT, PPTX (Microsoft PowerPoint Windows v.97, 2000, XP, 2003, 2007, 2010)
- .PDF (Adobe Portable Document Format)
- .JPG, VSD (Visio and JPEG)
- .GIF (Graphics Interchange Format)

To "Preview" the Fax, simply click **Preview** in the column on the right and the complete fax will be displayed.

The **Calculate Cost** feature is designed to give you an *estimate* of how much it will cost to deliver the fax. It is only an estimate, and should not be regarded as a literal charge, or cost of sending the fax. The **Calculate Cost** feature estimates how much it will cost to send the number of pages submitted to the destination you have selected. The **Calculate Cost** feature uses average transmission times and does not take dense graphics and slower fax machines into consideration.

Press **Send** to deliver your fax. Attachments will be converted to fax images on your local machine before being transmitted and delivered to your designated fax recipients. If you have elected to receive a notification for sent messages, you will receive an email from ctfnotify@microsoft.com.

Congratulations! You have successfully sent a fax.

Receiving Faxes

Faxes sent to your Internet Fax for Microsoft Office account will be sent to email addresses that you have specified in **"Receiving Email"** under the **"Preferences"** section during your set-up process. Again, you can have faxes forwarded to up to five (5) different email addresses.

Simply double-click on your received fax message file, and a designated Microsoft application will open your fax for viewing.

Your fax message will be delivered to you as a .tif, or TIFF file (Tagged Image File Format). Depending on your Operating System, you have different programs available to open .tif / TIFF files.

- **Windows XP**
    - o   Microsoft Office Document Imaging
    - o   Windows Picture and Fax Viewer
    - o   Microsoft Office Picture Manager
- **Windows VISTA**
    - o   Windows Photo Gallery

Generally, your fax message should open up automatically by double-clicking on it. If you are unable to open the .tif file, you will first need to save the attachment to your desktop. By then right-mouse clicking on the attachment, you will have the option to **'Open With'.** This will give you a drop-down menu of options. Please refer to the Tiff viewer options listed above to choose the appropriate viewing program.

Making changes to your Outbound Fax Service

You may enable Password Protection for each individual email address or delete any or all of the email addresses for outbound faxing. To delete an email address, simply click the Delete 'option,' right of the address, from your account on the web page.

Email Notification

If you wish to be notified by email every time you receive a fax you may enable this option directly from the website under the "Preferences" section. Enter the email address to which you'd like the notification delivered and you will receive an email shortly after a fax enters your mailbox.

Getting Help

This section explains how you can contact Concord Technologies' Customer Service, for questions regarding your support and customer service issues.

Contacting Concord Technologies Customer Service

Normal service hours are Monday-Friday from 7:30 AM to 5:00 PM (Pacific Time).

Telephone: +1 (206) 441-3346 or 1-800-792-0329

For support, in writing, please either fax or e-mail your question to the number or address below and a representative will respond within one business day:

Fax: +1 (206) 441-7965 or 1-800-301-0329

Email: service@concordfax.com.

You can contact Concord Technologies Customer Service to:

- Inquire about billing and charges.

- Change your current account information. For example, if you want to switch your current credit card billing to another credit card, contact Customer Service. All account changes are subject to the appropriate credit approval.

We recommend that you visit our web site at www.concordfax.com for frequently asked questions regarding our services.