

# Quick FAX Guide

Sending and Receiving Fax using Quick FAX

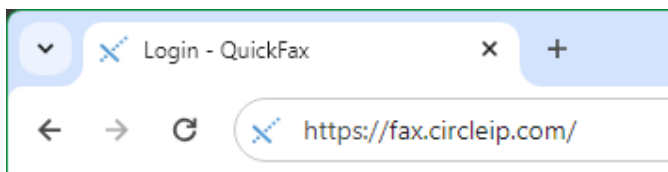
Rev 6.2

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## Part 1: How to Login

1. Type <https://fax.circleip.com> into your Internet Browser's (Chrome/Fire Fox/Edge/Safari) address bar and login.




2. Please login by using the Username or Primary Email address and Password provided by CIRCLE team.

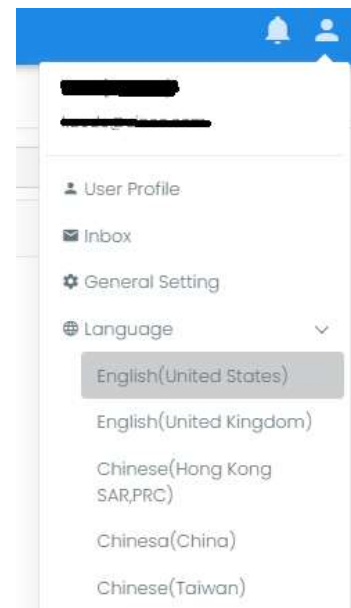


3. Once logged in, the QuickFAX Inbox page will appear on your screen like the photo below. You may now proceed to Part 2 which is how to send FAX.



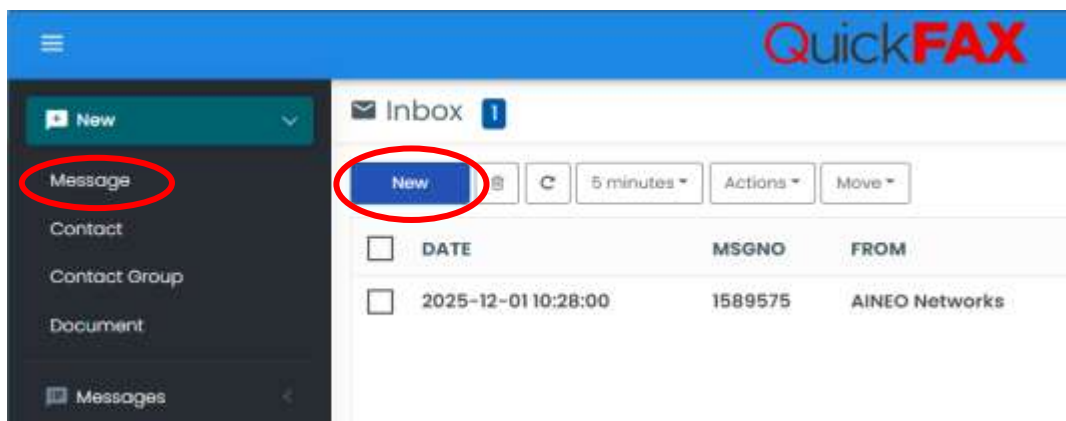
## Part 2: How to change the language displayed on the QuickFax Web Interface

1. In the top right corner of the page, click the person icon 
2. Click the Language Menu and then choose the language you want to read the site in.
3. You may need to refresh the webpage to ensure all parts of the website text change.

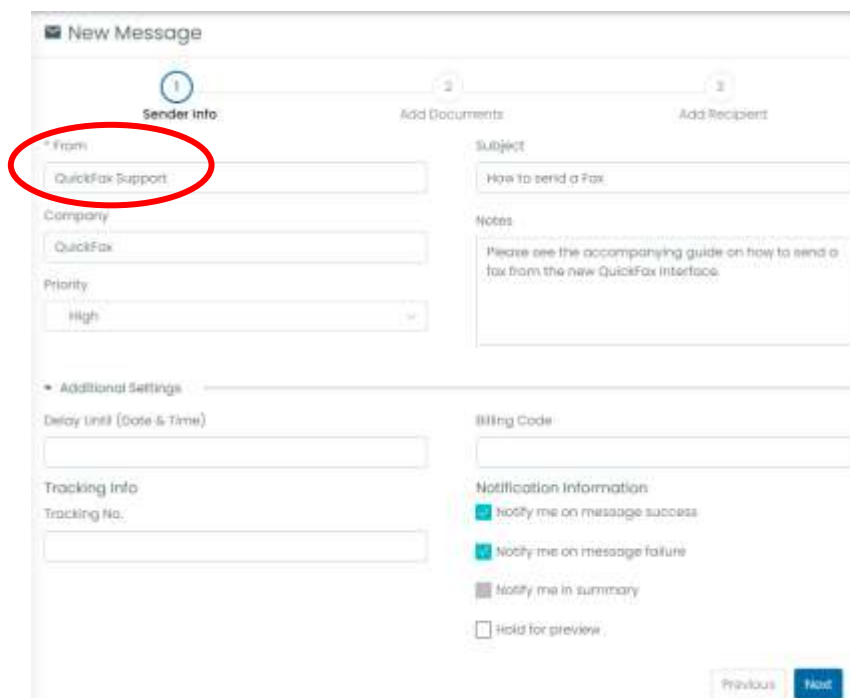


## Part 3: Sending a FAX

1. In the lefthand sidebar under the “New” menu, click “Message”. Or When in the Inbox or Sent page, click the blue “New” button in the top left.

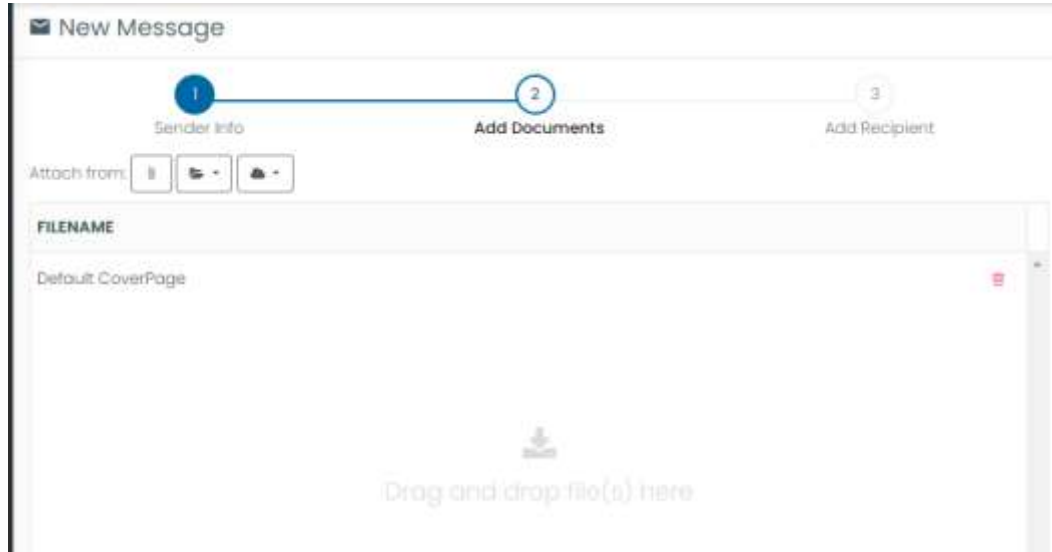


2. There are 3 steps for sending a fax. In step 1, add information for the cover page that will accompany the Fax if added. You must add information in the “From” field. You can also choose to schedule a time to send the fax and change the notification settings. Click “Next” to move to step 2.



The screenshot shows the 'New Message' form. The form is divided into three steps: 1. Sender info, 2. Add Documents, and 3. Add Recipient. The 'From' field is circled in red and contains the text 'QuickFax Support'. Other fields include 'Company' (QuickFax), 'Priority' (High), 'Subject' (How to send a Fax), 'Notes' (Please see the accompanying guide on how to send a fax from the new QuickFax interface), 'Delay Until (Date & Time)', 'Billing Code', 'Tracking Info' (Tracking No.), and 'Notification Information' (notify me on message success, notify me on message failure, notify me in summary, hold for preview). The 'Next' button is highlighted in blue.

- In Step 2, you add the Fax Document you wish to send.  
By Default the Coverage will be attached. You can delete this If you do not wish to send a coverpage.



### Attachment Restrictions

You must attach at least 1 document. You can only attach documents in the following formats:

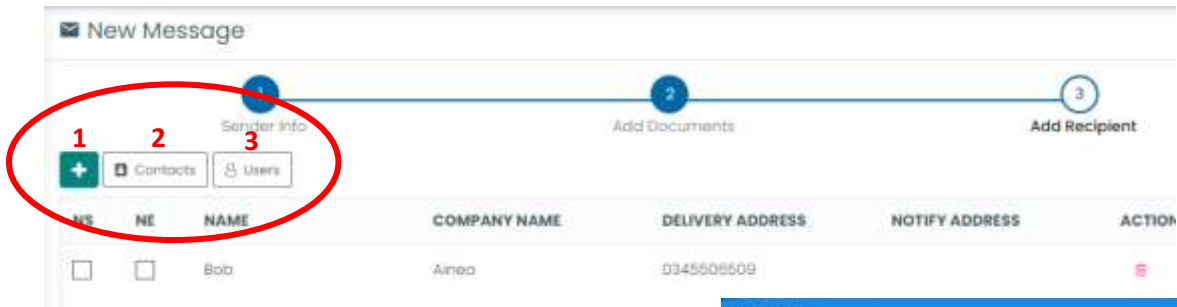
MS Office Documents – DOC, DOCX, XLS, XLSX, PPT, PPTX, VSD, and XPS

Adobe Acrobat – PDF

Image Files – BMP, GIF, TIF, JPG, PNG

Generic Files – TXT, HTML, HTM

4. At step 3 you add the Recipient. There are 3 ways to add recipients



### 1 – New Generic Recipient

Use this option to send to a new contact

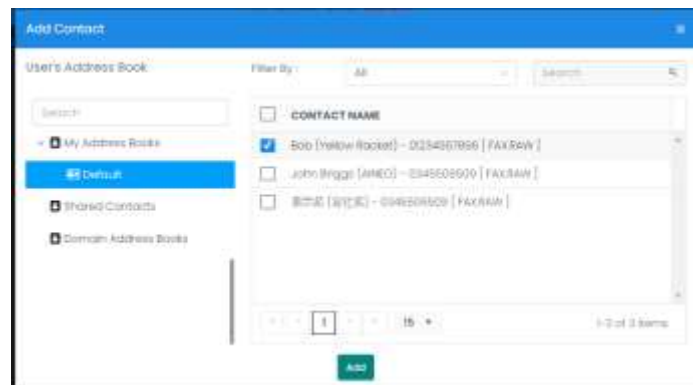


* Name Mr Smith	Insert the name to the person this fax is addressed to.
Company AINEO	Insert the name to the Company this fax is addressed to.
Notify Email john@atn.net	If you want to notify the recipient about the fax, you can enter their email address here.
Delivery Type Raw Fax	Please leave the delivery type as Raw Fax when sending to a Fax Number. You can change this to email when forwarding a fax to email.
* Address 0345508509	Enter the fax number of the recipient here. The number should be formatted using the standard phone number e.g 03xxxxxxx
Add to Address Book <input type="checkbox"/> Yes	If you want to save this contact you can add them to your address book by choosing yes.

### 2 – From Contacts

Here you can add recipients you have saved in the address book.

Check the contact and click Add.



### 3 – From your company

If you wish to send a fax to a QuickFax user within your Organisation, you can add them from the company menu.

5. To send the Fax, click the blue **Submit** button in the bottom right.
6. You will see a message popup confirming the creation of the Fax was successful and the message ID number.



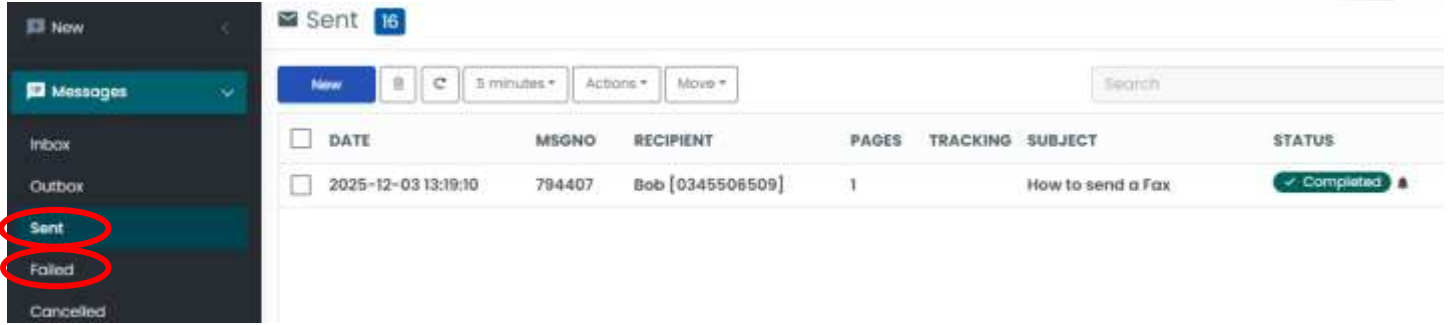
#### Part 4: How to Check the status of a sent fax.

1. On the Sidebar, click “Messages” and “Outbox”.



On this screen you will see the Status of any faxes which are being processed and sending. You can click the message to view more detailed information.

2. Once the fax has finished processing the message will be moved to either the Sent menu, Failed Menu or both (when a fax has partially completed, which can happen when sending to multiple recipients and a message fails to send).



## Part 5: Incoming Faxes

- Incoming Faxes are saved in the “Inbox” like any other mail software. If you want to see the message, you can open it by double-clicking. Unread messages are displayed in bold.



- Double-click the message to see the FAX details in a new window. FAXES can be saved to your PC by clicking the PDF button in the top right.



## Part 6: Forwarding your received FAX to an Email

1. Double-click on the received FAX that you want to forward.



2. Click “Select Action”, and click ” Forward”.



3. A popup will open looking like the send Fax screen. The fax will be automatically added to the attached files in step 2.

In the 3<sup>rd</sup> step when adding contacts, you can either choose from and existing contact which an email address field, or add a new contact and choose “Email” in the Delivery Type:

Ad Hoc Entry
✕

\* Name

Delivery Type

Company

\* Address

Format

Add to Address Book

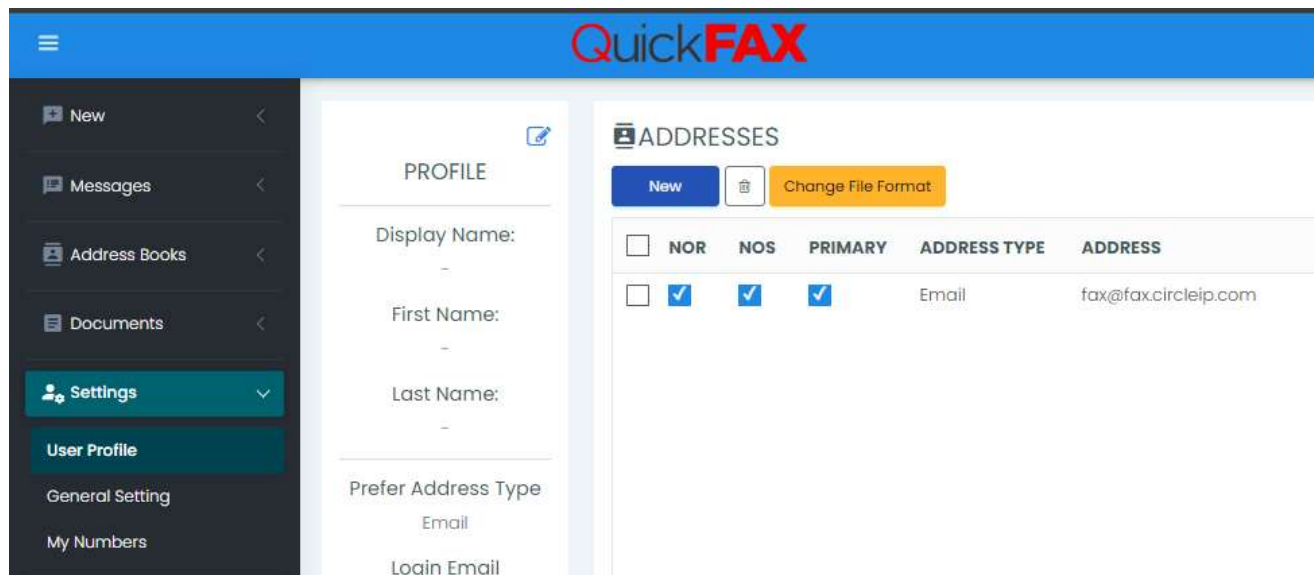
4. The file will be sent to the e-mail with fax attached and will look similar to the below.



## Part 7: How to enable Sent and Received notifications to your email

When you send or receive a fax, you can receive an email confirmation detailing the fax information.

1. On the Sidebar, Click “Settings” →”User Profile”.
2. Here you can either create a new address you wish to receive notifications to or update an existing address by clicking the contact.



3. In the popup add the email address in the Address field and choose a format to receive the faxes as an attachment.
4. Tick the boxes to either receive a notification when your account receives a fax and or when sending a fax, to have a copy sent to your email. These can be quickly toggled on the previous screen:

NOR = Notify on Receive

NOS = Notify on Sent

Primary = When sending a fax via an email, the Primary field is used to know which account to send the fax from.

In the example above, I can send a fax from the [fax@fax.circleip.com](mailto:fax@fax.circleip.com) email account.

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## Part 8: Sending FAX from your Email

To send a fax from your email account, you must make sure the email you send the fax from has the Primary flag set in your accounts user profile.

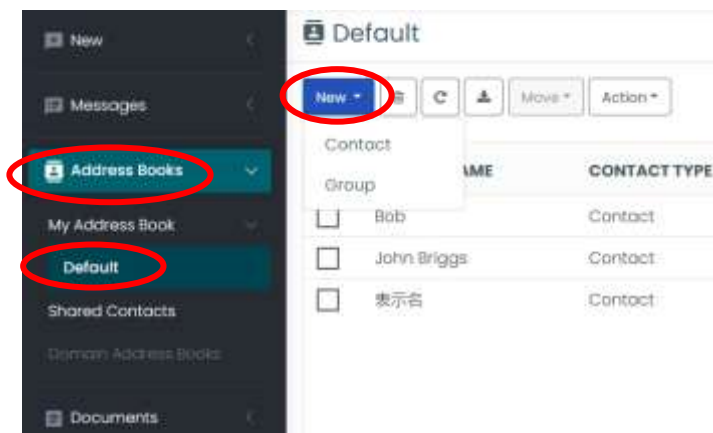
1. Enter the FAX number of the destination in the “xxx” part.  
xxxxxxxxxx@fax.circleip.com
2. Attach the file you want to send and send the email.
3. The Emails Subject and the Body of the email will be added to the cover page when sending the fax.

Please be sure to attach the file to the email and send it.

## Part 9: Adding Contacts to an Address Book

1. In the Sidebar, Click “Address Book” → “My Address Book” → “Default”.

2. Click **New** and choose either “Contact” or “Group”.




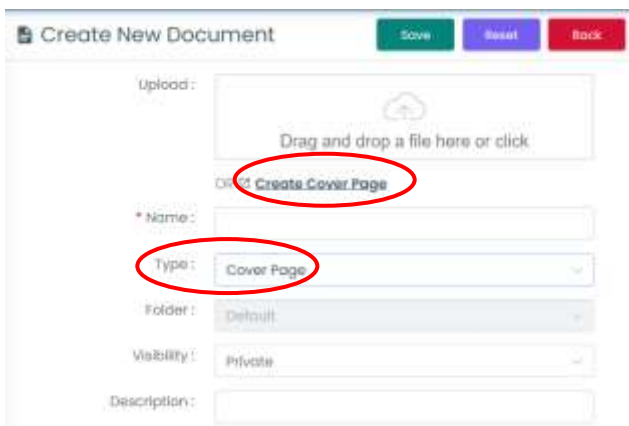
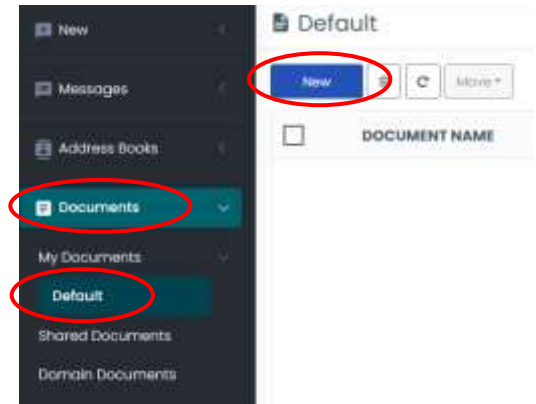
3. Fill in the “Display Name” and “Raw Fax” fields and choose “Raw Fax” for the “Preferred Address type”. Additional Information can be filled in to be added to the cover page and to make it easier to distinguish between similar contacts.

4. Click save to finish creating the contact.

## Part 10: How to create and edit a Cover Page

You can edit the cover page attached to the first FAX.

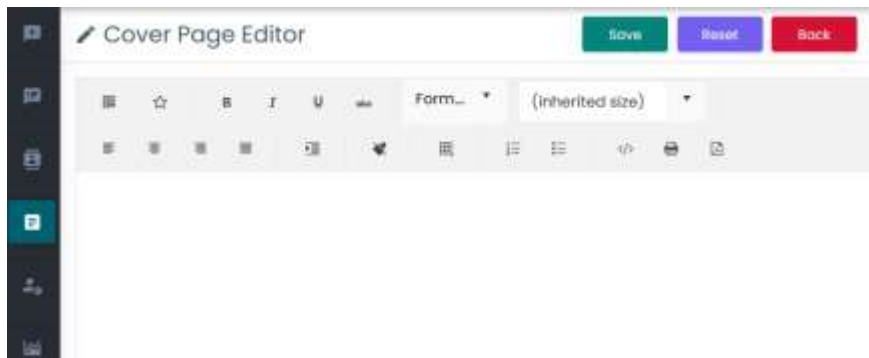
1. In the SideMenu click “Documents” → “My Documents” → ”Default” menu. Then click .
2. Change “Type” to “Cover Page” and upload an existing cover page file or click “Create Cover Page” to create a new Cover Page.



Upload	Upload a .HTML document
Name	Enter the name of the cover page
Type	Select a cover page (After selecting, the <a href="#">Create Cover Page</a> will appear)
Folder	Choose “Default”
Visibility	Private – Only visible to you Public – Visible to all users in your Org Global – Visible to All QuickFAX Users Disabled – Not visible to anyone
Description	Enter a detailed description of the cover page if needed

3. When creating or editing a Cover Page, you can use the Graphical interface as seen below.

You can use system variable tokens to display unique information like time and date sent, company name and transmission IDs by clicking the “★” mark and selecting the value you wish to use. See the table below for commonly used variable Tokens.



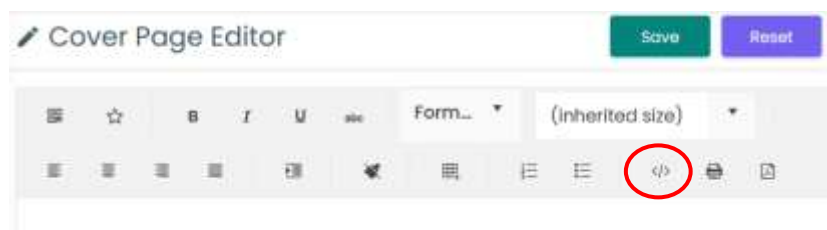
Commonly used token example:

Name	Token	Description
Company Name	\$\$MESSAGE.SENDER_COMPANY_NAME\$\$	Company Name's Settings can be changed
Sender Name	\$\$MESSAGE.SENDER_NAME\$\$	The name you entered in From in the Sender Profile when submitting
Send Date	\$\$MESSAGE.DATE\$\$	Date and time when the FAX is sent.
Destination company name	\$\$MESSAGE.XSACT.RECIPIENT_COMPANY_NAME\$\$	Company (name) entered in the destination when sending
(Name of the PIC of the destination)	\$\$MESSAGE.XSACT.RECIPIENT_NAME\$\$	Name entered in the destination when sending
Number of transmissions	\$\$MESSAGE.XSACT_PAGE_COUNT\$\$	Number of FAX transmitted
Message	\$\$MESSAGE.NOTE\$\$	Notes in Message Info entered when sending

- Once you have finished editing the Cover Page, click Save. This will take you back to the Create document page (from step 2). Click save again to Save the Cover Page.

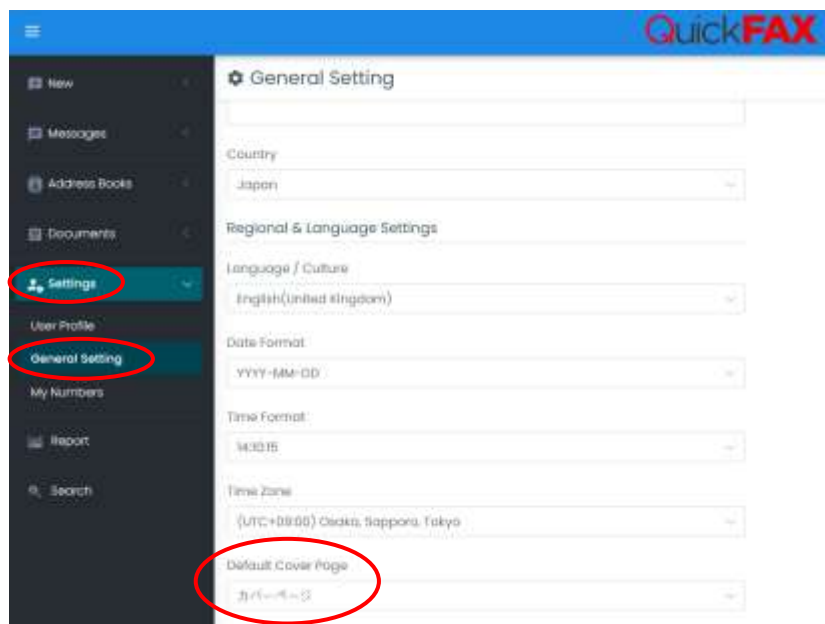
### < How to put a logo >

To add things like Logos, you will have you create the document using HTML. You can do this in a text editor or by clicking the </>



## Part 11: How to set the default Cover Page.

1. In the sidebar click “Settings” → “General Setting”.
2. Near the bottom of the page is the setting “Default Cover Page”. Here you can choose which cover page you want as default. You can also choose “None” if you do not wish to use a Cover Page.



## CIRCLE Contact Address

For inquiries, please contact the following:

アイネオ株式会社

CIRCLE Partner Services Team

[support@circleip.com](mailto:support@circleip.com)