USER GUIDE

FusionFAX
User Portal Guide

fusion
connect
A Morgan Stanley
Company

FusionFAX User Portal Guide

Contents

About FusionFax

Fusion Fax allows users to manage, send, and receive faxes from an authorized email address or through the Fusion Fax Portal.
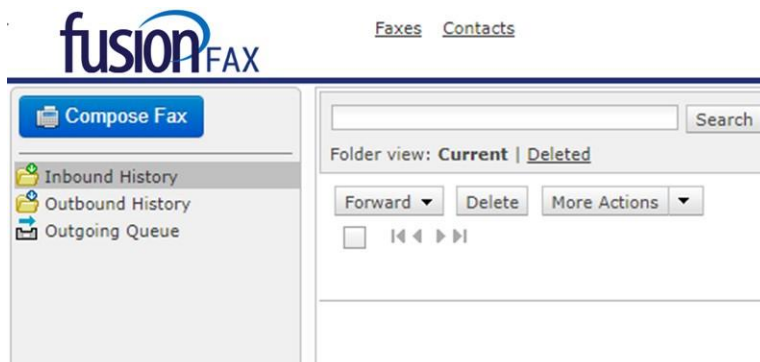
Send a Fax via the Web Client

FusionFAX provides a browser-based interface for faxing and displaying the status of sent, received and queued faxes. This interface is referred to by the term Web Client.

1. Log into the Fusion Fax Web client at https://fusionfax.fusionconnect.com.

fusionFAX

Email Address :	Type your email
Password :	
	☐ Stay signed in
	Login

2. Click on Compose Fax

fusionFAX   Faxes   Contacts

🖨 Compose Fax

📂 Inbound History
📂 Outbound History
📫 Outgoing Queue

| Search |
Folder view: **Current** | Deleted

Forward ▼   Delete   More Actions ▼

☐ |◀ ◀ ▶ ▶|

3. Populate the fields on the Compose tab using the descriptions listed below:
   o Recipients
     ▪ Name: Enter the recipient's name.
       NOTE: If the contact is in the Phone Book, the portal will allow for auto-population of the remaining fields
     ▪ Company: Enter the Company name.
     ▪ Fax: Format your recipient as follows: *{destination fax number}*@fax.fusion.com
     ▪ Enter the recipient's Fax number
   o Cover Sheet
     ▪ Subject: Enter a subject for the fax message.
     ▪ Comment: Type any comments you wish to include on the Cover Sheet.

   Note: Available cover sheets are automatically selected based on your profile.

4. Attach a file.
    o   Click Choose File.
    o   Browse to the file you want to attach and click Open.

Submit

| Compose | Sender & Company information | Options |

Recipients

Name: More recipients...

Company:

Fax:

Cover Sheet

Style: Default Cover Sheet (PingTone 4 without Logo #2.cse) ▼

Subject:

Comment:

Attachments

Document to attach

Choose File   No file chosen

More attachments...

5. Select **Sender & Company information** to update your personal information
6. Select **Options**
7. Click Submit

A confirmation screen will give the success or failure status.

If the recipient is not in your Contacts, you can opt to add them by clicking the box next to their name and then clicking OK.

Fax submitted
Fax successfully queued for delivery; Broadcast ID is 8B91A850-8E08-4518-989D-EB496ACCC936-11-BR
New Recipients
The following recipients do not exist in your personal contacts, please check the contacts you want to add:
☐ John Smith, 514-123-4567

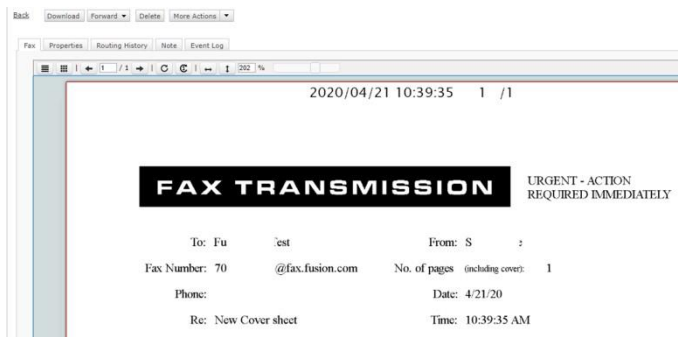Ok

Receiving Faxes via the Web Client

Faxes received through the web client will be displayed in the **Inbound History** folder. (Email notification may be sent as well by the administrator). Inbound faxes can be sorted by the following fields:

- Time (default)
- Status
- To
- From

To view a fax that has been received, simply click on the fax. The fax will be shown within the browser:

When viewing a fax, the following options are available:

- **Download:** Allows the User to save the fax as a .pdf file
- **Forward:** Allows the User to send the fax via email recipients
- **Delete:** Deletes the fax
- **More Options:**
    - **Print Fax Information:** Prints all information about the fax except for the fax image
    - **Mark as Unviewed:**

Within the browser of the fax, the following options are available:

- **Fax:** displays the inbound fax within the browser
- **Properties:** Transmission information regarding the fax
- **Routing History:** Routing history of the fax
- **Note:** Allows the User to add notes about the fax
- **Event Log:** Confirmation of events associated with the fax (received, routed to user, and email notifications)

Inbound History Folder

In the **Inbound History** folder, you can select between the **Current** or **Deleted** folder view.

The **Current** folder view displays the status of all the current faxes you have received.

The Inbound History fax folder has the following controls:

- o   Search: Enter a search term and click Search
- o   Sort: To sort Faxes, select from the drop down
- o   Fax Management Buttons: These buttons allow you to manage your faxes
- o   Fax List: The fax list contains all the faxes you have received.

Clicking on any fax will display the fax details.

Inbound History - Deleted Folder View

The Inbound History **Deleted** folder view displays the status of all inbound faxes that were deleted.

Restore button will restore the fax to your Inbound folder

Inbound History - Forwarding Faxes

Faxes can be forwarded from the **Inbound History** (either in **Current** or **Deleted** view):

Starting the Forwarding

Before selecting recipients, you have two options to start the forwarding action:

- o   Check the box at the left of the line (of one or several faxes), then click Forward; or
- o   Directly drag the fax (or a multiple selection of faxes) to the Forward button using the handle ( ) at the left of the line.

The Forward Button/Menu

In all cases, the Forward button will deploy a menu from which you can select destinations for:

- •   Quick forwarding   .
- •   Advanced forwarding

Quick Forwarding

You can benefit from several features and options allowing you to quickly forward faxes to your most used destinations.

However, as these features depend on your actual fax forwarding activity, you may first need to go several times through the advanced forwarding window before obtaining an effective quick-forward environment.

Quickly Available Destinations

The Forward menu contains – among other options – a list of the most recent destinations you may have used for forwarding faxes, and a list of destinations you may have tagged as favorites.
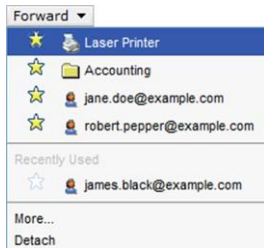
👉 **Note**: If you wish to forward the same fax to several destinations, you need to repeat the same action with all destinations, or you can perform this in one single action by selecting **More**.

Managing Favorites

Everywhere a destination is listed in the interface via the Forward feature (in the **Forward** menu or in the advanced forwarding window), a clickable star is displayed at its left for allowing to add it as Favorite or remove it from the list of Favorites.

The full list of Favorites is displayed in the **Forward** menu, above the Recently Used destination list.

Repetitive Forwarding to Various Destinations

If you need to repetitively forward faxes to various destinations, for example when you are in charge of distributing faxes received via a single fax number to various internal recipients of your company, this
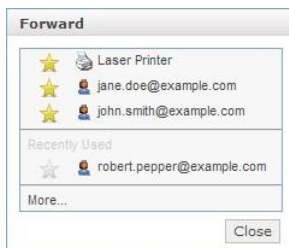
operation can be facilitated by selecting **Forward ➤ Detach** before starting forwarding faxes.

This way, you have all the content of the Forward menu permanently available in a detached window, allowing you to quickly drag-and-drop faxes to any of your recent or favorite destinations.

Advanced Forwarding

Forwarding the Fax Selection to Several Destinations

Searching Available Destinations

You can search destinations by entering characters in the **Search** field: the list below will instantly be updated to display only destinations whose name contains (anywhere in the name) the entered sequence of characters.

Filtering the Available Destinations

The available destinations can be of different types (fax users, folders, printers...). You can filter them by type using the drop-down list at the right of the **Search** field. All types are displayed by default

Outbound History Folder

The **Outbound History** folder contains two fax lists: one containing the current faxes (Current Folder View) and another to contain the deleted faxes (Deleted Folder View).

Outbound History - Current Folder View

In the **Outbound History** tab, you can select between the **Current** or **Deleted** folder view.
The **Current** folder view displays the status of all the current faxes that you have sent.

The Outbound History fax folder has the following controls:
- o **Search Feature:** Enter a search term and click Search
- o **Sort Feature:** To sort Faxes, select from the drop down
- o **Fax Management Buttons:** These buttons allow you to manage your faxes
- o **Fax List:** The fax list contains all the faxes you have sent

Clicking on any fax will display the fax details.

Outbound History - Deleted Folder View

The Outbound History **Deleted** folder view displays the fax status of all outbound faxes that were deleted.
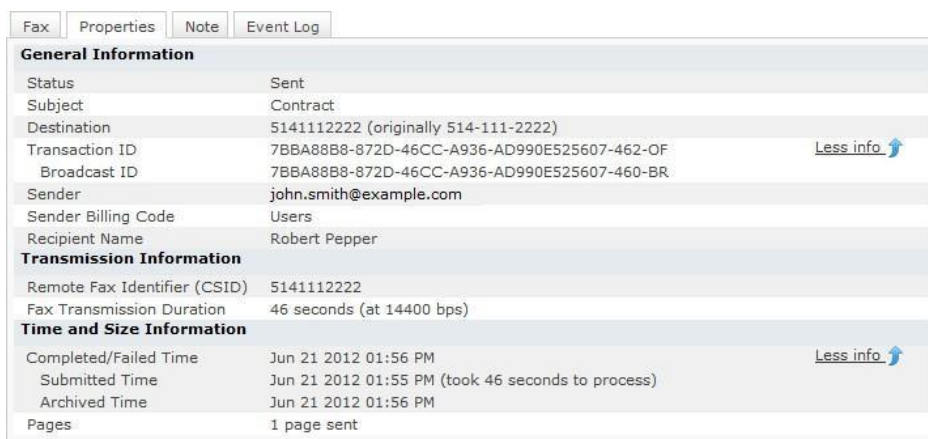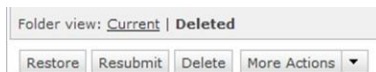

The Outbound History Deleted folder view has the same functionalities as the Outbound History - Current Folder View, but with the addition of a **Restore** button.

To view the details of a sent fax, click on it

Outbound Fax Tab

The procedure for displaying the contents of an outbound fax in a browser window is the same as the one for an inbound fax.

Outbound Properties Tab

The Properties tab shows the fax information.

Outgoing Queue Folder

The Outgoing Queue folder contains only one fax list. Faxes remain in this folder only until the sending process is complete.

Any fax for which the destination has returned a busy signal: the fax remains in the queue until FusionFAX issues a retry

Web Client Options

The **Options** link gives access to the tab described below.

Option	Description	Default
Language	To change the display language of the interface.	
View faxes as	To change the viewing format of faxes (TIF or PDF).	PDF
When sending a fax to new contacts	To configure the automatic adding of contacts to your phone book.	Ask me if I want to add them to my Personal Contacts
Disable Autocomplete	To disable the automatic selection of phone book contacts while typing a name or fax number in the fields of the Compose tab.	Unchecked
Change Password	To change the password of your FusionFAX account. **Note:** The default password policy is the following: 8 characters minimum, including at least 1 uppercase letter and 1 number (unless another policy was defined by your administrator)	

Send a Fax through Email

You can send a Fax from your email address. The email address that you are sending the fax from must first be associated with the user / email address provisioned in the Fusion Fax Portal.

To send a fax from your email address, in the To: field, format your recipient as follows:

{destination fax number}@fax.fusionuc.net

NOTE: *This is a different domain that the domain used within the portal.*

NOTE: Administrators must allow emails to be sent directly from email addresses through the **Security Options** of the **Profile** section of the Administrator Portal.