RightFax Web Client

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

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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.



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.)



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

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Comment] [

- 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.

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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.

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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.

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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.

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4. Select the appropriate billing code for this fax.

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**.

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

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Destination					
Enable Certified Delivery					
Voice Number					
Company					
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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.

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

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

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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**.

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Destination					
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Voice Number					
Company					
City/State					
Phonebook					

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

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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.

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

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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.

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Search User List					
Notes to place in fax history record					

Routing a Fax to Another User

You can quickly and easily forward a fax to another RightFax user who is registered on your RightFax server. This feature will move the fax from its current location to 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.

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Trash		3/21/2017 8:41 AM	TEST	8665551423	CS	OK
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All		3/21/2017 8:41 AM			1	ок
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2. Within the Fax Viewer page, select Route to User.

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3. In the **Route to User** page, enter any search criteria, and select **Search User** List.



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

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Route to User Cancel								
Route to User			•					
Search User List			<u> </u>					
Notes to place in fax history record								

4. Select a user to Route the Fax to.

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.

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		3/21/2017 8:41 AM			1	OK	
All		3/21/2017 8:41 AM			1	ок	
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2. Within the Fax Viewer page, select Fax History.

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

