



Version 9.0
Installing and Using the
InterAction Integration Module

Edition

Information in this document applies to version 9.0 of the Guide for Installing and Using the InterAction Integration Module.

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Installing and Using the InterAction Integration Software

The RightFax integration with Interface Software's *InterAction* contact management system lets you send faxes to contacts directly from within the InterAction client. When the integration software is installed, InterAction users can select one or more contacts, and then select a custom installed option to create a new fax. This runs the RightFax FaxUtil client software, creates a new fax, and addresses the fax to the selected contacts. Users can then write notes to include on the fax cover sheet, add file attachments or library documents, and customize their other fax options as they would when creating a new fax in FaxUtil. After the fax is sent, the user is returned to the InterAction client.

In addition, every time a fax is sent to a contact from within InterAction, a record is stored in that contact's activity log. Any fax that hasn't been deleted from the user's fax mailbox can be viewed by selecting it in the activity log.

This integration software requires:

- RightFax server v7.0 SP1 or higher
- RightFax FaxUtil v7.0 SP1 or higher installed on the client workstations
- InterAction v4.01 or higher for the server and all client workstations

The RightFax InterAction integration software is installed on each InterAction client machine from the RightFax server. Because the integration uses the RightFax client software FaxUtil for creating and sending faxes to the RightFax server, you must install FaxUtil on

each client workstation before installing the integration software. For information on installing FaxUtil, refer to the *RightFax Installation Guide*.

Installing the Integration Software

The InterAction integration software is automatically installed on the RightFax server when you run the server installation. However, to enable communication between the RightFax server and InterAction workstations, you must run a separate installation on each InterAction workstation.

To install the InterAction client software, log onto the InterAction client workstation and run the RightFax client installation as described in the *RightFax Installation Guide*. On the **Setup Features** screen, expand the **RightFax Client** group and select the **InterAction Integration** option. Complete the remaining installation steps according to the instructions in the *RightFax Installation Guide*.

Creating and Sending Faxes from InterAction

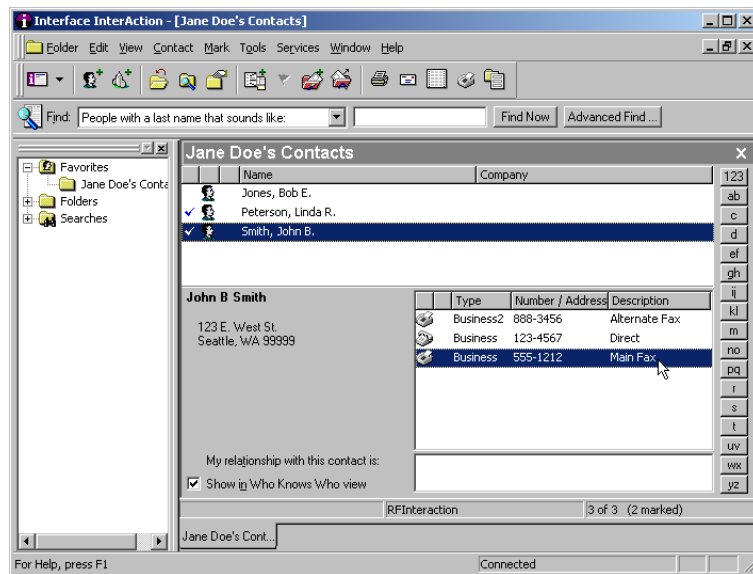
The RightFax InterAction integration lets you easily send faxes to one or more contacts directly from your InterAction software. All faxes sent from InterAction are forwarded to the fax server for processing and transmission. When a fax is sent via the RightFax server, RightFax also creates a new activity log entry for each

contact who received the fax. This records the time and date of each fax sent and links to the fax image so that sent faxes can be reviewed at any time.

To create and send a fax to one or more contacts

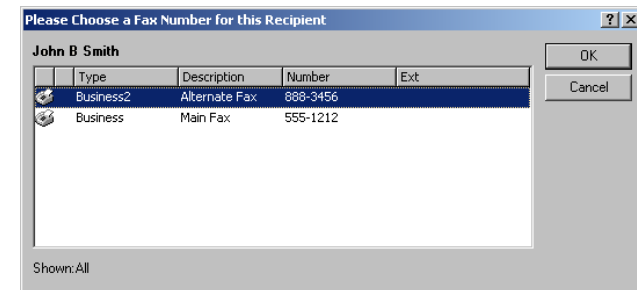
1. In InterAction, open the folder containing the contacts who will receive the fax.
2. If you are sending the fax to one contact only, select the desired contact so that the address and other contact information is displayed in the summary pane (below the list of contact names). If you are sending one fax to multiple contacts, click in the left column of each desired contact so that a check mark appears next to the contact type icon.

Figure 0.1 Selecting InterAction Contacts



3. If sending a fax to one contact only, double-click the contact's fax number in the summary pane. If you have checked multiple contacts to receive the fax, select **Send a Fax to the Marked Contacts** from the **Services** menu.
4. The integration software will launch the FaxUtil program which lets you create and send the fax. If you see the message "Please open a valid RightFax server," click the **OK** button to close the message box, and then select **Open Server** from the **File** menu. Enter the name of your RightFax server in the **Server Name** field (you should not need to change the setting in the **Protocol** field) and click **OK**.
5. Depending on your RightFax configuration, FaxUtil may also require you to supply login information before it will run. If prompted for a user ID and password, enter your RightFax user ID and password (this may be different from your network login information) and click the **OK** button.
6. If you are sending the fax to multiple contacts, some of those contacts may have more than one fax number listed (for example, primary and alternate fax numbers). For each of these contacts, a dialog box will appear asking you to select the fax number to use. Select the fax number you want and click **OK**.

Figure 0.2 Select a Fax Number



7. Once FaxUtil launches, it displays the **Fax Information** dialog box with all the contact's addressing information from InterAction already filled in.

Figure 0.3 Completing the Fax Information Dialog Box

If you selected multiple contacts to receive the fax, the number of contacts will be displayed in the **Name** box and all other boxes will remain blank.

8. Create your fax by adding cover sheet notes, attaching files and library documents, and completing the other fax transmission options on this dialog box. For a definition of each option in this dialog box, click the “What’s This” help button **[?]** in the top right, and then click the option you want defined. For more comprehensive help on how to send faxes from FaxUtil, refer to the *FaxUtil Quick Reference Card* or the FaxUtil online help.
9. When you have completed the **Fax Information** dialog box with the fax attachments and options you want, click **Send** to send the fax.

Reviewing Fax Records in the Contact Activity Log

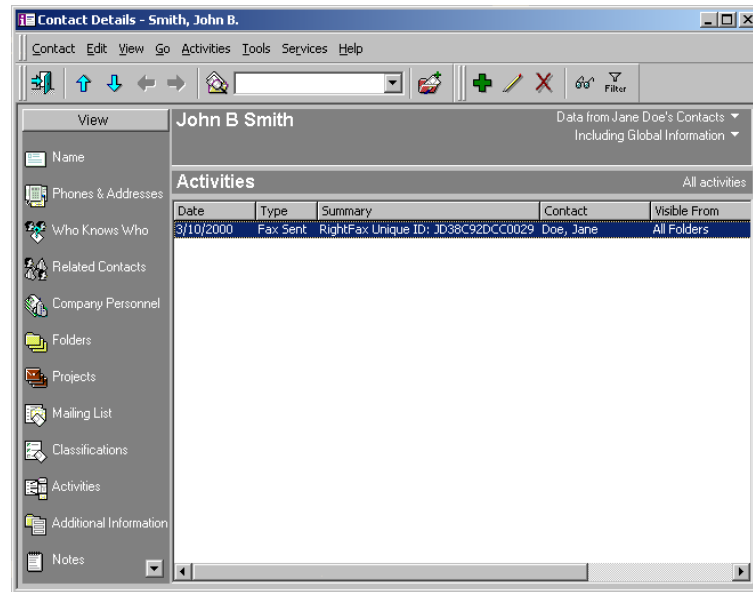
Every time you send a fax to a contact, a record of the fax is stored in that contact’s activity log. Any fax that hasn’t been deleted from the user’s fax mailbox can be viewed at any time by selecting it in the activity log.

To review the faxes that have been sent to a contact

Note An entry will be made to the activity log even when a fax does not transmit successfully (e.g., the receiving phone line is busy). For InterAction users to receive notifications about unsent faxes, the RightFax administrator must set up an alternate fax notification system (described in the RightFax Administrator’s Guide).

1. In InterAction, double-click the contact whose fax history you want to review. This opens the **Contact Details** window.
2. In the **View List**, on the left side of the window, click **Activities**. This opens the contact’s activity log.

Figure 0.4 The Contact Activity Log



Faxes sent via the RightFax integration include the unique ID of the fax in the **Summary** column. Every fax sent to or from RightFax has its own unique ID.



Note To view a fax from inside the InterAction activity log, the fax image must be saved in your FaxUtil mailbox. If the fax image has been deleted or moved to another folder or mailbox, FaxUtil will display an error message and return you to the InterAction activity log.

3. Double-click anywhere in the activity entry. This opens your FaxUtil mailbox with the specified fax highlighted.
4. To view the fax, select **View** from the **Fax** menu. This opens the FaxUtil fax viewer. For information on using the fax viewer, press F1 to open the viewer's online help.

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