



eFax User Guide

HOSTED VOICE eFAX APPLICATION



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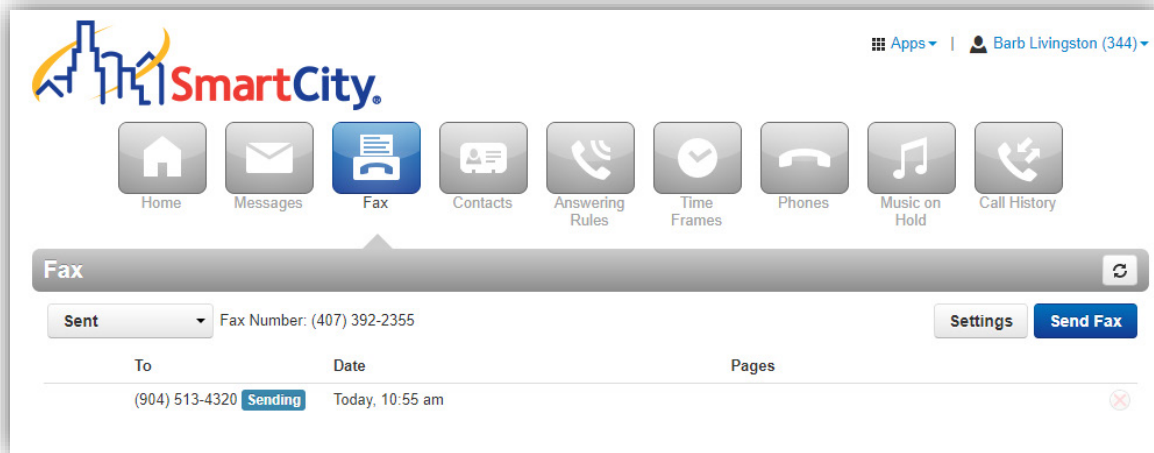
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Welcome to Hosted Voice eFax!

Welcome to the Hosted Voice eFax User Guide. Hosted Voice eFax is a web-based fax application that allows you to send and receive faxes using email or the Hosted Voice portal.

eFax is designed for those who prefer to use electronic faxing only, without the need to interface with a traditional fax machine.

With a host of fax features, you can use eFax to effortlessly sign, edit, and organize your faxes electronically. eFax supports multiple file types, including .pdf, .docx, .jpg, and more.



NOTE: This guide focuses on the features and options available for the Hosted Voice eFax application only. For those who prefer to use a physical fax machine; plus, get the highest level of reliability but also want the option to use the electronic features, Smart City offers a vFax Faxbridge service.

For detailed information about vFax Faxbridge, contact your Smart City Senior Account Executive.

Hosted Voice eFax Features

The Hosted Voice eFax application includes the following features:

- ❖ Receive fax to email.
- ❖ Receive fax from Hosted Voice Portal.
- ❖ Send fax from email.
- ❖ Send fax from Hosted Voice Portal

Please visit the Hosted Voice support page at <https://support.smartcityvoice.com/> if you have any further questions. The support page provides more information about the Hosted Voice solution, including both user guides and instructional videos.

Getting Started

The Getting Started section covers the following topics:

- ❖ eFax Requirements
- ❖ eFax Considerations
- ❖ Adding eFax to a User Account

NOTE: This guide assumes you have a general understanding of the Hosted Voice Portal. If you do not, please visit the Hosted Voice support page at <https://support.smartcityvoice.com/>. The support page provides more information about the Hosted Voice solution, including both user guides and instructional videos.

eFax Requirements

Hosted Voice eFax is a web-based faxing application and does not require any software installation. However, eFax does have the following browser and application requirements:

- ❖ We recommend you use the most current version of Google Chrome browser to access Hosted Voice eFax. Chrome browser supports the WebRTC standard.
- ❖ Before you can use Hosted Voice eFax, the eFax service must be enabled by the Hosted Voice system administrator.

eFax Considerations

Please be aware of the following things to consider when working with eFax:

	Description
Multiple emails per account	If you have multiple emails assigned to your account, eFax will use only the primary email.
Migrate sent/received faxes to a new user	You can move or re-purpose the fax account to another user, but you cannot move the sent/received faxes for the DID to a new user. The use case for migrating existing faxes to a new user is when the current user in the OMP has a new role within in the company, and a new user will take over the old role. In this situation, you may want to keep all existing faxes for the new user, instead of recreating the OMP account.
Deleting an eFax Account	eFax accounts may not be deleted by users, office managers, or resellers. To delete an eFax account, contact Hosted Voice support.
Fax Call History	Sent and Received faxes will not show in the call history
ATA/Email Faxes	Faxes sent from an ATA device or via email will not show in the eFax user's sent folder.
Delivery Confirmations Not Supported	Currently, eFax does not support delivery confirmations from ATA, Email, or the Hosted Voice portal. For faxes sent from the portal, log in to the User Portal to see the status of the fax you sent.
One-To-One mapping	A phone number can be assigned to only a single user. Also, a user account cannot have multiple fax numbers assigned.

Adding eFax to a User Account

Before someone can use Hosted Voice eFax, a fax number must be added to their user account. The following requirements must be met to add a fax number:

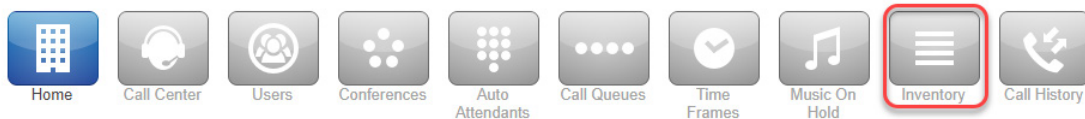
- ❖ A scope of Office Manager higher is required to add an eFax account.
- ❖ Direct Inward Dialing (DID) should be implemented at the site.
- ❖ Fax Service enabled on the domain (Contact support to request eFax service.)

NOTE: eFax does not currently support mass import for assigning fax numbers to users. Please see “eFax Considerations” for more information.

To add an eFax account:

1. Log in to the **Hosted Voice Portal**.

The Hosted Voice Home Page displays:

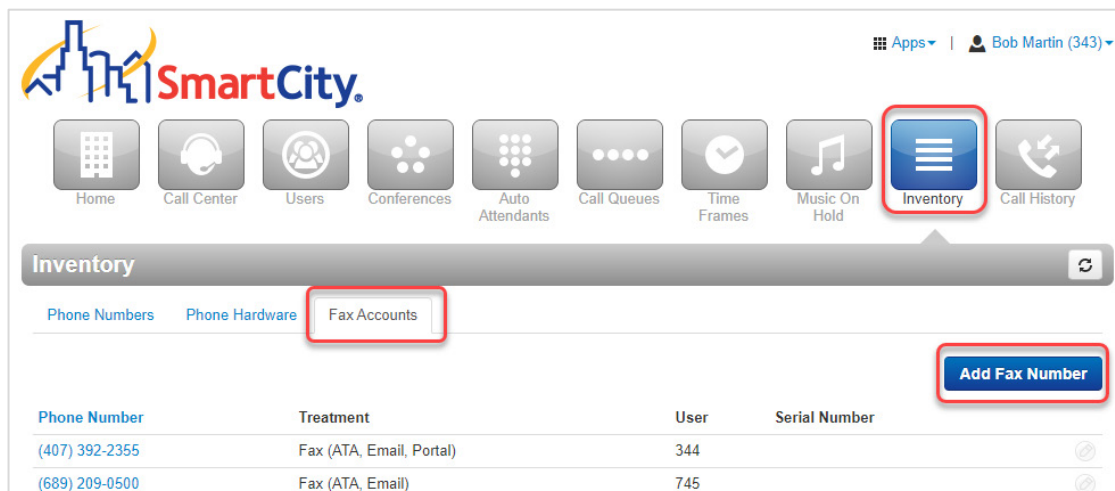


2. Select the **Inventory** menu icon.

NOTE: If you do not see the Inventory menu icon, you may need to click the **Manage Organization** link

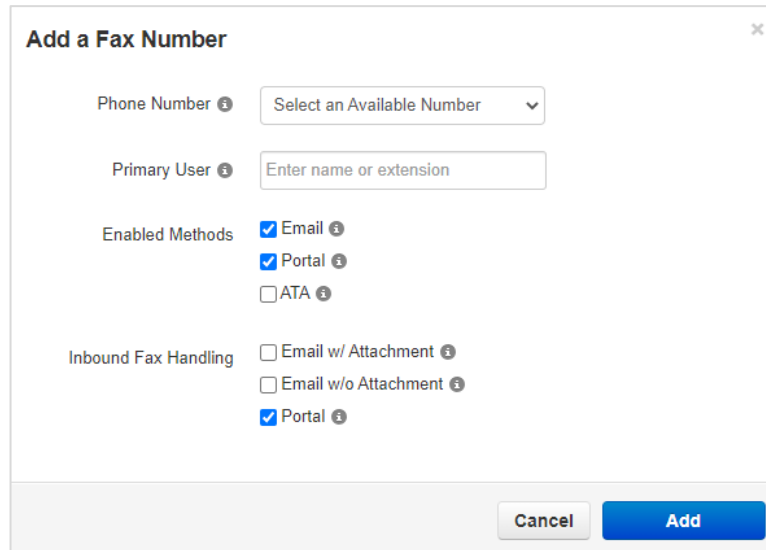
 [Manage Organization](#) at the top-right of the screen.

The Inventory screen displays:



3. Select the **Fax Accounts** tab.
4. Click the **Add Fax Number**  button.

The Add a Fax Number dialog box displays:



Add a Fax Number [X]

Phone Number ⓘ Select an Available Number ▼

Primary User ⓘ Enter name or extension

Enabled Methods

- ☒ Email ⓘ
- ☒ Portal ⓘ
- ☐ ATA ⓘ

Inbound Fax Handling

- ☐ Email w/ Attachment ⓘ
- ☐ Email w/o Attachment ⓘ
- ☒ Portal ⓘ

Cancel Add

5. Select a **Phone Number** from the drop-down list.
6. In the Primary User field, type the **user extension** or **name**.
7. Select type of fax you want to enable and how you want to handle inbound faxes. The following table describes each option:

Methods and Fax Handling Options	Description
Email	Send a fax to an email to send a fax.
Portal	Send a fax in the User Portal.
ATA	Allows Fax Machine connected to a supported ATA. • Device Type - List of available ATA • Serial Number - The serial number of the selected ATA
Email w/Attachment	Sends email to the user without the fax attachment but with a link to navigate to the portal fax page.
Email w/o Attachment	Sends email to the user with the fax as an attachment.
Portal	Allows the user to view the fax in the User Portal.

8. Click **Save** when done.

Using Hosted Voice eFax

This section provides instructions for how to send and receive faxes using email or the Hosted Voice eFax application. The Using eFax section covers the following topics:

- ❖ Sending and Receiving a Fax from Email
- ❖ Sending a Fax from the User Portal
- ❖ Managing Inbound Fax Settings in the User Portal
- ❖ Receiving Faxes in the User Portal

Sending and Receiving a Fax from Email

eFax enables you to send and receive faxes directly from your email.

NOTE: This feature will only work from an email address associated with an enabled fax account in the Hosted Voice solution.

To send a fax using email:

1. Open the email client for the email address associated with the eFax account.
2. Compose a message. To find your sender address, please contact your Hosted Voice administrator.

The full email address should appear as 11digitnumber@<fax.fqdn> (i.e., fax.smartcityvoice.com). For example, 15055009900@fax.smartcityvoice.com.

NOTE: It is important to always include the full 11 digits when sending a fax to any number in the US or Canada.

My first fax

To: 16085551252@fax.myco... 

From: 15055009900@charter.net

Subject: My first fax

Including a Cover Page

- eFax will automatically use the body of your email for the cover page.
- The To: field on the cover page is populated with the destination fax number by default.
- The From field uses the email/fax sender's full name.
- The Subject line uses the subject you type in the email Subject field.

Below is a sample fax cover

8/8/2021 6:12 PM From: Bob [redacted] (+1 508 782 2218) - To: +1 508 782 2218 Page 1 of 2

Fax

Date: 08/08/2021 6:12 PM

To: 15055009900

From: John Doe

Subject: [redacted]

Hi, attached is the receipt you requested.

Regards,

Bob

3. If needed, attach one or more documents to the fax email.

When sending a fax from email, you can attach one or multiple documents, with one or multiple document types. For example, you can attach a .pdf file and a .docx file in the same fax email.

The supported file types include:

- Image Files (TIFF, GIF, PNG, JPEG)
- Adobe Acrobat Files (PDF)
- Microsoft Office Files (DOC, DOCX, XLSX, PPTX)
- Text Files (TXT, RTF)

TIP: If you create a file using a scanner or print to file, always choose the 'black and white' option for the output.

Each document you attach is converted to a faxable format, then sent to your destination fax number.

4. When you are ready to send the fax, click the **Send** button in your email application.

NOTE: After document conversion to fax, the total document file size limit is 10MB. If the fax exceeds the file size limit, you will receive a non-deliverable or NDR message in your email inbox like the following message:

Your message wasn't delivered to anyone because it's too large. The limit is 10 MB. Your message is 15 MB.

Your message is larger than the size limit for messages. Please make it smaller and try sending it again.

→ this error:
SMTPSEND.OverAdvertisedSize; message size exceeds fixed maximum size

Sending a Fax from the User Portal

eFax enables you to send and receive faxes from the User Portal.

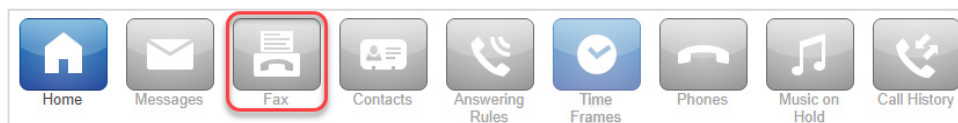
NOTE: To use this feature, you must have at a minimum, a Basic seat license, access to the User Portal, and an enabled eFax account in the Hosted Voice application.

To send a fax using the User Portal:

1. Open and log in to the **User Portal**.

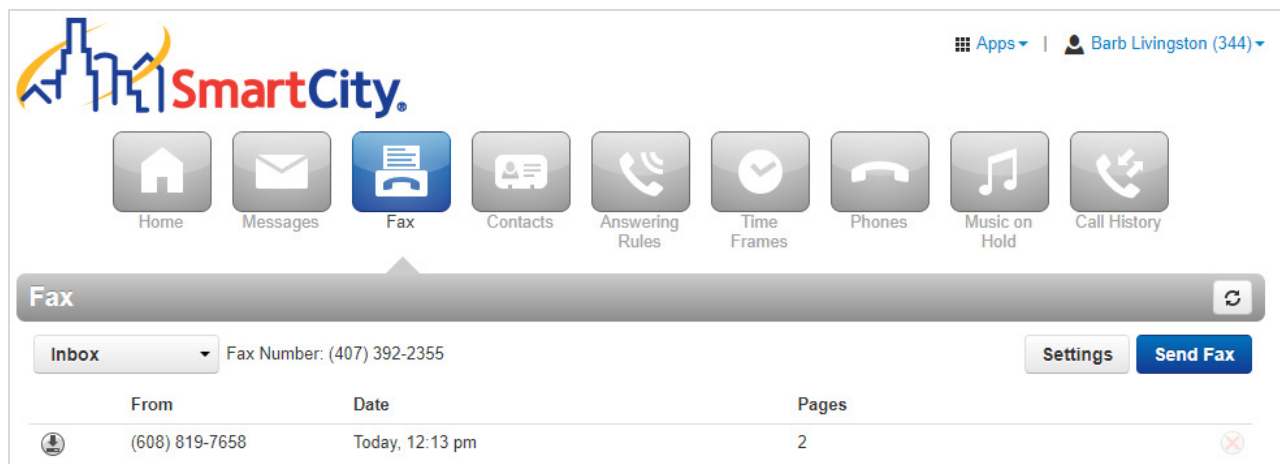
NOTE: If you don't see this button, the eFax is not configured or enabled on your account.

The Hosted Voice Home Page displays:



2. Click on the **Fax** menu icon.

The Fax screen displays in Inbox view, which shows a list of received faxes.

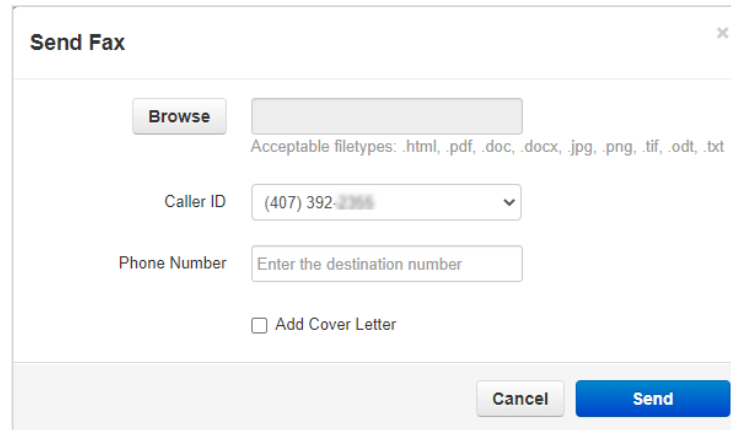


The Fax Number section should show the fax number assigned to your user account.

Fax Number: (407) 392-2355

3. Click the **Send Fax** button.

The Send Fax dialog box displays:



The 'Send Fax' dialog box contains the following fields and controls:

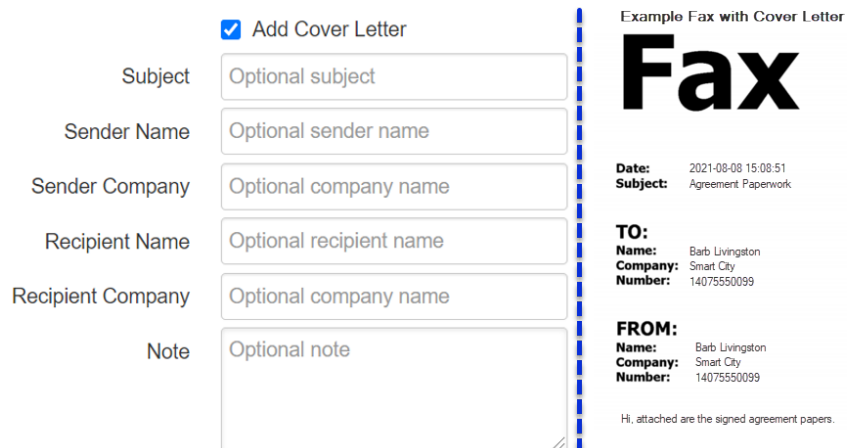
- Browse** button
- Acceptable filetypes: .html, .pdf, .doc, .docx, .jpg, .png, .tif, .odt, .txt
- Caller ID** dropdown menu showing (407) 392-2288
- Phone Number** text input field with placeholder 'Enter the destination number'
- ☐ **Add Cover Letter**
- Cancel** and **Send** buttons at the bottom right.

The Caller ID field should show your fax number.

- Click the **Browse**  button, then attach the document you want to fax.

NOTE: Supported file types include: .html, .pdf, .doc, .docx, .jpg, .png, .tif, .odt, .txt

- Type the **10-digit fax number** for where you want to send the fax.
- If needed, click the **checkbox** next to the “Add Cover Letter” option, then complete the sender and recipient information.



The 'Example Fax with Cover Letter' form includes the following fields and a preview:

- ☒ **Add Cover Letter**
- Subject**: Optional subject
- Sender Name**: Optional sender name
- Sender Company**: Optional company name
- Recipient Name**: Optional recipient name
- Recipient Company**: Optional company name
- Note**: Optional note

Example Fax with Cover Letter Preview:

Fax

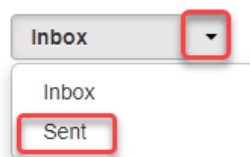
Date: 2021-08-08 15:08:51
Subject: Agreement Paperwork

TO:
Name: Barb Livingston
Company: Smart City
Number: 14075550099

FROM:
Name: Barb Livingston
Company: Smart City
Number: 14075550099

Hi, attached are the signed agreement papers.

- Click the **Send**  button.
- Click the **drop-down arrow** and then select **Sent** to view the status of a sent fax.



The dropdown menu shows 'Inbox' selected, with 'Sent' highlighted as an option.

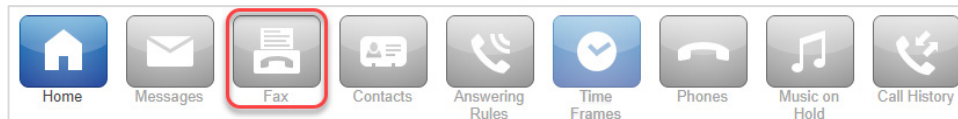
Managing Inbound Fax Settings in the User Portal

You can use the Settings dialog box to customize how to handle inbound faxes in eFax.

To manage inbound fax settings:

1. Log in to the **User Portal**.

The Hosted Voice Home Page displays:



2. Click on the **Fax** menu icon.

The Fax screen displays in Inbox view, which shows a list of received faxes.



3. Click the **Settings** button.
4. Select the desired options for how you want to handle inbound faxes. The following table describes each option:

Fax Handling Options	Description
Email w/Attachment	Sends an email to the user without the fax attachment but with a link to navigate to the User Portal fax page. Choose this option if you want to receive the fax document via email.
Email w/o Attachment	Sends an email to the user with the fax as an attachment. Choose this option if you want to keep the fax on the User Portal Fax page. This will contain a link that requires you to log in if you're not already.
Portal	Allows the user to view the fax in the portal. Choose this only if you want to keep the fax in the portal. You may select this option with/without the attachment

NOTE: You cannot modify the Enabled Methods. Contact your Hosted Voice administrator for help with those options.

Receiving Faxes in the User Portal

eFax enables you to receive faxes in the User Portal. When you receive a fax, you can preview the fax, download the fax for further viewing, or delete the fax as needed.

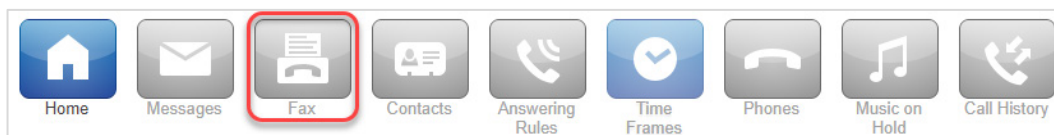
NOTE: To use this feature, you must have at a minimum, a Basic seat license, access to the User Portal and an enabled eFax account in the Hosted Voice portal.

To view/manage a received fax using the User Portal:

1. Open and log in to the **User Portal**.

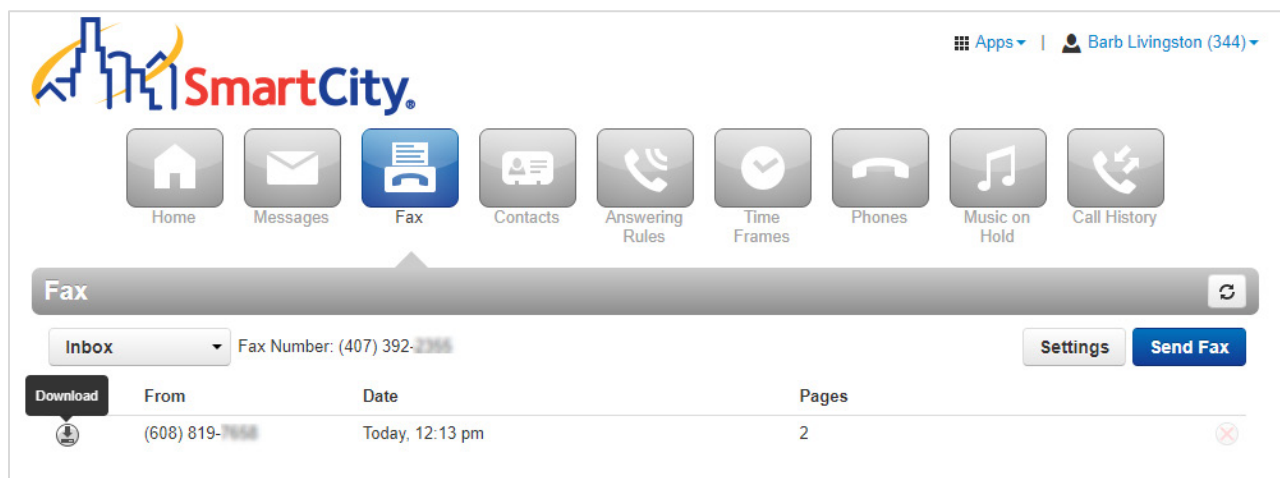
NOTE: If you don't see this button, the eFax is not configured or enabled on your account.

The Hosted Voice Home Page displays:



2. Click on the **Fax** menu icon.

The Fax screen displays in Inbox view, which shows a list of received faxes. Received faxes can be downloaded, previewed, or deleted from the Portal.



NOTE: A message status displays any fax receipt errors, such as if a fax call is dropped.

3. Click the **Download**  button next to the desired fax in the Inbox list.

4. The downloaded fax file shows at the bottom of the screen. Right-click on the file to open the fax, or navigate to the Downloads folder where the fax is stored.

