



**Interstar**

# LightningFAX

User Guide



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# 1 Introducing LightningFAX

## Who Should Read This Manual

This manual is intended for any one using LightningFAX to send, receive, and manage faxes. It does not cover LightningFAX installation and configuration, or the creation and management of users and user groups. Those topics are covered in the LightningFAX administrator and Installation Guide.

## An Overview of the Manual

**Chapter 2 Getting Started** provides a hands-on introduction to several common-place LightningFAX and SendFAX operations.

**Chapter 3 Introducing the Manager** details fax management and other operations using the LightningFAX manager.

**Chapter 4 Fax Details Information** details the information about incoming and outgoing faxes available to LightningFAX users.

**Chapter 5 Managing User Properties** details the user properties you can modify.

**Chapter 6 Introducing SendFAX** details how faxes are sent using SendFAX. Also outlined is including a profile and a cover sheet, how to use advanced transmission settings, and how to access a phone book.

**Chapter 7 Fax Utilities in LightningFAX** details using the various faxing interfaces and utilities available in the LightningFAX client is installed. It describes faxing from Windows applications, faxing using Microsoft Word's Mail Merge feature, emailing faxes, etc.

**Chapter 8 Introducing Phone Books** details how phone books are created and maintained, how to add contacts, contact lists, and groups of potential fax recipients.

**Chapter 9 Introducing the Viewer** details how to use the Viewer to search for and view faxes, how to manage the Viewer itself, and outlines how to add annotations to the faxes you have received.

**Chapter 10 Introducing the Cover Sheet Editor** details how the cover sheet editor can be used to generate cover sheets used when faxing with SendFAX.

**Chapter 11 Introducing Profiles** details LightningFAX profiles, which provide a means of managing your sender information in a variety of ways.

**Chapter 12 About Annotations** details the annotations available in both SendFAX and the viewer and the methods of adding them to faxes you send and faxes you have received.

**Chapter 13 Introducing Fax Headers** details what fax headers are and how to compose them.

**Chapter 14 Introducing LightningFAX Mail Gateways** details faxing through the mail gateways, that is, your email software. It also details creating distribution lists for fax broadcasts from your email program and how to use body codes in your message.

**Chapter 15 Introducing the Forms for Microsoft Outlook** details how to send faxes if you have installed the Forms for Microsoft Outlook, an interface that provides more extensive functionality than the gateway for Microsoft Exchange.

**Chapter 16 Introducing the Forms for Lotus Notes** details how to send faxes if you have installed the Forms for Lotus Notes.

### The LightningFAX Client

The principal components of the LightningFAX client are:

#### LightningFAX Manager

To the user, the manager provides the means to handle their incoming, outgoing and archived faxes, as well as to configure their user properties. For example, users can search for, view, print, delete, or archive faxes sent and received; forward or copy faxes to others in the LightningFAX network; and modify notification or printing options.

**Note:** Administrators can restrict changes that users can make to their settings.

#### SendFAX

SendFAX is the program used to compose, address, and send faxes. SendFAX also provides a means of entering fax sender and fax recipient information and changing transmission settings.

Faxes can be sent to numeric as well as email addresses.

**Note:** LightningFAX functionality can be installed so that end users fax strictly through their email software. When this is the case; faxes, both incoming and outgoing, are managed through such programs as Microsoft Outlook, Lotus Notes, or Netscape Communicator, exactly as email messages are. Further, the LightningFAX manager, SendFAX, and the tools and utilities that come with them, are not available.

### LightningFAX Tools

LightningFAX tools include the following.

#### Cover Sheet Editor

Administrators and users use the cover sheet editor to compose fax cover sheets to be used when faxing with SendFAX. A selection of preformatted cover sheets is provided. Variables that are resolved when the fax is sent can be added to any cover sheet to include such information as sender name, company name and address, telephone and fax numbers, etc.

By default, the cover sheet editor is not installed with the LightningFAX client. It is possible therefore that some users will not have access to it.

#### Private Phone Book

The private phone book allows a user to organize and group fax recipients for easy selection in SendFAX. Any number of phone books can be created. Administrators can make a public phone book available to a group of LightningFAX users; however, the public phone book is a custom component that is not included with a LightningFAX client installation.

#### The Viewer

The viewer allows users to display, read, and annotate faxes. In addition, users can rearrange fax pages to generate another fax. The viewer can be freely emailed to potential fax recipients.

Each tool is accessible through LightningFAX manager, SendFAX, and as a separate *Start* menu selection.

#### LightningFAX Printer Driver

The printer driver is automatically added to the list of available printers during Client installation. Users can send faxes from third-party applications Like Word, WordPerfect, Excel or Quattro Pro, etc., by selecting the LightningFAX printer driver after using the application's Print command. Executing the Print command launches SendFAX with the document included as a fax. The fax can then be addressed and sent.

#### LightningFAX Profiles

A profile can contain a fax header, reference a cover sheet, and store information about the fax sender. If one is available, a user can select a profile when faxing from SendFAX.

Profiles address several needs. For example, several profiles might each reference different cover sheets, each cover sheet written in a different language. Two or more profiles, each with different sender information, allow users to send faxes on behalf of others. Profiles also allow administrators to specify a common fax header and to enter company information once for a large number of users.

## Chapter 1 Introducing LightningFAX

Once composed and saved, profiles can be applied both through SendFAX and Forms for Microsoft Outlook.

Although profiles are often created by administrators, users can create, manage, and use their own profiles.

### LightningFAX PrintToMail Printer Driver

The LightningFAX PrintToMail printer driver provides a means of emailing a file from a third-party application. When writing a document in a third-party application such as Word or WordPerfect, the user prints and selects the PrintToMail printer. When the print operation is executed, the user's default email software is launched with the document attached as a TIFF fax image file. The user can then address and send the file as they would any other email message.

The recipient requires an appropriate TIFF viewer.

### Mail Merge for Microsoft Word

Mail Merge for Microsoft Word allows users to use Word to generate a Main Document and a Data Source and then fax to all recipients recorded in the Data Source.

When installed, Mail Merge for Microsoft Word adds a macro and a LightningFAX toolbar. Those additions aside, composing the Main Document and the Data Source remain much as they are in Word.

However, Mail Merge for Word uses four merge fields: *First Name*, *Last Name*, *Company*, and *Fax Number*, which are mapped to the Word merge fields selected when writing the Main Document.

### Additional Faxing Interfaces

LightningFAX also offers other faxing interfaces. These include the LightningFAX gateways for email software and for the Hewlett Packard Digital Sender.

### LightningFAX Gateways

If installed, a gateway provides a means of sending, receiving, and managing faxes through your email software. These are the gateways that can be installed on your computer.

- Gateway for Microsoft Exchange
- Gateway for Simple Mail Transfer Protocol (SMTP)
- Gateway for R/3

Generally, a gateway is installed as an alternative to the full LightningFAX client. It provides the means to send and receive faxes without the need to install, or to learn, the full LightningFAX client.

## LightningFAX Scanner Service

The scanner service for the Hewlett Packard 9100C Digital Sender faxes TIFF files generated by the Hewlett Packard Digital Sender. The fax operation takes place through the Digital Sender's interface.

The scanner service is a custom installation.

## LightningFAX User Status

There are three LightningFAX user status.

- Administrator

Administrators can configure LightningFAX, create and manage users and user groups, manage faxes; in short, execute any operation LightningFAX performs.

- Super User

Super users have the right to access the faxes received and route them to the proper recipient in the LightningFAX network. Unless an administrator gives them greater privileges, they can see only the cover sheet of the faxes they direct to others.

Note: If a Super User can only view the cover sheet of a fax, he/she will not be able to save the fax to the server.

- User

Users have the rights assigned them by an administrator. Aside from sending and managing their own faxes, they may be able to route faxes to members of the LightningFAX network.

## LightningFAX Groups

Groups are a means of organizing users. An administrator can make you a member of one or more groups. If you are a member of a group, you enjoy the settings assigned to that group, in addition to your user privileges. Group membership is not mandatory. An administrator might deliberately choose not to enroll some LightningFAX users in any group.

You can also be a guest in a group. Like primary group members, you will be able to access the group's incoming faxes. However, group settings are not applied to you. For example, an administrator may establish one set of archiving, printing, and notify options for a group and a different set for you. If you are a guest in the group, your user options, not the group's, apply.

### Users and LightningFAX Resources

A standard resource basically represents a grouping of fax channels (inbound and outbound). All channels in a resource share the same transmission parameters, such as CSID, number of retries, etc... It is however possible to override these parameters with individual user settings, if need be.

A resource is a repository for all the faxes sent or received on its channels. Each resource also has the potential to have its own routing table.

A resource is linked to only one driver, but a driver can connect to multiple resources (based on channel mapping).

Users are assigned access rights to a resource, which then lets them send and receive faxes through its channels. A user with access to multiple resources can thus have different personalized settings for each resource.

After initial installation to the Microsoft Windows operating system, the LightningFAX manager displays three resources in the tree view.

Common Resource	Resource 1	All Resources
-----------------	------------	---------------

By default, Resource 1 is associated with all LightningFAX channels. It is Resource 1 that actually transmits incoming and outgoing faxes. The Common Resource and All Resources, which cannot be associated with LightningFAX channels, are folders through which users access faxes.

The Common Resource is the bridge between all resources. Any communication between two resources must be done through the Common Resource.

It displays faxes forwarded or copied by other members of the LightningFAX network. All users have implicit access to this resource.

All Resources allows users to view simultaneously both incoming and outgoing faxes. For example, an administrator configures Resource 1 to transmit outgoing faxes. A second resource, Resource 2, is specified and configured to transmit incoming faxes. Finally, a user is given access to both resources. Only the user's outgoing faxes are displayed under Resource 1; the user's incoming faxes are displayed under Resource 2. By going to All Resources, the user can display both incoming and outgoing faxes at once.

All Resources has no configurable properties.

**Note:** Only LightningFAX administrators can access and modify resource properties.

## 2

## Getting Started

This chapter introduces some of the basic features of the manager, SendFAX, the phone book and profiles.

Users must of course log on, whether under their Windows domain account or under their LightningFAX account, before they can access LightningFAX.

### Logging on to LightningFAX

To log on to the manager:

- ❑ Choose Start ➔ Programs ➔ LightningFAX ➔ LightningFAX Manager.

If you are logging on for the first time, the logon dialog box appears.

**Note:** The log on procedures described here also apply when you launch SendFAX from the Windows Start menu.

### Logging on to a Windows NT Domain

Your exact log on depends on how your administrator configured the network. If LightningFAX was configured to make use of a Windows NT domain and includes the users in that domain, your logon window will match the following illustration.



- ❑ Click OK. You need not enter a password.

### Logging on using LightningFAX Authentication

If you have a LightningFAX account, you log on using LightningFAX authentication, that is, using the User ID and password of your LightningFAX account. The following logon dialog box is displayed.



- 1 Enter the LightningFAX user ID.
- 2 If you were assigned a password, enter it in the `Password` field.
- 3 Click `OK`.

**Note:** The LightningFAX server is usually configured to use port 7007. If your administrator used a different port, you must use the following syntax in the LightningFAX manager logon dialog box.

*server:port*

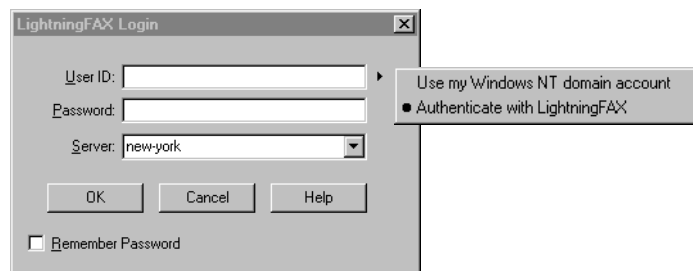
where *server* is the IP address or DNS or WINS name of the LightningFAX server and *port* is the port the administrator specified during installation.

### Choosing your Logon Format

When you have a LightningFAX account and a Windows NT domain account, you can choose either logon format.

To select either LightningFAX authentication or a Windows NT domain at log on:

- 1 Click the pop-up menu beside the User ID field.

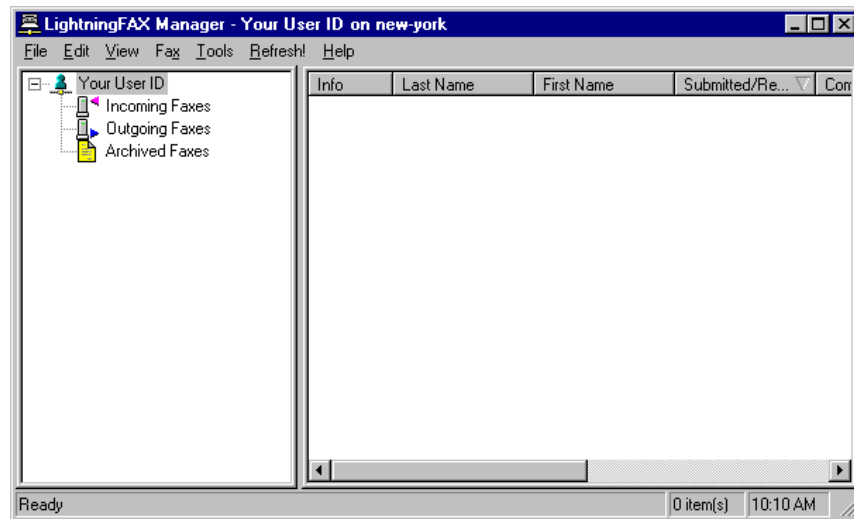


2 Select your logon format.

When LightningFAX is installed on more than one server machine, you can select the server you want by using *Server* to display the list of servers available to you.

You can enter a server name in this field if you wish. LightningFAX displays an error message if you enter an invalid server name.

After you log on, the manager is displayed.



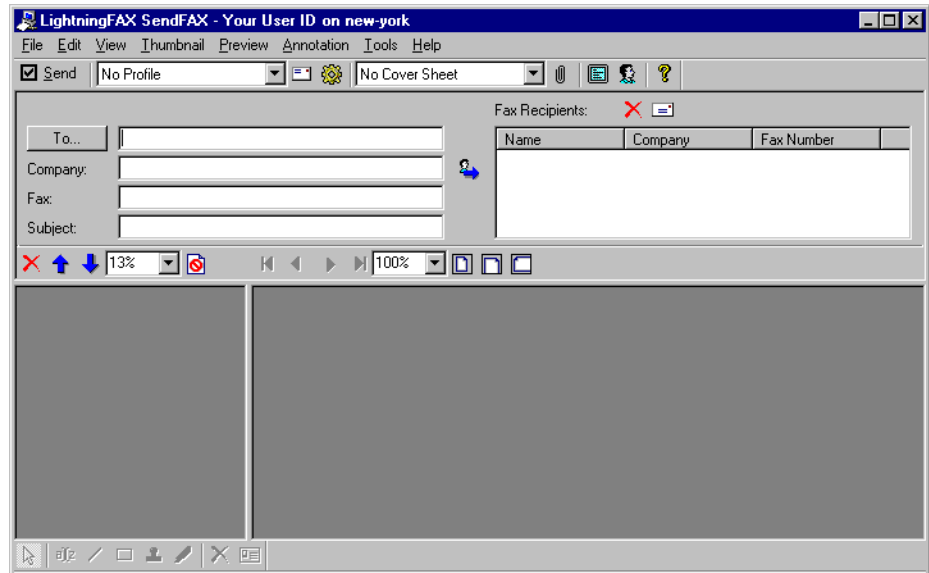
## Introducing SendFAX

Among the other activities available, you certainly send faxes.

You can access SendFAX through:

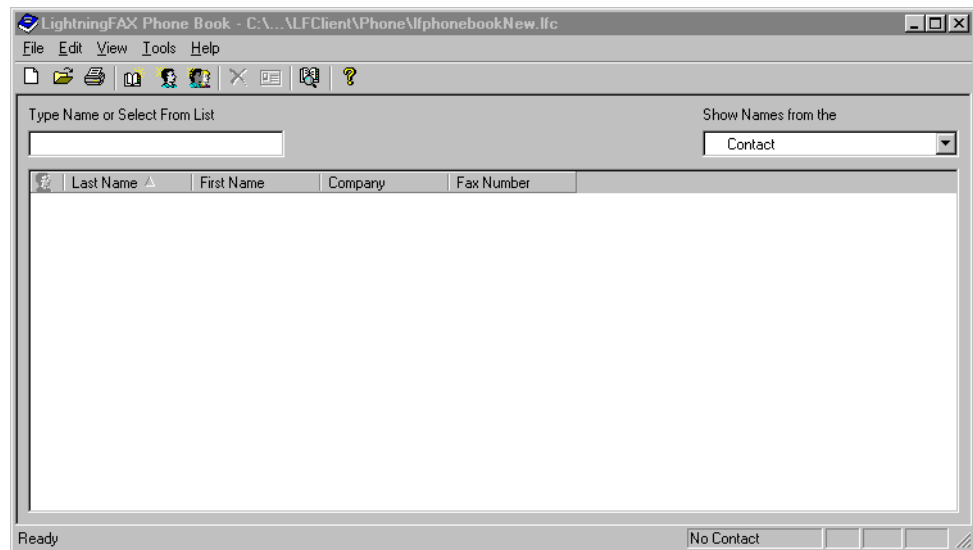
- Tools ➔ SendFAX in the manager window
- Start ➔ Programs ➔ LightningFAX ➔ SendFAX

The SendFAX window is displayed after you log on.



If this is your first time using SendFAX, one of the first things you might wish to do is to populate a telephone book with potential fax recipients. A phone book allows you to select fax recipients rather than manually address your faxes.

Choose **Tools** ➔ **LightningFAX Phone Book**.



LightningFAX offers a default phone book that contains information about the people you often send faxes to. We'll assume you decided to create a new one.

Phone books are organized in the following hierarchy.

- A phone book, a user can make any number of phone books
- A contact list, several contact lists can exist in a phone book
- A group, contacts can be grouped, faxes sent to the group are sent to all members of the group
- the contacts themselves

Let's say that you need only a single contact list. A default contact list named `Contact` already exists and you'll put the new contact there.

### Ungrouped Contacts

Choose `File` ➔ `New` ➔ `Contact` from the phone book menu.

The contact information is much as you'd expect: a name and job title, company information, and contact numbers. However, some fields are worth special attention.

The `Fax` and `E-mail` fields allow you to make three different entries. If your recipient travels frequently, you might wish to enter their home office as the first fax number, an office they visit often as the second, and perhaps their home fax number as a third. The same applies to your recipient's e-mail addresses.

When you do enter several fax numbers or e-mail addresses, the `Preferred Address` drop-down list becomes important. When you select a fax recipient from the phone book in SendFAX, the fax number or e-mail address shown in `Preferred Address` is the destination the fax is sent to.

**Note:** When you fax to an e-mail address, you instruct SendFAX to e-mail the fax message. A gateway must be installed in your network to deliver the e-mail. Your fax is received as an e-mail attachment.

Billing Information offers two fields: Billing Code and Sub-Billing Code. Here, you can enter a number that identifies your recipient or their company for billing purposes. For example, a law firm communicating by long distance to a client might bill the telephone charges to the client and subsequently assign a billing code to that client. That code would be entered here.

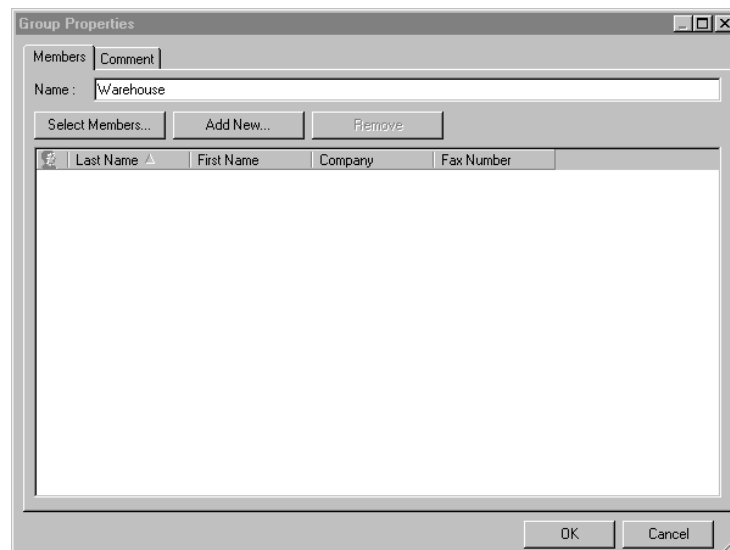
Two billing fields allow for greater precision. Although a small business might require a single billing code; a larger one might find it necessary to use one billing code to identify the firm and a sub-billing code to identify a particular department or office.

Click **OK** when you have entered all the contact information.

### Grouping Contacts

Creating groups of contacts allows you to select the group in SendFAX and fax to every member of the group.

Choose **File** ➔ **New** ➔ **Group** from phone book menu and enter a name in the Name field.



To enter a contact, click **Add New**. The Contact Properties window is displayed and you can enter contact information just as you did for an ungrouped contact.

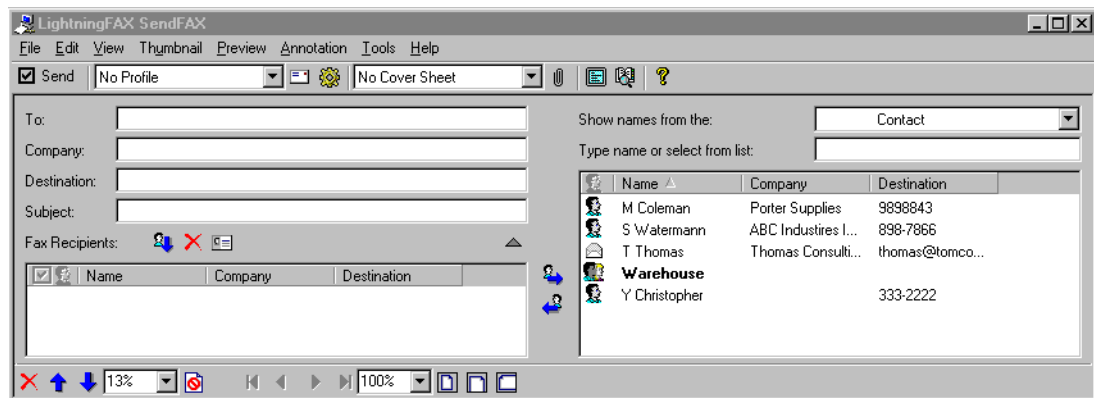
Click **OK** in the Group Properties window when you have entered all members.

## Displaying a Phone Book

By default, the SendFAX interface does not display a contact list from a phone book. If you have a phone book, and if your administrator has created a public phone book, you certainly want to display it when you're using SendFAX.

To display a phone book in SendFAX, choose **View** → **Phone Book** → **Show Right** or **View** → **Phone Book** → **Show Left**.

The following illustration shows SendFAX with a contact list from the phone book displayed on the right.



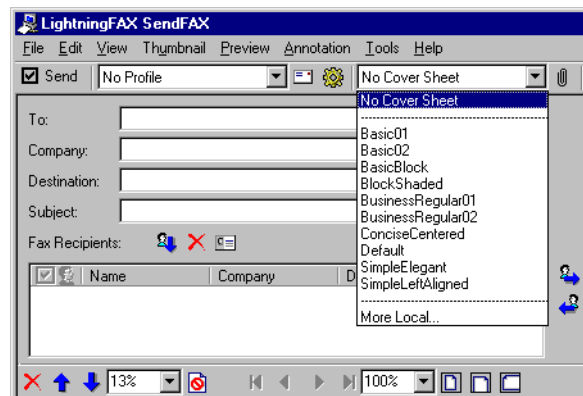
See Chapter 8 Introducing Phone Books to learn more.

## Choosing a Cover Sheet

LightningFAX makes several cover sheets available and, if it's installed on your system, you can use the cover sheet editor to create your own cover sheets.

Assuming that you'll begin with the pre-configured cover sheets, use the following steps to select one.

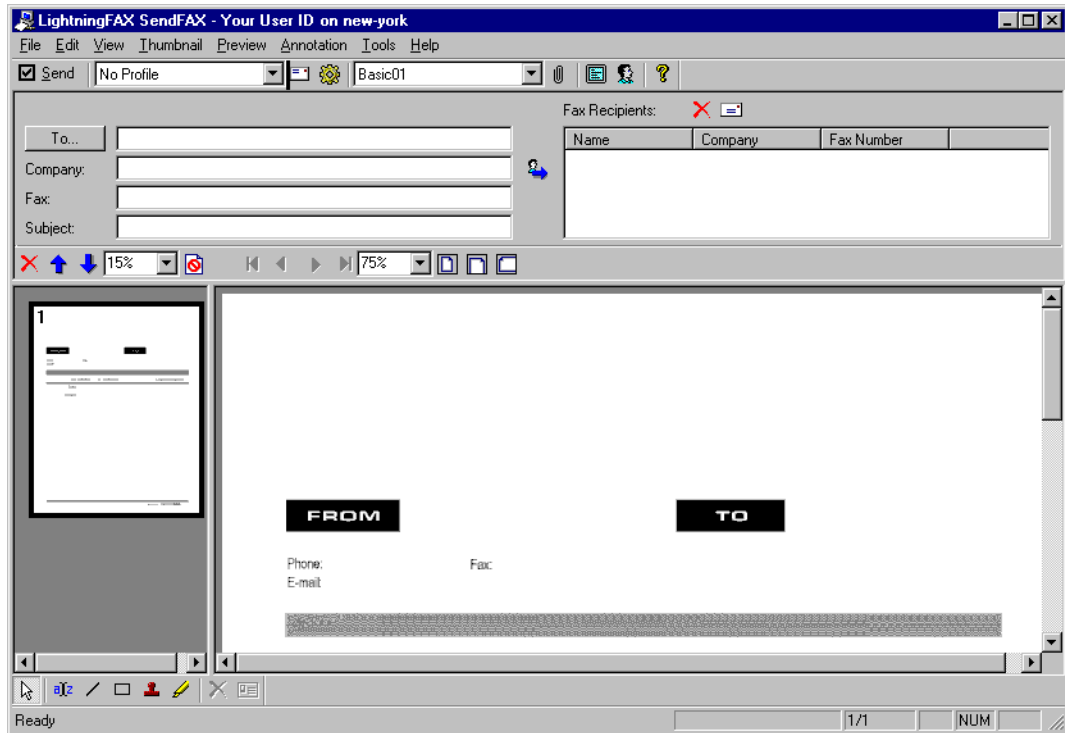
Use **No Cover Sheet** to select the cover sheet you want.



## Chapter 2 Getting Started

You might first select a cover sheet by using the pull-down list available in the *No Cover Sheet* pull-down list and selecting *More Local*. A list of available cover sheets is displayed. A preview of each cover sheet is displayed when a sheet is selected.

Assuming you pick *Basic01.cse*, SendFAX displays that cover sheet in the thumbnail (left-hand) and the fax preview panes.



A cover sheet will remain selected until you cancel it by selecting *No Cover Sheet* or choosing another.

See Chapter 10 *Introducing the Cover Sheet Editor* for more information.

### Your Profiles

A profile can store your personal information: your name, your contact numbers and e-mail address, and your company information. However, you can use profiles for several other purposes. Because profiles can reference a cover page; you can create two cover sheets, each containing the same information in different languages. You would then create a profile, each referencing one of the cover sheets. In SendFAX, you'd select one or the other profile, depending on which cover sheet you wanted to use.

Another use for profiles is to fax on behalf of others. After all, you don't have to enter your own name. You can create a profile that contains the personal information of a colleague and then use that profile when the colleague is on vacation or a business trip.

To create a profile, choose **Tools** → **Profile Management** and click **New**.

Enter a name and click **OK**.

Like phone books, a profile contains the fields you would expect. And, again, some fields and options are worth extra attention.

LightningFAX resources are folders where faxes are stored and users can be associated with more than one resource. If your administrator has given you access to several, you can use *Resource* to select one in the profile. Whenever you send a fax using that profile, LightningFAX will store a copy of the outgoing fax under your name on the resource the profile references. You might prefer to use a different resource when you know the resource you usually use is being heavily used by other SendFAX users.

Least cost routing (LCR) is a means of reducing or even avoiding long distance telephone charges. Your administrator might configure LCR when there are two or more LightningFAX servers in a local or wide area network.

For example, a company has a LightningFAX server in its offices in New York, Paris, and Rome. Let's say that a client of the New York office is located in London. An employee in the New York office could send a fax directly to the client, and pay the long-distance telephone charges. Alternatively, they could use LCR to send the fax to the office in Paris and let that office send the fax to its final destination by telephone. Because a LightningFAX server uses the TCP/IP protocol to communicate with an other LightningFAX server, the fax travels from New York to Paris using TCP/IP. In other words, the company avoids a transatlantic telephone call.

Of course, least cost routing doesn't just happen. Your administrator has to configure it and you must instruct SendFAX to use it. By creating a profile and selecting the `Use LCR` option, you can make LCR selection in SendFAX automatic. Just use that profile whenever your fax is to be sent using least cost routing.

Finally, there's your sender billing information. Your fax might represent a purchase order and you might wish to inform the recipient of the billing code your company expects on the invoices it receives. The `Sub-Billing Code` field allows for greater detail. For example, your company might have a billing code for orders and sub-billing codes that identify the product or services being ordered.


**Note:** Although other components in LightningFAX allow you enter the information while you are faxing, a profile is the only place where you can permanently store sender billing information.

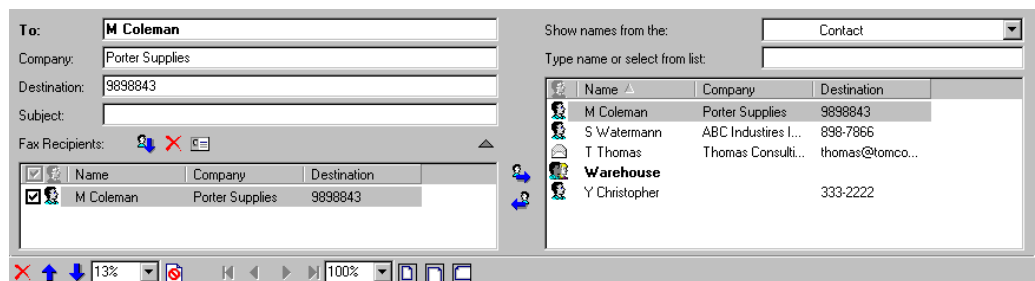
Click `OK` when you finished entering your profile information.

Now that you have a profile, you want to reference it in SendFAX. Use `Profile` to select any of the profiles you create.

See Chapter 11 Introducing Profiles for more information.


### Addressing a Fax

The simplest way to address a fax is to select a recipient or group from the phone book's contact list and click .




That action copies the name or group to the list of fax recipients.

Of course, you can also make direct entries to the `To`, `Company`, and `Destination` fields. `To` receives the recipient's name and `Destination` receives the recipient's fax number or e-mail address.

After making entries to these fields, click  to move the information to the list of fax recipients.

Next, of course, is information you want to send.

Choose `File` ➔ `Insert` or click  and then navigate to the file to be sent. If the file is on the desktop, you can drag-and-drop the file into the thumbnail view. You can add as many documents as you wish.

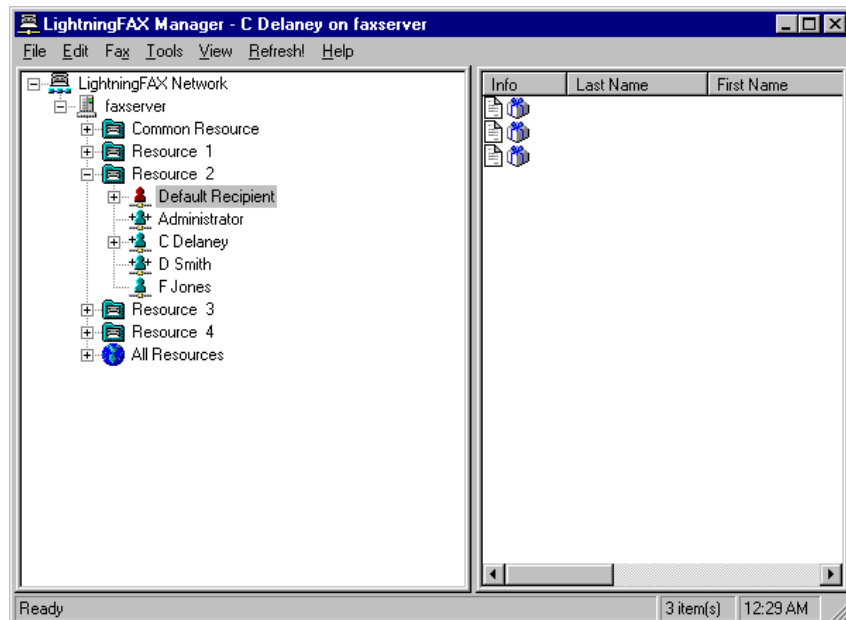
Finally, click `Send`.

## Routing Faxes

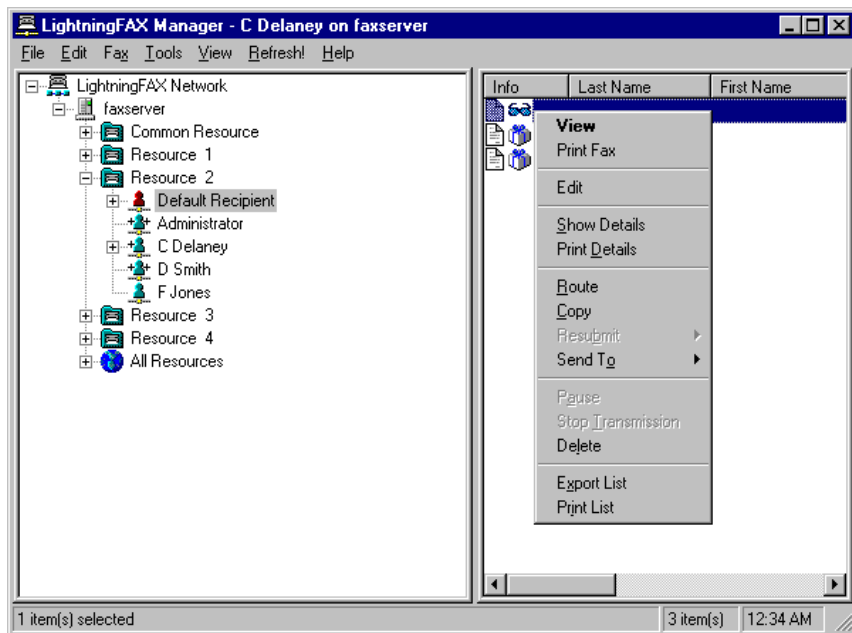
Routing faxes that have been received by the `Default Recipient` to the individual to receive them is the main function of a Super User, a status your administrator might give you.

In this example, C Delaney is the Super User tasked with routing incoming faxes from the `Default Recipient` to those who must receive them. Three users, P Martin, D Smith, and F Jones, have received faxes.

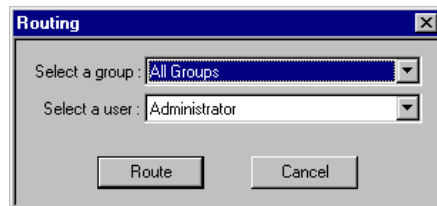
C Delaney is already logged on to LightningFAX and notices that incoming faxes have arrived on `Resource 2`, which is configured to receive faxes.



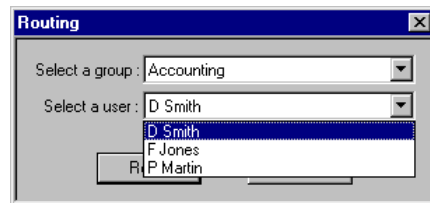
Clicking the first and automatically opening the viewer to inspect the cover page, C Delaney learns that this fax is sent to F Jones. Closing the view, C Delaney highlights the fax and right-clicks it.



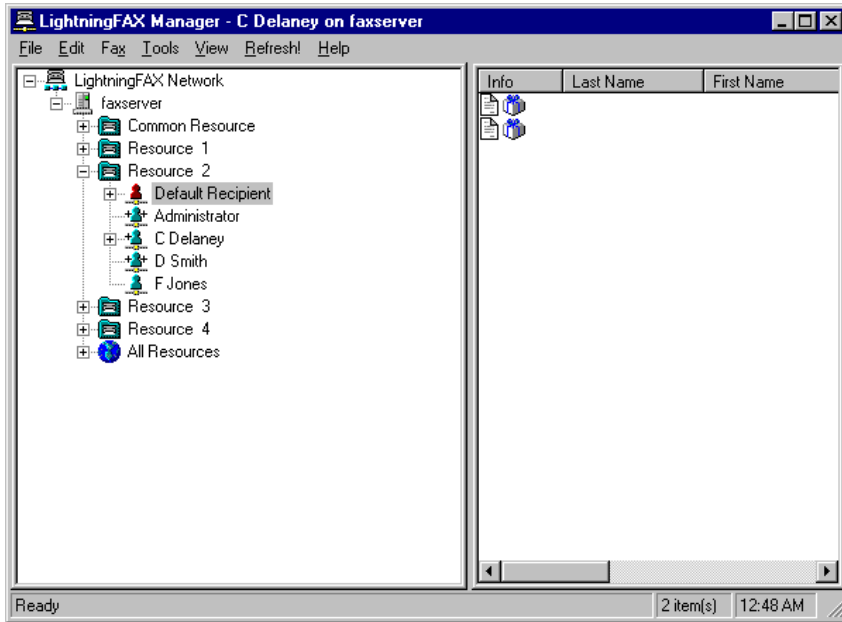
C Delaney selects *Route* in the pop-up menu.



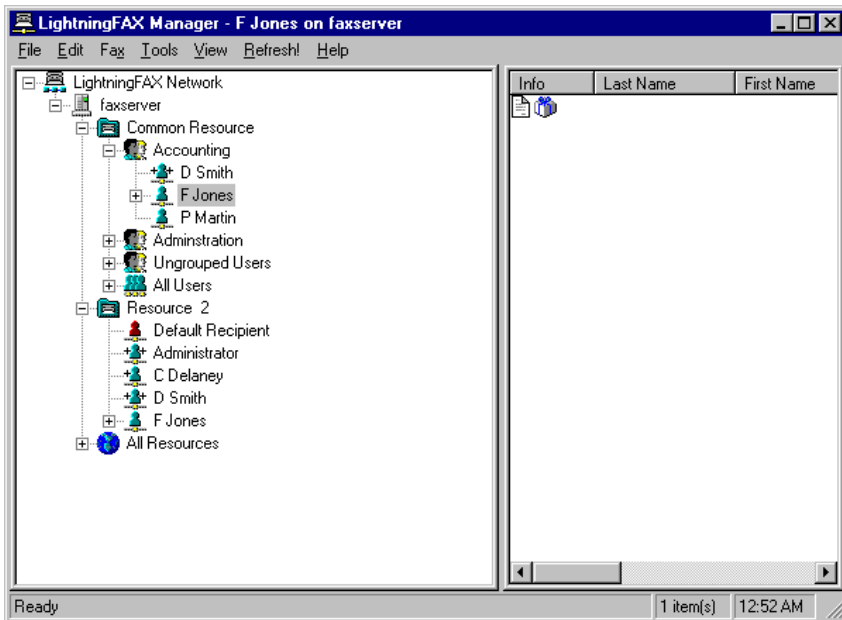
Knowing that F Jones works in the Accounting department, C Delaney uses the pull-down menus to choose the Accounting Group and the user F Jones and clicks *Route*.



The fax is immediately routed to F Jones and C Delaney continues with the next fax received.



At a client workstation in LightningFAX network, F Jones launches the LightningFAX Manager finds a fax waiting to be opened and read.



Further details on routing and fax management can be found in Chapter 3 Introducing the Manager.



## 3 Introducing the Manager

The manager provides access to your incoming, outgoing, and archived faxes in a tree structure similar to Windows Explorer. You can view, delete, and archive the faxes you are authorized to view. You can also route and copy them to other members of your network.

You can also set your user preferences; instruct LightningFAX to notify you when certain faxing events occur; specify how frequently LightningFAX is to check for newly received faxes; and, if you have access to a gateway, set user notification for faxes sent and received through your e-mail software.

When you log on to the LightningFAX network with your user ID from any workstation connected to the LightningFAX network, your personal default settings are used. You can log on to LightningFAX using either LightningFAX authentication or your Windows NT domain account.

### Launching the Manager

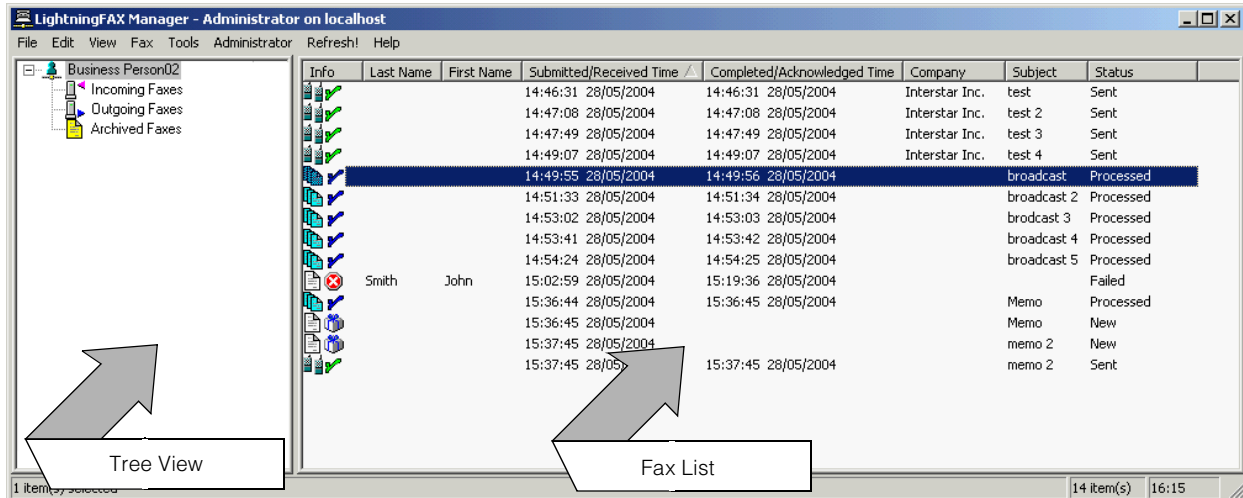
To launch the manager:

- 1 Choose Start ➔ Programs ➔ LightningFAX ➔ LightningFAX Manager.
- 2 Enter your log on information and password.

**Note:** When logging into the fax manager or the web client as an LDAP user, a password is mandatory. Trying to login with a blank password fails. Other types of users are logged in as anonymous users, when the password is left blank.

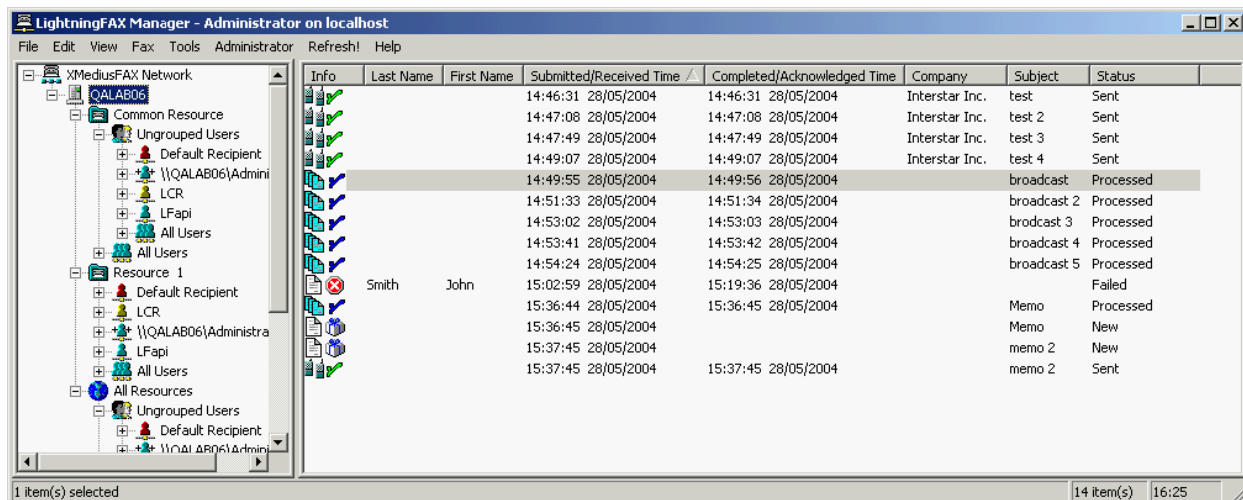
After you log on, the manager appears, listing your faxes. Faxes can be selected by highlighting them. Several or all faxes can be selected by holding the `Shift` key while highlighting them

## Chapter 3 Introducing the Manager



The administrator can assign you a restricted or an unrestricted view of the LightningFAX network. The restricted view shows your user ID and three branches: incoming faxes, outgoing faxes, and archived faxes.

The unrestricted view displays the entire network. Assuming you have expanded the tree to find your user ID, the unrestricted view might resemble the following illustration.

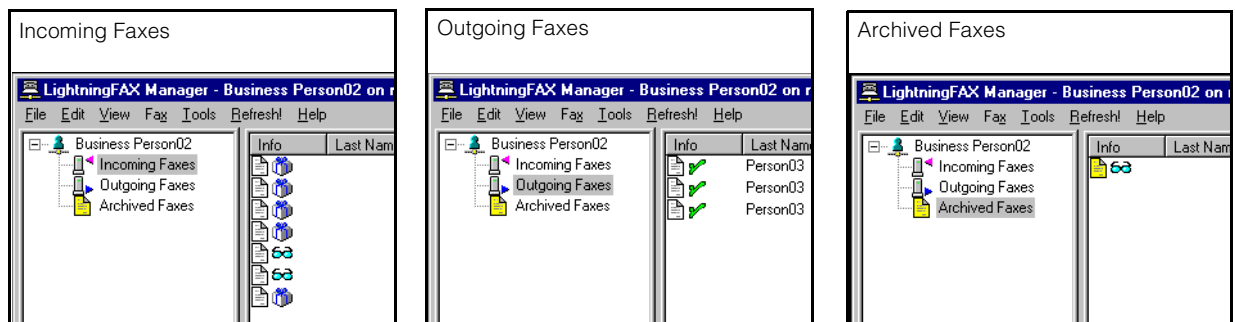


This view lists other users and groups as well as the resources with which users are associated. You are not able to view other users' faxes unless you have Administrator status. Whatever your status, you can use drag-and-drop to copy your faxes to other members of the network.

Faxes are transmitted to you in one of three different manners.

- ❑ Faxes transmitted to you by telephone are received by the resource with which you are associated and are routed to you by a user with Administrator or Super User privileges. You access these faxes by locating your user ID under *Common Resources* ➔ *All Users* or under *All Resources* ➔ *All Users*.
- ❑ If your administrator has enabled Direct Inward Dialing (DID) for you, these faxes are received directly by the resource with which you are associated.
- ❑ Other members of the network can route or copy their faxes to you. Again, you can access these by locating your user ID under *Common Resources* ➔ *All Users* or *All Resources* ➔ *All Users*.

Whichever the view, click the category in the tree to display only the faxes in that category in the fax list view.



**Note:** Your administrator can select one or another of these categories for your default fax list view. For example, if incoming faxes is your default fax list view, only incoming faxes are displayed in the manager when you log on. You must highlight another category in the tree view to see the faxes in that category in the fax list view.

The administrator can also decide what status of fax is displayed in the fax list view. For example, an administrator can specify that your outgoing failed faxes are not listed immediately at log on, but only when you highlight *Outgoing* in the tree view. Whether incoming or outgoing, faxes can be current or archived. Current faxes are those you have neither deleted nor archived.

Faxes can be archived only if you, or an administrator, enable the archiving options in your User Properties. The faxes you delete from the incoming or outgoing views are moved to the archive view. If archiving is not enabled, the faxes you delete are simply removed.

Archived faxes are removed by the same delete operation. However, an administrator must grant you the right to delete archived faxes.

### Fax List Display

By default, the Fax List displays fax information in seven columns: **Info**, **First Name**, **Last Name**, **Submitted/Received Time**, **Completed/Acknowledged Time**, **Company**, and **Subject**. However, you can adjust the column headings to display any information available in Fax Details.

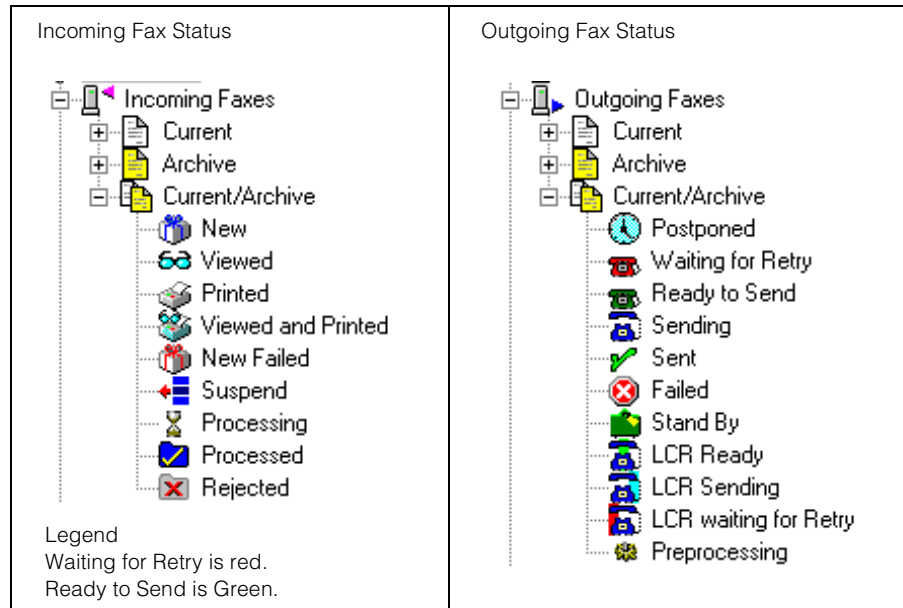
By default, faxes in the fax list are sorted on Submitted/Received Time in descending order. The most recent faxes appear first. If you wish you can select any column heading as the sort key and choose either ascending or descending sort order.

<input type="text" value="Info"/>	the fax's status as an icon
<input type="text" value="Last Name"/>	the fax recipient's first name (this field is blank in faxes you receive)
<input type="text" value="First Name"/>	the fax recipient's last name (this field is blank in faxes you receive)
<input type="text" value="Submitted/Received Time"/>	the date and time you submitted or received the fax
<input type="text" value="Completed/Acknowledged Time"/>	the date and time your fax transmission was completed or when your system acknowledged receiving a fax
<input type="text" value="Company"/>	the company name, if one was specified
<input type="text" value="Subject"/>	the subject, if one was specified
<input type="text" value="Status"/>	the fax's status as text

You can change the column headings if you wish by (a) deleting a column heading, (b) changing a column heading for another, and (c) inserting a new column heading.

### Incoming and Outgoing Fax Status

An incoming or outgoing fax has a specific status dictated by the stage in processing.



**Note:** Messages delivered or received through an email gateway use the same icons to indicate their status. However, not all status are applied.

Your default tree view might not display incoming faxes with a status of Processed or Rejected.

Status begun with the letters LCR refer to least cost routing and load balancing, a means of sending faxes over the Internet to reduce long distance charges. Your network may or may not be using least cost routing.

It may not be necessary to add that selecting a fax status with the cursor displays the faxes with that status in the fax list.

Faxes can be sent to one or several recipients. When sent to two or more recipients, they are called broadcast faxes.

An icon in the shape of a page identifies both kinds of transmissions. However, the icon identifying a broadcast fax has multiple pages and is turquoise.

A fax being transmitted to a single recipient has the status *Sending*, and if it is successful, has a green check-mark beside it and its status is *Sent*.

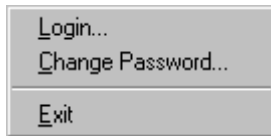
## Chapter 3 Introducing the Manager

A broadcast being transmitted has the status `Processing`, and if it is successful, receives a green check-mark beside its icon and its status is changed to `Processed`.

Info	Last Name	First Name	Submitted/Received Time	Completed/Acknowledged Time	Company	Subject	Status
			14:46:31 28/05/2004	14:46:31 28/05/2004	Interstar Inc.	test	Sent
			14:47:08 28/05/2004	14:47:08 28/05/2004	Interstar Inc.	test 2	Sent
			14:47:49 28/05/2004	14:47:49 28/05/2004	Interstar Inc.	test 3	Sent
			14:49:07 28/05/2004	14:49:07 28/05/2004	Interstar Inc.	test 4	Sent
			14:49:55 28/05/2004	14:49:56 28/05/2004		broadcast	Processed
			14:51:33 28/05/2004	14:51:34 28/05/2004		broadcast 2	Processed
			14:53:03 28/05/2004	14:53:03 28/05/2004		brodcast 3	Processed
			14:53:42 28/05/2004	14:53:42 28/05/2004		broadcast 4	Processed
			14:54:24 28/05/2004	14:54:25 28/05/2004		broadcast 5	Processed

A white arrow points from the text "Broadcast Faxes" to the row containing "broadcast" and "broadcast 2" through "broadcast 5".

### The File Menu



Login allows you to log on to LightningFAX and to select any valid fax server in the network.

Change Password lets you change your LightningFAX user password, if your administrator assigned one. A window prompts you for your current password, the new password, and a confirmation of the new password.

Exit closes the manager.

### The Edit Menu

Properties displays a window with a series of tabs in which you can specify the following information.

**Information** Specifies sender information, that is, information such as your first and last names, a salutation, your company name, etc.

This information is automatically passed to the corresponding variables in the fax cover sheets that introduce your faxes.

**Routing** Forwards faxes automatically to another user in the LightningFAX network.

If your administrator has given you the rights, you can also specify a Direct Inward Dialing (DID) number and enter a printer ID number.

**User Settings** Specifies your archiving, printing, deleting, and notification

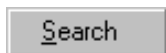
Frequency	Specifies how frequently LightningFAX is to poll the server to learn if you have new faxes and the rate at which you are notified of events like fax receipt or transmission failure.
Fax Settings	Specifies your Call Station Identification (CSID), a callback number, number of retries, suffix and prefix, and a fax header.
Preferences	<p>Alters the tree view presented by the manager. The default restricted view of the LightningFAX network has already been illustrated. The unrestricted view is detailed later in this chapter.</p> <p>Users with Super User status can select either view, and specify whether other users should be displayed in the tree view.</p>
E-Mail	<p>Specifies your preferences for notification if you use your email program to send faxes.</p> <p>One of the LightningFAX gateways must be installed in your network if specifications in this tab are to be functional. This tab does not appear if no gateway is installed.</p>

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The `Properties` menu selection is available only when your user ID is highlighted in the network view.

**Note:** The administrator can specify all of the above information for you. However, you can override most of these settings using the `Properties` menu selection. However, the administrator can set your archiving options and your printer ID; and enter your CSID, callback number, number of retries, fax header, suffix, and prefix; and prevent you from changing them.

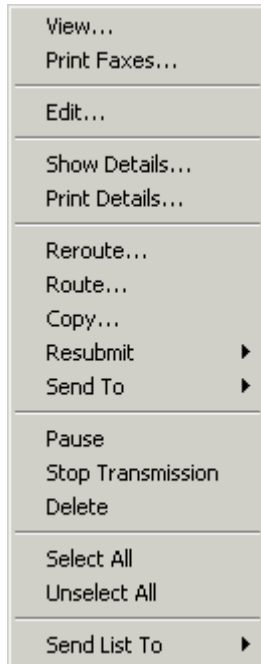
### The View Menu



`Search` looks for a text string in all the faxes listed, including broadcasts. You can filter the search by current and archived faxes, specify that only faxes of a certain status be searched, and specify a date or period of time.

If you select `Search` in a broadcast list, the search is only executed on the faxes within the broadcast itself.

### The Fax Menu



View opens the highlighted fax in the viewer.

Print Faxes print the highlighted fax.

Edit lets you edit or enter information about the recipient of the highlighted fax.

Show Details displays detailed information the highlighted fax.

Print Details prints the same information.

Reroute is only enabled for administrators. It takes a received fax and re-runs it automatically through the routing process.

Route redirects highlighted faxes to a single recipient in the network.

Copy copies the highlighted fax to one or more recipients in the network.

Resubmit resubmits failed, paused, or previously sent faxes. You can resubmit the fax immediately by choosing Resubmit ➔ Now or schedule transmission for a later time by choosing Resubmit ➔ Later.

Send To ➔ Mail Recipient launches your e-mail program. The highlighted fax is included as an attachment. Send To ➔ SendFAX launches SendFAX with the highlighting fax already inserted.

Pause suspends transmission of the highlighted fax. It can be applied to any fax whose status is Ready to Send, Waiting for Retry or Postponed. Resubmit resumes transmission.

Stop Transmission terminates transmission of the highlighted fax, setting the status to Failed. It can be applied to any fax whose status is Sending. LightningFAX finishes the page in transmission before stopping transmission. You can use the Resubmit menu selection to resubmit a failed fax.

Delete removes all highlighted faxes. If you or your administrator have enabled archiving, deleted faxes are moved from the current list to the archive.

Select All highlights all faxes.

Unselect All clears all highlighting of selected faxes.

Send List To sends the fax list to a file or to a printer. The list is ordered in columns, the labels are used as column headings.

**The Tools Menu**



SendFAX launches SendFAX.

PhoneBook launches the phone book. See Chapter 8 Introducing Phone Books for details.

Cover Sheet Editor launches the cover sheet editor. See Chapter 10 Introducing the Cover Sheet Editor for details.

Viewer launches the viewer. See Chapter 9 Introducing the Viewer for details.

Profile Management opens the Profile Management window. See Chapter 11 Introducing Profiles for details.

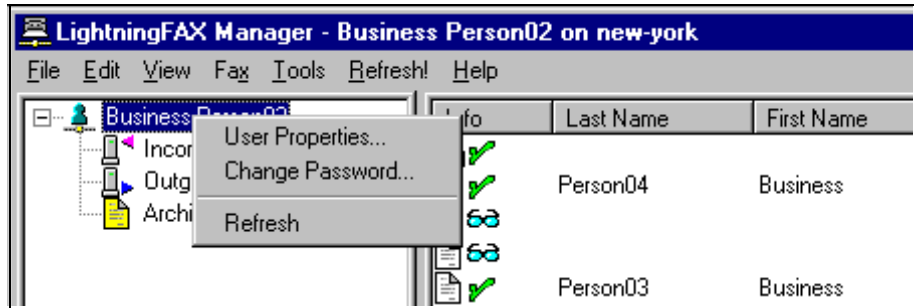
**The Refresh Menu**

Refresh updates the LightningFAX window, instructing LightningFAX to search the server for any new faxes. The time shown on the status bar is also updated.

**LightningFAX Manager Pop-up Menus**

Pop-up menus, displayed when you select your user ID, a fax, or a broadcast fax in the fax list view offer most of the menu selections described above. Only the additional selections these pop-up menus make available are described here.

**User ID Pop-Up Menu:**The following menu becomes available when you right-click after highlighting your user ID.



**Fax Pop-Up Menu:**The following menu becomes available when you right-click in the fax list view after highlighting a fax sent to a single recipient.

Info	Last Name	First Name	Submitted/Received Time ▲	Completed/Acknowledged Time	Company	Subject	Status
			14:46:31 28/05/2004	14:46:31 28/05/2004	Interstar Inc.	test	Sent
			28/05/2004	14:47:08 28/05/2004	Interstar Inc.	test 2	Sent
			28/05/2004	14:47:49 28/05/2004	Interstar Inc.	test 3	Sent
			28/05/2004	14:49:07 28/05/2004	Interstar Inc.	test 4	Sent
			28/05/2004	14:49:56 28/05/2004		broadcast	Processed
			28/05/2004	14:51:34 28/05/2004		broadcast 2	Processed
			28/05/2004	14:53:03 28/05/2004		brodcast 3	Processed
			28/05/2004	14:53:42 28/05/2004		broadcast 4	Processed
			28/05/2004	14:54:25 28/05/2004		broadcast 5	Processed
	Smith		28/05/2004	15:19:36 28/05/2004			Failed
			28/05/2004	15:36:45 28/05/2004		Memo	Processed
			28/05/2004			Memo	New
			28/05/2004			memo 2	New
			28/05/2004	15:37:45 28/05/2004		memo 2	Sent

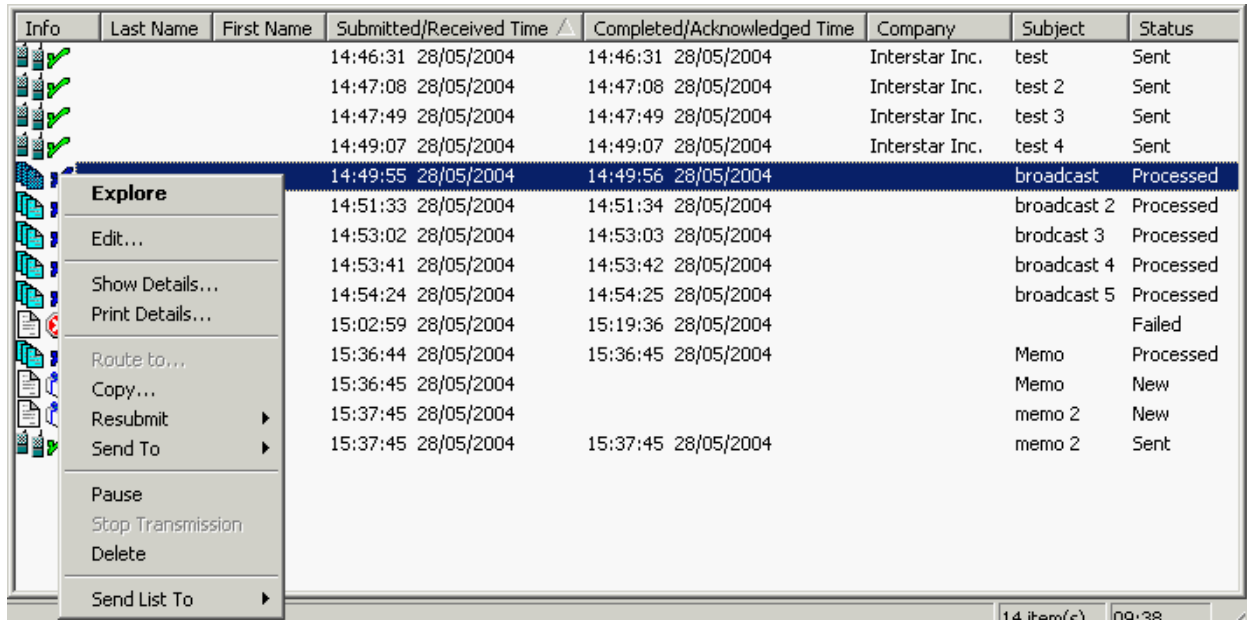
Send List To displays a sub-menu through which you send the list to a file or a printer.

If you select File, you can enter a file name or click Browse to navigate to an existing file that you intend to overwrite. A check box allows you to include the labels of the fax view list as column headings. A second check box specifies that all faxes included in a broadcast be written to the file. Although available when any fax is highlighted, this check box is functional only when a broadcast fax is highlighted.

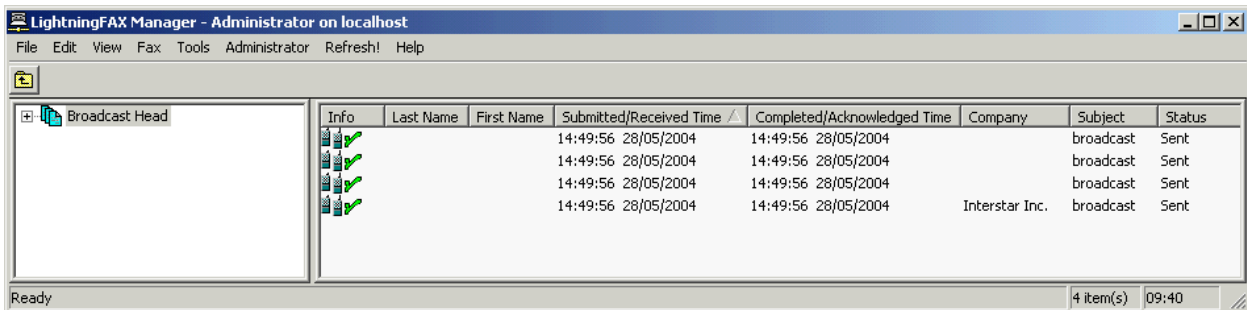
Two radio buttons allow you to include all faxes in the list or only selected ones.

If you select Printer, you send the fax list to the printer. One, several, or all faxes can be selected and you can select the printer if several are available.

**Broadcast Fax Pop-Up Menu:** The following pop-up menu becomes available when you right-click in the fax list view after highlighting a broadcast fax.

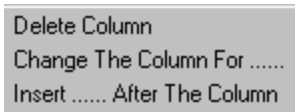


Explore modifies both the network and the fax list view to display the faxes in the broadcast.



You select any faxes included in the broadcast as you would any fax listed in the fax list view. The same menu selections and operations are available.

Click to return to the default view.



**Column-Headings Pop-up Menu** When you place the cursor over the column headings and right-click, the Column-Headings pop-up menu is displayed. This menu allows you:

- to delete the column heading below the cursor
- to select a different column heading to replace the column heading below the cursor
- to insert a new column heading immediately after the column heading below the cursor

Whether you choose Change The Column For or Insert After The Column, the following submenu selections are available.

### Chapter 3 Introducing the Manager

<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>Status</li> <li>Error Code</li> <li>Resource</li> <li>Message ID</li> </ul>	<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>Submitted/Received Time</li> <li>Completed/Acknowledged Time</li> <li>Duration Time</li> <li>Scheduled Time/Routed Time</li> <li>Archived Time</li> <li>Number of Files</li> <li>Pages Sent</li> <li>Pages Submitted/Received</li> </ul>
<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>Remote CSID</li> <li>Destination</li> <li>Priority</li> <li>Speed</li> <li>From</li> </ul>	<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>Last Name</li> <li>First Name</li> <li>Company</li> <li>Subject</li> <li>Application Name</li> <li>Document Name</li> </ul>
<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>User ID</li> <li>API Tag</li> <li>API Tag 2</li> <li>Sender Billing Code</li> <li>Sender Sub Billing Code</li> <li>Recipient Billing Code</li> <li>Recipient Sub Billing Code</li> </ul>	<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>LCR Information</li> </ul>
<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>Signal Strength</li> <li>Signal Quality</li> <li>Line Noise</li> <li>Channel Number</li> </ul>	<ul style="list-style-type: none"> <li>Item</li> <li>Time And Size</li> <li>Transmission</li> <li>Destination</li> <li>Miscellaneous</li> <li>LCR</li> <li>Line</li> <li>Routing</li> </ul>	<ul style="list-style-type: none"> <li>String</li> <li>Method</li> </ul>

Only summarized here, the definitions of the values these column headings represent can be found in Chapter 4 Fax Details Information.

### Edit Fax Information

- 1 In the manager, select the fax in the fax list.
- 2 Choose Fax ➔ Edit or right-click and choose Edit.
- 3 You can enter any combination of First Name, Last Name, Company, and Subject. The entries appear with the fax in the fax list.
- 4 Click Save.

### View Fax Details

- 1 In the manager, select a fax in the fax list.
- 2 Choose Fax ➔ Show Details or right-click and choose Show Details.
- 3 Select the General tab to display Sender, Item, and Time and Size Information.  
To display Transmission Information, select the Specific tab.  
To display Least Cost Routing and Miscellaneous Information, select the Other tab.  
Click View if you wish to view the current fax in the viewer.  
Click Print Details to print the details.
- 4 Click Close.

### Send Fax List Information to a File

The destination file can be a Microsoft® Excel comma separated file, (.csv) or a text file (.txt). Only the information pertaining to the columns displayed in the fax list is sent to the file.

- 1 In the manager, select one or more faxes in the fax list.
- 2 Choose Fax ➔ Send List to ➔ File or right-click and choose Send List to ➔ File.
- 3 Type a name, applying either the .csv or the .txt extension or use Browse to navigate to an existing file of either format to be overwritten.  
Under Range, select All Items if the information for all faxes is to be sent to the file. Select Selected Items if only the faxes you selected in step 2 are to be considered.  
Under Options, select Add Column title if you wish to include the fax list column headings.  
To include each component fax of a broadcast fax, select Add Broadcast Items.
- 4 Click OK.

### Send Fax List Information to a Printer

Only the information pertaining to the columns displayed in the fax list is sent to the file.

- 1 In the manager, select one or more faxes in the fax list.
- 2 Choose Fax ➤ Send List to ➤ Printer or right-click and choose Send List to ➤ Printer.
- 3 Enter the printer information required.
- 4 Click OK.

### Add a Column Heading

- 1 In the manager, position the cursor over a column heading. The new column heading will appear to the immediate right.
- 2 Right-click and choose Insert . . . after the column.
- 3 Select the new column heading from the sub-menu. For example, choosing Item ➤ Status inserts the column heading in the fax list.

### Replace a Column Heading

- 1 In the manager, position the cursor over the column heading you wish to replace
- 2 Right-click and choose Change the column for.
- 3 Select the new column heading from the sub-menu.

### Delete a Column Heading

- 1 In the manager, position the cursor over the column heading you wish to delete
- 2 Right-click and choose Delete the Column.

## Managing Faxes

Operations include viewing and printing faxes, transmitting faxes from the manager, deleting and —for administrators only— archiving faxes, and searching within the fax list.

### View a Fax

- 1 In LightningFAX Manager, select the fax in the fax list.
- 2 Choose Fax ➤ View or right-click and choose View. LightningFAX Viewer is launched, displaying the first page of the fax.

### Print a Fax

- 1 In LightningFAX Manager, select the fax in the fax list.
- 2 Choose Fax ➤ Print Faxes.
- 3 Select the printer options required.
- 4 Click OK.

## Transmitting from LightningFAX Manager

In addition to several means of sending a fax, you can pause or stop fax transmission.

### Copy a Fax

- 1 In the manager, select the fax in the fax list.
- 2 Choose **Fax** ➔ **Copy** or right-click and choose **Copy**.  
Use **Group** to select the group the recipient belongs to. Select **All Groups** to make all members of all groups available for selection. Select **Ungrouped Users** to make recipients who do not belong to any group available.
- 3 Under **User List**, select a recipient.
- 4 Click **Add**. Click **Add All** to copy to all recipients in **User List**.  
To correct any errors, select a recipient under **Recipient List** and use **Remove** or **Remove All**.
- 5 Click **Copy**.

### Pause a Fax

Pause can be applied only to faxes with a status of **Ready to Send**.

- 1 In the manager, select a fax with a status of **Ready to Send**.
- 2 Choose **Fax** ➔ **Pause** or right-click and choose **Pause**.
- 3 Click **Yes**.

### Reroute a Fax

**Reroute** is only enabled for administrators. It takes a received fax and re-runs it automatically through the routing process.

- 1 In the manager, select a received fax in the fax list.
- 2 Choose **Fax** ➔ **Reroute** or right-click and choose **Reroute**.
- 3 Click **Yes** when prompted.

### Route Faxes Manually

Routed faxes are removed from the fax list.

- 1 In the manager, select the fax in the fax list.
- 2 Choose **Fax** ➔ **Route** or right-click and choose **Route**.  
Use **Select a group** to select the group the recipient resides in. Select **All Groups** to make all members of all groups available for selection. Select **Ungrouped Users** to make recipients who do not belong to any group available.  
Use **Select a user** to select the recipient. **Administrator** is offered by default.
- 3 Click **Route**.

### Resubmit a Fax

Resubmit can be applied only to failed, paused, or successfully transmitted faxes. If you wish to resubmit a broadcast fax, you must select one of its component faxes.

- 1 In the manager, select a fax with a status of Failed, Paused, or Sent in the fax list.
- 2 Choose Fax ➔ Resubmit or right-click and choose Resubmit.
- 3 Click Now.  
You can change the prefix, the long distance code, the area code, the fax number, and the suffix if necessary.
- 4 Click Resubmit.

### Resubmit a Fax at a Later Time

Resubmit can be applied only to failed, paused, or successfully transmitted faxes. If you wish to resubmit a broadcast fax, you must select one of its component faxes.

- 1 In the manager, select the fax with a status of Failed, Paused, or Sent in the fax list.
- 2 Choose Fax ➔ Resubmit or right-click and choose Resubmit.
- 3 Click Later.  
Use Date to specify a date. Use Time to specify a time.  
Click Phone if it is necessary to change the prefix, the long distance code, the area code, the fax number, or the suffix.
- 4 Click Resubmit.

### Send a Fax as Email

- 1 In the manager, select one or more faxes in the fax list.
- 2 Choose Fax ➔ Send to ➔ Mail Recipient or right-click and choose Send To ➔ Mail Recipient.  
Your default e-mail program is launched with the selected faxes included as attachments.
- 3 Address and send the e-mail.

### Fax a Fax

- 1 In the manager, select one or more faxes in the fax list.
- 2 Choose Fax ➔ Send to ➔ SendFAX or right-click and choose Send To ➔ SendFAX.  
SendFAX is launched with the selected faxes inserted.
- 3 Address and send the fax.

### Stop Fax Transmission

Stop Transmission can be applied only to faxes with a status of Sending.

- 1 In the manager, select a fax with a status of Sending.
- 2 Choose Fax ➔ Stop Transmission or right-click and choose Stop Transmission.
- 3 Click Yes. The status is updated to Failed.

### Delete a Fax

Faxes with a status of Ready to Send, Sending, LCR Ready, LCR Sending, and LCR Waiting for Retry cannot be deleted.

- 1 In the manager, select one or more faxes in the fax list.
- 2 Choose Fax ➔ Delete or right-click and choose Delete.  
 If archiving options and archiving notification are enabled, a message confirms that the deleted files will be archived.  
 If archiving options alone are enabled, a message confirms deletion.  
 If archiving options are not enabled, a message warns that the faxes will be deleted without being archived.
- 3 Confirm or cancel deletion.

### Search the Fax List

You can specify a variety of means and search criteria.

#### Search Fax List by Text

Text searches are applied to the values displayed under the First Name, Last Name, Company, and Subject column headings.

- 1 In the manager, choose View ➔ Search. The fax list is modified to allow you to enter search criteria.  
 If necessary, use Filter to search current faxes, archived faxes or both.  
 If necessary, use Status to search only faxes of a particular status.
- 2 Type the search string in the Search Text field. The search string can include any values you expect to find in the First Name, Last Name, Company, and Subject columns.
- 3 Click Search.  
 The fax list will display all the faxes that met your search criteria.
- 4 Perform the operation you wish.
- 5 Click Close to restore the fax list view.

### Search Fax List by Fax Status

- 1 In the manager, choose **View** ➔ **Search**. The fax list is modified to allow you to enter search criteria.  
If you wish, use **Filter** to search current faxes, archived faxes or both.
- 2 Use **Status** to select a particular fax status.
- 3 Click **Search**.  
The fax list will display all the faxes that met your search criteria.
- 4 Perform the operation you wish.
- 5 Click **Close** to restore the fax list view.

### Search Fax List by Date

- 1 In the manager, choose **View** ➔ **Search**. The fax list is modified to allow you to enter search criteria.  
If you wish, use **Filter** to search current faxes, archived faxes or both.  
If you wish, use **Status** to search only faxes of a particular status.
- 2 Use **Date** to select **Today**, **From 1 week**, or **From 1 month**.
- 3 Click **Search**.  
The fax list will display all the faxes that met your search criteria.
- 4 Perform the operation you wish.
- 5 Click **Close** to restore the fax list view.

### Search Fax List by Date - Advanced

- 1 In the manager, choose **View** ➔ **Search**. The fax list is modified to allow you to enter search criteria.
- 2 If you wish, use **Filter** to search current faxes, archived faxes or both.  
Use **Status** to search only faxes of a particular status.  
Use **Date** to select **Custom**.  
Use **Start Date** to select the starting date of your search.  
Use **End Date** to select the ending date of your search.
- 3 Click **Search**.  
The fax list will display all the faxes that met your search criteria.
- 4 Perform the operation you wish.
- 5 Click **Close** to restore the fax list view.

## 4

## Fax Details Information

The `Show Details` menu selection of the manager displays detailed information about a fax selected from the fax list. This information can be viewed, but not modified.

Much of the information is common to all types of faxes, however, in a few cases, the fields displayed for outgoing, broadcast, and incoming faxes differ.

### General Fax Details

#### Incoming Faxes

##### Sender Information

Field	Description
Last Name	The last name you specify through the Edit menu selection of the manager.
First Name	The first name you specify through the Edit menu selection of the manager.
Company	The company you specify through the Edit menu selection of the manager.
Subject	The subject you specify through the Edit menu selection of the manager.

### Item Information

Field	Description
Status	The present status of the fax.
Error Code	A failed transmission generates an error code. Click <a href="#">More</a> for details. The value zero indicates that no error occurred.
Item Type	indicates if the item is a broadcast head, archive or a single item.
Media Type	indicates the media type, the value is Fax.
Resource	indicates the resource used to transmit the fax.
Message ID	A unique ID number assigned by LightningFAX for the selected fax. This ID number can be used to trace the fax at a later time.

### Time and Size Information

Received Time	<p>The time and date a document was received by the Default Recipient before being routed to the final destination by an administrator or Super User.</p> <p>In an environment where DID is implemented, the time and date indicate when a document was received by the DID number of the user.</p>
Ack. Time	Acknowledged Time indicates the time an item was viewed by the recipient.
Duration Time	The actual transmission time indicated by the fax board.
Routed Time	The time and date the fax was routed to the final destination is indicated as the routed time.
Number of Files	If you receive a multi-page document, each page in your document is a file. A 10-page document will have 10 files. However, if you receive in multi-page TIFF format all the pages of your fax document are embedded in a single file.
Pages Received	The number of pages received.

## Outgoing Faxes

### Destination Information

Field	Description
Last Name	The last name you specify through the Edit menu selection of the manager.
First Name	The first name you specify through the Edit menu selection of the manager.
Company	The company you specify through the Edit menu selection of the manager.
Subject	The subject you specify through the Edit menu selection of the manager.
Application Name	The name of the application used to send the fax.
Document Name	The filename of the document sent.

### Item Information

Field	Description
Status	The present status of the fax.
Error Code	A failed transmission generates an error code. Click <b>More</b> for details. The value zero indicates that no error occurred.
Item Type	indicates if the item is a broadcast head, archive or a single item.
Media Type	indicates the media type, the value is Fax.
Resource	indicates the resource used to transmit the fax.
Message ID	A unique ID number assigned by LightningFAX for the selected fax. This ID number can be used to trace the fax at a later time.
Has Cover Sheet	The value Yes or No appears.

### Time and Size Information

Field	Description
Submitted Time	The time and date a document was initially submitted for transmission.
Completed Time	indicates the time when the LightningFAX driver actually completes the transmission.
Duration Time	The actual transmission time indicated by the fax board.

## Chapter 4 Fax Details Information

Scheduled Time	LightningFAX can be configured to send a fax within a specific period of time. For example, you may want to save on long distance charges by sending your faxes only during the discounted hours. LightningFAX indicates the beginning of that time period in this field.
Number of Files	If you send a multi-page document, each page in your document is a file. A 10-page document will have 10 files. However, if you send in multi-page TIFF format all the pages of your fax document are embedded in a single file.  The number of files for Outgoing Head Broadcast faxes indicates the total number of fax recipients.
Page Submitted	The number of pages submitted for transmission.
Pages Sent	The number of pages transmitted.
Archived Time	The time and date a document was stored in the archive database.

### Specific Information

#### Transmission Information

Incoming and outgoing faxes display the following fields as Transmission Information.

Field	Description
Local CSID	Your Call Station ID (outgoing only).
Callback Number	Your callback number for outgoing faxes; the sender's call back number for incoming faxes (outgoing only).
Remote CSID	The sender's CSID detected on an incoming fax.
Fax Number	indicates the destination fax number (outgoing only).
Number of Retries Left	indicates the number or retries left before SendFAX stops attempting to transmit and sets the fax status to Failed (outgoing only).
Priority	LightningFAX provides a 1-10 priority level to users. Level 1 is the highest priority level and can only be used by users granted this privilege by the administrator. The default priority level is three.
Speed	indicates the speed of transmission in baud.
Channel Number	indicates the channel of the fax board used to transmit the fax.

Field	Description
Routing String	indicates the user ID of the person who routed the fax to you or the routing information used for automatic routing using DID, DTMF, DNS, etc. (incoming only)
Routing Method	indicates whether routing was automatic or manual (incoming only.)

### Other Details

Other Details includes information on Least Cost Routing, which applies only to outgoing faxes, and miscellaneous information. The fields are identical for both incoming and outgoing faxes..

Field	Description
Message ID	This is a unique identifier assigned by LightningFAX for the selected fax item. This ID number can be used to trace the fax at a later time.
Resource	indicates the resource used to transmit the fax.
Server Address	indicates the IP Address of the Fax Server that transmits the selected fax item. In a network making use of least cost routing, this may not be the IP address of the fax server you logged in to.
Server Port	indicates the port number of the server that transmits the selected fax item.
User ID	indicates your user ID.
API Tag	indicates the API tag number associated with the fax, which could be used by a system integrator for any purpose.
API Tag 2	offers an additional API field receiving a number as large as 10 digits.

Incoming or outgoing faxes display the following fields in two categories: Sender or Recipient.

Billing Code	indicates the billing code assigned by the fax sender.
Sub Billing Code	indicates the sub billing code assigned by the fax sender.



## 5

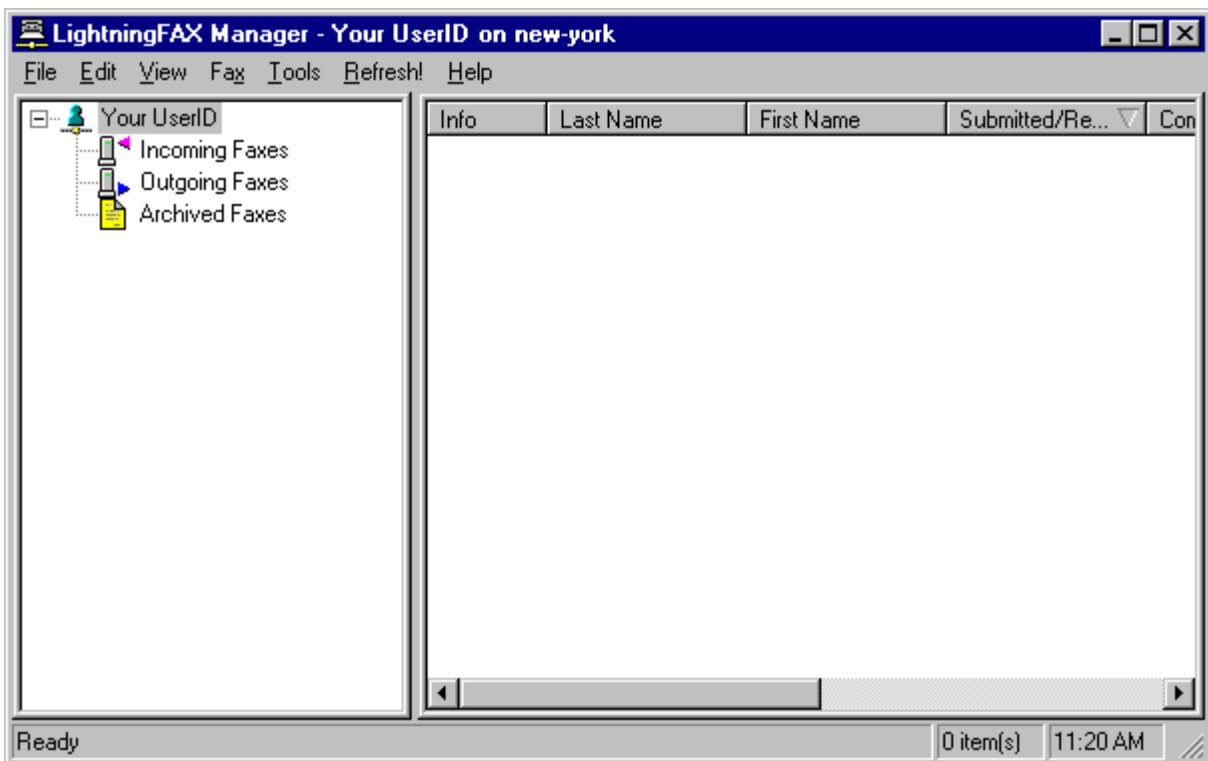
## Managing User Properties

This chapter describes how you can modify your user properties, whether to select a printer or to change transmission settings or to change your personal and company information.

Like your faxes, your user properties are managed through the manager.

### Launching the Manager

Choose Start ➔ Programs ➔ LightningFAX ➔ LightningFAX Manager.



Information	Routing	User Settings	Frequency
Personal Name	Fax Forwarding	Archiving Options	Refresh Rate
Company	Printer ID	Printing Options	Manual Refresh
Contact Numbers		Deleting Options	Notification Rate
		Notification Options	
Fax Settings	Preference	E-Mail	
Number of Retries	Default Tree View	Notification	
CSID, Callback Number, Prefix, Suffix, and Fax Header	Archive Confirmation	E-mail Address	
		LightningFAX Gateway	

**Access User Properties**

- ❑ Select your user ID in the manager, right-click choose User Properties.

## User and Group Properties

Individual users and groups share many properties. When specified at the group level, a property's value is applied to the same property at the user level if and only if no value is specified at the user level.

For example, if company information is specified at the group level and you belong to that group and have no company information specified in your user properties, your company information is the information specified for the group.

You can change that information by accessing your user properties and entering company information. In other words, user properties override group properties.

Administrators can prevent you from changing some properties by applying an Administrator Lock. When they do, you will not be able to make entries to the field in question.

### Change your Password

- 1 In the manager, choose **File** ➔ **Change Password**.
- 2 Enter your current password.
- 3 Enter and confirm your new password.
- 4 Click **OK**.

### Specify Personal Information

- 1 In the manager, select your user ID, right-click and choose **User Properties**.
- 2 Select the **Information** tab.
- 3 Type a **Salutation**, **First Name**, **Last Name** and **Job Title**, if applicable.

**First Name** and **Last Name** should not be confused with the user ID. By default, users are identified in LightningFAX manager by user ID. First and Last names appear after the user ID only if they are added here.

- 4 Click **OK**.

**Note:** Personal information can also be specified in profile. If a profile is used, the personal information entered through user properties is overridden.

### Specify Company Information

- 1 In the manager, select your user ID, right-click and choose **User Properties**.
- 2 Select the **Information** tab.
- 3 Type the name and address information for the company in the appropriate fields.
- 4 Type your contact numbers and e-mail address.
- 5 Click **OK**.

**Note:** Company information can also be specified in profile. If a profile is used, the company information entered through user properties is overridden.

### Specify Fax Settings

Administrators can prevent you from changing these settings by applying an Administrator Lock.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Fax Settings tab.
- 3 Click Use these settings.

Type a Call Station ID (CSID), if desired.

Type a Callback Number, if desired.

Type a Prefix, if necessary. For example, some fax machines require that the number 9 be dialed to acquire an outgoing line. If that is the case, the entry 9, would be made here.

A comma can be used to specify a pause of one second. Whether such pauses are necessary is determined by the requirements of the telephone company or the PBX.

Type a Suffix, if necessary. For example, some telephone or PBX networks require the user to enter a code immediately after dialing a long distance number. If that is the case, the entry is made here.

If a fax header is to be included, click Edit Fax Header and define the header.

- 4 Click OK.

Note: If specified here, a CSID and a Callback Number override the CSID and callback Fax Number specified at the resource level.

### Specify Number of Retries

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Fax Settings tab.
- 3 Specify a Number of Retries. The default is three.
- 4 Click OK.

### Specify Notification Options

Notification takes the form of the appropriate message displayed in a pop-up window. Notification messages are displayed when the manager is running and immediately upon launching the manager.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the User Settings tab.
- 3 Under Notifying Options, select Notify Success to notify after successful outgoing transmission.

To notify after outgoing transmission failure, select Notify Failed.

To notify after incoming fax receipt, select Notify New.

To notify after incoming fax failure, select Notify New Failed.

- 4 Click OK.

### Specify Email Notification Options

Email options are specified when an email gateway is installed. These options redirect incoming faxes from the Default Recipient in the manager to the user's email inbox and specify any desired notification options.

It should not be necessary to underline that e-mail options are meaningless if no gateway is installed and, of course, you must know which email gateway is being used.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the E-mail tab.
- 3 Select `Notify Success` to notify the user after successful outgoing transmission.  
To notify after failed outgoing transmission, select `Notify Fail`.  
To notify after new incoming transmission, select `Notify New`.
- 4 Type the E-mail Address.  
Note: If the gateway for R/3 is installed, the entry to E-Mail Address is your R/3 user's personal fax number.
- 5 Select the gateway.
- 6 Click OK.

### Change Notification Rate

Notification rate represents the interval LightningFAX waits before polling for new notification messages. Notification rate cannot be changed from the default if Notifying Options have not been specified.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Frequency tab.
- 3 Under Notification Rate, position the slider nearer to High or to Low.
- 4 Click OK.

### Specify Archiving Options

Administrators can prevent you from changing archiving options by applying an Administrator Lock.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the User Settings tab.
- 3 Under Archiving Options, select `Archive Details` to archive fax details only.  
To archive both messages and details, select `Archive Messages and Details`.
- 4 Click OK.

### Specify Deleting Options

If archiving is enabled, deletion removes faxes from only the manager; the faxes remain in the archive. If archiving is not enabled, deletion permanently removes the fax message. An administrator must authorize the deletion of archived items.

An administrator can prevent you from changing deleting options by applying an Administrator Lock.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the User Settings tab.
- 3 Under Deleting Options, select Delete after Success to automatically delete fax messages after successful outgoing transmission.

To automatically delete fax messages after outgoing transmission failure, select Delete after Fail.

To automatically delete incoming fax messages after printing, select Delete after Printing New.

To automatically delete incoming fax messages after failure, select Delete New Failed.

- 4 Click OK.

### Archiving Confirmation on Deletion

If archiving options are selected and an administrator has instructed LightningFAX to confirm archiving on deletion, LightningFAX informs you that the fax you are deleting will be archived.

If archiving options are not selected and confirmation is set, LightningFAX informs you that the fax you are deleting will not be archived. You can cancel deletion.

If archiving options are selected and confirmation is not set, LightningFAX asks you to confirm deletion.

To change whether confirmation messages are displayed or not displayed:

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Preference tab.
- 3 Select or deselect Confirm whether items will be archived when deleted.
- 4 Click OK.

### Select a Printer

An administrator must first configure a printer and tell you the printer's ID number before you can select it. Administrators can prevent you from changing this setting by applying an Administrator Lock.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Routing tab.
- 3 Under Printer ID, type the Printer ID.
- 4 Click OK.

### Specify Printing Options

An administrator can prevent you from changing this setting by applying an Administrator Lock.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the User Settings tab.
- 3 Under Printing Options, select Print Details on Success to automatically print fax details after successful outgoing transmission.  
To automatically print fax details after outgoing transmission failure, select Print Details on Failed.  
To automatically print fax details on incoming fax receipt, select Print Details on New.  
To automatically print fax details when an incoming fax fails, select Print Details on New Failed.  
To automatically print the fax after successful outgoing transmission, select Print Message on Success.  
To automatically print the fax after outgoing transmission failure, select Print Message on Failed.  
To automatically print the fax on incoming fax receipt, select Print Message on New.  
To automatically print the fax when an incoming fax fails, select Print Message on New failed.
- 4 Click OK.

### Specify Fax Forwarding

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Routing tab.
- 3 Under Forwarding Faxes, select Forward to.
- 4 Use the Group list to display only members of a given group or to display all ungrouped users.

## Chapter 5 Managing User Properties

- 5 Select a LightningFAX user as the recipient.
- 6 Click **Transfer** if faxes are to be transferred. Click **Duplicate** if faxes are to be copied.
- 7 Click **OK**.

### Change the Refresh Rate

Refresh rate is the frequency at which the manager updates the display of fax messages.

- 1 In the manager, select your user ID, right-click and choose **User Properties**.
- 2 Select the **Frequency** tab.
- 3 Position the slider under **Refresh Rate** nearer to **High** or to **Low**.
- 4 Click **OK**.

### Select Manual Refresh

The refresh rate slider is not available when manual refresh is selected.

- 1 In the manager, select your user ID, right-click and choose **User Properties**.
- 2 Click the **Frequency** tab.
- 3 Under **Refresh Rate**, select **Manual Refresh**.
- 4 Click **OK**.

### Specify Default Resource for Outgoing Faxes

An administrator can prevent you from selecting a default resource.

- 1 In the manager, select your user ID, right-click and choose **User Properties**.
- 2 Select the **Fax Settings** tab.
- 3 Under **Default Resource**, select a resource. Only the resources you can access are available.
- 4 Click **OK**.

### Specify Least Cost Routing (LCR) for Outgoing Faxes

Least cost routing (LCR) and load balancing must first be configured by an administrator. An administrator can prevent you from selecting LCR.

- 1 In the manager, select your user ID, right-click and choose **User Properties**.
- 2 Select the **Fax Settings** tab.
- 3 Under **Default Resource**, select **Use LCR**. **Default Resource** is dimmed. Your outgoing faxes will be sent by the resource configured for LCR.
- 4 Click **OK**.

### Advanced User Properties

Advanced properties govern the tree view and you can modify these properties only if an administrator has given you the right to. If you can see only your user ID and your fax folders in the tree view in LightningFAX Manager, you have a restricted view.

### Change the Tree View

Administrators and Super Users can toggle between a restricted and an unrestricted tree view. However, an administrator can prevent other users from changing this setting.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Preference tab.
- 3 Deselect Show me a Restricted View.
- 4 Click OK.

### Hide Other Users

An administrator can prevent you from changing this setting.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Preference tab.
- 3 Select I do not want to see other users.
- 4 Click OK.

### Show User ID and Full Name

An administrator can prevent you from changing this setting.

- 1 In the manager, select your user ID, right-click and choose User Properties.
- 2 Select the Preference tab.
- 3 Select Show me the full name and User ID to display those items. Select Show me only the User ID to display only that.
- 4 Click OK.



## 6

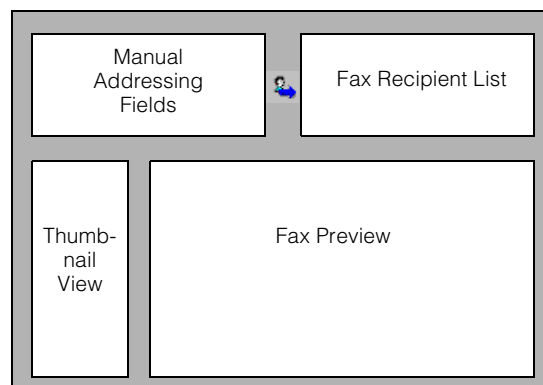
## Introducing SendFAX

This chapter details SendFAX, the principal faxing interface. Operations described include:

- addressing a transmission
- adding a cover sheet
- changing transmission settings
- altering sender and recipient information
- inserting, modifying, and annotating a document
- selecting or generating a profile
- selecting a phone book
- modifying the interface information

### Launching SendFAX

- Choose Start ➔ Programs ➔ LightningFAX ➔ SendFAX.
- In the manager, choose Tools ➔ SendFAX.



**The Default SendFAX Interface**

Menus and toolbars aside, the default interface after initial installation is divided into four main areas or panes.

The **Manual Addressing Fields** — To, Company, Destination, and Subject — allow you to type recipient information directly.

Usually, To receives the name. Destination, which is the only mandatory field of the four, receives either the fax number or the email address.

The `Fax Recipient List` displays the individuals and groups who are to receive the transmission, either selected from a phone book or typed directly into the manual addressing fields.

The `Thumbnail View` displays successively a reduced image of each page of the fax. The default reduction is 13 per cent of the original. A scrollbar enables you to view any page. You can also widen the `Thumbnail View` itself. Selecting a page in the `Thumbnail View` displays that page in the `Fax Preview`. The `Thumbnail View` also makes it possible to reorder and delete pages from the fax you are composing.

The `Fax Preview` displays a single page of the fax at a time. The default size is 100 per cent of the original. It is here that you add annotations to a fax before transmission. Annotations can include text; highlight; bitmap images; lines and rectangles.

SendFAX also provides the means to select a profile, a cover sheet, to display a contact list of potential fax recipients from one of several phone available to you. You can alter transmissions settings, modify your sender and recipient information, and change the interface to suit your requirements.

### The File Menu

`New` cancels the current fax, clearing the fax recipient list and begins a new one.

`Insert` lets you insert a file into your fax.

`Save As` lets you save your fax in a local or network directory.

`Save Profile` creates a profile based on the current fax, user, cover sheet, and fax header settings. See Chapter 11 Introducing Profiles for the information about creating and using profiles.

`Print` lets you send the fax message to a physical printer or an `LightningFAX` printer driver.

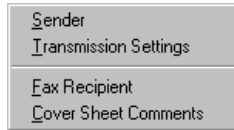
`Send` sends the fax and closes the SendFAX interface.

`Send Without Closing` sends the fax but keeps the SendFAX interface open, for example, to allow you to send the same fax to other recipients.

`Logon` opens the logon dialog box, allowing you to change the fax server or account you are logged on to.

`Exit` closes SendFAX.

## The Edit Menu



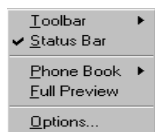
**Sender** opens the Sender Information dialog box, allowing you to modify the information about you sent with the fax.

**Transmission Settings** opens the Transmission Settings dialog box. You can set the fax header, dialing options, calling options, and timer settings for the fax.

**Fax Recipient** opens the Edit Contact window, allowing you to modify the information about a selected fax recipient in the fax recipient list.

**Cover Sheet Comments** lets you enter a comment in your cover sheet in the preview window.

## The View Menu



**Toolbar** allows you to display the different SendFAX toolbars. When a toolbar is visible, a check mark appears beside its name. There are four different Toolbars to choose from: Main, Preview, Thumbnail, and Annotation.

**Status Bar** displays or hides the Status Bar. A checkmark appears beside it when it is visible.

**Phone Book** displays a submenu whose selections switch the display of (a) the manual addressing fields and the fax recipients with (b) the contact selection pull-down list and the contact list.

**Full Preview**, if selected, displays only the thumbnails and fax preview. The display of the manual addressing fields, the fax recipient list, and the contact information is suspended. Deselecting **Full Preview** redisplay that information in the SendFAX window.

**Options** can display three tabs:

**General** offers toggles for the display of names from the available phone books, such as the public phone book, the LightningFAX network user IDs, the phone book service, and the MAPI and Lotus Notes address books, if these are installed. It also offers toggles for the display of cover sheets available, both on the server and on the local computer.

**MAPI and Lotus** (if installed) display settings for billing and sub-billing code mapping.

## The Thumbnail Menu



**Delete** removes pages selected in the thumbnail view from your fax.

**Move** offers menu selections that move the selected page up one page, down one page, to the first page after a cover sheet, or the last page of the fax. Page numbering is automatically adjusted.

**Mark As** ➔ **Do Not Send** instructs SendFAX to exclude the page selected in the thumbnail view when you transmit the fax. **Mark As** ▶ **Send** restores an excluded page to Send.

**Zoom** increases or decreases the magnification of pages in the thumbnail view.

### The Preview Menu



First Page lets you view the first page of your fax.

Previous Page lets you view the previous page of your fax.

Next Page lets you view the next page of your fax.

Last Page lets you view the last page of your fax.

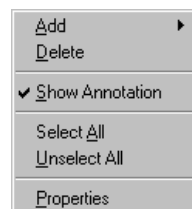
Best Fit displays the page at the magnification that best fits the preview window.

Fit to Width displays the page at the maximum width that fits in the preview window.

Fit to Height displays the page at the maximum height that fits in the preview window.

Zoom lets you choose one of the preset magnification values.

### The Annotations Menu



Annotations are objects that a user may add to draw attention to certain parts of a fax.

Add displays a submenu that lets you add an annotation to your fax. Annotation types include: **Text**, **Line**, **Rectangle**, **Stamp**, and **Highlight**.

Delete lets you remove an annotation. Select the annotation and click Delete.

Show Annotation toggles the display of the annotations on a fax page and the availability of the Annotation toolbar. If annotations are not displayed, the toolbar is not available. A check mark appears beside this menu selection when annotations are displayed.

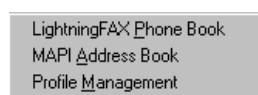
Select All selects all the fax annotations on the current page.

Unselect All deselects all selected fax annotations.

Properties changes the properties of line, rectangle, and text annotations. Properties include color and line thickness, as well as font and type size for text annotations.

See Chapter 12 About Annotations for full information.

### The Tools Menu



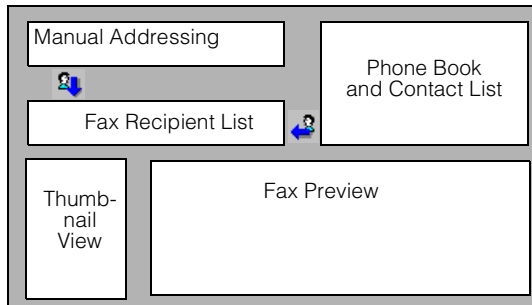
LightningFAX Phone Book launches the phone book window through which you can create a new phone book, update contacts in an existing one, and select a phone book and contact list for sending faxes. See Chapter 8 Introducing Phone Books, for detailed information.

MAPI Address Book launches your MAPI Address Book in which you can enter contact information.

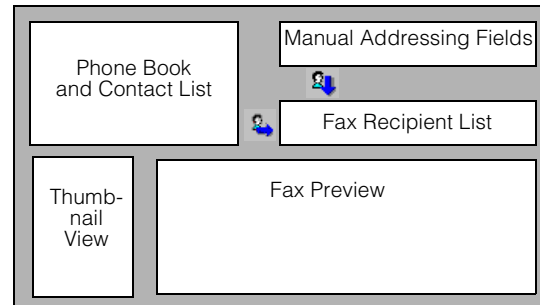
Profile Management launches the Profile Management window. See Chapter 11 Introducing Profiles, for further information.

## Managing Phone Books

The default interface can be customized in a variety of ways. The most frequent change is to display a contact list from a phone book. Phone book information can be displayed on the left or right of the interface.



**SendFAX Interface with Phone Book (Show Right)**



**SendFAX Interface with Phone Book (Show Left)**

**Note:** This documentation assumes that phone book information is displayed on the right side of the SendFAX interface.

## Display Phone Books and Address Books

- 1 In SendFAX, choose **View** ➔ **Options**.
- 2 Select **LightningFAX Phone Book**, **LightningFAX Users**, **Phone Book Service**, **MAPI Address Book** or **Lotus Notes Address Book**.
- 3 Click **OK**.

## Public Phone Books

The **Phone Book** service is a public phone book assigned to a group by an administrator. The primary members of the group are automatically granted access to the phone book. The same menus and operations used to manage private phone books are used to manage public phone books. However, the contents are read-only for all users except administrators.

Administrators can create a public phone book only if the **Phone Book** service has been installed.

All other phone books are private to you.

**Note:** Only administrators can create and manage a public phone book.

### Move Phone Book Display

- 1 In SendFAX, choose **View** ➔ **Phone Book**.
- 2 Choose **Show Right** to display the phone book on the right side of the SendFAX interface.  
Choose **Show Left** to display the phone book on the left side of the interface.

### Cancel Phone Book Display

- 1 In SendFAX, choose **View** ➔ **Phone Book**.
- 2 Deselect **Show Right** or **Show Left**, whichever is selected. The phone book is removed from the SendFAX interface.

### Select a Contact List

- 1 In SendFAX, choose **View** ➔ **Phone Book** ➔ **Show Right** or **Show Left**, if the phone book is not displayed,
- 2 Use **Show names from the** to display phone books, the MAPI address book, or any other address book available to you.
- 3 Select the contact list displayed under the title of the address or phone book.


### Toggle Phone Book Availability

- 1 In SendFAX, choose **View** ➔ **Options**.
- 2 Select the **General** tab.
- 3 Select or deselect **LightningFAX Phone Book**, **LightningFAX Users**, **Phone Book Service**, **MAPI Address Book**, or **Lotus Notes Address Book**.
- 4 Click **OK**.


### Addressing Transmissions

You can address a transmission manually or by selecting a recipient from one of your phone books.

#### Manually Address a Transmission

- 1 In SendFAX, type an entry in the **To** field.  
If desired, type an entry in the **Company** field.
- 2 Type a fax number or email address in the **Destination** field. Only this entry is mandatory.  
If desired, type an entry in the **Subject** field.  
**Note:** If the phone book is not displayed on the right of the SendFAX interface, choose **View** ➔ **Phone Book** ➔ **Show Right**.
- 3 Click .  
The recipient is copied to the list under **Fax Recipients**.


**Select a Recipient from a Phone Book**


- 1 In SendFAX, choose **View** ➔ **Phone Book** ➔ **Show Right** if the phone book is not displayed on the right of the SendFAX interface, If necessary, use **Show names from the** to select the contact list.
- 2 Type a recipient's name or select a group or individual recipient from the contact list.
- 3 Click .
 

The recipient is copied to the list under **Fax Recipients**.

**Select a Recipient from a Phone Book (not displayed)**


**Note:** The following operation describes how to select a recipient from a phone book when the phone book is not displayed in the SendFAX interface.

- 1 In SendFAX, click . SendFAX displays the phone book in a separate window.
 

If necessary, use **Show names from the** to select the correct phone book and contact list.
- 2 Type the name or select the recipient from the phone book.
- 3 Click .
 

Repeat steps 2 and 3 for each recipient desired.
- 4 Click **OK**.

**Edit Recipient Information**

- 1 Under **Fax Recipients**, select the fax recipient.
- 2 Choose **Edit** ➔ **Fax Recipient** or click .
- 3 Make your modifications or additions.
- 4 Click **OK**.

**Quickly Change Recipient Destination**

This procedure lets you change the destination of a recipient, by selecting it from a list of available destinations.


- 1 In SendFAX, address the fax manually or select a recipient from the contact list.
- 2 Under **Fax Recipient**, right-click on the recipient and select **Destinations**.
- 3 Select the preferred destination from the list.

### Cancel Transmission to a Recipient

Canceling transmission to a recipient instructs SendFAX not to transmit to that recipient but leaves the recipient listed under *Fax Recipients*. You cancel transmission when you wish to recompose messages to be sent to different groups of recipients. For example, some recipients are to receive one document; others are to receive that and a second document. You can insert the first document and add all recipients, canceling those who are to receive two documents. You transmit the fax, then add the second document.

- Deselect  to the left of the recipient's name under *Fax Recipients*.


### Delete a Recipient from the Fax Recipient List

- 1 Select the recipient in the list under *Fax Recipients*.
- 2 To the right of *Fax Recipients*, click .

### Managing Fax Documents

This section describes how documents can be placed within SendFAX for transmission.

#### Insert a Document



- 1 In SendFAX, choose *File* ➔ *Insert* or click .
- 2 Navigate to the document you wish to transmit and select it.
- 3 Click *Open*.

Repeat steps 2 to 3 as often as required.

**Note:** If the correct folder is open on your desktop, you can drag and drop documents directly to SendFAX.

#### Reorder Fax Pages


- 1 With a fax of two or more pages open in SendFAX, select a page in the *Thumbnail View*.
- 2 Choose *Thumbnail* ➔ *Move* then choose *First*, *Up*, *Down*, or *Last*, as required.

Alternatively, click  or  above the *Thumbnail View* to move the page as desired.

#### Cancel Transmission of a Page

**Note:** A canceled page is not transmitted with the rest of the fax.

- 1 Open a fax in SendFAX, and select the page in the *Thumbnail View*.
- 2 Choose *Thumbnail* ➔ *Mark As* ➔ *Do Not Send*.


Alternatively, click  above the *Thumbnail View*.

**Restore a Canceled Page**

- 1 Select the canceled page in the Thumbnail View.
- 2 Choose **Thumbnail** ➔ **Mark As** ➔ **Send** to restore a canceled page.

**Delete a Page from a Fax**

- 1 Open a fax in SendFAX and select the page in the Thumbnail View.
- 2 Choose **Thumbnail** ➔ **Delete**.

Alternatively, click  above the Thumbnail View.

- 3 Confirm deletion.

**Managing Cover Sheets**

LightningFAX makes several default cover sheets available for selection. In addition, the Cover Sheet Editor allows you to compose and save your own cover sheets. See Chapter 10 Introducing the Cover Sheet Editor for full information on generating cover sheets for use with SendFAX.

**Select a Cover Sheet**


- 1 In SendFAX, use  to select **More Cover Sheets**.

By default, cover sheets are stored in the `profile\username\Application Data\Interstar Technologies\LFClient\Cover` folder. However, cover sheets can be stored in any folder. If necessary, navigate to another folder.

- 2 Select the cover sheet you want.
- 3 Click **Open**.

The cover sheet remains selected the next time you launch SendFAX.

**Cancel a Selected Cover Sheet**

- In SendFAX, use  at the right of the current cover sheet name to select **No Cover Sheet**.

**Add a Comment to a Cover Sheet**

- 1 In SendFAX, select a cover sheet, if one is not selected.
- 2 Choose **Edit** ➔ **Cover Sheet Comments**.
- 3 Type the comment.

**Toggle Cover Sheet Availability**

- 1 In SendFAX, select **View** ➔ **Options**.
- 2 Select the **General** tab.

- 3 Under Show Cover Sheets From, select or deselect LightningFAX Server or Local Machine.

LightningFAX Server governs cover sheets stored on the server. Local Machine governs cover sheets stored on your computer in the profiles\*username*\Application Data\Interstar Technologies\LFclient\Cover folder.

- 4 Click OK.

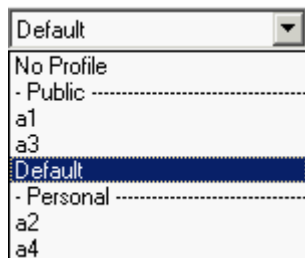
### Managing Profiles

Profiles serve a variety of purposes. Sender information, your name and contact numbers, as well as company information, can be stored in a profile. Profiles can specify a cover sheet which is used whenever you transmit through SendFAX with that profile. Profile can store sender billing information. A profile can also include a fax header.

Although administrators often compose profiles and make them available to users, users can compose profiles of their own whenever necessary.

See Chapter 11 Introducing Profiles for more information.


#### Select a Profile





**Note:** This operation requires at least one already-defined profile.

- 1 In SendFAX, use the first selection box to select the profile. The selected profile remains selected the next time you launch SendFAX.

#### Cancel a Selected Profile

- 1 In SendFAX, use  at the right of the current profile name to select No Profile.

#### Generate a Profile in SendFAX

- 1 In SendFAX, use  to select the profile you wish to copy if the new profile is be based on an existing one, Alternatively, to generate an entirely new profile, use  to select No Profile.
- 2 Choose File ➔ Save Profile.
- 3 Type a new name in the Profile Name field.
- 4 Type your modifications or additions.
- 5 Click OK.

## Fax from SendFAX

- 1 Launch SendFAX.  
If desired, select a profile.  
If desired, select a cover sheet.
- 2 Insert one or more documents.  
If desired, reorder, cancel, or delete fax pages.  
If desired, add annotations in Fax Preview.
- 3 Manually address the transmission or select one or more recipients from the contact list.  
You can select a different contact list to select other recipients.  
Make whatever modifications or additions you require to the sender information.  
Make whatever modifications or additions you require to the fax recipient information.  
If required, change the transmission settings.
- 4 Choose **File** ➔ **Send** or click **Send** to transmit immediately and close SendFAX. You can also use either of the following hotkey combinations: **Ctrl + Enter** or **Alt + s**.  
Choose **File** ➔ **Send without Closing** if you wish to compose another transmission.

## Advanced Transmission Settings


Advanced transmission settings include:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Changing Sender Information    | <input type="checkbox"/> Specifying a Call Station ID | <input type="checkbox"/> Specifying a Callback Number |
| <input type="checkbox"/> Changing Dialing Options       | <input type="checkbox"/> Changing Calling Options     | <input type="checkbox"/> Scheduling Transmission      |
| <input type="checkbox"/> Selecting an Outgoing Resource | <input type="checkbox"/> Using Least Cost Routing     | <input type="checkbox"/> Saving a Transmission        |
| <input type="checkbox"/> Adding a Fax Header            |   |   |

## Edit Sender Information

Changes to sender information in SendFAX are applied to a single transmission. For example, you might send a fax on behalf of another user and change the Name information to reflect that operation.


Sender information includes your name and title; company name and address; your telephone, cellular, and fax numbers, and email address; and sender billing information.

- 1 In SendFAX, choose **Edit** ➔ **Sender** or click .  
If sender information has already be specified, those entries appear.
- 2 Type your modifications or additions.
- 3 Click **OK** to apply the sender information to the current transmission alone.
- 4 Click **Save**, **OK**, and then **OK** to apply the information and update your user properties.

### Add or Change a Call Station ID (CSID)

A Call Station ID (CSID) can be specified at several levels, on a resource, in a profile, in user or group properties. The operation described here overrides any CSID specified at any location.


**Note:** Administrators can deny users the right to change a CSID.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Type the Call Station ID in the **CSID** field. If a CSID was already assigned, it will appear in that field. If you do not have the right to change a CSID, the field is dimmed.  
Click **Restore** to correct any errors.
- 3 Click **OK** to apply the CSID to the current transmission alone.  
Click **Save** then **OK** to apply the CSID and save it to your user properties.

### Add or Change a Callback Number

A callback number can be specified at several levels, on a resource, in a profile, in user or group properties. The operation described here overrides any callback number specified at any location.


**Note:** Administrators can deny users the right to change a callback number.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Type the callback in the **Callback Number** field. If a callback was already assigned, it will appear in that field. If you do not have the right to change a callback number, the field is dimmed.  
Click **Restore** to correct any errors.
- 3 Click **OK** to apply the callback number to the current transmission alone.  
Click **Save** then **OK** to apply the callback number and save it to your user properties.

### Add or Change Dialing Options

Dialing options can include a prefix, a number to be dialed before the actual fax number, or a suffix, a number to be dialed after the fax number. The first might be the code used to access an outgoing telephone line, the second might be a code that permits you to make a long distance call.


**Note:** Administrators can deny users the right to change dialing options.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Type a **Prefix** or a **Suffix** or both.  
Click **Restore** to correct any errors.
- 3 Click **OK** to apply the dialing options to the current transmission alone.  
Click **Save** then **OK** to apply the dialing options and save them to your user properties.

### Add or Change Calling Options



Calling options include the number of retries and the priority. These can be set in other locations. Changes made here override those settings.

**Note:** Administrators can deny users the right to change calling options.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Type a **Priority**. The default is three; the range extends from one, the highest, to 10 the lowest.  
Type a **Number of Retries**. The default is three; 99 is the highest available number.  
Click **Restore** to correct any errors.
- 3 Click **OK** to apply the calling options to the current transmission alone.  
Click **Save** then **OK** to apply the calling options and save them to your user properties.

### Schedule Transmission



**Note:** Only messages destined for fax recipients (not email or LightningFAX recipients) can be scheduled for later transmission.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Under **Timer Settings**, select **From**.
- 3 Use  to display a calendar and select a date.  
Select a specific hour and minute. Date and hour can be combined.  
Timer settings, if specified, become the default. Select **As soon as possible** when it becomes necessary to cancel them.  
Click **Restore** to correct any errors.

- 4 Click **OK** to apply the timer settings to the current transmission alone. Click **Save** then **OK** to apply the timer settings and save them to your user properties.
- 5 Choose **File** ➔ **Send** or click **Send**.  
If an administrator has configured it, a prompt will ask you to enter a billing code or a billing and sub-billing code. Enter one or both values in **Billing Code** and **Sub Billing Code**.  
You can eliminate this prompt by entering the billing code information in your sender information before transmitting the fax.


### Select an Outgoing LightningFAX Resource

An administrator can prevent you from selecting an outgoing resource.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Under **Resource**, use  to select a resource. The transmission will be sent through this resource.  
Click **Restore** to correct any errors.
- 3 Click **OK** to send only the current transmission by the resource.  
Click **Save** then **OK** to apply the resource selection and save it to your user properties.

### Transmit using Least Cost Routing and Load Balancing

To be successfully used, a least cost routing table must be already established. An administrator can prevent you from selecting LCR.

- 1 In SendFAX, choose **Edit** ➔ **Transmission Settings** or click .
- 2 Under **Resource**, select **Use LCR**. The **Resource** selection is dimmed.
- 3 Click **OK** to apply least cost routing and load balancing to the current transmission only.  
Click **Save** then **OK** to apply least cost routing and load balancing and save that selection to your user properties.

### Save a Fax Transmission


- 1 In SendFAX, compose the transmission, inserting one or several documents.
- 2 Choose **File** ➔ **Save As**.  
If necessary, navigate to the preferred directory.
- 3 Type a **File name**. The **.tif** format is applied automatically.
- 4 Click **Save**.

### Add or Edit a Fax Header

A fax header can be specified at several levels, on resource, in a profile, in user or group properties. The operation described here overrides any fax header specified at any location.

If a fax header is already selected, through a profile or resource, these operations allow you to edit it.

**Note:** Administrators can deny users the right to change a fax header.

- 1 In SendFAX, choose `Edit` ➔ `Transmission Settings` or click .
- 2 Click `Edit Fax Header`.
- 3 Compose or edit the fax header.  
Click `Restore` to correct any errors.
- 4 Click `OK` to apply the fax header to the current transmission alone.  
Click `Save` then `OK` to apply the fax header and save it to your user properties.

### MAPI Address Books and Billing Information

MAPI address books can be made available in SendFAX. Most MAPI fields are automatically mapped to corresponding LightningFAX phone book fields, with two exceptions: `Billing Code` and `Sub Billing Code`.

A MAPI address book user can however enter billing information in a field in a MAPI address book and then instruct SendFAX to map those fields to `Billing Code` and `Sub Billing Code`.

- 1 In SendFAX, choose `View` ➔ `Options`.
- 2 Select the `MAPI` tab.
- 3 Use `LightningFAX Field` to select `Billing Code` or `Sub Billing Code`.
- 4 Use `MAPI Property` to select the MAPI field that contains the billing information.

`MAPI Property Value` displays the value of the `MAPI Property` for the selected contact.





**Note:** This `MAPI Property` can be selected, even if the warning `There is no value defined for this property` is displayed.

### Advanced Display Management

The following operations change the display, either of the document being transmitted or of the SendFAX interface itself.

#### Preview Fax Pages


With a fax of two or more pages open in SendFAX:

- Choose **Preview** → **First Page** or click  to preview the first page.
- Choose **Preview** → **Previous Page** or click  to preview the previous page.
- Choose **Preview** → **Next Page** or click  to preview the next page.
- Choose **Preview** → **Last Page** or click  to preview the last page.

These menu selections and buttons are available only when the page is available for selection.

#### Zoom the Thumbnail View


With a cover sheet or a fax open in SendFAX:

- Choose **Thumbnail** → **Zoom** or use  above the Thumbnail View to select a zoom percentage.


Values available are 13, 14, 15, 20, 25, 30, 35, 40, 45, 50, 75, and 100 per cent of the original.


#### Zoom the Fax Preview


With a cover sheet or a fax open in SendFAX:

- Choose **Preview** → **Zoom** or use  above Fax Preview to select a zoom percentage.

Values available are 25, 50, 75, 100, 150, and 200 per cent of the original.


Alternatively, choose **Preview** → **Best Fit** or click  to select the best fit in the Fax Preview pane.

Choose **Preview** → **Fit to Width** or click  to select Fit to Width, width being the width of the Fax Preview page.

Choose **Preview** → **Fit to Height** or click  to select Fit to Height, height being the height of the Fax Preview page.


#### Display Full Preview


Full Preview cancels the display of the manual addressing fields, the phone book, and the fax recipient list. Only Thumbnail View and Fax Preview remain.

- In SendFAX, choose **View** → **Full Preview** or click .

The same steps restore the default interface, canceling Full Preview.

### Cancel Addressing Fields Display

- In SendFAX, click  above the fax recipients list. The display of the manual addressing fields is canceled and the fax recipient list is expanded.

Click  to restore the manual addressing fields.



## 7

# Fax Utilities in LightningFAX

LightningFAX makes available several utilities that allow you to send transmissions without using SendFAX, the email gateways, or forms for Microsoft Outlook. This chapter details those functions and utilities.

### Faxing from Windows Applications

If SendFAX is installed on your computer, you can fax from any Windows application that is also installed on your system.

**Note:** Microsoft Word is the program used to describe faxing from Windows applications. However, you can perform the same faxing operations from any Windows application with print capabilities.

To send a fax from Word:

- 1 Create or open the document you want to fax.
- 2 Choose **File** ➔ **Print**.
- 3 Use **Name** to choose **LightningFAX**.
- 4 You can specify any page range available to you through the application's print options.

Most of the print options offered by the application are available. For example, in Microsoft Word, you can choose **Options** and instruct Word to print in reverse order.

- 5 Click **OK**.  
SendFAX is launched and you are prompted to log on.
- 6 Address the fax.  
You can add a profile or a cover sheet or make an entry to the **Subject** field,
- 7 Click **Send**.

### Send a fax with a specific resolution

To send a fax from an external application, with a specific resolution:

- 1 In the application, create or open the document you want to fax.
- 2 Access the printing properties dialog, usually from the `File` menu.
- 3 In the `Select Printer` section of the dialog, select the printer as `LightningFax`.
- 4 Click the `Paper/Quality` tab (if available).
- 5 Click on the `Advanced` button.
- 6 Set the printer driver's resolution in the `Graphic-Print Quality` field. Choices are `Low(200x100)` and `High(200x200)`.

**Note:** This changes the printer resolution for the whole system, and remains so until it is changed again, using the above procedure.

The `Fine(300x300)` and `Ultra Fine(400x400)` resolutions (when supported) can only be enabled by creating and modifying a registry key. Call your Interstar technical support representative, for more details.

- 7 Depending on the application you are using, click the `Print` button, or exit the printer properties dialog and select `File` ➔ `Print`.
- 8 If the printer properties dialog appears again, click `OK` to close it, as the properties are already set.

`SendFAX` is launched and you are prompted to log on.

- 9 Address the fax.

You can add a profile or a cover sheet or make an entry to the `Subject` field,

- 10 Click `Send`.

### Mail Merge for Word

Mail Merge for Microsoft® Word enables you to merge a Main Document and a Data Source written in Word and to fax the Main Document to all recipients recorded in the Data Source.

**Note:** You should speak to your system administrator if Mail Merge for Microsoft® Word is not installed on your computer.

The first step is create a Main Document, which is the actual fax message, entering Word merge fields which receive the information entered in the Data Source. Although any of the Word merge fields can be selected, `FirstName`, `LastName`, `Company`, and `WorkPhone` are recommended. A Data Source is then created. The entries made to the Data Source are the information to appear in the Word merge fields. Both Main Document and Data Source can then be saved.

The second step is to open the Main Document, map the LightningFAX merge fields to the Word merge fields and fax the document.

Mail Merge for Word offers four merge fields: First Name, Last Name, Company, and Fax Number. These are mapped to the Word merge fields you select.

The fax operation itself is accomplished through SendFAX. A fax is sent to each entry in the Data Source.

**Note:** Because of a limitation in the printer driver, the contents of the LightningFAX merge fields in the Data Source must not exceed, in the number of pages (i.e. the number of page breaks), the size of the Word merge fields in the Main Document, otherwise the SendFAX transmission will fail.

Mail Merge for Word must first be installed.

### Create a Main Document and a Data Source in Word

- 1 Launch Word.
- 2 Choose **Tools** ➔ **Mail Merge** from the Word menu.
- 3 Click **Create** and choose **Form Letters**.
- 4 Click **Get Data** and choose **Create Data Source**.

Although any of the Word fields can be selected, `FirstName`, `LastName`, `Company`, and `WorkPhone` correspond most closely the LightningFAX merge fields.

- 5 Click **Edit Data Source**.
- 6 Enter the `FirstName`, `LastName`, `Company`, and `WorkPhone` information for as many fax recipients as required.

**Note:** Omitting a fax number in the `WorkPhone` field produces an error message when you attempt to fax with SendFAX.


- 7 Click **OK**.
- 8 Write the fax message as the Main Document. Use **Insert Merge Field** to insert the `FirstName`, `LastName`, `Company`, and `WorkPhone` merge fields wherever they are needed.

**Note:** Do NOT use Word's **Merge the data with the document** command.

- 9 Save both documents.


**Note:** Although the above example assumes that the data source is itself a Word document, Word's mail merge operation accepts data sources from other programs, Excel, for example. For the best performance when faxing, however, Interstar recommends that you always use a data source created in Word.

### Fax using Mail Merge for Word

- 1 Exit SendFAX if it is running.
- 2 Open a Main Document written in Word.
- 3 Click .
- 4 Use `First Name` to map to the Word's `FirstName` merge field.  
Use `Last Name` to map to the Word's `LastName` merge field.  
Use `Company` to map to the Word's `Company` merge field.  
Use `Fax Number` to map to Word's `WorkPhone` merge field.  
Note: Mapping is not saved. The next time you fax a Main Document, you must again map the LightningFAX fields to the Word merge fields.
- 5 Click `OK`. Word generates a Main Document for each fax recipient recorded in the data source.  
The Print window is displayed with LightningFAX selected as the printer.
- 6 Click `OK`. SendFAX is launched and you are prompted to log on.  
The fax is displayed in SendFAX with the first record in the Data Source as its recipient. All fax recipients from your Data Source appear in the list of Fax Recipients.  
You can add a profile or a cover sheet, make an entry to the `Subject` field, and choose not to send a fax to a given recipient.  
Note: You cannot add other fax recipients or documents to the fax.
- 7 Click `Send`.

### Fax from Microsoft Word

If you are using Microsoft Word, and Mail Merge for Word is installed, you can fax any Word document using the following procedures.

- 1 Launch Word.
- 2 Compose your fax message.
- 3 Click .
- 4 Address the fax.  
You can add a profile or a cover sheet or make an entry to the `Subject` field,
- 5 Click `Send`.


### Send a fax with a specific resolution

To send a fax from Microsoft Word, with Mail Merge and a specific resolution:

- 1 In Word, select **File** ➔ **Print**.
- 2 In the **Printer** section of the dialog that appears, select the printer Name as **LightningFax** or **Print to mail**.
- 3 Click **Properties**.
- 4 Click the **Paper/Quality** tab (if available).
- 5 Click on the **Advanced** button.
- 6 Set the printer driver's resolution in the **Graphic-Print Quality** field. Choices are **Low(200x100)** and **High(200x200)**.

**Note:** This changes the printer resolution for the whole system, and remains so until it is changed again, using the above procedure.

The **Fine(300x300)** and **Ultra Fine(400x400)** resolutions (when supported) can only be enabled by creating and modifying a registry key. Call your Interstar technical support representative, for more details.

- 7 Click **OK**.
- 8 Click **OK**.
- 9 Click **Close**.
- 10 Back in Word, click the  button.  
SendFAX is launched and you are prompted to log on.
- 11 Address the fax.  
You can add a profile or a cover sheet or make an entry to the **Subject** field.
- 12 Click **Send**.

### E-Mail a TIFF File Using PrintToMail

PrintToMail is means of sending fax format (TIFF) files through e-mail software. The utility converts documents generated by third-party applications to the TIFF format and launches your default e-mail software with the file included as an attachment. A cover sheet, if you include one, is treated like any other attachment.

**Note:** Your recipient must have a viewer that displays TIFF files.

### E-Mail a TIFF File

- 1 Use the third-party application to write or open the document to be faxed.
- 2 Access the print options that allow you to select a printer.
- 3 Select the `PrintToMail` printer.
- 4 Print the document. `PrintToMail` launches your default e-mail software. The document is included as an attachment in TIFF format.
- 5 Address your recipient as you would any e-mail message. You can use any functionality your e-mail software provides.
- 6 Send the message.

### Send a fax with a specific resolution

To send a fax using Print to Mail, with a specific resolution:

- 1 Use the third-party application to write or open the document to be faxed.
- 2 Access the printing properties dialog, usually from the `File` menu.
- 3 In the `Select Printer` section of the dialog, select the printer as `Print to mail`.
- 4 Click the `Paper/Quality` tab (if available).
- 5 Click on the `Advanced` button.
- 6 Set the printer driver's resolution in the `Graphic-Print Quality` field. Choices are `Low(200x100)` and `High(200x200)`.

Note: This changes the printer resolution for the whole system, and remains so until it is changed again, using the above procedure.

The `Fine(300x300)` and `Ultra Fine(400x400)` resolutions (when supported) can only be enabled by creating and modifying a registry key. Call your Interstar technical support representative, for more details.

- 7 Depending on the application you are using, click the `Print` button, or exit the printer properties dialog and select `Print` in the `File` menu.
- 8 If the printer properties appears again, click `OK` to close it, as the properties are already set.
- 9 Terminate the fax composition in the email application.
- 10 Click `Send`.

## 8

## Introducing Phone Books

A phone book is a collection of contact lists, links and views, that stores contact information about recipients. You access the phone book in SendFAX to address faxes to the contacts recorded in the phone book.

LightningFAX provides a single un-populated phone book. It resides in the `\Profiles\username\Application Data\lightningfax\LFclient\Phone` folder in the Windows 95/98/ME/NT versions. In Windows XP, 2000 and 2003, it resides in the `\Documents and Settings\username\Application Data\Interstar Technologies\lightningfax\LFclient\Phone` folder.

You can add phone books to that or any other directory. Phone book files have the `.lfc` extension. You can create as many phone books as needed. The contents of a phone book can be:

- defined as a contact list;
- imported into a contact list, from an external data source;
- linked to an external data source.

In the first two cases, the information actually resides within the phone book. Users can modify it whenever necessary. A phone book is composed of at least one contact list. A contact list is a list of potential fax recipients detailing their first name, last name, company name, and address, fax number, e-mail address, etc... A phone book can have any number of contact lists, however, only one contact list can be used at a time. A default contact list named `Contact` is generated when you create a new phone book.

In the third case, LightningFAX links to an external source; the information is displayed through the phone book, but cannot be modified using the phone book's menus. If information linked to a phone book is to be changed or updated, users must update the external source using the software that created it.

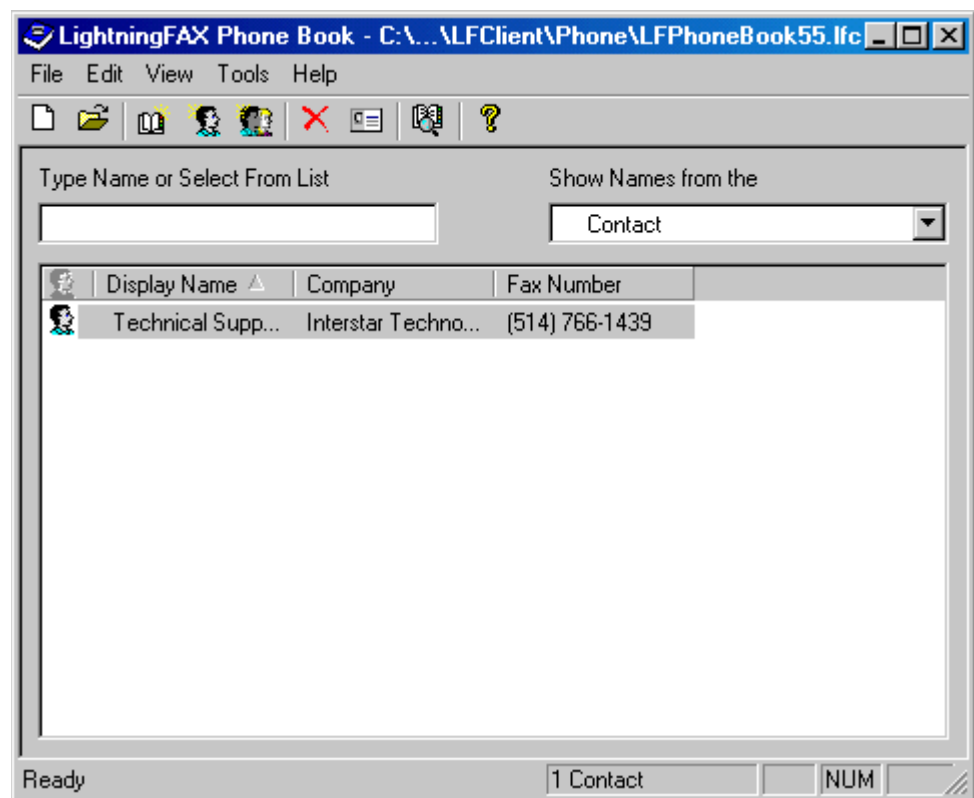
## Chapter 8 Introducing Phone Books

Finally, basic or advanced searches can be performed in a phone book. The results of these searches can be saved, thus creating views that can be consulted at a later time.

**Note:** These views are dynamic, so that any modification to a contact, if applicable, is automatically reflected in a view, the next time it is consulted.

### Launching the Phone Book

- Choose Start ➔ Programs ➔ LightningFAX ➔ LightningFAX Tools ➔ Phone Book.
- In the manager, choose Tools ➔ Phone Book.
- In SendFAX, choose Tools ➔ LightningFAX Phone Book.



The default phone book or the phone book you last opened is automatically selected. Also selected automatically is the default contact list or the contact list you last chose in the phone book.

### The File Menu

**New** allows you to create a new phone book, a new contact list within an existing phone book, a new contact in a contact list, and a new group of contacts.

**Open** allows you to open an existing phone book.

**Save As** saves the current phone book under a new name.

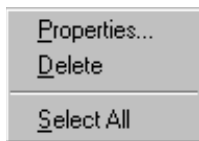
**Import** imports data from an external data source to the current contact list.

**Link** creates a link between the current phone book and an external data source.

**Link Fields** allows you to update the links that match the fields of an external data source to the phone book's internal fields.

**Exit** closes the phone book.

### The Edit Menu

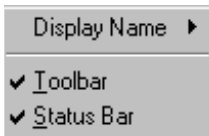


**Properties** displays the properties of a selected contact or group.

**Delete** deletes all selected items (contacts or groups).

**Select All** selects all contacts or groups in the currently displayed contact list.

### The View Menu

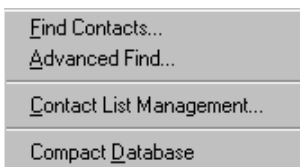


**Display Name** switches the order in which names are displayed. You can choose **First Name Last Name**; **Last Name First Name**; or **Last Name, First Name**.

**Toolbar** displays or hides the toolbar at the top of the phone book window.

**Status Bar** displays or hides the status bar at the bottom of the phone book window.

### The Tools Menu



**Find Contacts** performs a search for a contact.

**Advanced Find** performs a search for a contact and allows more complicated search criteria.

**Contact List Management** lets you rename or delete contact lists, links or views already present in the phone book.

**Compact Database** compacts the phone book database.

### Managing Phone Books

A phone book is composed of at least one contact list. A contact list is a list of potential fax recipients detailing their first name, last name, company name, and address, fax number, e-mail address, etc. A phone book can have any number of contact lists, however, only one contact list can be used at a time. A default contact list named Contact is generated when you create a new phone book.

In the phone book, contact lists are chosen using the Show Names from the drop-down list.

Clicking Full Name allows you to enter a title (Dr. Mr. Miss, Mrs., or Prof.) and first and last names. The title will appear as a salutation in the fax.

Additional information can be entered clicking the User Defined tab. Four user-defined fields and a comment field are provided.

The same menus and operations used to manage private phone books are used to manage public phone books. However, the contents are read-only for all users except administrators.

#### Open a Phone Book

- 1 In the phone book, choose File ➤ Open.
- 2 Select the phone book.
- 3 Click Open.

#### Add a Phone Book

- 1 In the phone book, choose File ➤ New ➤ Phone Book.
- 2 Type a name. The .lfc extension is automatically appended.
- 3 Click Save.

You can populate the default contact list with contacts and, optionally, with groups.

#### Add a Contact List

- 1 In the phone book, choose File ➤ New ➤ Contact List.
- 2 Type a name.
- 3 Click OK.

#### Delete a Contact List

- 1 In the phone book, choose Tools ➤ Contact List Management.
- 2 Select the contact list.
- 3 Click Delete.
- 4 Confirm deletion.
- 5 Click Close.

### Rename a Contact List

- 1 In the phone book, choose **Tools** ➔ **Contact List Management**.
- 2 Select the contact list.
- 3 Click **Rename** and type the new name.
- 4 Click **Close**.

### Add a Contact

- 1 In the phone book, choose **File** ➔ **New** ➔ **Contact**.
- 2 Click **Full Name** to select a salutation and to enter a first and last name or position the cursor in the field and type the first and last name without a salutation.

No field in the contact information is mandatory. The phone book prompts for a first name when none is entered. However, you are not obliged to enter one. You can even create an empty contact for later completion.

- 3 Enter any other user information.  
You can enter as many as three fax numbers and three e-mail addresses. The **Preferred Address** field allows you to select the one that SendFAX will use when several are specified.  
Use the **User Defined** tab to enter additional information not defined by the fields available. For example, having entered the company address in the **Address** fields, you might wish to use the **User Defined** fields to enter a contact's personal address. You can also enter a comment through this tab.
- 4 Click **OK**.

### Delete a Contact

Contacts are listed as individuals and as group members. Deleting an individual contact deletes that contact from any group they are members of.

- 1 In the phone book, select the contact.
- 2 Choose **Edit** ➔ **Delete**.
- 3 Confirm deletion.

### Edit a Contact

- 1 In the phone book, select the contact.
- 2 Choose **Edit** ➔ **Properties**.
- 3 Enter the changes to the contact's properties.
- 4 Click **OK**.

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### Compact the Database

- 1 In the phone book, choose **Edit** ➔ **Compact Database**.
- 2 Click **OK**.

### Phone Book Groups

A group is composed of a number of individual contacts and, optionally, other groups. By selecting a group when faxing, you fax to all contacts in it. A contact list can include any number of groups.

The contacts you place in a group remain listed as independent contacts in the contact list. If you delete the group, the members remain available as independent contacts. If you delete them as individual contacts, however, they are also deleted from the group.

### Add a Group

- 1 In the phone book, choose **File** ➔ **New** ➔ **Group**.
- 2 Type a name in the **Name** field.
- 3 Click **Add New** to add a contact not already in the phone book.  
Click **Select Members** to add a contact or a group already in the phone book.  
Use **Remove** to correct any errors.
- 4 Click **OK**.

### Delete a Group


Contacts are listed as individuals and as group members. Deleting a group does not delete a contact's individual listing.

- 1 In the phone book, select the group.
- 2 Choose **Edit** ➔ **Delete**.
- 3 Confirm deletion.

### Add New Contact to a Group

- 1 In the phone book, select the group.
- 2 Click **Edit** ➔ **Properties**.
- 3 Click **Add New**.
- 4 Enter the contact information.
- 5 Click **OK**.
- 6 Click **OK**.

### Add Existing Contact/Group to a Group

- 1 In the phone book, select the group.
- 2 Choose `Edit` ➔ `Properties`.
- 3 Click `Select Member`.
- 4 Select a contact or a group. A group cannot be nested in itself.
- 5 Click .
- 6 Click `OK`.
- 7 Click `OK`.

### Delete a Contact/Group from a Group

- 1 In the phone book, select the group.
- 2 Choose `Edit` ➔ `Properties`.
- 3 Select the contact or group.
- 4 Click `Remove`.
- 5 Click `OK`.

### Phone Book Searches

The phone book offers a basic find and an advanced find. The basic find searches a single contact list or link, and specifies the exact entries you expect to find in information fields like `First Name`, `Last Name` and `Fax Number`.

An advanced find allows you to specify a far wider range of criteria. You can select any of the information fields available and specify several search criteria. Furthermore, an advanced find can specify more than one contact list or link.

### Find a Contact

- 1 In the phone book, choose `Tools` ➔ `Find Contacts`.
- 2 The phone book offers `Name`, `Company`, `Fax Number`, and `City` as search criteria. Type the appropriate entries.

Use  to change `City` to `State/Province` or `Country`.

Select `Save As` and enter a name if the search is to be saved. Saved searches can be selected and run using `Show Names from the`. They are listed under the heading `View`.

- 3 Click `Find Now`.

## Chapter 8 Introducing Phone Books

### Use Advanced Find

- 1 In the phone book, choose **Tools** ➔ **Advanced Find**.  
By default, the current contact list or link is selected. Use **Browse** to select or deselect contact lists and links.
- 2 Under **New Criteria**, use **Field** to select an information category.
- 3 Use **Condition** to select a condition type.  
Condition types include **contains**, **is exactly**, **begin with**, **doesn't contain**, **is empty**, and **is not empty**.
- 4 Under **Value**, type an entry that represents the expected results. The **is empty** and **is not empty** conditions require no **Value** entry.
- 5 Click **Add to List**.  
You can specify one or more criteria. Use **Remove** to make any corrections.
- 6 Under **Options**, select **Match any criteria when two or more criteria exist and any one fulfills the conditions of the search**.  
To apply every criteria to the search, select **Match all criteria**.
- 7 Select **Save As** and enter a name if the search is to be saved.  
Saved searches can be selected and run using **Show Names** from the. They are listed under the heading **View**.
- 8 Click **Find Now**.

### Phone Book Display

By default, a phone book displays contact information in three columns: **Display Name**, **Company**, and **Fax Number**. However, you can adjust the column headings to display any of the information fields available in the phone book.

You can select any column heading as the sort key. For example, the default sort key is **Display Name**, in ascending order. If you wish, you can select **Fax Number**, **Company** or any other displayed column heading as the sort key. Sort order can be ascending or descending.

### Add a Column Heading

These changes affect all contact lists.

- 1 In the phone book, position the cursor over column bar at the location where the new heading is to be inserted.
- 2 Right-click and choose **Insert Column**.
- 3 Choose the column heading from the appropriate menu selection.

### Delete a Column Heading

- 1 In phone book, position the cursor over the unwanted column heading.
- 2 Right-click and choose **Remove This Column**.

## Importing an External Data Source

External data sources can be imported into a phone book, as part of the current contact list. Once resident in the phone book, the contacts can be updated like any other contact.

External sources might be a worksheet in a spreadsheet or a table in a database that contains a list of names and fax numbers. By importing the source, you import the names and fax numbers into the current contact list.

The external source should be properly organized, with field names that correspond in meaning, if not in exact phrasing, to the information fields used by the phone book. For example, a field called Name in an external data source might include both first and last name. First Name and Last Name, however, are two distinct fields in the phone book. You may wish to update the external source before importing it.

You may need to assign fields being imported to the corresponding fields offered by the phone book. When field names match phone book names closely or exactly, LightningFAX automatically links the field in the external source to the corresponding phone book field. When field names do not correspond, you are given an opportunity to link them manually.

### External Data Sources

- Borland® dBASE III, IV and 5
- Corel® Paradox
- Microsoft® Access
- Microsoft® Excel
- Phone Book
- Symantec® ACT!
- An ODBC-compliant data source
- A comma separated value (.csv) text file. In a text file data source, the values are delimited by commas.

## Import an External Data Source

Although other external sources are available, this example imports information from a Microsoft Excel spreadsheet.

- 1 In the phone book, choose **File** ➔ **Open** to select the correct phone book  
If necessary, use **Show Names** from the to select the correct contact list.
- 2 Choose **File** ➔ **Import**.
- 3 Use **Select the format of your database** to select Excel.  
Click **First Row Contains Field Name** if the first row of the spreadsheet represents the field names or column headings.

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- 4 Type the path and name of the file in the field provided. Alternatively, click `Browse` to navigate the file, select it, and click `OK`.
- 5 Click `Next`.
- 6 Select the worksheet that contains the contact information.
- 7 Click `OK`.

The phone book attempts to match corresponding fields. However, should field names in the external source not match, you must perform the link yourself by clicking in the right hand column where the phrase `No Link` appears. A pull-down list displays the phone book fields available.

Use `AutoMatch` to instruct the phone book to apply the most likely match. Use `Reset` to clear all matches and begin again.

- 8 Click `Finish`.

### Linking to an External Data Source

External data sources can be linked to a phone book. A linked external source is always treated as a new and distinct contact list.

LightningFAX uses the name of the table or worksheet as the name of the contact list. The name, which must be unique, can be changed either during the linking operation or afterwards through `Edit` ➔ `Rename`. It is subsequently displayed in the `Contact List` field.

You cannot link an external contact list into an existing contact list.

The contacts in a linked contact list cannot be edited or updated through LightningFAX. The phone book displays this information in read-only format. If contact information in a linked contact list is to be changed, you must update the source itself. Contacts in a linked contact list cannot be assigned to a group. Additional contacts cannot be added, individual contacts cannot be deleted directly through the LightningFAX Phone Book.

Because linking is dynamic, the changes you make to the contents of source are reflected in the linked contact list.

You can update the fields in a linked contact list. For example, if you add a new field to the source, or change the field name of an existing field in the source, it may be necessary to link it to a specific phone book field.

### Link to an External Data Source

Although other formats are available, this example imports information from a Microsoft Excel spreadsheet.

- 1 In the phone book, choose **File** ➔ **Link**.
- 2 Use **Select** the format of your database to select **Excel**.
- 3 Click **First Row Contains Field Name** if the first row of the spreadsheet represents the field names or column headings.
- 4 Type the path and name of the file in the field provided. Alternatively, click **Browse** to navigate the file, select it, and click **OK**.
- 5 Click **Next**.
- 6 Select the worksheet that contains the contact information.
- 7 Click **OK**.

The phone book attempts to match corresponding fields. However, should field names in the external source not match, you must perform the link yourself by clicking in the right hand column where the phrase **No Link** appears. A pull-down list displays the phone book fields available.

Use **AutoMatch** to instruct the phone book to apply the most likely match. Use **Reset** to clear all matches and begin again.

- 8 Click **Finish**.

### Update a Linked External Source

- 1 In the phone book, use **Contact List** to select the linked contact list.
- 2 Choose **File** ➔ **Linked Fields**. The **Set Link** window appears.
- 3 Use the pull-down list by right-clicking the right hand column for the appropriate field.
- 4 Select the phone book field that best corresponds to the external field name.
- 5 Click **Finish**.

**Reset** sets all phone book fields to **No Link**. **Reset** might be used when a linked external source is greatly modified and a good many links must be manually assigned.



## 9

## Introducing the Viewer

The viewer lets you view the faxes you receive. Using the viewer, you can:

- annotate a fax
- forward a fax to other members of the network
- e-mail a fax
- examine a fax's routing history
- print a fax (including long faxes)
- create, save, and send a split fax
- save a copy on your PC
- update the original TIFF file stored on the server

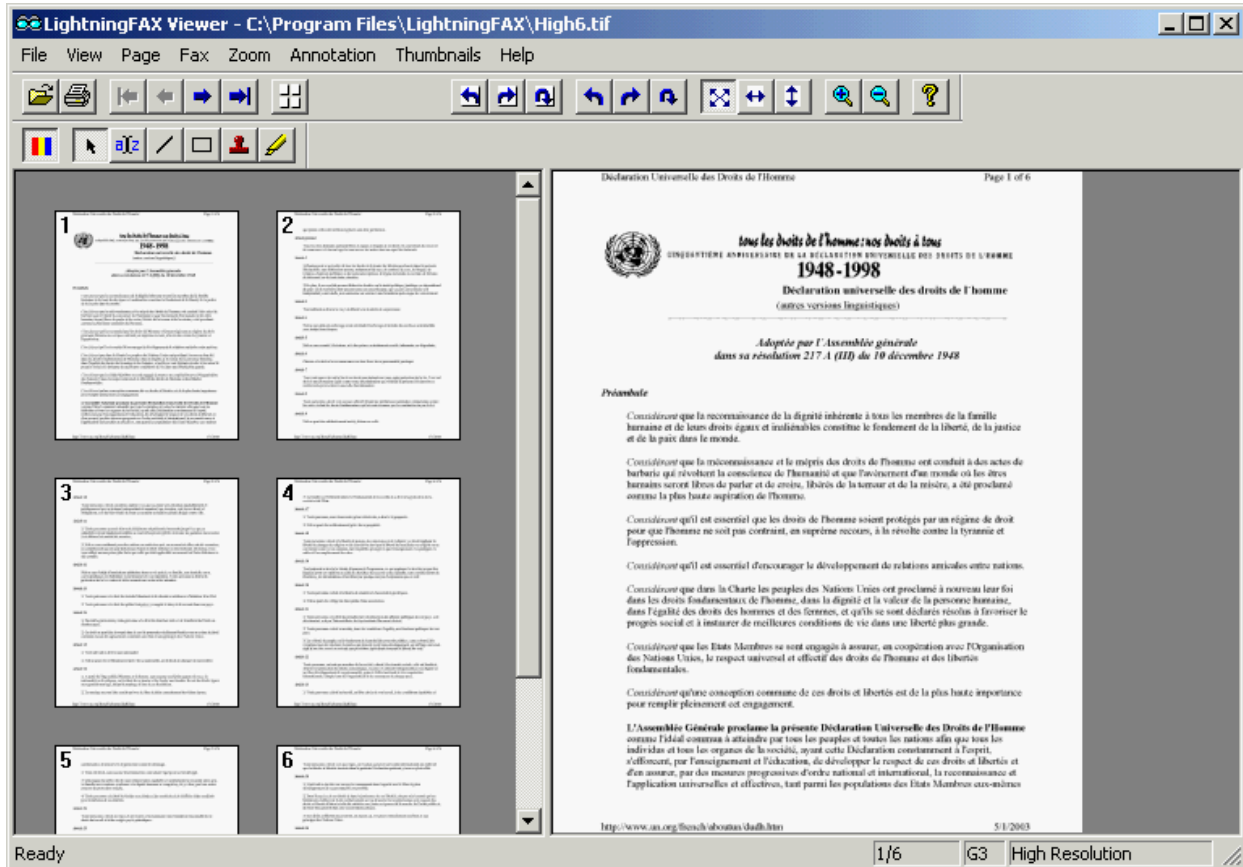
You can rotate fax pages if they were sent in the wrong orientation and change the viewer's display settings. A zoom setting decreases or increases the display size of the fax. The thumbnail view displays the individual pages of a multi-page fax in a vertical list.

You can e-mail the viewer as an attachment to whoever needs it. The file is named `LFViewer.exe` and resides in the `Windows\Redist` sub-folder of the LightningFAX CD.

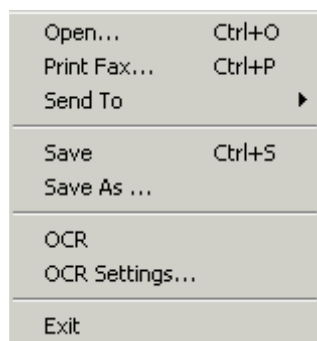
## Chapter 9 Introducing the Viewer

### Launching the Viewer

- Choose Start ➔ Programs ➔ LightningFAX ➔ LightningFAX Tools ➔ Viewer.
- Choose Tools ➔ Viewer in the manager menu.
- Double-click a fax displayed in the manager



### The File Menu



Open opens an TIFF existing file. The TIFF file format is used for faxes.

Print Fax sends the fax to a printer.

Send to ➔ Mail Recipient launches the default e-mail software; the fax in the viewer is automatically included as an e-mail attachment. Send To SendFAX launches SendFAX; the fax in the viewer is opened in SendFAX.

Save saves the fax with any modifications.

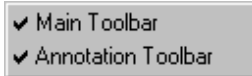
Save As saves a copy of the fax under a new name.

OCR launches the OCR program you have installed on your system.

OCR Settings lets you specify the path to your OCR executable. You can specify a path or use the browse button.

Exit closes the viewer.

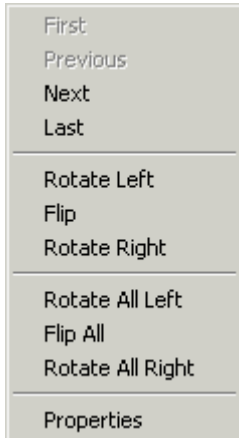
### The View Menu



Main Toolbar toggles the display of the main toolbar.

Annotation Toolbar toggles the display of the annotation toolbar.

### The Page Menu



First displays the first page of the fax in the viewer's main view. This selection is not available when the first page occupies the main view.

Previous displays in the main view the page immediately before the one currently in the main view. This selection is not available when the first page occupies the main window.

Next displays in the main view the page immediately after the one currently displayed in the main view. This selection is not available when the last page occupies the main view.

Last displays the last page of the fax in the main view. This selection is not available when the last page occupies the main view.

Rotate Left rotates the page currently in the main view 90 degrees to the left. A page originally display in portrait orientation now appears in landscape.

Flip rotates the page currently display in the main view 180 degrees.

Rotate Right rotates the page currently displayed in the main view 90 degrees to the right.

Rotate All Left rotates all pages 90 degrees to the left.

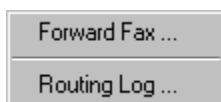
Flip All rotates all pages 180 degrees.

Rotate All Right rotates all pages 90 degrees to the right.

Properties displays a window containing information such as the type of compression, the horizontal and vertical resolution, the type of resolution (high or low) and the size (horizontal and vertical), in pixels, of the fax.

**Note:** The type of resolution is also displayed on the status bar, at the lower right of the Viewer window.

### The Fax Menu



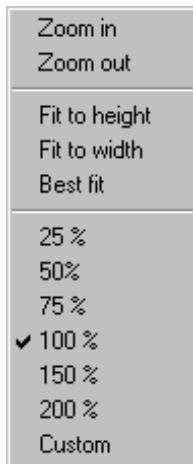
Forward Fax displays a window through which you can forward the fax to other members of the network.

Routing Log displays a window containing information such as the date and time the fax was received, the user, group, or server that received it. The LightningFAX server automatically writes the information to a comments column in the window.

Neither selection is available if you launched the viewer as a independent utility and are not logged on to LightningFAX.

If you launched the viewer through the View selection offered by LightningFAX, you can open and forward any TIFF file to members of your network.

### The Zoom Menu



Zoom in selects the next display scale.

Zoom out selects the previous display scale.

Fit to height resizes the vertical height of the page to the view.

Fit to width resizes the horizontal width of the page to the view.

Best fit selects the best scale to fit the page to the view.

25% to 200% are pre-set scales. 100%, the default scale, is actual size.

Custom displays a window through which you can enter a zoom percentage.

### The Annotation Menu



Annotations are selected by clicking the type of annotation desired, drawing a rectangle in the page displayed, and applying the annotation selected within the rectangle. All annotations can be resized and moved about the page.

Annotations are only described here. Annotations are detailed in Chapter 12 About Annotations. See Add Annotations on page 120. The operations described in that chapter are applicable in the viewer. Slight differences in operation are noted.

Show Annotations toggles the entry and the display of annotations in the page displayed. When it is not selected, annotations cannot be entered and existing annotations are not displayed.

Select is chosen after entering an annotation to cancel the annotation mode. For example, if you select Text or Line, you remain in text mode or line mode. Dragging the cursor a second time draws another text box or another line. Click Select to cancel the annotation mode.

Select mode also allows you to select existing annotations to resize, move, or delete them.

Text draws a text box on the currently displayed page. Type the text immediately after drawing the box. Text boxes can be resized by clicking them and dragging the handles.

Line draws a line on the page.

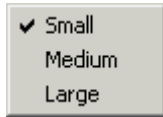
Rectangle draws a rectangle on the page.

Stamp displays a window through which you select a bitmap (.bmp) file. Select the .bmp file you wish and drag the cursor to form a rectangle. The selected .bmp graphic is written to the page.

LightningFAX offers three .bmp images: Approved, For Your Approval, and Please Sign and Return. You can use any others available. Like text boxes, bitmap stamps can be selected and resized.

Highlighter lets you draw a rectangular rubber band over important text. Yellow highlight fills the rectangle.

## The Thumbnails Menu



**Small** displays a small version of the thumbnail, in the left panel of the viewer.

**Medium** displays a medium size version of the thumbnail, in the left panel of the viewer.

**Large** displays a large size version of the thumbnail, in the left panel of the viewer.

### Open a Fax in the Viewer

- 1 Launch the viewer, and choose **File** ➔ **Open**.
- 2 Navigate to the file and select it.
- 3 Click **Open**.

These are alternative methods.

- Double-click a fax displayed in the manager.
- Right-click a fax displayed in the manager, select **Show Details** and click **View** in the **Show Details** window.

**Note:** Use either alternative if you intend to forward the fax from the viewer.

### E-Mail a Fax through the Viewer

**Note:** Any annotations made prior to this procedure will be saved permanently.

- 1 Launch the viewer and open a TIFF file.
- 2 Choose **File** ➔ **Send to** ➔ **Mail Recipient**.
- 3 Address the e-mail.
- 4 Click **Send**.

### Forward a Fax from the Viewer

**Note:** You can forward only the faxes in your LightningFAX message store.

- 1 Double-click on the fax in the manager.
- 2 Choose **Fax** ➔ **Forward Fax**.  
If necessary, use **Group** select a group.
- 3 Highlight a name in the **User List**. You can forward faxes only to other members of the network.
- 4 Click **Add**.  
Use **Add All** to add all user names as recipients. To make any corrections, highlight a name in the **Recipient List** and use **Remove**. Use **Remove All** to remove all recipients.
- 5 Click **Forward**.

### Print a Fax from the Viewer

- 1 Launch the viewer and open a TIFF document.
- 2 Choose **File** ➔ **Print Fax**. You can change printers, enter the number of pages, etc.
- 3 Click **OK**.

### Printing Long Faxes

In some cases, faxes can extend over multiple pages. The printing feature of the viewer can be tweaked, to determine how these faxes can be shrunk or cut into pieces, for optimal printing conditions.


To configure this setting, you need to change a registry key. For more details, contact your Interstar technical support representative.

### Managing Viewer Display Settings

The viewer allows you to manipulate how faxes are displayed in a variety of ways.

#### Show or Hide Thumbnails

The thumbnail view displays fax pages in a vertical column on the left. By default, the thumbnail view in the viewer is closed.

- Click  in the viewer toolbar to toggle the display of the thumbnail view.
- Click any thumbnail to display the page in the main view.

By default, thumbnails are displayed in *Small* format. Right-clicking in the thumbnail panel at the left, offers a selection of *Small*, *Medium* or *Large*. Choose the size that you prefer.

#### Rotate or Flip Fax Pages in the Viewer

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To rotate the page in the main view 90 degrees to the left:	Choose <b>Page</b> ➔ <b>Rotate Left</b>
To rotate the page in the main view 180 degrees:	Choose <b>Page</b> ➔ <b>Flip</b>
To rotate the page in the main view 90 degrees to the right:	Choose <b>Page</b> ➔ <b>Rotate Page Right</b>
To rotate all pages 90 degrees to the left:	Choose <b>Page</b> ➔ <b>Rotate All Left</b>
To rotate all pages 180 degrees:	Choose <b>Page</b> ➔ <b>Flip All</b>
To rotate all pages 90 degrees to the right:	Choose <b>Page</b> ➔ <b>Rotate All Right</b>

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**Select a Fax Page in the Viewer**


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To display the first page of the fax in the main view:	Choose Page ➔ First
To display the previous page:	Choose Page ➔ Previous
To display the next page:	Choose Page ➔ Next
To display the last page:	Choose Page ➔ Last

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**Change Display Size in the Viewer**


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To select the next larger display scale:	Choose Zoom ➔ Zoom in
To select the previous display scale:	Choose Zoom ➔ Zoom out
To resize the fax to fit the vertical height of the main view:	Choose Zoom ➔ Fit to height
To resize the fax to fit the horizontal width of the main view:	Choose Zoom ➔ Fit to width
To select the best available scale:	Choose Zoom ➔ Best fit

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25% to 200% are pre-set scales. 100%, the default scale, is actual size.

Custom displays a window through which you enter a zoom percentage.

**Using OCR in the Viewer**

If a program for optical character reading is available, you can enter its path and filename in the viewer. The functions available in the program can then be applied to a TIFF document opened in the viewer.

**Select an OCR Program**

- 1 In the viewer, choose File ➔ OCR.
- 2 Enter the path and file name of the OCR program.
- 3 Click OK.

**Generate an OCR File**

- 1 Launch the viewer and open a TIFF file or double-click on a fax in LightningFAX manager.
- 2 Choose File ➔ OCR.
- 3 Perform whatever OCR function the program makes available.

Note: The operations available will depend on the capabilities of your OCR program.

### About Saving TIFF Files

The faxes you access through the manager are actually stored in a database on the computer that acts as the server in the network. However, the viewer lets you save a local copy. If you have made modifications to a fax, for example, by adding annotations, you may wish to save a local copy on your computer's hard drive, leaving the original unmodified.

Alternatively, you can choose *Save* to overwrite the original.

**Note:** Saving a broadcast is not supported.

### Save a Copy

**Note:** Any annotations made prior to this procedure will be saved permanently.

- 1 Launch the viewer and open a TIFF file or double-click on a fax in the manager.  
Add any annotations you wish.
- 2 Choose **File** ➔ **Save As**.
- 3 Enter the name of your file. The `.tif` extension is automatically applied.
- 4 Click **Save**.

### Save the Original

- 1 Double-click on a fax in the manager.
- 2 Add any annotations you wish.
- 3 Choose **File** ➔ **Save**.

### Using the Routing Log

If the administrator has enable the routing log, you can display the information it contains about the fax in the viewer. The information includes the date and time the fax was received and the user, group, or server who sent it. These comments are automatically entered and appear in red. You can also enter your own comments. These appear in black. Both types of comments can be printed.

**Note:** The administrator must have enabled the routing log before any of the following operations can be successfully executed.

### View the Routing Log

- 1 Double-click on a fax in the manager.
- 2 Choose **Fax** ➔ **Routing Log**.
- 3 Click **Close** to close the Routing Log window.

**Enter a Comment in the Routing Log**

- 1 Double-click on a fax in the manager.
- 2 Choose Fax ➔ Routing Log.
- 3 Click Insert New Comment.
- 4 Enter the comment and press Return.  
You can enter as many comments as you wish by clicking Insert New Comment.
- 5 Click Close to close the Routing Log window.

**Print the Routing Log**

- 1 Double-click on a fax in the manager.
- 2 Choose Fax ➔ Routing Log.
- 3 Click Insert New Comment to add a comment.
- 4 Click Print Routing Log to send a copy of the routing log to a printer.
- 5 Click Close to close the Routing Log Information window.



Use the cover sheet editor to design new or redesign existing cover sheets. You can import graphics and bitmap (.bmp) images; add text, lines and shapes; or customize any of the ten cover sheets included with LightningFAX.

Use the cover sheet editor:

- to create, import, and link to OLE 2.0-compatible objects within the cover sheet editor
- to draw lines, squares, rectangles, circles, and polygons
- to add text and bitmap (.bmp) images
- to add variables that automatically insert such information as sender name and company, etc.

**Note:** In cover sheet editor documentation, the terms **item** or **items** refer to text, lines and shapes, variables, bitmap graphics, and OLE 2.0 compatible objects. The terms **object** or **objects** refer only to OLE 2.0 compatible objects.

A wire frame surrounds the items placed in a cover sheet. All items can be selected with the mouse and edited, deleted, or moved.

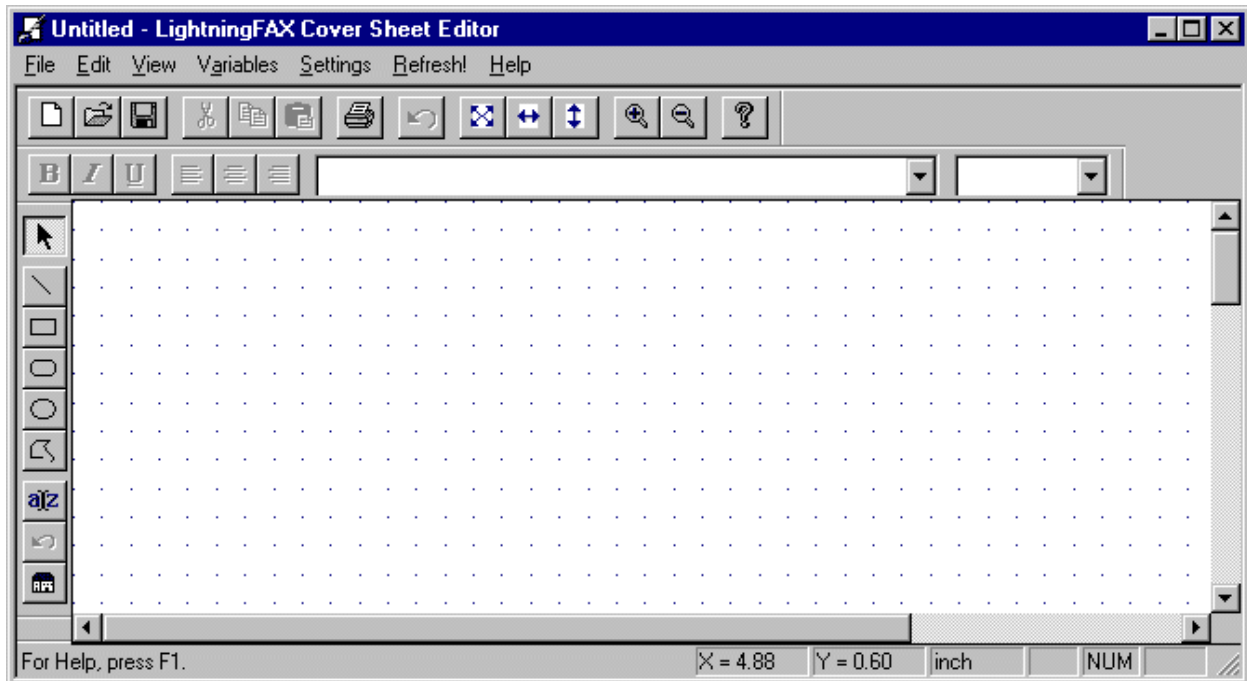
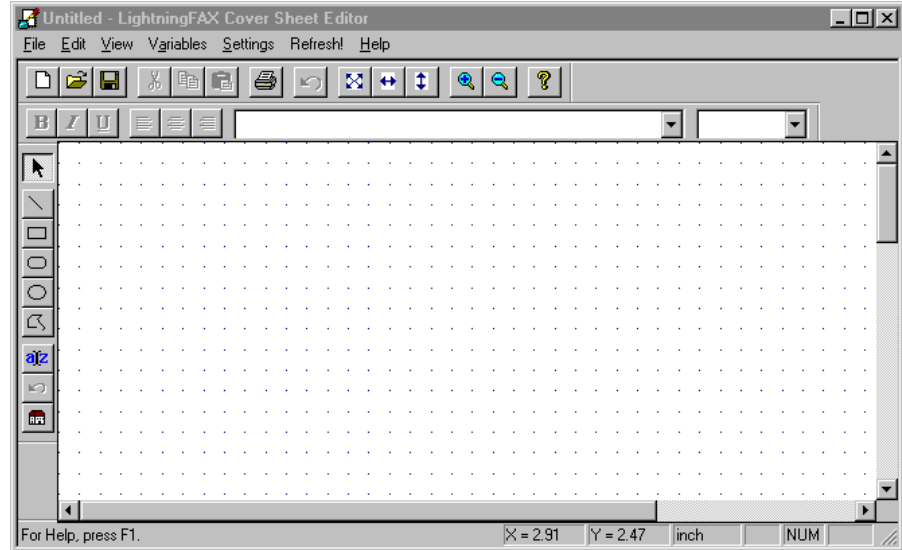
Stand-alone fax machines usually have a lower resolution than laser printers. Your cover sheets may have a slightly coarse appearance when printed by a fax machine.

**Note:** The LightningFAX administrator can chose not to install the cover sheet editor on users' computers.

## Chapter 10 Introducing the Cover Sheet Editor

### Launch the Cover Sheet Editor

- Choose Start → Programs → LightningFAX → LightningFAX Tools → Cover Sheet Editor.
- Choose Tools → Cover Sheet Editor in LightningFAX manager.



### The File Menu



New allows you to create a new cover sheet.

Open opens a previously saved cover sheet.

Save saves the current cover sheet.

Save As saves your current cover sheet under a different name or in a different location.

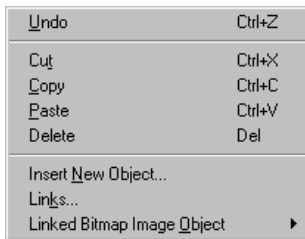
Print prints the current cover sheet.

Print Preview displays cover sheet as it will look when printed.

Print Setup sets print options.

Exit closes the cover sheet editor.

### The Edit Menu



Undo erases the last action.

Cut removes the selected object or objects and copies them to the Windows clipboard. The objects can then be pasted back on the same page or on another page using the Paste command.

Copy copies the selected object or objects to the clipboard without removing them. The objects can then be pasted back on the same page or on another page using the Paste command.

Paste copies the contents of the clipboard to your cover sheet. You can then paste it as often as needed.

Delete erases selected objects.

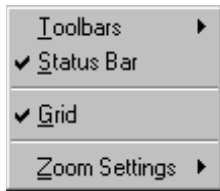
Insert New Object lets you create, import and link to graphics, text, spreadsheets, wave sounds, etc., created with other applications. Those applications must be installed to enable object creation.

If the cover sheet is linked to any OLE 2.0-compatible objects, the Links menu selection allows you to edit and update those links. This menu selection is not available if there are no linked objects in the cover sheet.

Bitmap Image Object offers a submenu with Edit, Open, and Convert menu selections. Edit lets you edit a highlighted bitmap using the editor's tools. Open opens the image in the application that created it. Convert saves the image to another file format.

The text of this last menu selection will vary according to the object selected in the cover sheet. For example, if you have selected a linked CorelDraw object, the phrase Linked CorelDraw Object appears instead of Bitmap Image Object. The subordinate menu selections, Edit, Open, and Convert remain unchanged.

### The View Menu



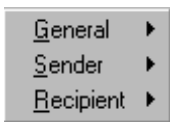
**Toolbars** displays the main toolbar, the drawing toolbar, and the text attributes toolbar.

**Status Bar** enables or disables the status bar at the bottom of the cover sheet editor window.

**Grid** toggles the display of the grid points on the page.

**Zoom Settings** lets you choose a different magnification setting to view your pages. By default, the page is displayed at 100%, its actual size.

### The Variables Menu



There are three categories of variables used in cover sheets: **General**, **Sender** and **Recipient**. These variables are automatically filled in by LightningFAX at the time of your fax transmission.

### The Settings Menu



**Page Setup** lets you choose the page size of the cover sheet: **Letter**, **Legal**, **A3**, **B3** or **A4**, or view the page dimensions by inches, pixels or millimeters.

### The Refresh Menu

The **Refresh** menu refreshes the cover sheet.

### Cover Sheet Variables

There are three categories of variables used in cover sheet: **General**, **Sender** and **Recipient**. These variables are automatically filled in by LightningFAX at the time of your fax transmission.

General variables include:

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Time	Number of Pages	Commentary	API Tag 2
Date	Subject	API Tag	

---

Sender variables include:

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Dear	Street	Phone	Billing Code
Display Name	City	Fax	Sub Billing Code
First Name	State/Province	Cellular	
Last Name	Country	Pager	
Company	Zip Code	E-mail	
Title			

---

Sender information is defined in the fax sender's **Information** property.

Recipient variables are arranged in four categories.

<b>Name</b>	<b>Address</b>	<b>Destination</b>	<b>Other</b>
Dear	Street	Destination	Phone
Display Name	City	Fax	Extension
Last Name	State/Province	Fax 2	Cellular
First Name	Zip Code	Fax 3	Pager
Company	Country	E-mail	Billing Code
Title		E-mail 2	Sub Billing Code
		E-mail 3	Phone Book Commentary
			User 1
			User 2
			User 3
			User 4

Recipient information is defined in the LightningFAX Phone Book. The menu selection `Dear` receives the value entered in the `Salutation` field in the Phone Book.

### OLE 2.0 Compatible Objects

Because the cover sheet editor is OLE 2.0 compatible, you can create, embed, or link to any OLE 2.0 compatible object created with a wide variety of third-party applications.

When you create a new object, the application that generates it is launched within the cover sheet editor. That application's menus, toolbars, and status bar are integrated into the cover sheet editor window. An application window allows you to perform the necessary operations. Clicking outside the window, but within the cover sheet, closes the application.

Among many others, objects placed in a cover sheet can be CorelDraw and Corel PhotoPaint graphics, Microsoft Paint graphics, Microsoft PowerPoint slides, Word and WordPerfect documents, wave sounds, and video clips.

The application to generate the desired object type must be accessible from the computer running the cover sheet editor.

### Embedding and Linking Objects

To embed an object is to place it in the cover sheet much like any other item such as text or a variable. However, an embedded object can be updated from within the cover sheet editor; when you do, the original application is launched within the cover sheet editor.

To link to an object is to reference it from the cover sheet without physically embedding it in the cover sheet. Changes made to the linked object, using the application that created it, are automatically reflected in the cover sheet.

### Managing Linked Objects in a Cover Sheet

By default, linked objects in a cover sheet are updated automatically. When the object is changed through the application that created it, those changes are reflected immediately and automatically in the cover sheet. However, updating can be made manual. When manual updating is selected, the object remains as it was when you originally linked to it. Changes made to the object are ignored.

For example, a logo already used as a linked object in a cover sheet is to be modified. You might change the update from automatic to manual while these changes are being made. When the modifications are finished, you have the option of returning to automatic updating or updating manually in anticipation of further changes.

You can also launch the application to edit to linked object directly, break the link, and change the object. Breaking the link embeds the object. Changing the object links to another object.

### Editing and Converting Objects

When an object created by another application is selected in the cover sheet editor, you can edit it by launching the application that created it. If the object was imported, the application can be launched within the cover sheet editor or as an independent program. If the object was linked, the application is always launched independently.


If the formats are supported, you can also convert the object to another format.


#### Create a Cover Sheet

- 1 Open the cover sheet editor.
- 2 Add text, a line or shape, graphic images, variables and OLE 2.0 compatible objects. Users can import or link to an OLE 2.0 compatible object.
- 3 Choose *Save As* and type a name. The `.cse` extension is automatically applied.





#### Add Text

Text formatting includes bold, italic, and underline; typeface and size; flush-left, flush-right, and centered.


- 1 Click .
- 2 Draw a text box.
- 3 Type the text.
- 4 Click outside the text box.

Note: When any text box is selected, clicking  undoes the last edit that was made on its content. Clicking it again restores the modifications.

### Add Lines and Shapes

- 1 Click  to add a line.  
Click  to add a rectangle or square.  
Click  to add a rectangle or square with rounded corners.  
Click  to add a circle or ellipse.
- 2 Drag a box at the location you want the object to appear.
- 3 Release the mouse button.

### Add a Polygon


- 1 Click  to add a polygon.
- 2 Position the cursor.
- 3 Click once and move the cursor to the next corner.  
Repeat step 2 as often as required.
- 4 Double-click to cancel polygon entry.

### Add Variables

- 1 Chose Variables.
- 2 Choose a General, a Sender or a Recipient variable.
- 3 Drag a box at the location you want the variable to appear.
- 4 Release the mouse button.


### Add an Object

The cover sheet editor enables you to insert the content of a file as an object, so that you may edit it at any time, using the application that was used to create it.

- 1 Choose `Edit` ➔ `Insert New Object` or click .
- 2 Select the `Create from File` option.  
If necessary, click `Browse` to navigate to the file.  
Select the `Display as Icon` option if you wish the object to appear as an icon in the cover sheet.
- 3 Select the file and click `Open`.
- 4 Click `OK`.  
LightningFAX imports the object into the cover sheet. It may be necessary to move the object or to change its size.

### Create an Object

The cover sheet editor also enables you to create a new object and choose the application that you wish to use.


- 1 Choose **Edit** ➔ **Insert New Object** or click .
- 2 Select the **Create New** option.
- 3 Choose an application from the list.
- 4 Click **OK**.

The application is launched within the cover sheet editor. Note that application's menu selections, and its toolbar and status bar are made available. You can resize the application's window if necessary.

- 5 Perform whatever operations are required to create the object.
- 6 Click outside the object but within the cover sheet.

The application is closed, leaving the object you created. It may be necessary to move or resize the object.

### Link to an Object

- 1 Choose **Edit** ➔ **Insert New Object** or click .
- 2 Select the **Create from File** option.
- 3 Select the **Link** option.

If necessary, click **Browse** to navigate to the file.

Select the **Display as Icon** option if you wish the object to appear as an icon in the cover sheet.

- 4 Select the file and click **Open**.
- 5 Click **OK**.

LightningFAX imports the object into the cover sheet. It may be necessary to move the object or to change its size.

### Change a Link to Manual Update

- 1 Select a linked object.
- 2 Choose **Edit** ➔ **Links**.
- 3 Choose the **Manual** option.  
If necessary, use **Cancel** to cancel an unwanted operation.
- 4 Click **Close**.

### Manually Update a Link to an Object

- 1 Select a linked object.
- 2 Choose **Edit** ➔ **Links**.
- 3 Click **Update Now**.  
If necessary, use **Cancel** to cancel an unwanted operation.
- 4 Click **Close**.

**Break a Link to an Object**

- 1 Select a linked object.
- 2 Choose **Edit** ➔ **Links**.
- 3 Click **Break Link**.
- 4 Click **Close**.

**Update an Object**

- 1 Select an object.
- 2 Choose **Edit** ➔ *application type* **Object**.  
This menu selection is the last in the **Edit** menu. Its exact name will change according to the type of object selected. If a bitmap image is selected, for example, the menu selection will be **Bitmap Image Object**. If the object selected is linked to the cover sheet, the work **Linked** will appear before the name of the application type.
- 3 Choose **Edit** to launch the original application inside the cover sheet editor.  
Alternatively, choose **Open** to launch the original application as an independent program.  
If the object is linked to the cover sheet, the application is always launched as an independent program.
- 4 Make whatever updates you need.
- 5 When finished, click outside the application if you launched the application inside the cover sheet editor.
- 6 When finished save your changes and choose **File** ➔ **Exit** in the application, if you launched the application as an independent program.

**Update a Linked Object in a Cover Sheet**

The following is an alternative method of updating linked objects.

- 1 Select a linked object.
- 2 Choose **Edit** ➔ **Links**.
- 3 Choose **Open Source**.  
The original application is launched as an independent program.
- 4 Make whatever changes you need.  
If necessary, use **Cancel** to cancel an unwanted operation.
- 5 Choose **File** ➔ **Save** in the application.

**Convert an Object**

- 1 Select the object.
- 2 Choose **Edit** ➔ *application type* **Object** ➔ **Convert**.
- 3 Select the target format for conversion in the **Convert** window.  
Only the compatible conversion formats will be available. For example, a bitmap image created with Microsoft Paint can be converted to a **Picture (Device Independent Image) Bitmap**.
- 4 Click **OK**.

**Edit an Item in a Cover Sheet**

- 1 Select the item.
- 2 Choose **Edit** ➔ **Cut** to remove the item to the clipboard.  
Choose **Edit** ➔ **Copy** to copy the item to the clipboard.  
Choose **Edit** ➔ **Paste** to paste the item from the clipboard to the cover sheet.
- 3 If necessary, use **Edit** ➔ **Undo** to undo an unwanted change.

**Delete an Object from a Cover Sheet**

- 1 Select the item.
- 2 Choose **Edit** ➔ **Delete**.

**Print a Cover Sheet**

- 1 Open a cover sheet.
- 2 Choose **File** ➔ **Print**.  
Change whatever print options you wish.
- 3 Click **OK**.

**Preview a Cover Sheet**

- 1 Open a cover sheet.
- 2 Choose **File** ➔ **Print Preview**.
- 3 Choose **Close**.

**Change Cover Sheet Display Settings**

---

To toggle display of toolbars in the cover sheet editor:	Choose <b>View</b> ➔ <b>Toolbars</b> ➔ <b>Main Toolbar</b> Choose <b>View</b> ➔ <b>Toolbars</b> ➔ <b>Drawing Toolbar</b> Choose <b>View</b> ➔ <b>Toolbars</b> ➔ <b>Text Attributes Toolbar</b>
To toggle the display of the status bar:	Choose <b>View</b> ➔ <b>Status Bar</b>
To toggle the display of the grid:	Choose <b>View</b> ➔ <b>Grid</b>

---

**Change Cover Sheet Zoom Settings and Page Display**

Cover sheet zoom settings are available in magnifications of 200, 100, 50, and 25 per cent. The default is 100 per cent.

---

To select a higher zoom setting:	Choose <b>View</b> ➔ <b>Zoom Settings</b> ➔ <b>Zoom In</b>
To select a lower zoom setting:	Choose <b>View</b> ➔ <b>Zoom Settings</b> ➔ <b>Zoom Out</b>

---

### Change Cover Sheet Page Display

---

To view the entire page:	Choose View ➤ Zoom Settings ➤ Fit Entire Page
To fit to page width:	Choose View ➤ Zoom Settings ➤ Fit Page Width
To fit to page height:	Choose View ➤ Zoom Settings ➤ Fit Page Height

---

### Change Cover Sheet Page Size

Users can select Letter, Legal, A3, B3 and A4 page sizes. You can also display page size in Inches, Pixels or Millimeters.

- 1 Choose Settings ➤ Page Setup in the cover sheet editor.  
Select a measure, if required.  
Select a measure of Inches, Pixels or Millimeters; if required.
- 2 Select a paper size.



A profile can contain a fax header, reference a cover sheet, and contain sender information. A profile can also specify a Call Station ID (CSID), a callback number (CBN), a prefix, a suffix, the number of retries, the fax priority, and sender billing information. A profile can be associated with a resource or make use of least cost routing and load balancing. If a profile is to make use of least cost routing and load balancing, an LCR network must be configured.

Profiles are saved and can be applied through SendFAX or the Forms for Microsoft® Outlook.

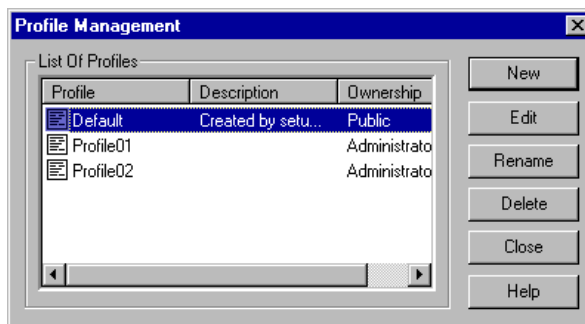
Profiles serve a variety of needs.

- ❑ Administrators can use a profile to specify once the company information that otherwise would be specified repeatedly in the user properties of each user.
- ❑ Creating several profiles, each with different sender information, allows a user to send faxes on behalf of others.
- ❑ An individual user might use profiles to consistently apply a particular fax header and cover sheet to their faxes. For example, a user might create one cover sheet for intra-office and another for external communications. One profile references the first, another references the second.
- ❑ Several otherwise identical profiles might each reference a different cover sheet, each cover sheet containing the same information, but in a different language.

**Note:** A profile must be used if sender billing information is to be saved with fax sender information.

### Launching the Profile Manager

- Choose Tools → Profile Management in the manager or in SendFAX.



### Types of Profiles

Profiles may be:

- private, created and used by an individual user
- public, created by an administrator and available to all users
- group, created by an administrator and associated with a group

Overlooking its other functions, a public profile provides a means of specifying corporate information once rather than repeatedly in the User Properties of every user. Such information would include company name and address, telephone and fax numbers, Call Station ID, callback number, etc. This information, entered in a public profile, overrides the same information entered in a user's Properties.

A group profile serves the same purpose for groups.

Only administrators can edit public or group profiles. All users can create private profiles. Private profiles are available only to those who create them.

### LightningFAX Default Profile

LightningFAX provides a default profile, which uses the name Default. It references the default cover sheet, also named Default; is associated with Resource 1, provides for three retries and sets a fax priority of three. All other information is blank. You can use this as your default profile, or use it as the basis for other profiles.

### Default Profiles

Any profile can be declared the default, and there may be a default profile of each type. When this is the case, LightningFAX automatically applies first the default public profile. If no default public profile exists, LightningFAX applies the default group profile. If that does not exist, it applies the default private profile.

When sending a fax, however, users can select any profile available to them. For example, although a default group profile exists, a user in the group can choose their private profile.

## Sender Information

Sender information in public and group profiles includes:

Company	Street	City	State	Country
Zip Code	Phone	Fax	Call Station ID (CSID)	Callback Number (CBN)
Prefix	Suffix			

Sender information in private profiles includes the above and the following:

Salutation	First Name	Last Name	Job Title	Email
Cellular	Pager	Billing Code	Sub Billing Code	

Profiles can also include a fax header and reference a cover sheet.

## Associating a Profile with a LightningFAX Resource

A profile can be associated with a resource. A profile would be associated with a resource when faxes are transmitted through any one of several resources. The profile would be applied when a fax is transmitted through the associated resource.

If least cost routing (LCR) and load balancing have been configured, the profile can instruct LightningFAX to use LCR when transmitting faxes.

## About Billing Codes

Administrative procedures sometimes require that billing information be associated with a fax transmission. For example, long distance costs may be charged to specific departments within a company. A sender billing code can be specified to identify the department. Similarly, a recipient billing code might be assigned when clients are to be charged such costs.

Billing information consists of a billing and a sub-billing code for both sender and recipient. Using billing and sub-billing codes together can provide a greater degree of precision. For example, a billing code might identify a particular department in a national corporation; several different sub-billing codes might each identify that department's regional offices.

Sender billing information is usually specified in a profile, although this is not mandatory. If no profile is being used, or if the profile being used with SendFAX does not contain billing information, the fax sender can enter it by accessing their sender information.

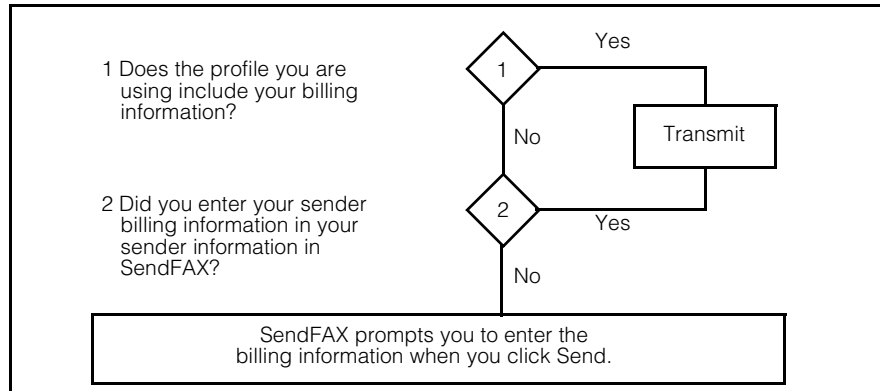
Sender billing information can be stored only in a private profile.

Recipient billing information is usually specified in the recipient's entry in a phone book. Again, this is not mandatory. Fax senders can enter recipient billing information by accessing the fax recipient's properties when using SendFAX.

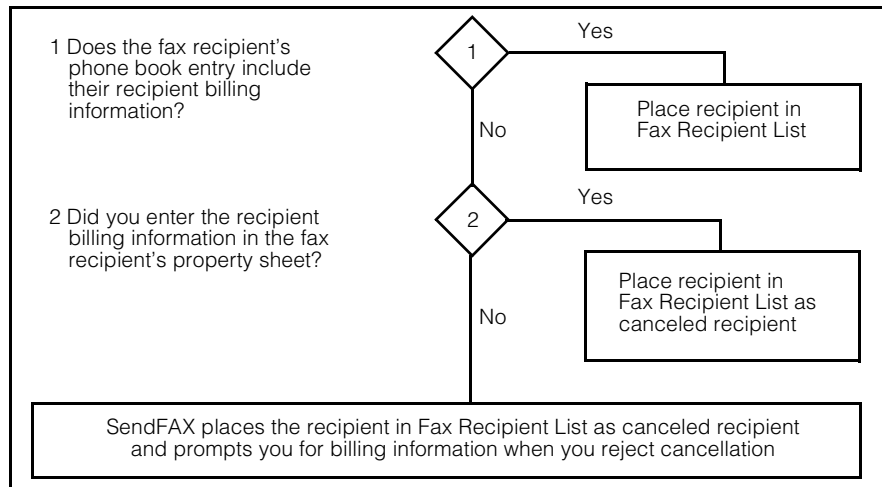
### Enforcing Billing Code Entry and Validation

Fax senders can enter billing information, whether sender or recipient, at their discretion. However, administrators can enforce the entry of billing codes.

The following diagram outlines SendFAX operation when the entry of sender billing information is enforced.



The following diagram outlines SendFAX operation when the entry of recipient billing information is enforced.



### Billing Code Validation

Billing information is validated by entries made to either or both of two files: `sbilling.dat` and `rbilling.dat`. The first file validates sender billing information; the second, recipient information. Both files must be stored in the `\Program Files\LightningFAX\LFServer` folder. Both are ASCII files composed with any text editor.

The syntax of entries in these files is `billingcode, [sub-billingcode]`, where both entries are any alphanumeric string. For example, `abcindustries`, represents the billing code alone; `abcindustries,dept12` represents a billing and a sub-billing code. Wildcards can be specified. The question mark, `?`, represents any single alphanumeric character; the asterisk (`*`) represents any number of alphanumeric characters.

**Note:** Although a sub-billing code is optional, the comma must be entered.

## Create a Profile

- 1 In the profile manager, click **New**.
- 2 Type a name in **Profile Name**. An optional description can be entered in the **Description** field.

If desired, use **Copy Profile Settings From** to select an existing profile as the basis for the new profile.

Administrators can specify the type of profile: **Public**, **Private**, or **Group**. The default is **private**. Users create only private profiles.

To create a group profile, select **For Group** and select the group.

- 3 Click **OK**. The **Editing Profile** window is displayed.

To add a fax header, select **Use Fax Header**. You can edit fax header information by clicking **Edit Fax Header**.

To include a cover sheet, select **Use Cover Sheet**. Click **...** and select a cover sheet. Only a LightningFAX cover sheet with the `.cse` extension can be selected.

- 4 Type the sender information. Sender information in a profile overrides the corresponding information in user and group properties.

If required, select a particular resource. Only those resources configured for use when LightningFAX was installed will be available.

If least cost routing has been configured, administrators can instruct LightningFAX to use it by selecting the *Use LCR* option.

To make the profile a default, select *Set this profile as default*.

If desired, change the number of retries. The default is three. The maximum is 99.

If desired, change the fax priority. The default is three. Fax priority ranges from 1, the highest, to 10, the lowest.

If a sender billing code or both a billing code and a sub-billing code is to accompany the faxes sent using the profile, type them in *Billing Code* and *Sub-Billing Code*.

- 5 Click *OK*.

### Edit a Profile

- 1 In the profile manager, select the profile. Only administrators can edit public and group profiles.
- 2 Click *Edit*.
- 3 Enter whatever changes are necessary.
- 4 Click *OK*.

### Rename a Profile

- 1 In the profile manager, select the profile.
- 2 Click *Rename*.
- 3 Type the new name.
- 4 Click *OK*.

### Delete a Profile

- 1 In the profile manager, select the profile.
- 2 Click *Delete*.
- 3 Confirm deletion.

Annotations can be added to a document in SendFAX and a TIFF file opened in the viewer.

Annotations are added by selecting the type of annotation, drawing a rectangle in the page displayed, and applying the annotation selected within the rectangle. All annotations can be resized and moved about the page. Annotations can also be formatted. Color and thickness can be assigned to lines and rectangles; color, font, and size can be assigned to text.

Annotations added in SendFAX are not permanent. They are superimposed on the page in the Fax Preview page and incorporated in TIFF file SendFAX generates when you transmit the document. The original document remains unchanged. Annotations added in the viewer are saved if you save the TIFF file. The next time you open that document in the viewer, the annotations will be present. You can then modify them as necessary.

In both SendFAX and the viewer, annotations are accessed through the `Annotation` menu selection.

### Annotation Types

There are five types of annotations:

**Text** draws a text box on the currently displayed page. Type the text immediately after drawing the box. Text boxes can be resized by clicking them and dragging the handles.

**Line** draws a line on the page.

**Rectangle** draws a rectangle on the page.

**Stamp** displays a window through which you select a bitmap (.bmp) file. Select the bitmap file you wish and drag the cursor to form a rectangle. The selected bitmap graphic is written to the page.



LightningFAX offers three bitmap images: **Approved, For Your Approval**, and **Please Sign and Return**. You can use any others available. Like any annotation, bitmap stamps can be selected and resized.

**Highlighter** draws a rectangular, yellow colored rubber band. Use it to highlight important text.

### Show and Hide Annotations

- ❑ In SendFAX or the viewer, choose **Annotation** ➔ **Show Annotation** to toggle the display of annotations.

### Add Annotations

- 1 In SendFAX, choose **Annotation** ➔ **Add** ➔ **Text, Line, Rectangle, or Highlighter.** In the viewer, choose **Annotation** ➔ **Text, Line, Rectangle, or Highlighter.**
- 2 Position the cursor at the desired starting point.
- 3 Drag the cursor to the desired end point and release the mouse. If you drew a text box, type the text.
- 4 In SendFAX, click  in the Annotation toolbar to cancel the annotation type. In the viewer, click , You must cancel the annotation type to perform any other operations.

### Add a Bitmap (.bmp) Annotation

- 1 In SendFAX, choose **Annotation** ➔ **Add** ➔ **Stamp.**  
In the viewer, choose **Annotation** ➔ **Stamp.**  
A window displays the three bitmap files provided with SendFAX. The text of each bitmap file is indicated by its filename: **Approved, For Your Approval**, and **Please Sign and Return**.
- 2 Select any one of these three or navigate to another directory to select another bitmap.
- 3 Click **Open.**  
In SendFAX, the bitmap is automatically positioned at the top left of the page. Move or resize it as necessary.  
In the viewer, drag the cursor to enter the bitmap.

### Delete an Annotation

- 1 In SendFAX, select the annotation and choose **Annotation** ➔ **Delete.**, In the viewer, select the annotation, right-click and choose **Delete.**
- 2 Confirm deletion.

### Move and Resize Annotations

- 1 Select the annotation.
- 2 Click once. Eight resizing handles appear on the perimeter of text boxes, rectangles, and highlight. Two handles appear at each end of a line.
- 3 Move the annotation by dragging it., Resize the annotation by dragging its handles.

### Edit Text Annotations

- 1 In SendFAX, position the cursor over the text box and double-click., In the viewer, position the cursor over the text box, right-click, and choose **Properties.**
- 2 Enter the changes.
- 3 In SendFAX, click anywhere outside the text box., In the Viewer, click **OK.**

### Format Annotations

Format properties for lines and rectangles include thickness and color. Format properties for text include foreground and background color; font and type size; bold, italic, and underline.

**Note:** Formatting cannot be applied to bitmap images.

- 1 Select a line, rectangle, or text box.
- 2 In SendFAX, choose **Annotation** ➔ **Properties.**, In the viewer, right-click and choose **Properties.**
- 3 Assign the properties you wish.
- 4 Click **OK.**



A fax header is a line of text printed at the top of each page sent. LightningFAX makes available a large number of variables — Day, Month, Year, etc — that can be included in a fax header. Text can also be specified.

Some variables, like Month, Time, and Fax Number, are resolved by the system. Others, like Company, CSID, and Sender Phone Number, are resolved by entries made to a user's or group's Information property. If no information is entered there, the variable in the fax header will contain no information.

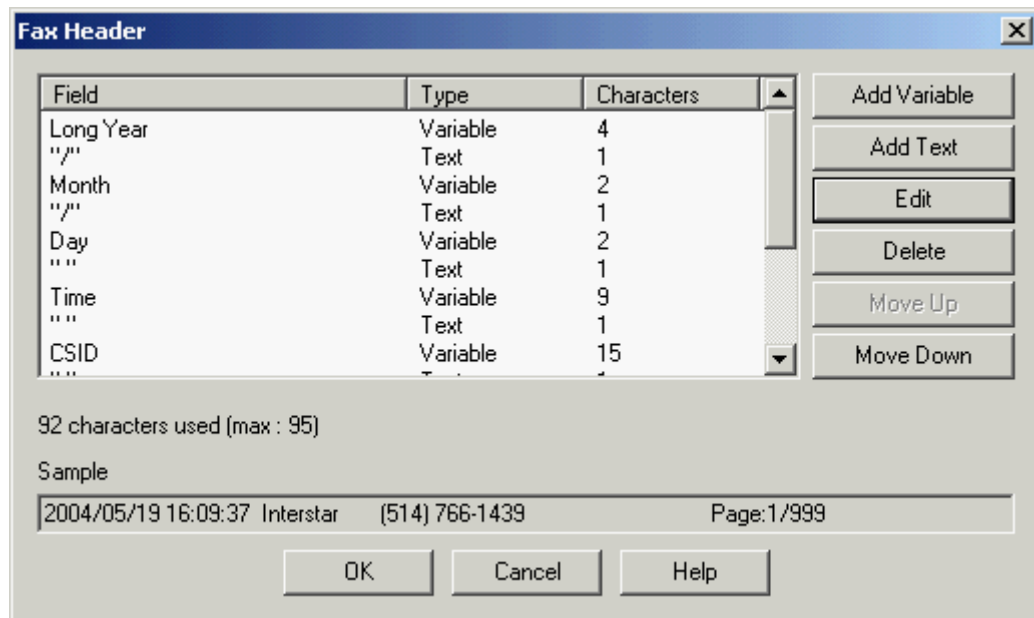
Fax headers can be specified (a) in a profile, (b) for an individual user, (c) for a group, and (d) for a resource. That is the order of precedence when a fax header is specified at more than one level. For example, a fax header specified in a profile overrides a fax header specified for an individual user, and so on.

### Default Fax Header

After initial installation of LightningFAX, a default fax header is already associated with resource 1. This fax header includes:

- the date in Year, Month, and Day
- time in Hour, Minute, and Seconds
- a Call Station ID (CSID)
- a callback number (CBN)
- the word **Page** followed by page number and total number of pages

This fax header may be modified or deleted, as required.



### Add Fax Header to a Resource

**Note:** Only administrators add fax headers to resources.

- 1 Select the resource in the manager.
- 2 Choose Edit ➔ Properties or right-click and choose Resource Properties.
- 3 Click Fax Header.
- 4 Compose the fax header.


### Add Fax Header for a Group or User

- 1 Select a group or user in the manager.
- 2 Right-click and choose Group Properties or User Properties.  
**Note:** Only administrators add fax headers to groups.
- 3 Select the Fax Settings tab.
- 4 Under Settings, select Use these settings if it is not already selected.
- 5 Click Edit Fax Header.
- 6 Compose the fax header.

### Add Fax Header to a Profile

- 1 In the manager, choose Tools ➔ Profile Management to create a new profile or edit an existing one.
- 2 Select Use Fax Header.
- 3 Click Edit Fax Header.
- 4 Compose the fax header.

### Add Fax Header in SendFAX

- 1 Choose `Edit` ➔ `Transmission Settings` or click .
- 2 Click `Edit Fax Header`.
- 3 Compose the fax header.

### Delete a Fax Header

- 1 Open an existing fax header.
- 2 Click `Add Variable`.
- 3 Select `No Fax Header`.
- 4 Click `OK` and confirm deletion.
- 5 Click `OK`.

### Compose or Edit Fax Headers

**Note:** Fax headers can be no more than 95 characters long.

#### Add a Variable

- 1 Add or open a fax header.
- 2 Click `Add Variable`.
- 3 Select the variable from the list.

The `Variable Number` field identifies the variable.

The `Maximum Characters` field indicates the longest entry possible. For example, the `Sender Company` variable allows for a maximum of 47 characters.

The `Characters Used` field specifies how many of the available characters are to be used. For example, if the company name uses 11 characters, you might wish to type 12 in `Characters Used`; using 11 characters for the name with an extra character for the space before the next variable.

If you do not make an entry to `Characters Used`, the maximum characters are used.

Some variables such as `Hour`, `Minute`, and `Second` must use their maximum number of characters. That is, you cannot specify fewer characters than the maximum indicated.

The `Sample` field offers an example of the variable selected.

- 4 Click `OK`.

#### Add Text

- 1 Add or open a fax header.
- 1 Click `Add Text`.
- 2 Type the text. Blank space can be entered by pressing the spacebar.
- 3 Click `OK`.

Your text is placed in the list, with quotation marks added automatically.

## Chapter 13 Introducing Fax Headers

### Edit a Variable or Text

- 1 Open or add a fax header.
- 2 Select a variable or the text already entered in the fax header.
- 3 Click `Edit`.
- 4 Make the changes you want.
- 5 Click `OK`.

### Delete a Variable or Text

- 1 Select the variable or text already entered in the fax header.
- 2 Click `Delete`.
- 3 Click `OK`.

### Reorder Variables and Text

- 1 Select the variable or text already entered in the fax header.
- 2 Use `Move Up` to raise the variable or text one place in the list. Use `Move Down` to lower the variable or text one place in the list.
- 3 Click `OK`.

LightningFAX mail gateways are a means of sending and receiving faxes without using SendFAX. Most frequently, a gateway is installed as an alternative to installing and using the manager, SendFAX, and the various tools and utilities that accompany those products.

If a gateway is installed, it is probable that your administrator wishes that you send and receive faxes through your e-mail software rather than through SendFAX. Indeed, it is probable that SendFAX isn't installed on your computer.

The gateways include:

- Gateway for Microsoft Exchange
- Gateway for Simple Mail Transfer Protocol (SMTP)
- Gateway for R/3

**Note:** The gateway for SMTP provides faxing functionality for such e-mail software as Microsoft Outlook Express, Netscape Communicator, Eudora, etc. If you are using any of these products, see See Faxing through the SMTP Gateway on page 131. to learn how to send faxes.

### LightningFAX Addressing Format

No matter what mail gateway is used to transmit faxes, XMediusFAX provides a way of specifying per-recipient properties.

The recipient address can be formatted using `key=value` pairs, that provide extra information. Each pair must be separated by a forward slash `"/`.

Spaces can appear in the values, for example: `fn=John Doe`.

Here are the keys available:

---

<code>dear</code>	<code>fax</code>
<code>first</code> or <code>fn</code> (first name)	<code>pager</code>
<code>last</code> or <code>n</code> (last name)	<code>cellular</code>
<code>address</code>	<code>company</code> or <code>co</code>
<code>city</code>	<code>email</code>
<code>state</code>	<code>jobtitle</code>
<code>zipcode</code>	<code>distlist</code>
<code>country</code>	<code>billingcode</code> or <code>bc</code>
<code>phone</code>	<code>subbillingcode</code> or <code>sbc</code>

---

These can be used with all LightningFAX gateways. However, each gateway has a slightly different way of addressing recipients. Examples are presented in the following sections, according to the gateway described. See also About Distribution Lists on page 133 for information on distribution lists.

### About the Gateway for Microsoft Exchange

If the gateway for Microsoft® Exchange is installed in the network, users can fax with Microsoft Outlook. Fax recipients can be added to the personal address book (with Exchange 5.5 only; not available with Exchange 2000) and a distribution list of fax recipients can be created. Nothing prevents users from transmitting a same message to both e-mail and fax recipients at the same time.

**Note:** The forms for Microsoft Outlook should not be confused with the gateway for Microsoft Exchange. The gateway and the forms work together but serve different purposes.

The gateway submits outgoing faxes, generated from mail messages, to the fax server, and processes mail notifications triggered by the fax server.

The forms for Microsoft Outlook are simply an extended graphical user interface designed for the manipulation of mail messages sent to and received from the gateway.

Incoming faxes are managed as incoming e-mail messages are managed.

**Add Recipients to Microsoft Outlook Address Book 1 (Exchange 5.5 Only)**

- 1 Launch Outlook.
- 2 Choose **Tools** ➔ **Address Book**.
- 3 Choose **File** ➔ **New Entry**.
- 4 Select the **LightningFAX Address** tab.
- 5 Click **OK**. The **New LightningFAX Address Properties** window is displayed.
- 6 Type a **Display Name** and **Fax number**.
- 7 Additional information can be entered in the **Business**, **Phone Numbers**, and **Notes** tabs.
- 8 Click **OK**.

**Add Recipients to Microsoft Outlook Address Book 2 (Exchange 5.5 Only)**

- 1 Launch Outlook.
- 2 Choose **File** ➔ **New** ➔ **Mail Message**.
- 3 Choose **Tools** ➔ **Address Book** or click **To** in the **Message** window.
- 4 Click **New** in the **Select Names** window.
- 5 Select the **LightningFAX Address** tab.
- 6 Click **OK**.
- 7 Type a **Display Name** and a **Fax number**.  
Additional information can be entered in the **Business**, **Phone Numbers**, and **Notes** tabs.
- 8 Click **OK**.

**Specify Notification Options for Microsoft Outlook (Exchange 5.5 Only)**

- 1 Launch Outlook.
- 2 Choose **File** ➔ **New** ➔ **Mail Message**.
- 3 Choose **File** ➔ **Properties**.
- 4 Click **Send Options**.
- 5 Select the **Fax Options** tab.  
Under **Notify Sent**, select **Yes** to enable notification of successful transmission.  
Under **Notify Failed**, select **Yes** to enable notification of failed transmission.
- 6 Click **OK**.

### Specify a Cover Sheet for Microsoft Outlook (Exchange 5.5 Only)

- 1 Launch Outlook.
- 2 Choose File ➤ New ➤ Mail Message.
- 3 Choose File ➤ Properties.
- 4 Click Send Options.
- 5 Select the Fax Options tab.
- 6 Under Cover Sheet, select First Mail Attachment. The first mail attachment will be transmitted as a cover sheet.
- 7 Click OK.

### Specify a Fax Header for Microsoft Outlook (Exchange 5.5 Only)

- 1 Launch Outlook.
- 2 Choose File ➤ New ➤ Mail Message.
- 3 Choose File ➤ Properties.
- 4 Click Send Options.
- 5 Select the Fax Options tab.
- 6 Under Settings, type a Fax Header.
- 7 Click OK.

### Specify a Call Station ID for Microsoft Outlook (Exchange 5.5 Only)

- 1 Launch Outlook.
- 2 Choose File ➤ New ➤ Mail Message.
- 3 Choose File ➤ Properties.
- 4 Click Send Options.
- 5 Select the Fax Options tab.
- 6 Under Settings, type a Local CSID.
- 7 Click OK.

### Fax from the Microsoft Outlook Address Book

- 1 Launch Outlook.
- 2 Choose File ➤ New ➤ Mail Message.
- 3 Click To.
- 4 Use Show Names from the to select your Personal Address Book.
- 5 Select a recipient's name or a fax distribution list
- 6 Click To, Cc, or Bcc to transfer recipients to the Message Recipients list.
- 7 Click OK.
- 8 Enter the text of your fax.  
A cover sheet can be included as an attachment.  
You can include any other attachments. These are faxed, like the text entered in the message window itself.
- 9 Click Send.

### Fax from Microsoft Outlook

- 1 Launch Outlook.
- 2 Choose **File** ➔ **New** ➔ **Mail Message**.
- 3 In **To**, type the recipient's name and fax number of using the following syntax.

```
[FAX:recipient_name@fax_number]; . . .
```

For example:

```
[FAX:J Doe@222-333-4444].
```

The keyword FAX, the square brackets enclosing the command, the name, and the fax number are mandatory. Enter additional recipients by separating each with semi-colons.

Alternatively, use the LightningFAX addressing format described on page 128.

An example would be:

```
fax:/fn=John/ln=Smith@5551212
```

**Note:** As shown above, the `fax=fax_number` syntax used with other gateways has no meaning when addressing recipients for the gateway for Microsoft Exchange, since the number goes after the "@".

- 4 Enter the text of your fax.  
A cover sheet can be included as an attachment.  
You can include any other attachments. These are faxed, like the text entered in the message window itself.
- 5 Click **Send**.

### Faxing through the SMTP Gateway

E-mail products that use the gateway for SMTP include such products as Microsoft Outlook Express, Netscape Communicator, and Eudora. The following section outlines the means to manage address books and to send faxes. However, details may vary depending on the e-mail software you are using.

#### Add Recipients to an SMTP Mail Client

All SMTP mail clients, such as Microsoft Outlook Express and Netscape Messenger, include an address book in which you can store names, e-mail addresses, and other information. If the LightningFAX Gateway for SMTP is installed, you may wish to enter fax recipients in the address book. The following steps are generalized to apply to most SMTP mail clients.

- 1 Launch the SMTP mail client.
- 2 Choose the menu selection that open the address book.
- 3 Choose the menu selection that allows you to enter a new contact.
- 4 Type the recipient's name in the fields provided.

## Chapter 14 Introducing LightningFAX Mail Gateways

- 5 In the field that normally receives the e-mail address, enter the recipient information using the following syntax:

*fax=fax\_number@domain\_name*

where *domain\_name* is the domain where the email account resides.

For example:

*fax=4445555@MyCompanyDomain.com*

- 6 Add the recipient.

**Note:** All SMTP mail clients allow you to maintain mailing or distribution lists of the contacts in an address book. The gateway for SMTP allows you to select a mailing list or distribution list of fax recipients. However, because the details of adding contacts to a mailing list vary depending on the mail software, Interstar can only direct you to the documentation provided by your SMTP mail software.

### Fax from an SMTP Address Book

- 1 Launch the SMTP mail client.
- 2 Choose the menu selection that initiates a new message.
- 3 Choose the menu selection that allows selection of a contact or mailing list.
- 4 Type a title in the `Subject` field.
- 5 Type the text of the fax.
- 6 Add whatever attachments are to be sent.
- 7 Choose the menu selection that transmits the fax.

**Note:** The gateway for SMTP supports cover sheets through body codes. If LightningFAX cover sheets reside on your computer, you can use the cover sheet body codes. If they reside on the computer where the LightningFAX server resides, you can use body codes to specify a public profile that references a cover sheet. See About Body Codes on page 135 and, specifically, Cover Sheet Body Codes on page 138 for information. The `@@Profile` body code is described on page 136. Your system administrator should detail which method is available to you.

### Fax from an SMTP Mail Program

- 1 Launch the SMTP mail program.
- 2 Choose the menu selection that initiates a new message.
- 3 Type the recipient in the `To` field using the following format:

*fax=fax\_number@domain\_name*

where *domain\_name* is the domain where the email account resides.

For example:

*fax=4445555@MyCompanyDomain.com*

Alternatively, if the gateway has been configured to poll the messages from a mailbox using the POP3 protocol, you can enter the recipient like this:

```
" fax_number" <FAX@smtp_server_name.com>
```

For example:

```
" 3335555 " <FAX@centerone.com>
```

You can also use the XMediusFAX addressing format described on page 133.

An example would be:

```
fax=5551212/fn=John/ln=Smith/  
co=MyCompany@domain.com
```

**Note:** You can enter several recipients by separating each with a comma or a semi-colon, depending on the mail program

- 4 Enter the text of the fax.
- 5 Add whatever attachments are to be sent.
- 6 Choose the menu selection that transmits the fax.

### Fax Using a Distribution List

All gateways support the use of distribution lists to fax a large number of recipients.

A distribution list is a comma-separated-value (.csv) file composed in any text editor or in Microsoft Excel.

**Note:** The delimiter does not necessarily have to be a comma. Any acceptable international delimiter may be used, as long as it is specified in the List Separator field of the Numbers tab, in the Start ➤ Settings ➤ Control Panel ➤ Regional Options dialog.

### About Distribution Lists

You can create a distribution list using any text editor such as Notepad or with Microsoft Excel. The .csv extension is mandatory. The file is arranged in columns and rows. The columns represent a category of information — such as first name, last name, company, address, fax number, etc. The rows represent the information about the recipients that corresponds to the category.

These are the available headings.

Address1	Country	LastName	User1
Address2	Email	Pager	User2
BillingCode	Extension	Phone	User3
Cellular	Fax	Salutation	User4
City	FirstName	State	ZipCode
Company	JobTitle	SubBillingCode	

### Creating a Distribution List

Each heading is entered as a single column on the first row. Headings can be specified in any order and in any combination; although Fax is mandatory. The value for each category used is specified on the rows below.

A distribution list in Excel might resemble the following.

FirstName	LastName	Company	Fax	BillingCode
Sue	Bernard	CGF Consulting	989-3333	BAC12ZH12
Albert	Fellows	ABC Industries	333-2232	A 1094990
Debi	Johnson		111-3333	
David	Mark	Katon Inc.	888-0099	
Lynn	Schiller		999-3333	7708102 THS

Spaces are permitted and most categories — Fax is the exception — can be without entries.

**Note:** When using Microsoft Excel, be sure to save the spreadsheet as a .csv file.

The same information in a .csv text file would match the following. Spaces are permitted. Unfilled categories are indicated by commas.

```
FirstName, LastName, Company, Fax, BillingCode
Sue, Bernard, CGF Consulting, 9893333, BAC12
Albert, Fellows, ABC Industries, 333-2232, A 1094
Debi, Johnson, , 111-3333,
David, Mark, Katon Inc., 888-0099,
Lynn, Schiller, , 999-3334, 7708
```

### Faxing through a Distribution List

- 1 Launch your e-mail program.
- 2 Specify the distribution list in the To field using the following format.

```
distlist=filename.csv
```

You can also use the LightningFAX addressing format described on page 128.

An example would be:

```
distlist=clients.csv@MyFaxDomain.com
```

- 3 Include the .csv file as an attachment.
- 4 Compose your message.
- 5 Click Send.

## About Body Codes

Body codes are codes you specify in the body of your message. Some are strictly informational, others perform an action of some kind, a third type specifies a cover sheet and the sender information to appear in it. A body code also specifies a distribution list for fax broadcasts.

Body codes are specified in the following format.

```
@@CODE [value]
```

Although most specify a value, some do not. For example, the @@UseLCR body code is used without a value to select Least Cost Routing. The @@CSID body code requires a value.

If spaces appear in the value, an address is usually composed of the number and the name of a street, the value is entered between quotation marks.

```
@@CODE "value value value"
```

If the quotation marks are omitted, only the first string is recognized as a value. The next strings are considered part of the actual message being sent.

**Note:** Body codes are not supported in messages in RTF or HTML format. If body codes are to be used, the message must be in plain text.

## Informational Body Codes

Informational body codes write information that appears in fax details. When the fax details are accessed in the manager, the values specified appear.

Informational body codes include:

---

@@APITag	specifies the API tag to appear in Specific fax details. API tags are no more than 10 numeric characters.
@@APITag2	
	@@APITag 12343
@@CallBackNumber	specifies the callback number to appear in Specific fax details.
	@@CallBackNumber 191-8888
@@CSID	specifies a call station ID to appear in Specific fax details. An alphanumeric value is specified.
	@@CSID "ABC 123"

---

## Operational Body Codes

Operational body codes perform an action of some kind. Actions can include specifying a priority, selecting an outgoing LightningFAX resource, selecting a profile, and scheduling transmission, etc.

Operational body codes include:

---

<code>@@AlternateNotificationAddress</code>	<p>specifies an alternate notification email address than the default.</p> <p><code>@@AlternateNotificationAddress</code> <i>email_address</i></p>
<code>@@FaxHeader</code>	<p>specifies the alphanumeric line to appear at the top of a received fax. Fax headers can detail sender information, the company name and a fax number, or even a slogan.</p> <p>See Chapter 13 Introducing Fax Headers for details.</p> <p><code>@@FaxHeader "Sent by LightningFAX"</code></p>
<code>@@FaxPrefix</code>	<p>specifies a number to be dialed before the fax number. An example of a fax prefix is a number dialed to obtain an outside telephone line.</p> <p><code>@@FaxPrefix 9</code></p>
<code>@@FaxSuffix</code>	<p>specifies a number to be dialed after the fax number is dialed. An example of a fax suffix is your PIN number.</p> <p><code>@@FaxSuffix 9890</code></p>
<code>@@NoNotificationOnFail</code>	<p>specifies that no notification appear in your e-mail program when an outgoing transmission fails. There is no value to specify.</p> <p><code>@@NoNotificationOnFail</code></p>
<code>@@NoNotificationOnSuccess</code>	<p>specifies that no notification appear in your e-mail program when an outgoing transmission is successful. There is no value to specify.</p> <p><code>@@NoNotificationOnSuccess</code></p>
<code>@@Priority</code>	<p>specifies a priority for the fax sender. Entries range from one, the highest, to 10, the lowest. A fax sent with a priority of one will be transmitted before a fax sent with a priority of three.</p> <p><code>@@Priority 3</code></p>
<code>@@Profile</code>	<p>specifies the profile to be used. Profiles contain sender information and can reference a fax header and cover sheet. The value specified is the name of the profile.</p> <p><code>@@Profile profile_name</code></p>

<code>@@ResourceNumber</code>	<p>specifies an outgoing LightningFAX resource. You must have access to the resource in order to select it. By default, resources are numbered from 1 to 15.</p> <p><code>@@ResourceNumber 3</code></p>
<code>@@Retries</code>	<p>specifies the number of times an attempt to establish a connection should be made. Entries can range from zero (no retries) to 10.</p> <p><code>@@Retries 0</code></p>
<code>@@ScheduledDate</code>	<p>specifies the date your message is to be sent. This value appears in fax details. Date is specified in the format <code>YYYY-MM-DD</code>. The exact time of day the fax will be sent on that date is the time the fax is submitted.</p> <p><code>@@ScheduleDate 2001-01-31</code></p>
<code>@@ScheduledDateTime</code>	<p>specifies the time your message is to be sent in seconds since January 1, 1970.</p>
<code>@@ScheduledTime</code>	<p>specifies the time your message is to be sent. This value appears in fax details. Time is specified in the format <code>hh.mm[:ss]</code> in 24-hours. Seconds are optional.</p> <p><code>@@ScheduledTime 23:59</code></p>
<code>@@UseLCR</code>	<p>specifies that your message is to be sent using Least Cost Routing. There is no value to specify.</p> <p><code>@@UseLCR</code></p>
<code>@@UserID</code> <code>@@UserPassword</code>	<p>specifies that the fax is to be sent on behalf of a LightningFAX user. You must know the user's LightningFAX user ID and include the user's password.</p> <p><code>@@UserID Administrator</code> <code>@@UserPassword grdn25</code></p> <p><b>Note:</b> Administrators can oblige users of an SMTP mail gateway to verify the right to send faxes using e-mail software by entering their LightningFAX user ID and password. When this is the case, the <code>@@UserID</code> and <code>@@UserPassword</code> codes must be used.</p> <hr/>

### Cover Sheet Body Codes

Cover sheet body codes let you specify a LightningFAX cover sheet and specify the sender information to appear in it. LightningFAX attaches the cover sheet automatically, placing the sender information in the body codes in the cover sheet.

For example, you could use the `@@Cover` body code to select the cover sheet named Default and use the `@@SenderFirstName` and `@@SenderLastName` body codes to indicate your first and last name in the message. The fax recipient will receive your message with that cover sheet and your first and last name correctly listed.

Cover sheet body codes must correspond to the variables that appear in the cover page. That is, if you specify the `@@SenderPager` body code and use the `@@Cover` to include a cover sheet that does not have a pager variable, the code will be ignored.

Cover sheet body codes include:

---

<code>@@Cover</code>	specifies a LightningFAX cover sheet to be sent with your message. Please note that the <code>.cse</code> extension must not be entered and that only cover sheets that reside on the server can be specified here.  <code>@@Cover Basic02</code>
<code>@@NoCover</code>	specifies that no cover sheet be used. This body code might be applied when the <code>@@Profile</code> body code uses a cover sheet you do not wish to use. There is no value to specify.  <code>@@NoCover</code>
<code>@@SenderDear</code>	specifies a salutation such as Ms. Mr., etc.  <code>@@SenderDear Prof.</code>
<code>@@SenderAddress1</code> <code>@@SenderAddress2</code>	specifies the sender's address  <code>@@SenderAddress1 "123 Any Street"</code> <code>@@SenderAddress2 "Suite 3324"</code>
<code>@@SenderBillingCode</code> <code>@@SenderSubBillingCode</code>	specifies your main or principal billing code and a detail sub-billing code. The first might identify your company, the second a department within the company  <code>@@SenderBillingCode 123ACME56</code> <code>@@SenderSubBillingCode Dept12A</code>
<code>@@SenderCellular</code>	specifies the sender's cellular phone number  <code>@@SenderCellular 123-545-9999</code>

---

---

<code>@@SenderCity</code>	specifies the sender's city. <code>@@SenderCity "New York"</code>
<code>@@SenderCompany</code>	specifies the sender's company. <code>@SenderCompany "ABC Industries"</code>
<code>@@SenderCountry</code>	specifies the sender's country. <code>@SenderCountry "Great Britain"</code>
<code>@@SenderEmail</code>	specifies the sender's e-mail address. <code>@@SenderEmail bjones@abc.org</code>
<code>@@SenderFax</code>	specifies the sender's fax number <code>@@SenderFax 999-7777</code>
<code>@@SenderFirstName</code>	specifies the sender's first name. <code>@@SenderFirstName John</code>
<code>@@SenderJobTitle</code>	specifies the sender's job title. <code>@@SenderJobTitle Manager</code>
<code>@@SenderLastName</code>	specifies the sender's last name. <code>@@SenderLastName Doe</code>
<code>@@SenderPager</code>	specifies the number of the sender's pager <code>@@SenderPager 345333</code>
<code>@@SenderPhone</code>	specifies the sender's telephone number. <code>@SenderPhone 9998888</code>
<code>@@SenderState</code>	Specifies the sender's state or province or region. <code>@SenderState "West Virginia"</code>
<code>@@SenderZipCode</code>	Specifies the sender's zip or postal code. <code>@@SenderZipCode 100098-1212</code>

---

**Distribution List Body Code**

---

<code>@@DistritbutionList</code>	references a distribution list, which must be included in your message as an attachment. See About Distribution Lists on page 133 for details on composing distribution lists. <code>@@DistributionList advert01.csv</code>
----------------------------------	--

---

### Using Body Codes

Body codes are often used to include a few items of information that might otherwise be omitted.

If you use the `@@Profile` body code and reference a profile that already includes a cover sheet, you would be unlikely to also use the `@@Cover` body code and use cover sheet body codes to populate it with sender information. You might, on the other hand, need to use a fax prefix, or to schedule transmission for a later date or time.

Combining the `@@DistributionList` and `@@ScheduledTime` body code would allow you to fax to a large number of recipients and to schedule transmission for the early morning hours.

Here is an example of how body codes might be used.

```
@@FaxHeader "ABC Industries - ** ** - 332-455-9999"  
@@DistributionList broadcast02.csv  
@@Priority 1  
@@ScheduledTime 01:30  
@@FaxPrefix 9
```

The forms for Microsoft Outlook let users send and receive fax messages in a more detailed format, through Microsoft Outlook. Aside from the basic fax composition form (for sending), there are forms to be used when receiving notifications of fax system events (Incoming New, Incoming Failed, Outgoing Sent, Outgoing Failed and Preview), and forms for creating private or public profiles.

Incoming faxes are received in your inbox and are handled exactly as you handle the e-mail you receive. HTML and RTF formats are supported.

**Note:** To use the forms for Microsoft Outlook with Outlook 2003 on Windows 2003, you need to either install the Windows 2003 Service Pack 1 or disable "Cached Exchange Mode", in Outlook 2003.

## Fax Status

Icons distinguish the various statuses of the faxes you send and receive. See Incoming and Outgoing Fax Status on page 25 to learn what each icon means.

**Note:** The forms for Microsoft Outlook should not be confused with the gateway for Microsoft Exchange. The gateway and the forms work together but serve different purposes.

The gateway submits outgoing faxes, generated from mail messages, to the fax server, and processes mail notifications triggered by the fax server.

The forms for Microsoft Outlook are simply an extended graphical user interface designed for the manipulation of mail messages sent to and received from the gateway.

The features of the forms for Microsoft Outlook include profiles, cover sheets, the capability of entering sender and recipient billing information, etc...


### Forms for Microsoft Outlook and Profiles

A profile, either public or private, is a pre-defined set of values designed to fill up the composition form. It saves time for the users, since they do not have to fill out repeatedly the same information for each fax they send, for instance, the company name, address and phone numbers; a cover sheet to include with the fax, etc...

In their default configuration, the forms for Microsoft Outlook offer public profiles, which are usually maintained by the administrator. A forms user selects either of the profiles when faxing using Outlook.


However, if a user must have private profiles as well, the administrator installs the Outlook Add-in on the user's computer. That operation provides a folder named `LFProfiles` for the user's private profiles.

Private profile fields form a superset of the public profiles fields, because they are dedicated to a single individual and thus enclose personal information such as his/her name, while the latter is shared amongst individuals in the same organization, and thus encloses global information such as its address.

Installing the Outlook Add-in also adds the  button to the Outlook toolbar. As described below, users can then launch the fax composition form by making the usual menu selections or simply by clicking the button (if SendFAX is not installed).

### Forms for Microsoft Outlook and SendFAX

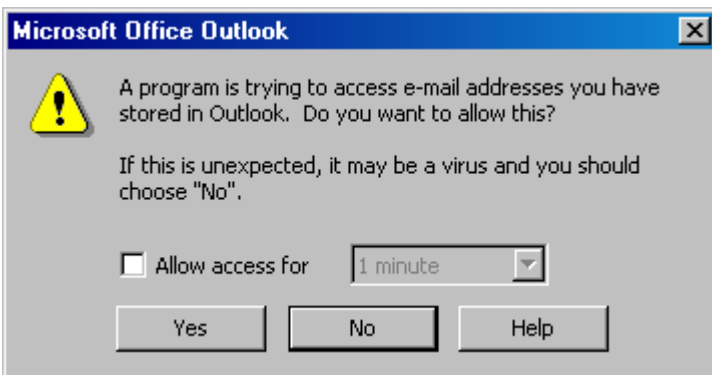
Finally, power users sometimes require the still more extensive functionality of SendFAX, LightningFAX's main faxing interface. When this is the case, an administrator installs both the Outlook Add-in and SendFAX on the user's computer. Then, when the user

clicks the  button in Outlook, SendFAX replaces the fax composition form. All the other forms remain accessible.


This chapter assumes that you do not have SendFAX installed. If you do, see Chapter 6 Introducing SendFAX for complete information on using that module.

### Launching the Fax Composition Form

**Note:** When launching the `Composition` and profile forms, or sending a fax composed with them, you may get the following warning from Outlook:



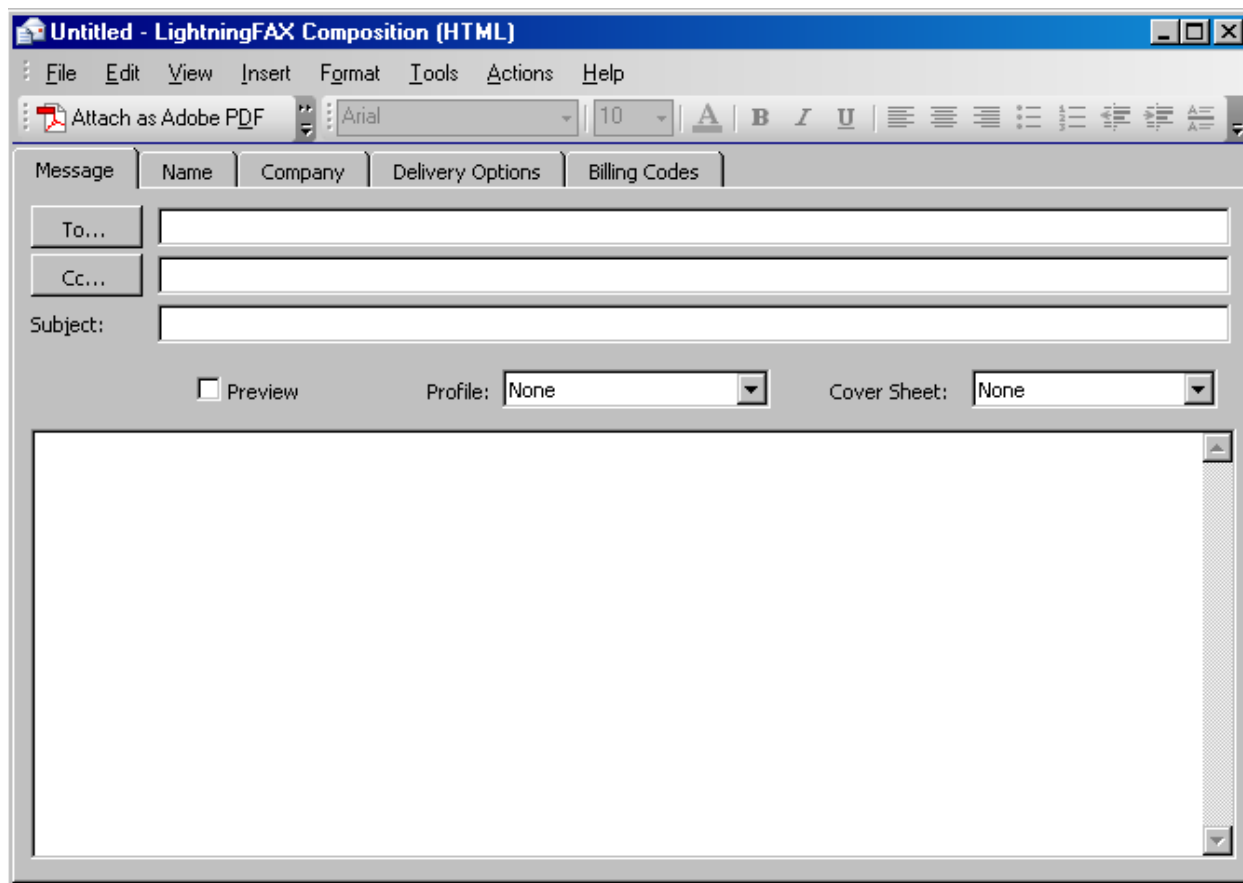
Simply click `Yes`.

- 1 Launch Outlook.
- 2 If the Outlook Add-in is installed, click the  button or choose Tools ➤ Create a new FAX.  
If SendFAX is installed, it is launched automatically. Otherwise, the Composition Form is displayed in Outlook.

OR

- 1 Launch Outlook.
- 2 If the Outlook Add-in is not installed or if it is installed along with SendFAX, choose Tools ➤ Forms ➤ Choose Form.  
Note: If necessary, you may need to select the Organizational Forms Library in the Look In field, first.
- 3 Double-click on LightningFAX Composition, or select it and click Open.

**Note:** Other forms may be displayed; you can safely ignore them.



**Managing Sender Information and Transmission Settings**

Sender information includes such things as your name and job title, your contact numbers and email address, your company and its address, etc...

Sender information is applied only to the current fax. An alternative to repeatedly entering sender information is to create a private profile. Your sender information can be entered once in a profile and you would select that profile when you send a fax.

Using a profile does not prevent you from entering sender information when sending an individual fax. The information you enter in the *Composition Form* will override corresponding information in any profile you use.

Sender information is organized in four tabs:

<b>Name</b>	<b>Company</b>	<b>Delivery Options</b>	<b>Billing Codes</b>
Salutation	Email	Prefix	Sender Billing Code
First Name	Phone	Suffix	Sender Sub Billing Code
Last Name	Fax	Retries	Recipient Billing Code
Title	Cellular	Priority	Recipient Sub Billing Code
	Pager	Delayed Delivery	
	CSID	Notify on successful delivery	
	Callback	Notify on failed delivery	
	Name	Use LCR	
	Address		
	City		
	State/Province		
	Zip Code		
	Country		

Most of the fields are self-explanatory. However, some fields require more details:

- CSID represents your call station ID.
- Prefix represents a number to be dialed before the fax number is dialed; an number dialed to access an outside telephone line is an example.

- ❑ `Suffix` represents a number to be dialed after the fax number is dialed; an personal access code to permit long distance calls is an example.
- ❑ `Retries` represents the number of times the server retries send a fax, when it fails to transmit successfully (the remote fax machine may be busy, or does not answer). A default can be set by the administrator. The minimum is 0; the maximum 99.
- ❑ `Priority` indicates whose faxes have a higher or lower priority. Priority ranges from 1, the highest, to 10, the lowest. An administrator can assign a default, and you cannot enter a priority higher than the priority assigned by the administrator. By default, the priority is set at 3.
- ❑ `Use LCR` instructs the forms for Microsoft Outlook to use Least Cost Routing. Briefly, least cost routing is a means of sending faxes to a LightningFAX server near the final destination via the internet. The fax is then forwarded from that server to its destination by telephone. An administrator will inform you if least cost routing is available. You must select it whenever your faxes are to use it.
- ❑ For the outgoing notification forms to be used (see `Outgoing Fax Notifications` on page 155), the `Notify on successful delivery` and `Notify on failed delivery` boxes should be checked accordingly.

### Adding Fax Recipients to your Personal Address Book

- 1 Choose `Tools` ➔ `Address Book`.
- 2 Select the appropriate contact list.
- 3 Click `New`.
- 4 Select `New Contact` and click `OK`.
- 5 Enter the recipient's name in the `Full Name` field. You can then specify a fax number in the `Business Fax` field. Alternatively, you can enter an e-mail address in the `E-mail` field.

When you send a fax to a contact with a fax number, the fax is sent to the recipient's fax machine. When you send a fax to a contact with an e-mail address, the fax is included as an e-mail attachment and received in the recipient's e-mail inbox.

**Note:** If you enter both a fax number and an e-mail address, Outlook creates a single contact entry, but presents both destinations as separate entries in the address book.

- 6 Add any additional contact information you wish.
- 7 Click `Save and Close`.
- 8 Close the `Address Book` window.

### Creating a Fax Distribution List

- 1 Choose **Tools** ➔ **Address Book**.
- 2 Select the appropriate contact list.
- 3 Click **New**.
- 4 Select **New Distribution List** and click **OK**.
- 5 Enter the name of the distribution list in the **Name** field.
- 6 Click **Select Members** to add existing contacts. Use **Add New** to add new contacts.
- 7 Click **OK**.
- 8 Click **Save and Close**.
- 9 Click **OK**.

### Creating a Private Profile

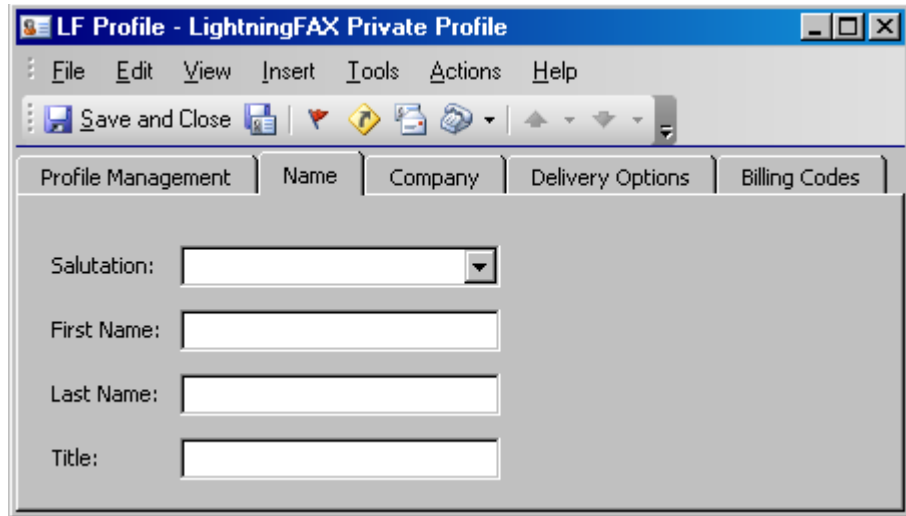
An administrator must install the Outlook Add-in to provide you with private profiles. You can have more than one private profile although each must have a unique name. Information entered in a profile mirrors the sender information described above. However, the two notification options are not available.

- 1 In Outlook, display the folder list.
- 2 Select the **LFProfiles** folder.  
 Note: MRU is the most recently used profile. It is used by the composition form to remember values used previously. Users should not manipulate items in this folder.
- 3 Click **New** or double-click in the right-hand panel.
- 4 Enter the information the private profile is to contain.
- 5 Click **Save and Close**.



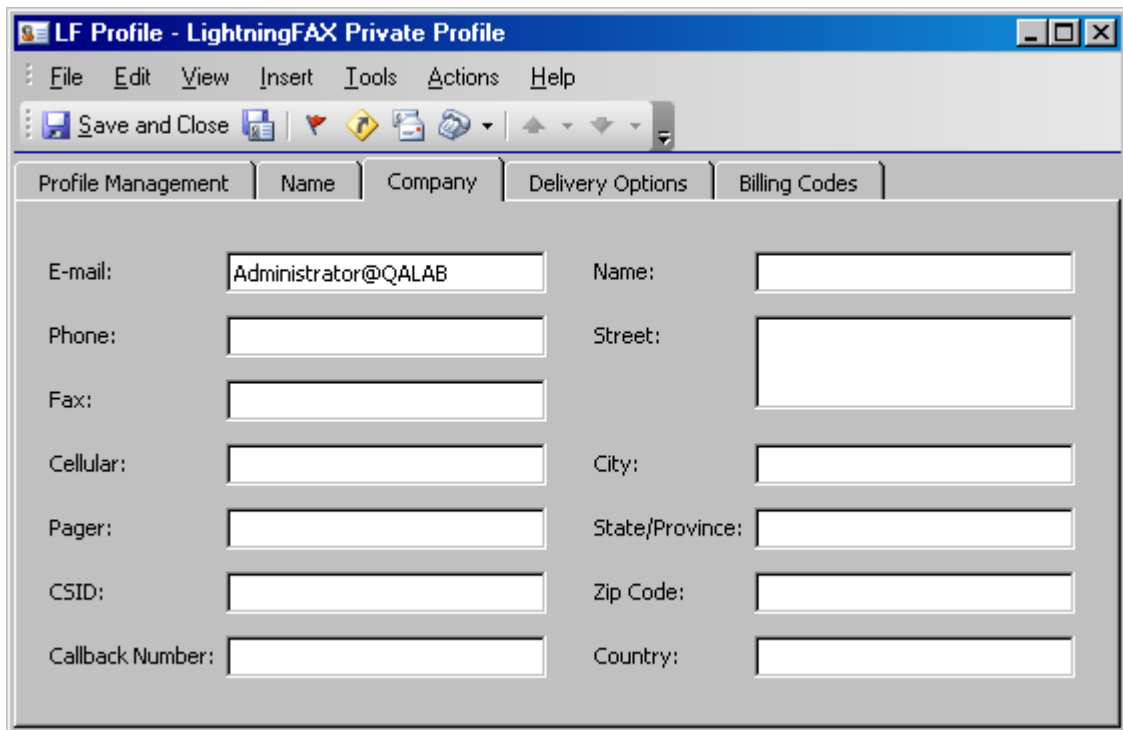
In the dialog for the **Profile Management** tab is information concerning the private profile itself:

Profile Name	the name of the private profile;
Cover Sheet	select a standard cover sheet;
Description	a description of the private profile.



In the dialog for the Name tab is personal information about the sender:

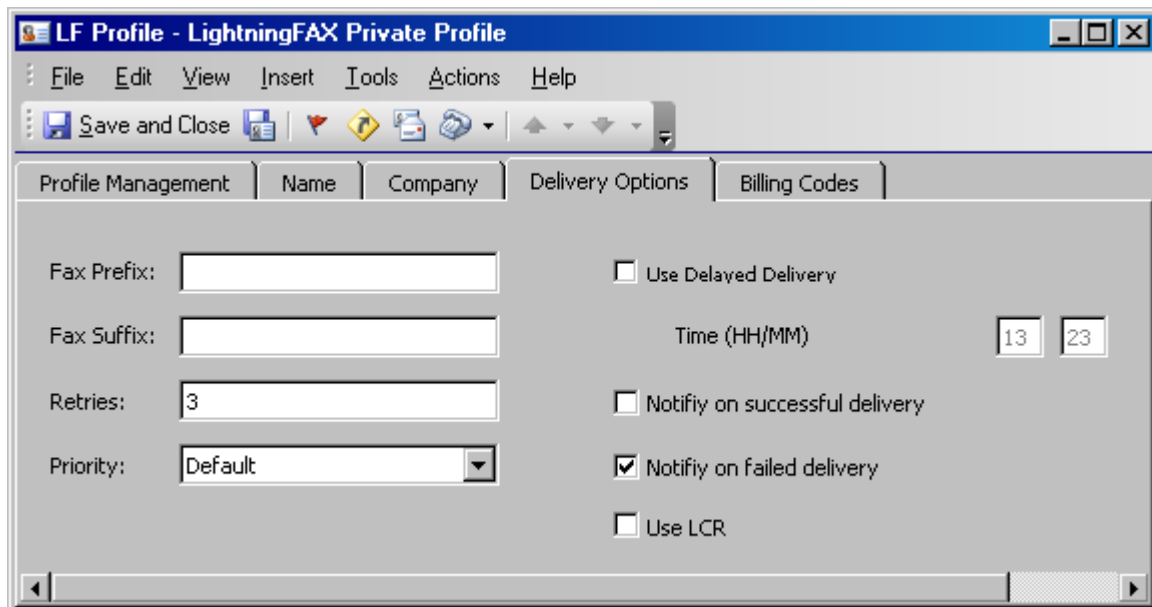
Salutation	select a standard salutation;
First Name	the first name of the sender;
Last Name	the last name of the sender;
Title	the title used by the sender.



## Chapter 15 Introducing the Forms for Microsoft Outlook

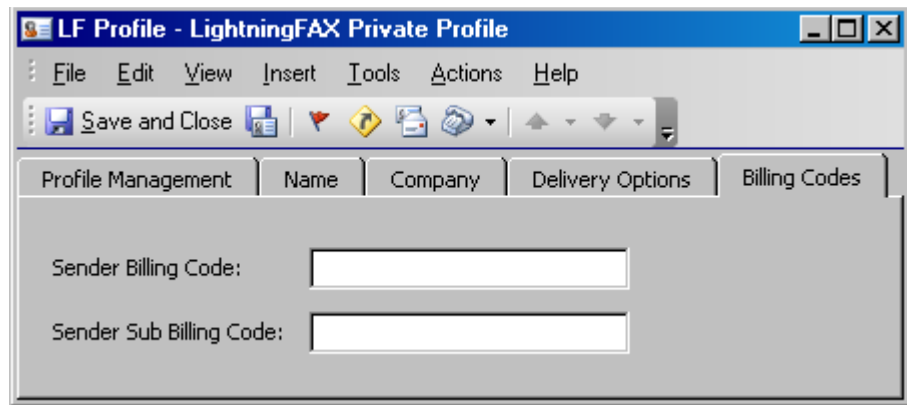
In the dialog for the `Company` tab is information relating the organization the sender is representing:

E-mail	the email address of the sender;
Phone	the phone number of the sender or the company;
Fax	the fax number used by the sender;
Cellular	the cellular phone number of the sender;
Pager	the number of the paging device used by the sender;
CSID	the Call Station ID of the sender;
Callback Number	a phone number where the sender can be contacted;
Name	the name of the organization represented by the sender;
Street	the street address of the organization represented by the sender;
City	the city where the organization is located;
State/Province	the state or province where the organization is located;
Zip Code	the zip or postal code of the organization represented by the sender;
Country	the country where the organization is located;



The dialog for the `Delivery Options` tab offers settings that determine how a fax is to be transmitted:

Fax Prefix	a prefix to be appended before the fax message;
Fax Suffix	a suffix to be appended after the fax message;
Retries	the number of times to retry sending the faxes, before failure;
Priority	select a priority for fax transmission;
Use Delayed Delivery	check this box to transmit the faxes at a specific time, entered in the <code>Time (HH/MM)</code> field;
Notify on successful delivery	check this box to receive a notification when a fax is successfully transmitted;
Notify on failed delivery	check this box to receive a notification when a fax fails to transmit;
Use LCR	check this box to use least-cost routing when sending faxes.



The dialog for the `Billing Codes` tab lets you specify billing code information for the sender, if required:


Sender Billing Code	the billing code of the sender;
Sender Sub Billing Code	the sub-billing code of the sender.

### Faxing with Forms for Microsoft Outlook

- 1 In the `Composition Form`, click `To`.
- 2 Select a contact list and click `Add` to add a contact or a distribution list to make entries to the `To` or `Cc` fields (see `Adding Fax Recipients to your Personal Address Book` and `Creating a Fax Distribution List` on page 146 for more details).
- 3 Click `OK`.
- 4 You can enter a `Subject`, if you wish.
- 5 Use `Profile` to select a profile, if you wish only) (see `Creating a Private Profile` on page 146 for more details).
- 6 Use `Cover Sheet` to select a standard cover sheet, if you wish .

**Note:** A single custom cover sheet (of `.cse` format) can be added manually, by specifying it as an attachment to the fax, as shown in step 8. `None` must be selected in the `Cover Sheet` box, however.

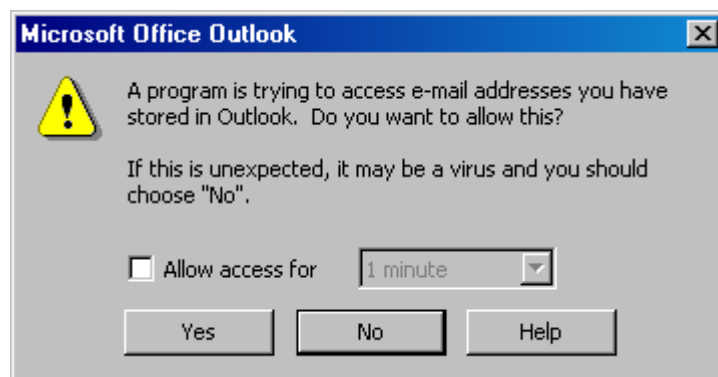
Profiles can include a cover sheet. If the profile you selected includes one, using `Cover Sheet` will replace the cover sheet specified in the profile.

- 7 Enter the text you wish to appear on the cover sheet in the message window.
- 8 Click  to navigate to a folder and select the documents you wish to fax.
- 9 If you wish to first receive a `Preview` notification, before sending the fax, check the `Preview` box. The preview is emailed to your inbox, but the fax is not sent.

Uncheck this box, if you want to actually transmit the fax.

- 10 Click `Send`.

**Note:** When launching the `Composition` form, or sending a fax composed with it, you may get the following warning from Outlook:



Simply click `Yes`.

### Manual Addressing

You can also address a fax by entering an e-mail address in the `To` field or by using the following syntax to enter a fax number.

```
[FAX:recipient_name@fax_number] ; . . .
```

For example: [FAX:J Doe@111-222-3333].

You can enter more than one recipient by separating each with a semi-colon.

### Notification Forms

There are five different notification forms: `Incoming Failed`, `Incoming New`, `Outgoing Failed`, `Outgoing New` and `Preview`.

The first four enable the gateway for Microsoft Exchange to issue enhanced notifications, according to the status of sent or received faxes, while the `Preview` form, as its name implies, enables it to issue a notification that includes a preview of an outgoing fax (when specified in the `Composition Form`).

**Note:** These forms are not intended for fax composition, only for reading, opening them in Outlook is pointless.

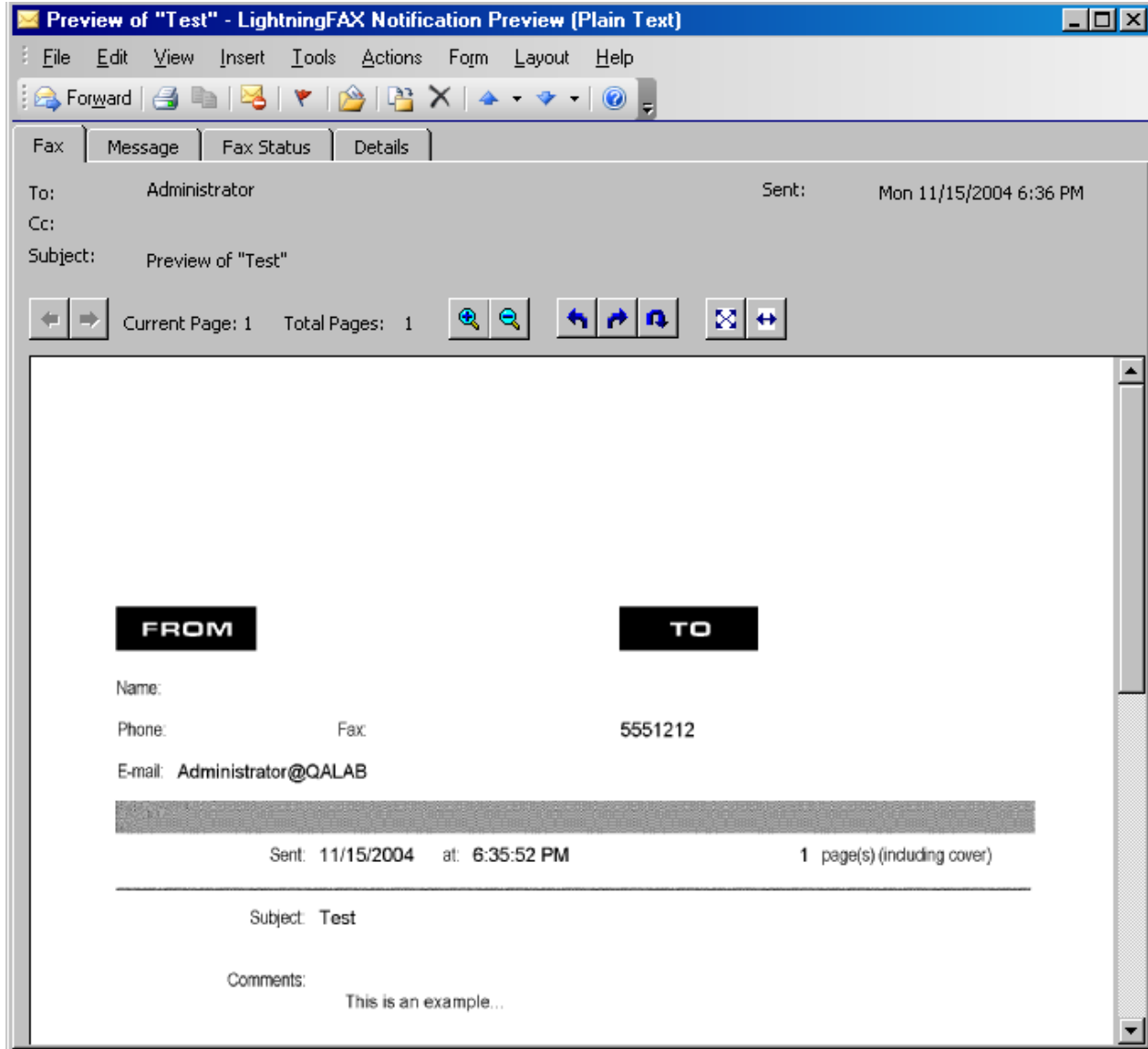
When opening a notification form, the content of the fax is displayed as a TIFF or PDF document, under the default `Fax` tab (see snapshot on next page).

**Note:** The PDF viewing component in Adobe Acrobat Reader 7 is only compatible with Microsoft Outlook 2003 or Microsoft Outlook XP with Service Pack 3. Using it with any older version of Outlook may cause the latter to crash unexpectedly.

The `Subject` display differs, according to the type of notification:

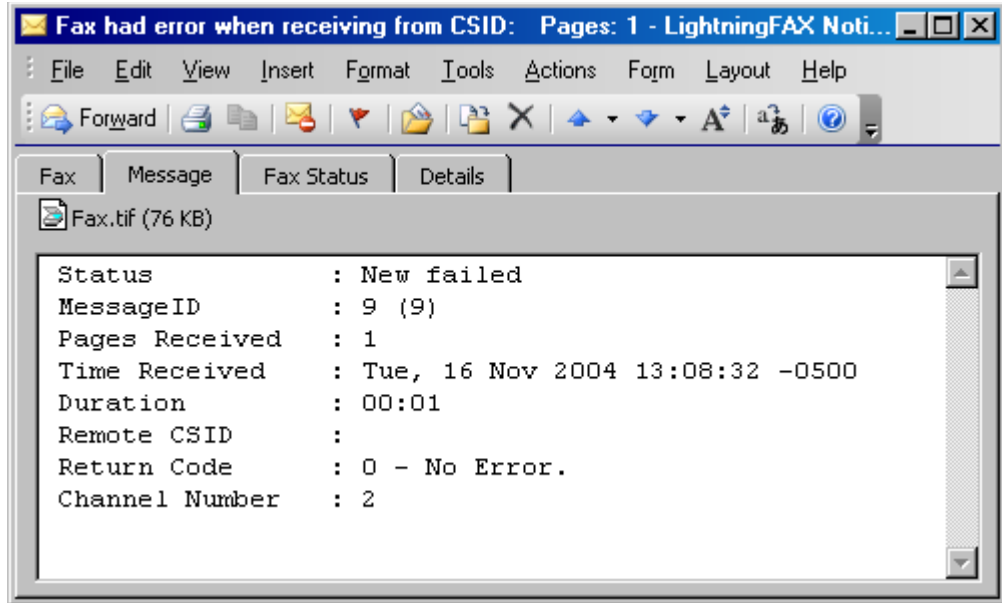
- In the case of an `Incoming Failed` notification, it says `Fax had error when receiving from CSID: Pages x`, where `x` is the number of pages in the fax.
- In the case of an `Incoming New` notification, it says `Fax Received from CSID: Pages x`.
- In the case of an `Outgoing Failed` notification, it says `Fax had error when sending to recipient at destination`, where `recipient` and `destination` are as specified by the user.
- In the case of an `Outgoing Sent` notification, it says `Fax sent to recipient at destination`,
- In the case of a `Preview` notification, it says: `Preview of fax_subject`, where `fax_subject` is as specified by the user.

There are three other tabs available: `Message`, `Fax Status` and `Details`.



### Incoming Fax Notifications

The *Message* tab displays the basic information you would receive, in the form of a notification email, from the gateway for Microsoft Exchange, if the forms were not installed. The values displayed in this example are the default settings. The content of this display can be modified by an administrator, by changing the appropriate notification template file (.wtx).



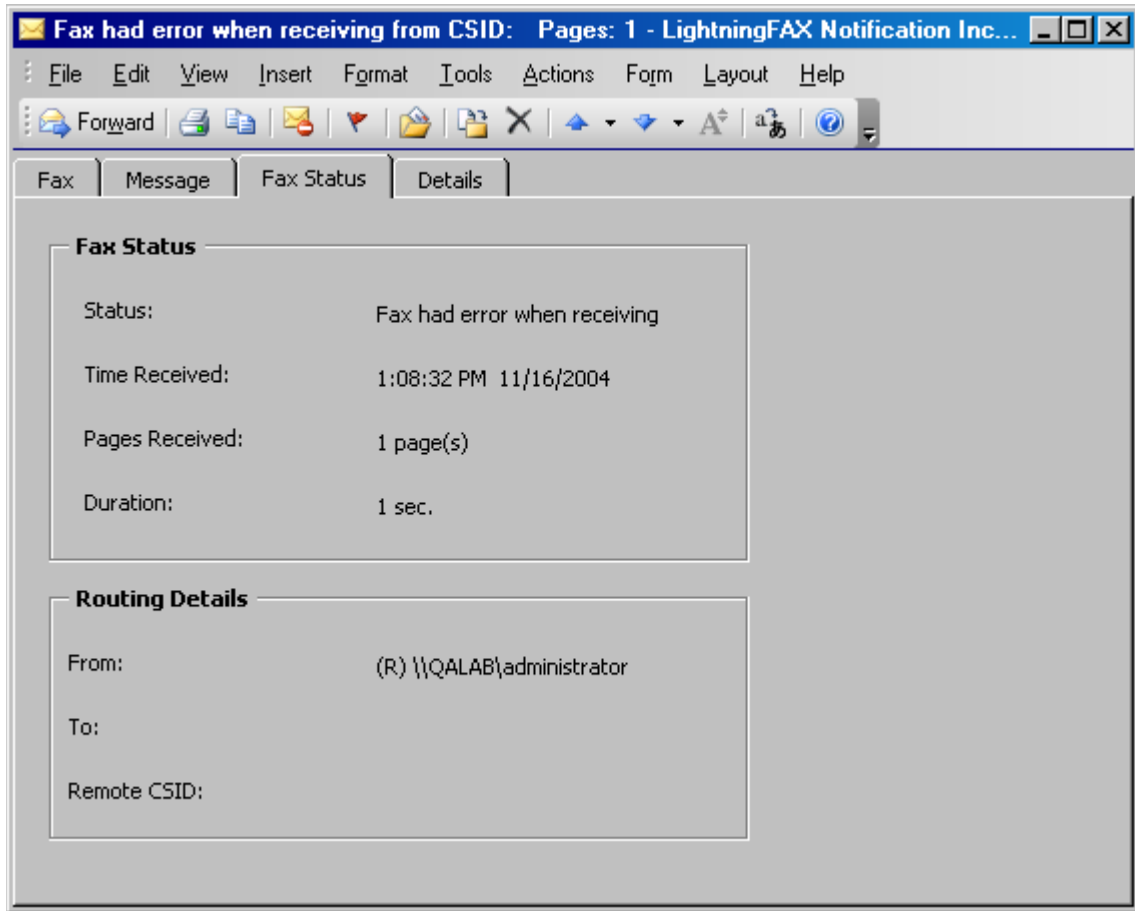
For an Incoming New or an Incoming Failed notification, under the Message tab, are several display values:

Status	the status of the fax, either New or New Failed;
Message ID	the ID number of the message, as attributed by the server;
Pages Received	the number of pages received, as part of the fax;
Time Received	the time and date at which the fax was received;
Duration	the time required for transmitting the fax;
Remote CSID	the Call Station ID of the sender;

An Incoming Failed notification also has the following values:

Return Code	the error code and message returned with the failed transmission;
Channel Number	the number of the channel through which the fax was received.

The Fax Status tab displays two sections:



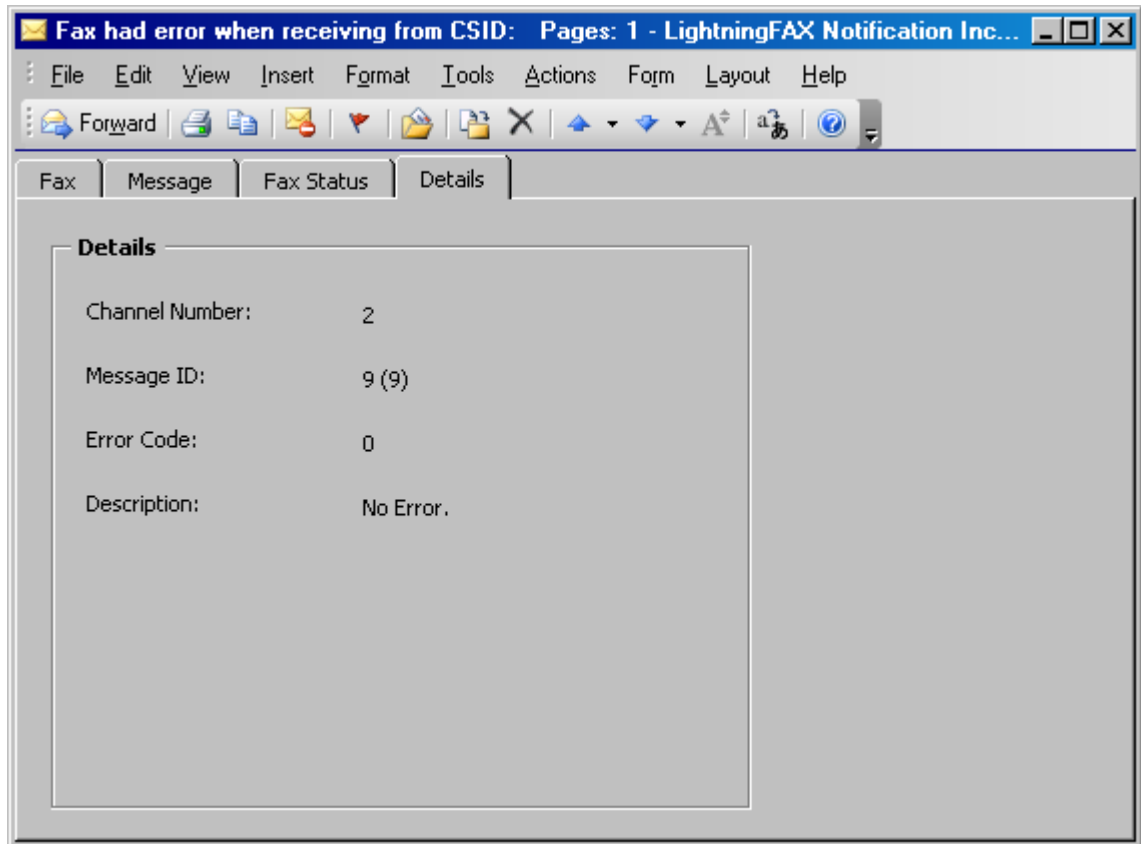
In the Fax Status section are four display values:

Status	either Fax Received or Fax had error when receiving;
Time Received	the time and date at which the fax was received;
Pages Received	the number of pages received, as part of the fax;
Duration	the time required for transmitting the fax.

In the Routing Details section are three display values:

From	the user who routed the fax;
To	the user to whom the fax was routed;
Remote CSID	the Call Station ID of the sender.

Finally, under the `Details` tab are four display values:

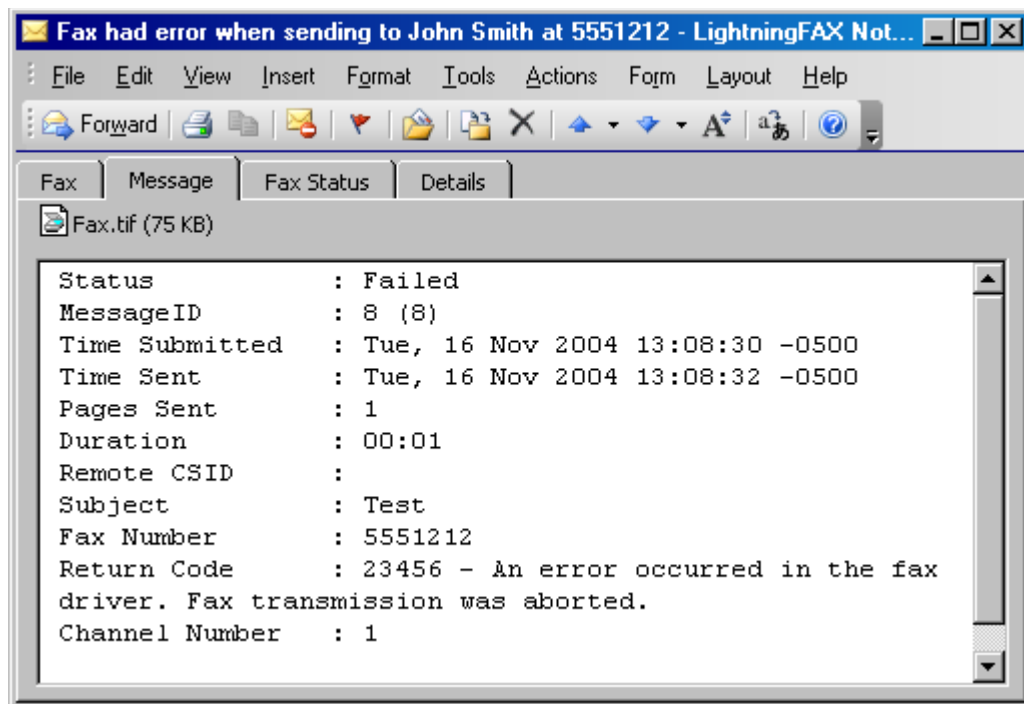


Channel Number	the number of the channel through which the fax was received;
Message ID	the ID number of the message, as attributed by the server;
Error Code	the error code returned with the failed transmission (0 if no error);
Description	the description of the error.

### Outgoing Fax Notifications

The `Message` tab displays the basic information you would receive, in the form of a notification email, from the gateway for Microsoft Exchange, if the forms were not installed. The values displayed in this example are the default settings. The content of this display can be modified by an administrator, by changing the appropriate notification template file (`.wtx`).

**Note:** The `Notify on successful delivery` and `Notify on failed delivery` boxes should be checked accordingly, in the `Composition` form, if you want to receive outgoing fax notifications.



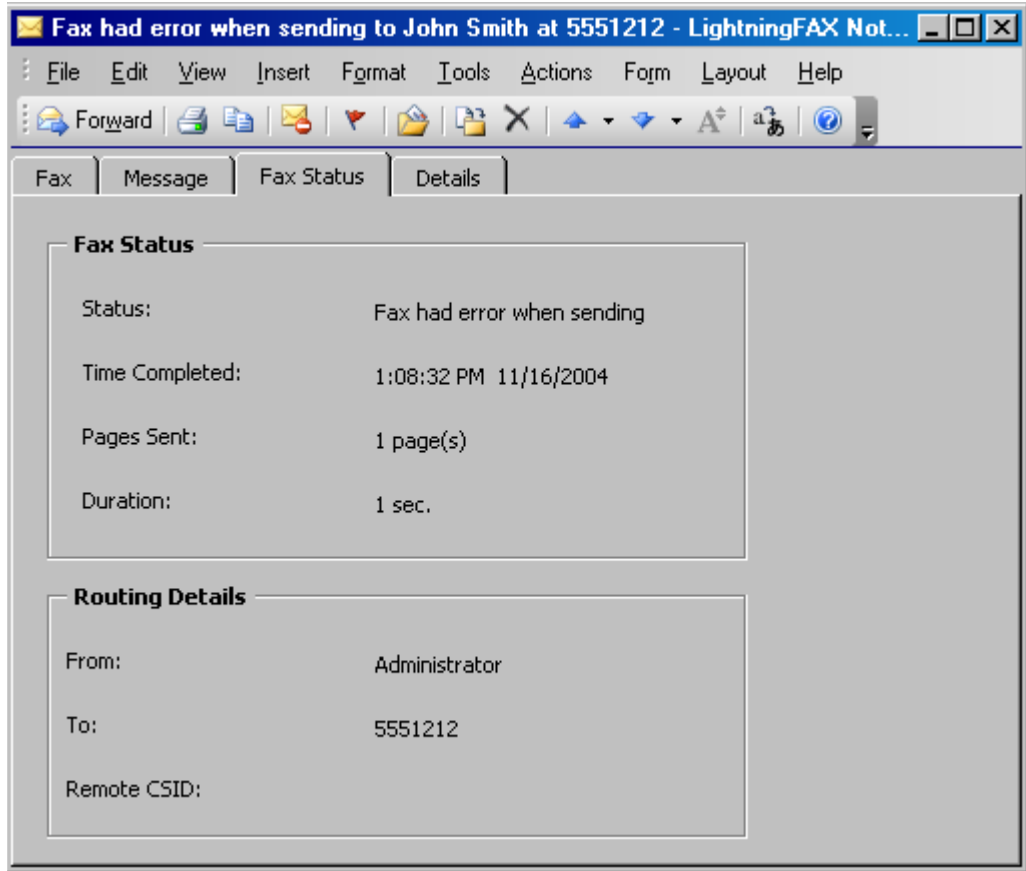
For an Outgoing Sent or an Outgoing Failed notification, under the Message tab, are several display values:

Status	the status of the fax, either Sent or Failed;
Message ID	the ID number of the message, as attributed by the server;
Time Submitted	the time and date at which the fax was submitted;
Time Sent	the time and date at which the transmission of the fax began;
Pages Sent	the number of pages sent;
Duration	the time required for transmitting the fax;
Remote CSID	the Call Station ID of the sender;
Subject	the subject of the fax, as specified by the user;
Fax Number	the phone number of the recipient fax.

An Outgoing Failed notification also has the following values:

Return Code	the error code and message returned with the failed transmission;
Channel Number	the number of the channel through which the fax was sent.

The Fax Status tab displays two sections:



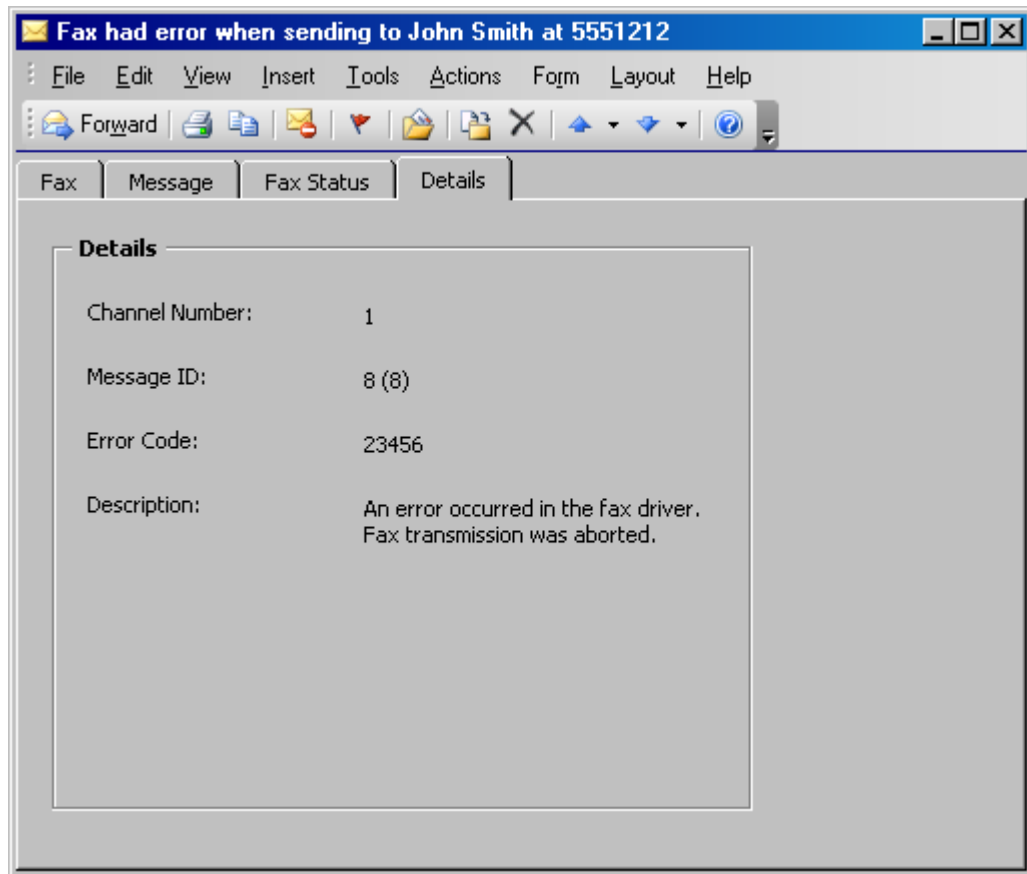
In the Fax Status section are four display values:

Status	either Fax Sent or Fax had error when sending;
Time Completed	the time and date at which the transmission of the fax was completed;
Pages Sent	the number of pages sent;
Duration	the time required for transmitting the fax.

In the Routing Details section are three display values:

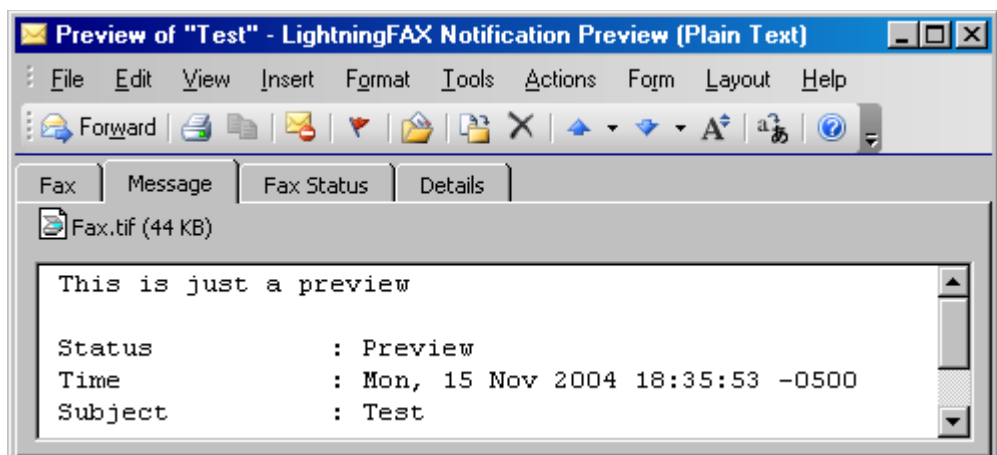
From	the user who routed the fax;
To	the user to whom the fax was routed;
Remote CSID	the Call Station ID of the destination.

Finally, under the `Details` tab are four display values:



Channel Number	the number of the channel through which the fax was sent;
Message ID	the ID number of the message, as attributed by the server;
Error Code	the error code returned with the failed transmission (0 if no error);
Description	the description of the error.

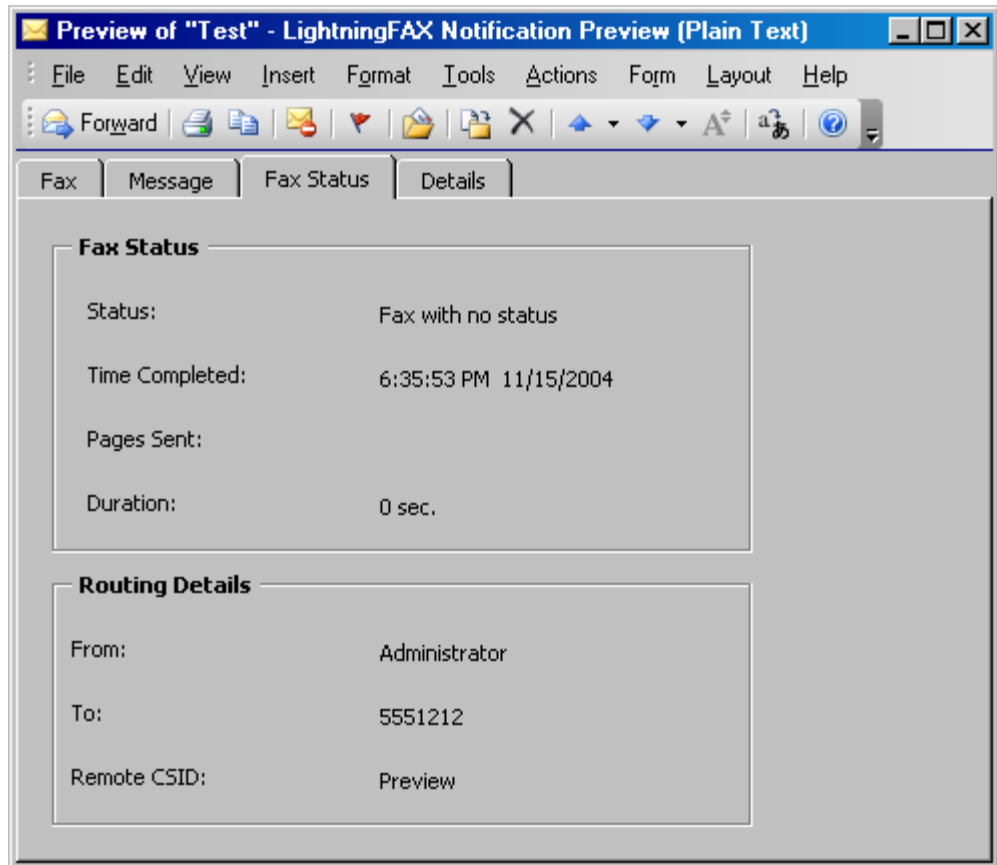
### Preview Notifications



Under the Message tab is the text `This is just a preview`, as well as three display values:

Status	always <code>Preview</code> ;
Time	the time and date at which the preview transmission was completed;
Subject	the subject of the fax, as specified by the user.

The Fax Status tab displays two sections:



In the Fax Status section are four display values:

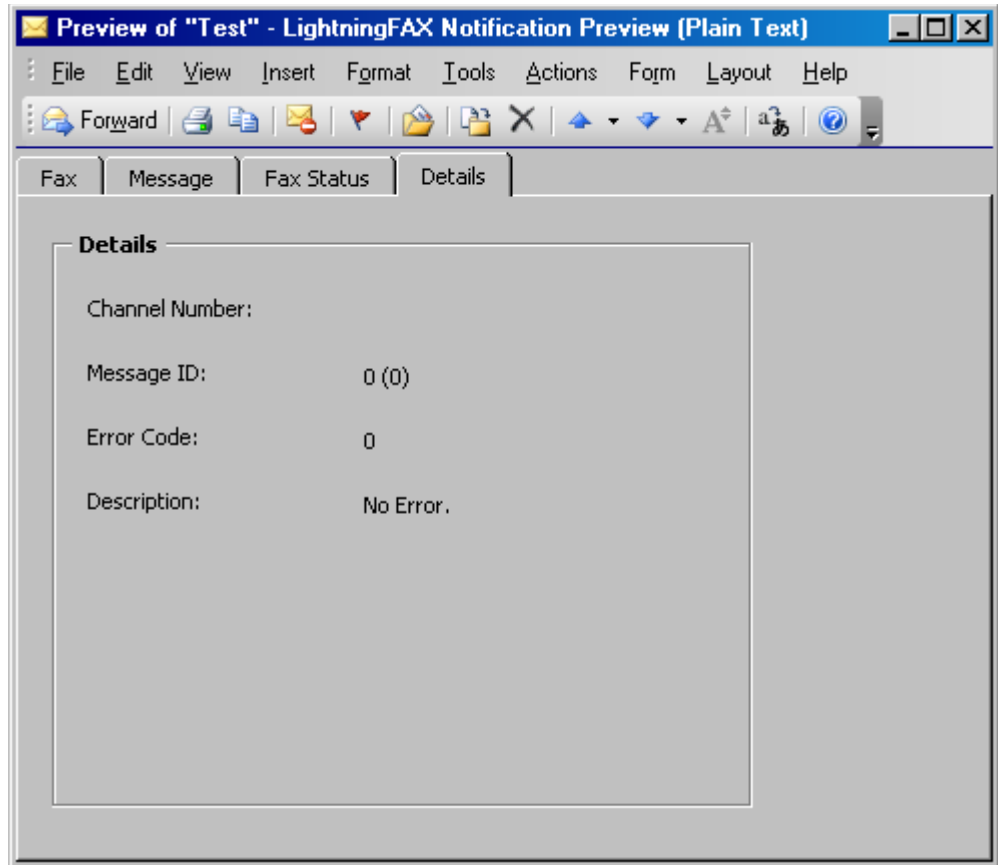
Status	always <code>Fax with no status</code> ;
Time Completed	the time and date at which the preview transmission was completed;
Pages Sent	always empty;
Duration	always <code>0 sec.</code>

## Chapter 15 Introducing the Forms for Microsoft Outlook

In the `Routing Details` section are three display values:

<code>From</code>	the sender identification;
<code>To</code>	the recipient identification;
<code>Remote CSID</code>	the Call Station ID of the destination.

Finally, under the `Details` tab are four display values:



<code>Channel Number</code>	not applicable in a <code>Preview</code> notification;
<code>Message ID</code>	not applicable; always 0 (0) in a <code>Preview</code> notification;
<code>Error Code</code>	the error code returned, if any (0 if no error);
<code>Description</code>	the description of the error.

The forms for Lotus Notes let users send fax messages in a more detailed format, through Lotus Notes.

### Launching the Lotus Notes Client

To launch the Lotus Notes client:

- 1 Click **Start** ➔ **Programs** ➔ **Lotus Applications** ➔ **Lotus Notes**.
- 2 Log in, using your Domino account.

### Opening the Fax Memo Form

There are two ways to open the form for creating a new fax:

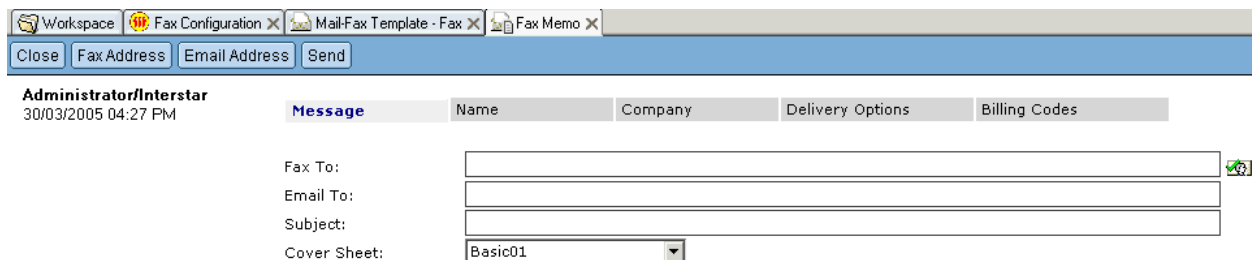
- 1 Click on the **Mail Fax Template on *server\_name*** icon in the client workspace (where *server\_name* is the name of the Lotus Notes server).

- 2 Select **Create** ➔ **Fax**.

or

- 1 Double-click on the **Mail Fax Template on *server\_name*** icon in the client workspace.
- 2 Under the **Mail Fax Template - Fax** tab that appears (corresponding to the **Fax** item in the **Views** selection of the left-hand panel), click **New Fax**.

A **Fax Memo** tab appears, under which you may enter the information and contents of your fax.




## Form Layout

The form layout is made-up of sender and recipient information and transmission setting fields, contained in a series of five tabs. Fields are the basic elements of data capture, storage, and display on forms.

## Fields

### Message Tab

**Fax To:** The fax number of the recipient(s);

**Note:** Click the  button to resolve the recipient numbers.

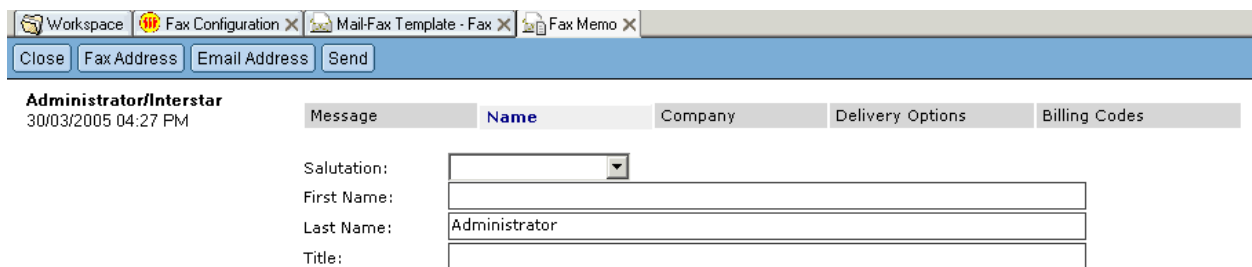
**Email To:** The email address of the recipient(s);

**Subject:** The subject of the fax memo;

**Cover Sheet:** A selected cover sheet, to append to the memo. The default cover sheet is Basic01.

None does not append any cover sheet.

### Name Tab



**Salutation:** A selected greeting. Available values are: Mr., Miss, Madam, Mister;

**First Name:** The sender's first name (surname);

**Last Name:** The sender's last name;

**Title:** The sender's job title.

### Company Tab

- Email: The sender's email address;
- Phone: The sender's company phone number (voice);
- Fax: The sender's company fax number;
- Cellular: The sender's cellular phone number;
- Pager: The sender's pager number;
- CSID: The sender's Call-Station ID;
- Callback Number: The sender's callback number (CBN);
- Name: The sender's company name;
- Address: The sender's company address (number and street);
- City: The city where the sender's company is located;
- State/Province: The state or province where the sender's company is located;
- Zip/Postal Code: The sender's company ZIP or postal code;
- Country: The country where the sender's company is located.

### Delivery Options Tab

- Prefix: When it is necessary to dial a number to access an external line, that the prefix number can be entered here. In most cases, the prefix is 9;
- Suffix: Appears after the fax number. An example of a suffix is a PIN number dialed after a telephone number to authorize a long distance call;
- Retries: Specifies the maximum number of times the gateway tries to transmit the fax memo, before failing. The maximum is 99;
- Priority: Specifies the fax priority. It ranges from 1, the highest, to 10, the lowest;
- Notify on successful delivery  
Check this box to issue a notification after a fax is sent successfully;
- Notify on failed delivery  
Check this box to issue a notification if a fax is cannot be transmitted;
- Use LCR  
Check this box to enable least-cost routing, if it has been configured;
- Delayed Delivery  
Check this box to transmit the fax memo at a specific time, entered in the Time and Date fields.

### Billing Codes Tab

The screenshot shows a software window titled "Administrator/Interstar" with a timestamp of "30/03/2005 04:27 PM". The window contains a "Billing Codes" tab. At the top, there are buttons for "Close", "Fax Address", "Email Address", and "Send". Below these buttons is a table with the following columns: "Message", "Name", "Company", "Delivery Options", and "Billing Codes". Under the "Billing Codes" column, there are four input fields labeled: "Sender Billing Code:", "Sender Sub Billing Code:", "Recipient Billing Code:", and "Recipient Sub Billing Code:".


- Sender Billing Code: The billing code of the sender;
- Sender Sub Billing Code: The sub-billing code of the sender;
- Recipient Billing Code: The billing code of the recipient;
- Recipient Sub Billing Code: The sub-billing code of the recipient.

**Note:** For more information about billing codes, see About Billing Codes on page 115.

## Buttons

Some buttons are also available, to execute simple actions.

Close	Lets you close the fax memo without saving it.
Fax Address	Lets you select recipients (individuals or groups) from an address book. When one or more names are selected, it tries to resolve the fax numbers, as described in the next section.

**Note:** Click the  button to resolve the recipient numbers again.

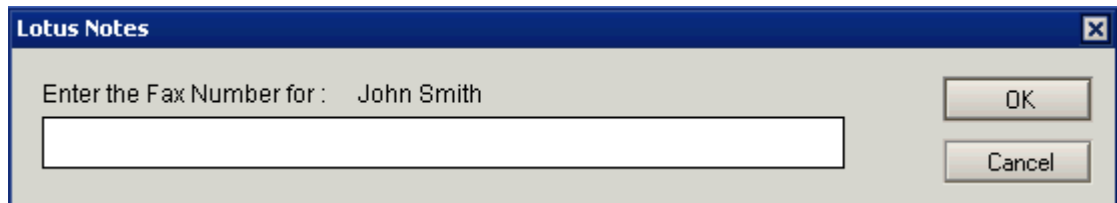
Email Address	Similar to Fax Address, lets you select recipients from an address book and returns the associated email address.
Send	Once the fax memo is completed, performs fax number resolution (if it hasn't been done already) and transmits it.

## Number Resolution

The rules for resolving the recipient fax number are as follows:

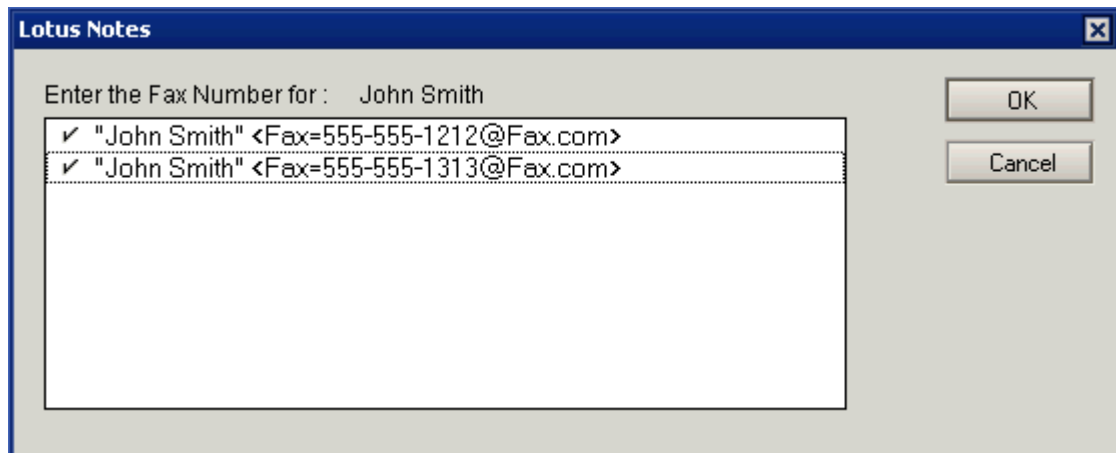
### Individuals

If a recipient exists in one of the Lotus Notes address books, but does not have a fax number, a dialog box appears, prompting you to enter a number for this individual.



If a recipient exists in one of the address books and has only one fax number specified (either Home fax or Office fax), the resolution then returns this number.

If a recipient exists in one of the address books and has multiple fax numbers (Home fax and Office fax), a dialog box appears, prompting you to select which number the fax memo is to be sent to.



### Groups

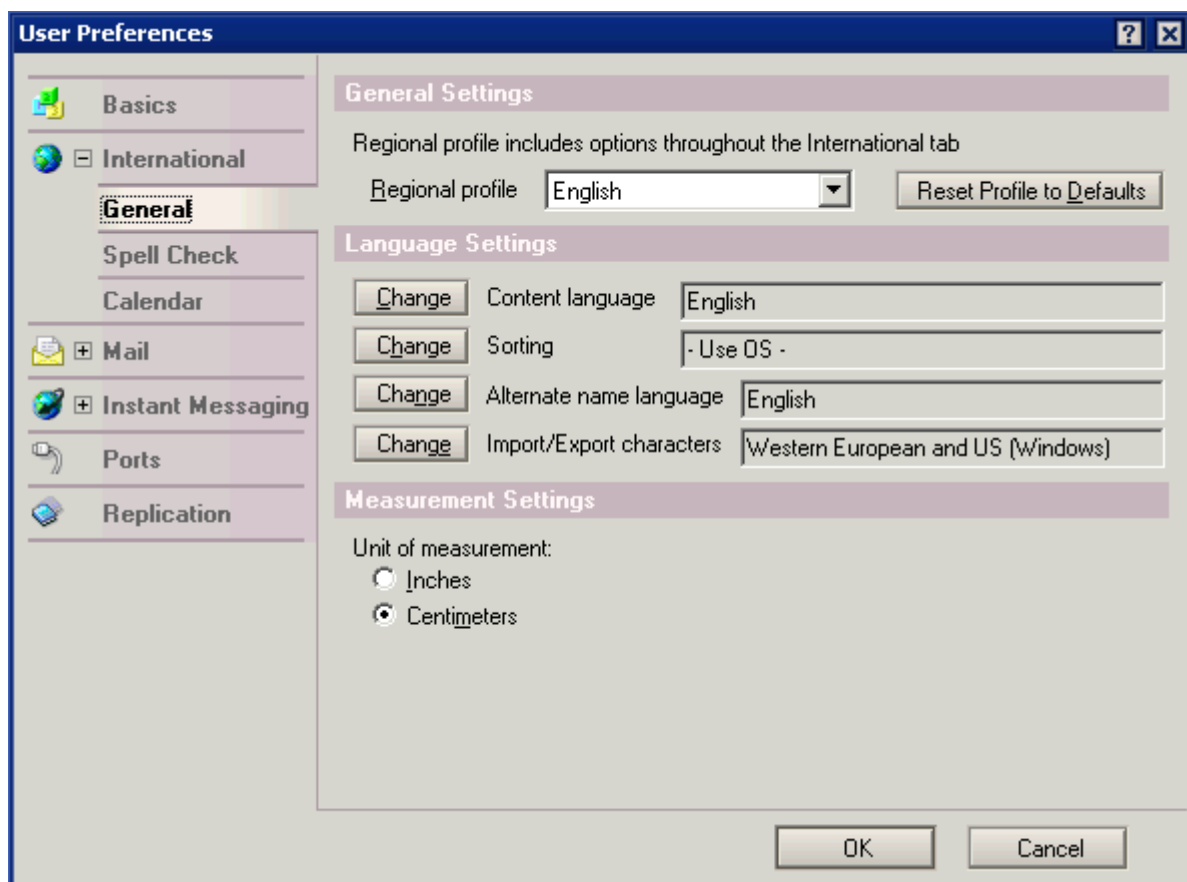
The same rules as for individuals apply for groups,

**Note:** Lotus Notes lets you embed groups within groups, up to six levels deep.

### Changing the Language for the Fax Memo Form

By default, the language for the fax memo form is determined by the Lotus Notes regional profile. To change it:

- 1 Select File ➔ Preferences ➔ User Preferences.
- 2 In the User Preferences dialog that appears, click International.



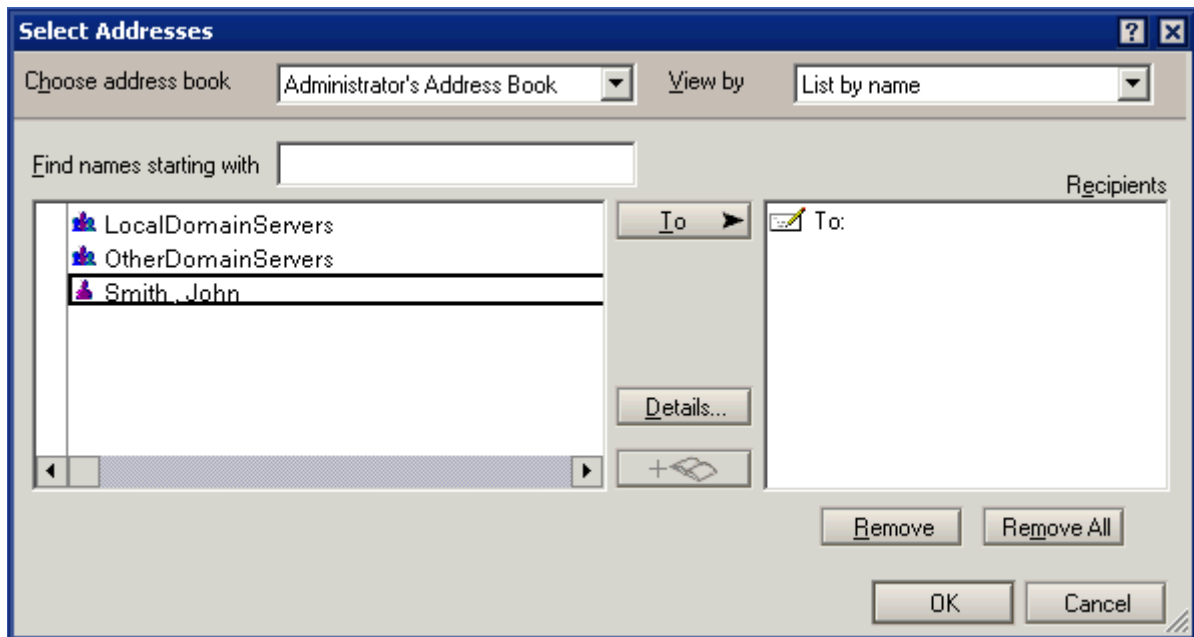
- 3 In the Regional profile box, select the desired language.
- 4 Exit and restart the Lotus Notes client.


## Creating and Sending a Fax

**Note:** If a field in any tab of the form is left empty, the equivalent setting defined for the LightningFAX user is used as default. See Managing User Properties on page 45, for more details.

- 1 In the fax memo form, under the `Message` tab, type the fax number(s) or the email addresses to which you want to transmit, in the `Fax To` and `Email To` fields.

You may also click on the `Fax Address` or `Email Address` buttons respectively to select recipients, by double-clicking on them in the `Select Addresses` dialog (or by clicking on them and clicking on the `To` button), and clicking `OK` when done.,





**Note:** The fax numbers selected are automatically resolved. Click the  button to resolve your selections again.

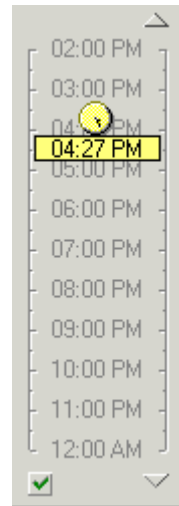
- 2 Enter the subject of the fax memo in the `Subject` field.
- 3 If needed, select a cover sheet in the `Cover Sheet` box. The default cover sheet configured for the gateway for SMTP is chosen by default. If you do not want to include a cover sheet, select `None`.
- 4 Enter the content of your fax memo, in the blank area below the line.  
**Note:** You may also enter or edit this at any time, under any of the other tabs.
- 5 Click on the `Name` tab.
- 6 Enter a `Salutation`, `First Name`, `Last Name` and `Title`, as needed.
- 7 Click on the `Company` tab.

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- 8 Fill the fields as needed.
- 9 Click on the **Delivery Options** tab.
- 10 Enter a **Prefix**, **Suffix**, **Retries** and **Priority**, as needed.
- 11 Check the **Notify on successful delivery** and/or the **Notify on failed delivery** boxes, if you want to receive notifications when those events occur.
- 12 Check the **Use LCR** box, to enable least-cost routing.
- 13 Check the **Delayed delivery** box, if you want the fax memo to be transmitted at a later time.

To set the delay, you can either type the date in the DD/MM/YYYY format, in the **Date** field, and the time in the HH:MM PM format, in the **Time** field, or by clicking on the  or  buttons, respectively, and selecting them.

← March 2005 →						
Mo	Tu	We	Th	Fr	Sa	Su
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3



- 14 Click on the **Billing Codes** tab.
- 15 Fill the fields as needed.
- 16 Click **Send**.

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