

# RightFax Web Client

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*Quick reference guide to getting started with RightFax  
Web Client for RightFax 10.6, Feature Pack 3*

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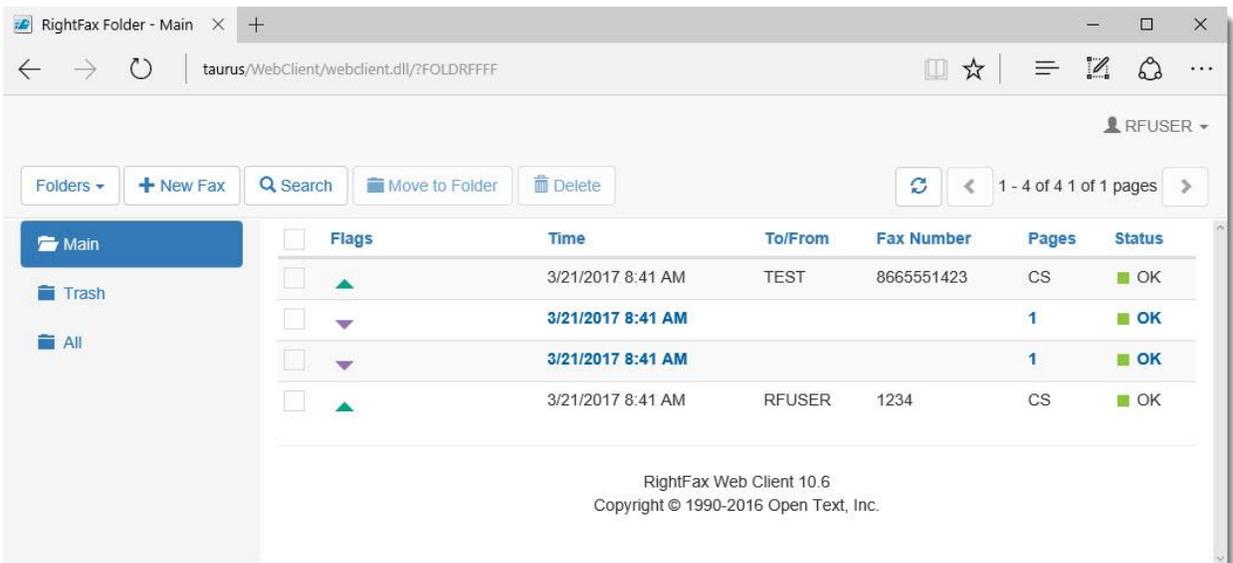
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# RightFax Web Client

RightFax Web Client is a browser-based client application that can be used for basic functionality. The RightFax Web Client works on Microsoft Windows and Apple OS X, and on Apple iOS (on iPads and iPhones).

Within the RightFax Web Client home page, users can create, view, edit, and print faxes, along with a number of other useful features for managing fax traffic.



Let's get started and see how you can use RightFax Web Client to quickly and easily fax from any Web Browser!

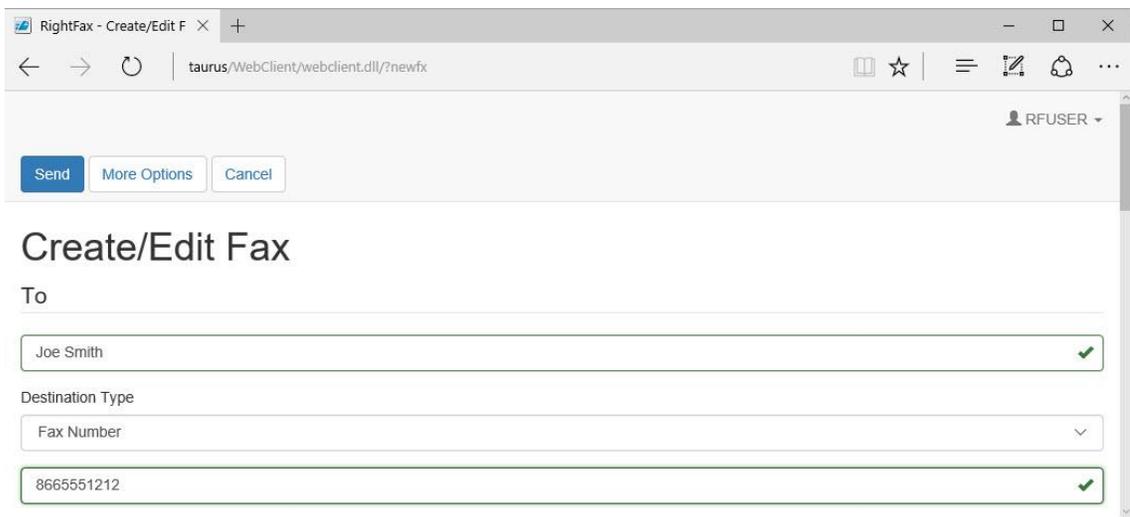
OPENTEXT™  
RightFax

## Creating and Sending Faxes

### Create a New Fax

RightFax Web Client can be used to create new faxes with a variety of attachment types and destination options.

1. Click the **New Fax** button.  This opens the **Create/Edit Fax** page.
2. In the Create/Edit Fax page, enter the information for the fax. Usually you must enter at least one fax recipient's name, the destination type, and a Fax Number or E-mail Address.



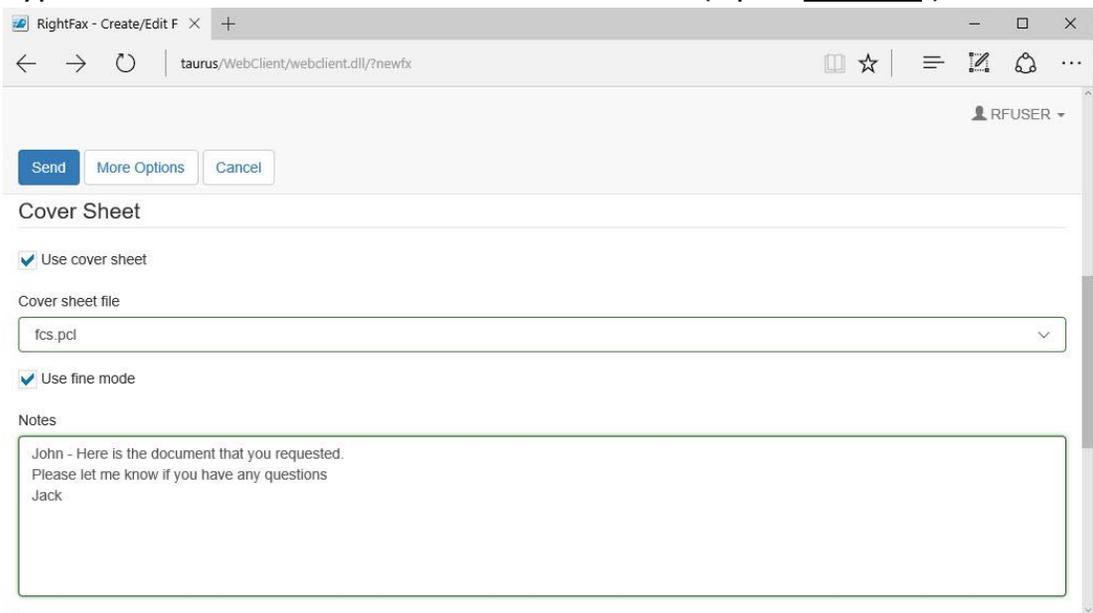
The screenshot shows a web browser window titled "RightFax - Create/Edit F" with the URL "taurus/WebClient/webclient.dll/?newfx". The page has a user profile "RFUSER" in the top right. At the top, there are three buttons: "Send" (highlighted in blue), "More Options", and "Cancel". Below the buttons is the heading "Create/Edit Fax". The form contains three fields: "To" with the value "Joe Smith" and a green checkmark; "Destination Type" with a dropdown menu showing "Fax Number"; and a text field with the value "8665551212" and a green checkmark.

3. Click **Send** to send the fax.

## Add a Cover Sheet

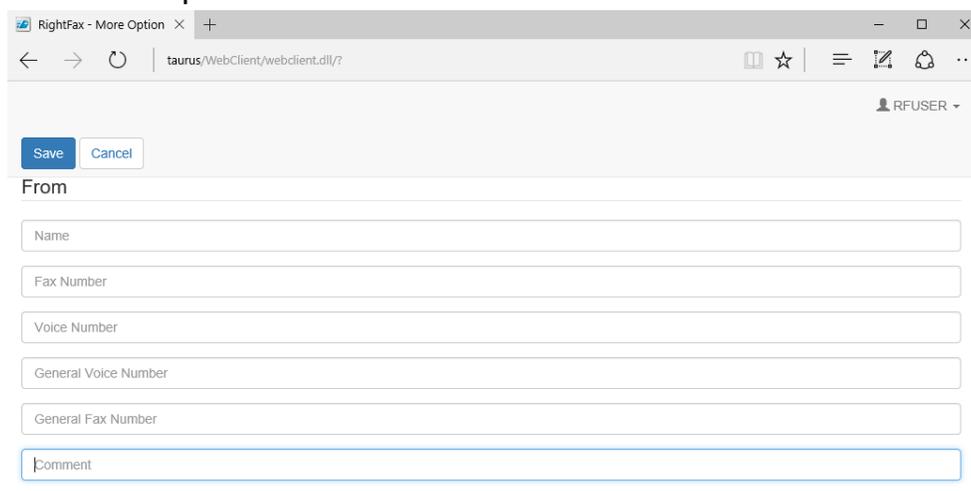
Cover sheets are optional for every fax sent from RightFax. The cover sheet can contain additional notes intended for the recipient.

1. Within the **Create/Edit Fax** page, scroll down to **Cover Sheet**. (By Default **Use Cover Sheet** is selected.)
2. In the **Cover Sheet file** drop down select the appropriate cover sheet.
3. Type the Cover sheet notes in the Notes field. (Up to **21 lines**.)



The screenshot shows a web browser window titled 'RightFax - Create/Edit F'. The address bar shows 'taurus/WebClient/webclient.dll/?newfx'. The user is logged in as 'RFUSER'. The 'Cover Sheet' section is visible, featuring a 'Send' button, 'More Options', and 'Cancel' buttons. Below these are three checkboxes: 'Use cover sheet' (checked), 'Use cover sheet file' (with a dropdown menu showing 'fcs.pcl'), and 'Use fine mode' (checked). A 'Notes' text area contains the following text: 'John - Here is the document that you requested. Please let me know if you have any questions Jack'.

4. To add a comment or specify other sender information select **More Options**.
5. Within **More Option** scroll down to the **From** section.



The screenshot shows a web browser window titled 'RightFax - More Option'. The address bar shows 'taurus/WebClient/webclient.dll/?'. The user is logged in as 'RFUSER'. The 'From' section is visible, featuring a 'Save' button and 'Cancel' button. Below these are several input fields: 'Name', 'Fax Number', 'Voice Number', 'General Voice Number', 'General Fax Number', and a 'Comment' field.

6. Note: You can use the “**Comment**” field to include information about the fax that will not appear on the cover sheet. This field becomes searchable content, in the event that you want to reference the fax to an event, such as a case number, invoice number, or account name.
7. Optional: Enter the sender’s contact information in the **From** section, click **Save**, and then click **Send** to send the fax.

## Attach Library Documents

Library Documents are frequently used documents that can be added to faxes. Your administrator can add frequently used document to the RightFax Library Documents to make them available for easy faxing.

1. Within the **Create/Edit Fax** page scroll down to **Attachments**.
2. Select **Attach Library Document**.



3. Within the **Document Library**, select the library document required for this fax. The documents will be added to the end of the fax in the order they were selected.



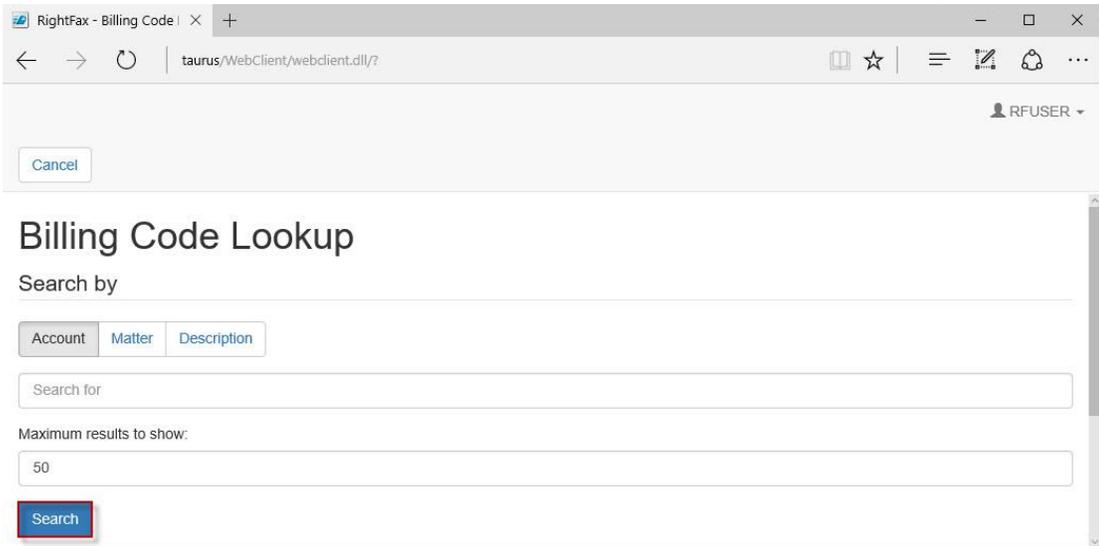
## Assign Billing Codes

Billing codes allow an administrator to identify a fax by the sender, the recipient, or the content of the fax for reporting purposes.

1. Within the **Create/Edit Fax Page**, scroll down to **Billing Information**.
2. Select **Billing Search**.



3. Within the Billing Code Look up page, you can search by Account, Matter, and Description. Click **Search** to display a list of available billing codes.



4. Select the appropriate billing code for this fax.

The billing code lookup completed.

### Billing Code Lookup

Search by

Account Matter Description

Search for

Maximum results to show: 50

Search

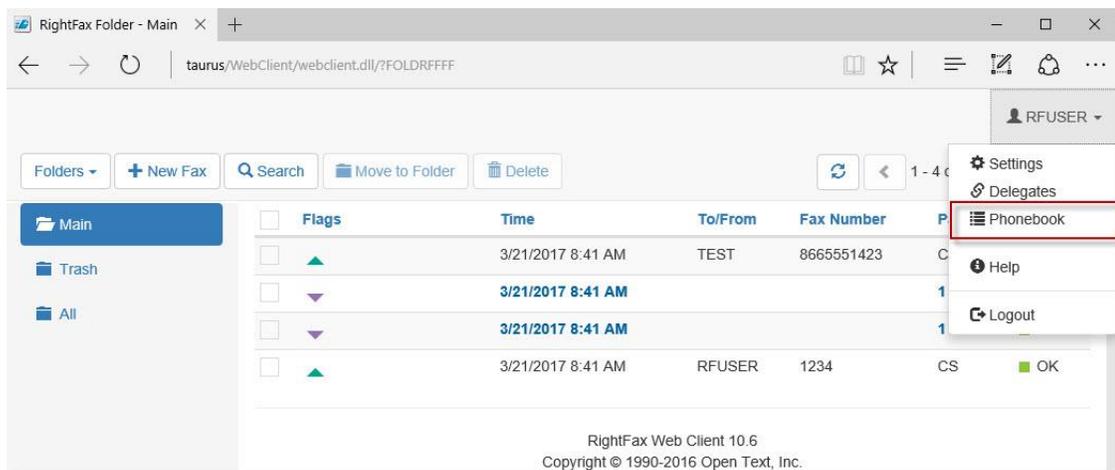
Account	Matter	Description
7841	JONES V SMITH	
87342	SMITH V JONES	

## Adding Entries into Your Phonebook

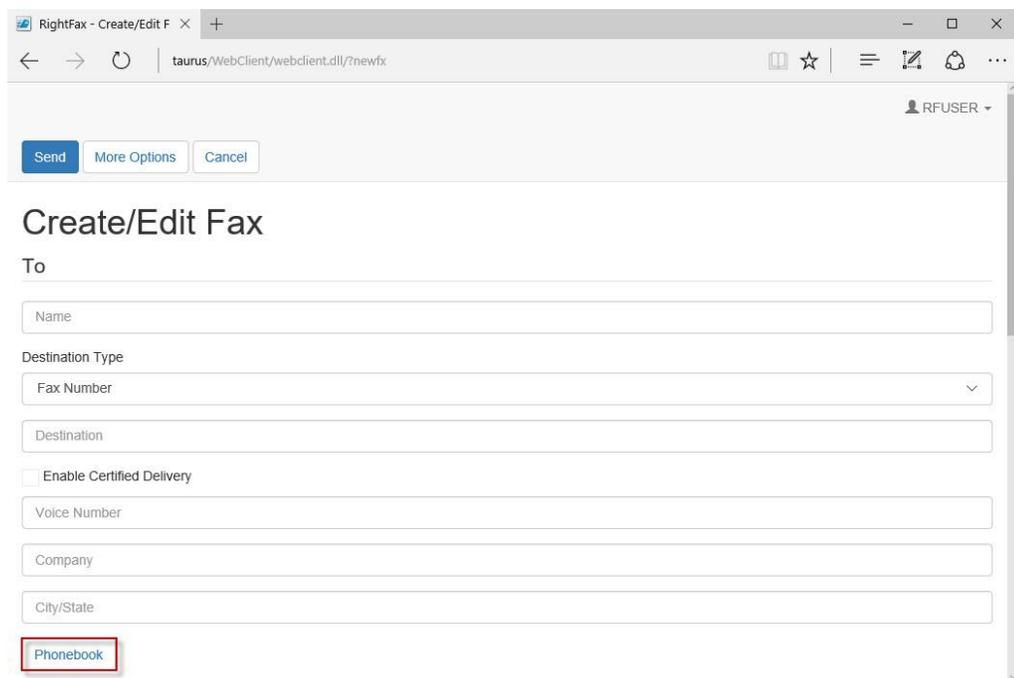
RightFax Web Client lets you create a personal phonebook of fax contacts. You can add individual contacts to your phonebook or frequently faxed numbers. You can also create group contacts that let you easily send one document to multiple members of the same group.

### There are two options to access Phonebook using the RightFax Web Client:

- Open the **Web Client Home** page, on the **username** menu, click **Phonebook**.



- From the **Create/Edit Fax** page, under **To**, click **Phonebook**.

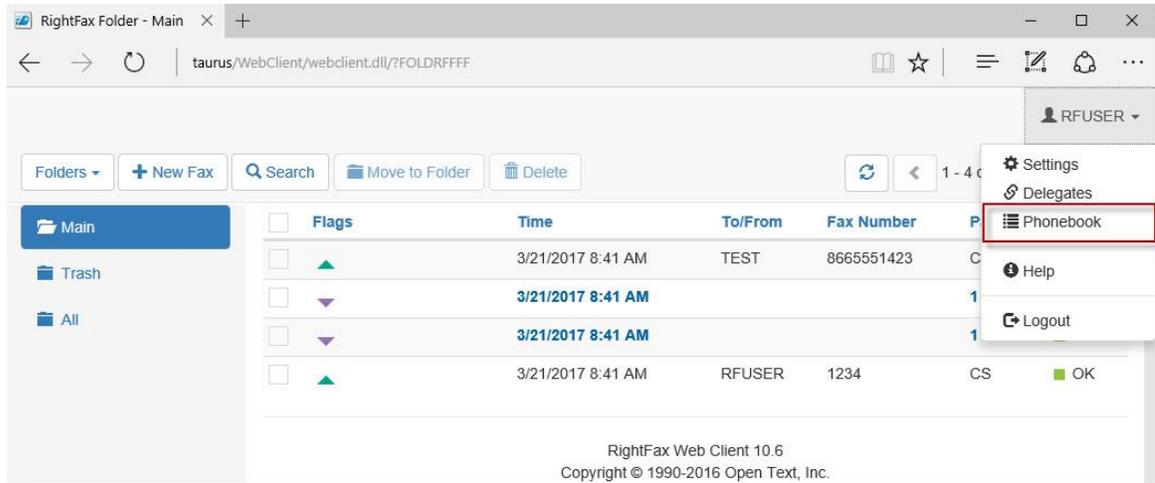


## Create an Individual Phonebook Entry

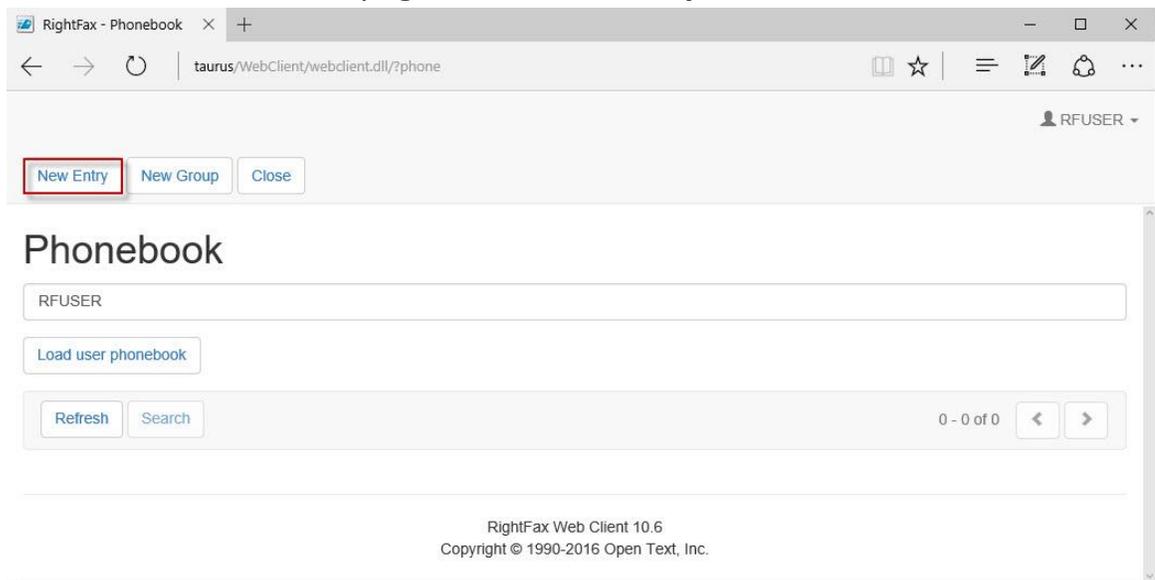
Entries can be added to the phonebook individually for quick access to frequently used contacts.

**Note:** This option is not available for small mobile devices.

1. Open the **Web Client Home** page, on the **username** menu, click **Phonebook** from the menu.



2. Within the **Phonebook** page select **New Entry**.



3. Enter the fax number in the **Destination** field and fill in any other contact information you prefer to save for the contact.

RightFax - Phonebook Entry

taurus/WebClient/webclient.dll/?nuphn

RFUSER

Save Delete Cancel

### Phonebook Entry

KATHY\_MORITIME ✓

Published

Read Only

#### Address

Katy Moritime

Pacific Shipping

Address

City/State

8776231903 ✓

Destination Type

Fax Number

4. Click **Save**.

## Use your Phonebook

It is possible to easily add recipient to one fax by using the RightFax Phonebook.

1. Click the New Fax button. **+ New Fax** This opens the **Create/Edit Fax** page.
2. From the **Create/Edit Fax** page, under **To**, click **Phonebook**.

RightFax - Create/Edit F × +

taurus/WebClient/webclient.dll/?newfx

Send More Options Cancel

### Create/Edit Fax

To

Name

Destination Type  
Fax Number

Destination

Enable Certified Delivery

Voice Number

Company

City/State

**Phonebook**

3. Select each contact that needs to receive this fax.

RightFax - Phonebook × +

taurus/WebClient/webclient.dll/?

New Entry New Group Close

### Phonebook

RFUSER

Load user phonebook

Refresh Search 1 - 4 of 4

Type	ID	Name	Company	Fax Number	Owner
<input checked="" type="checkbox"/>	BELLA_PERRY	Bella Perry	Kona Gas Co.	8771552333	RFUSER
<input type="checkbox"/>	GREG_SMITH	Greg Smith	Seattle Brewing	8774516231	RFUSER
<input type="checkbox"/>	JACK_KLINE	Jack Kline	Acme Co	8775555555	RFUSER
<input type="checkbox"/>	KATHY_MORITIME	Katy Moritime	Pacific Shipping	8776231903	RFUSER

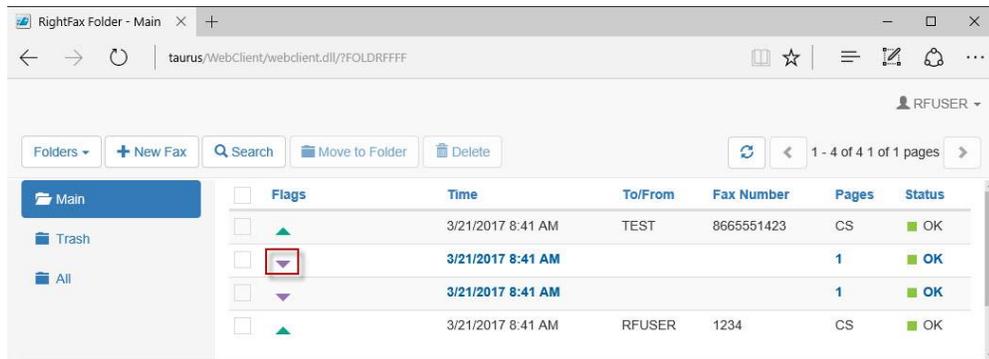
RightFax Web Client 10.6  
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4. Fill out the required fields, add any attachments, and click **Send**.

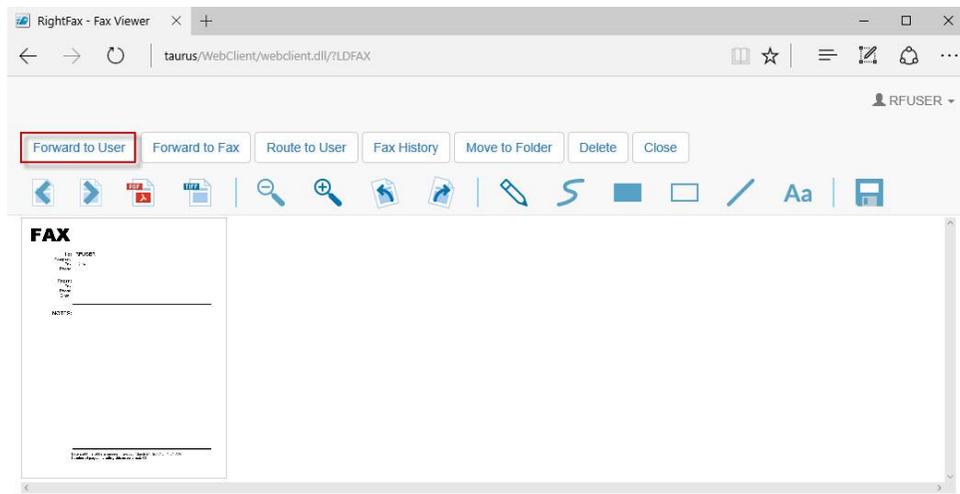
## Forward a Fax to Users or Fax Numbers

You can quickly and easily forward a fax to another RightFax users who is registered on your RightFax server. This feature will place a copy of the fax in the inbox of the destination user's account and will be noted in the history of the fax.

1. Open the Web Client Home page, and open a sent or received fax.



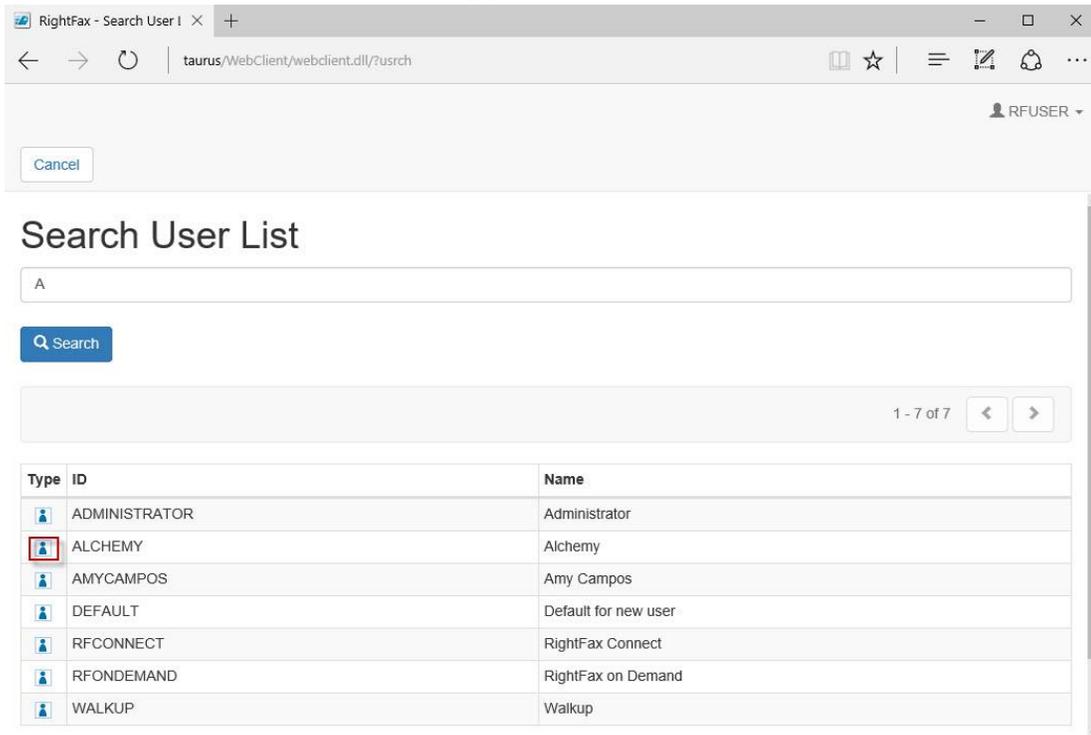
2. Within the Fax Viewer page, select **Forward to User**.



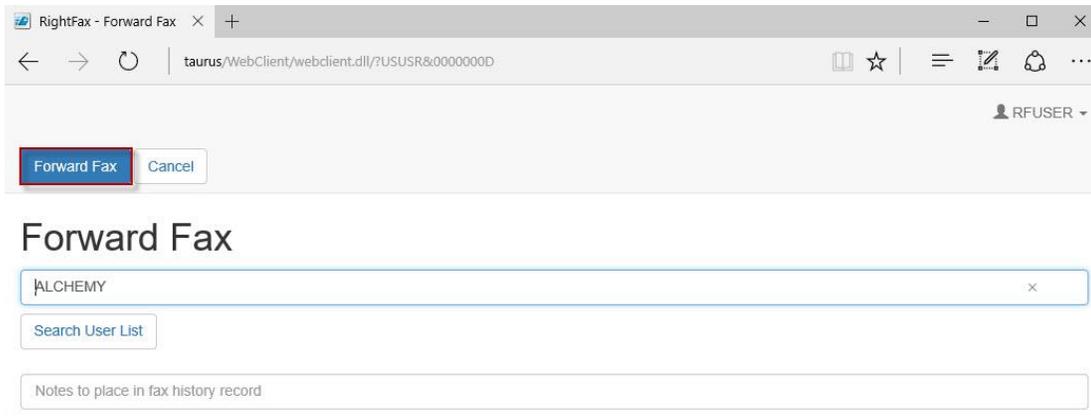
3. In the Forward Fax page, enter any search criteria, and click Search User List.



4. Select the user to forward a copy of the fax.

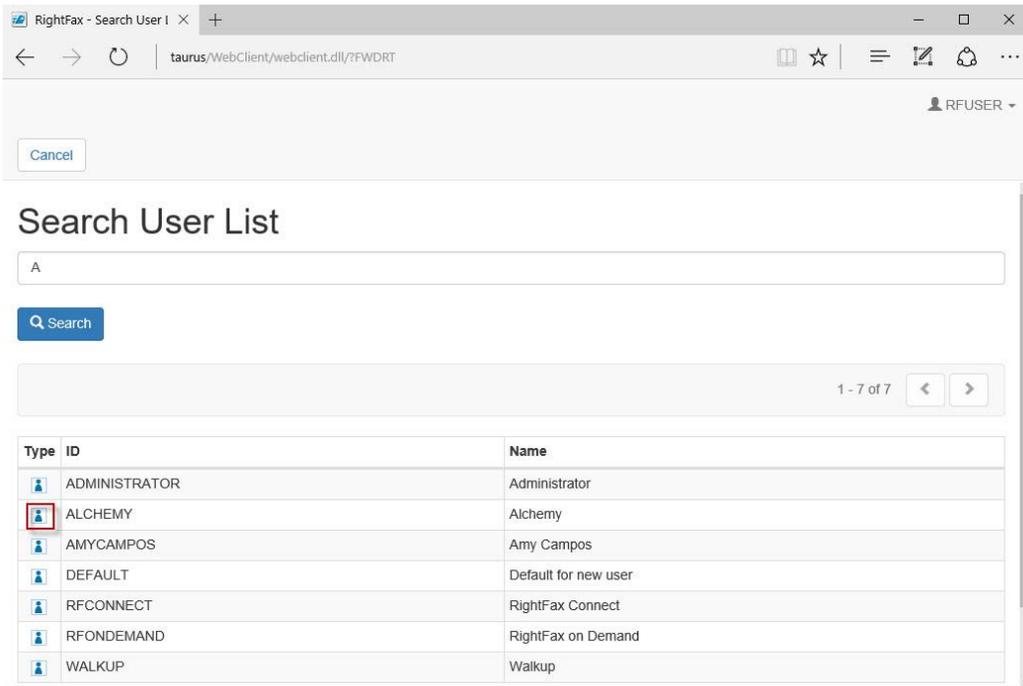


5. Click **Forward Fax**, to send a copy of the fax to one or multiple recipients.





4. Select a user to Route the Fax to.



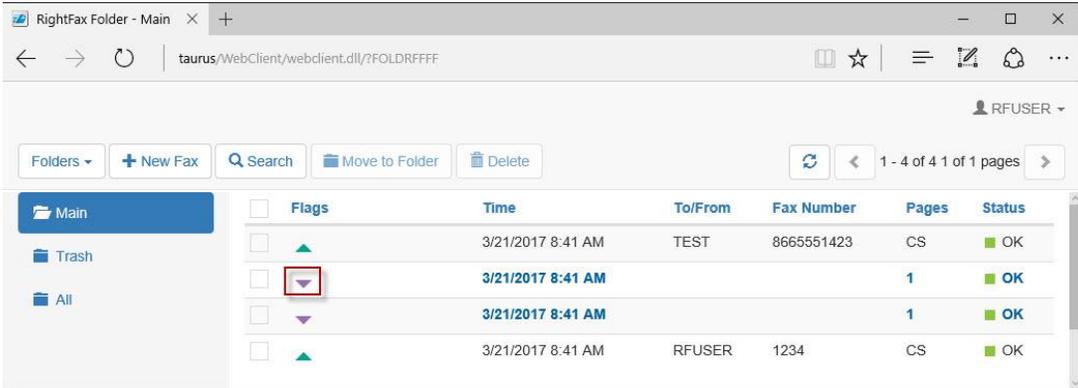
5. After selecting the user click **Route to User** to move the fax to one or multiple users.



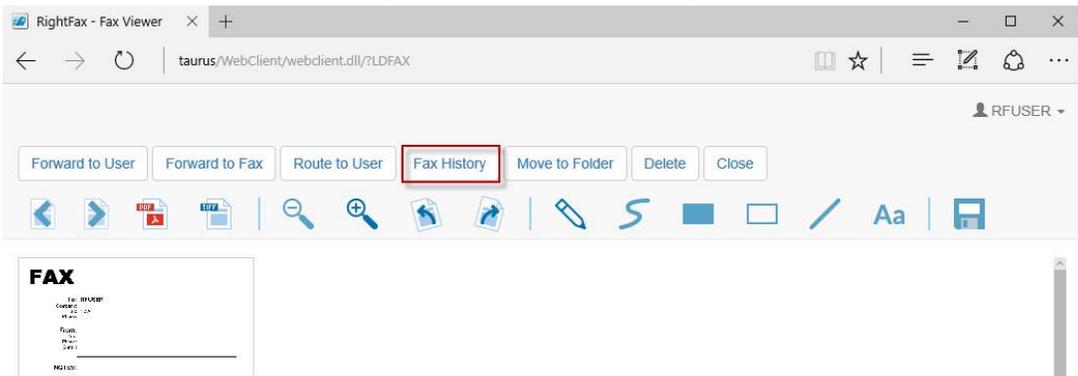
## Viewing A Fax's History

You can view a detailed audit trail of the fax history of a fax, which will include detail such as when it was delivered, viewed and by whom, if it was routed or forwarded and to whom, if it was edited/annotated, and other important details.

1. Open the **Web Client Home** page, and open a sent or received fax.



2. Within the Fax Viewer page, select **Fax History**.



3. The **Fax History** page will display, click Close to exit Fax History.

