

Captaris RightFax

Quick Reference Guide




Client for Microsoft Outlook

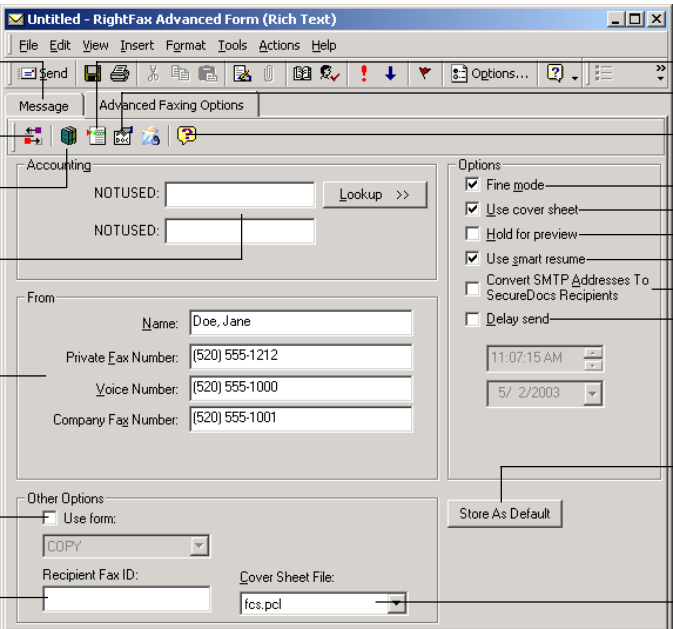
Using the RightFax Form in Outlook

The RightFax form simplifies creating, addressing, and formatting fax messages in Microsoft Outlook.

To Open the RightFax Form

- 1 Click the **New Fax to Contact** button  in the Outlook toolbar.
- 2 If you are sending your document to one or more recipients, complete the **Quick Fax Address** dialog box. The recipient's name and fax number are required. Click **Add Another** to add additional fax recipients.
- 3 When you have added the addressing information for all the fax recipients you want, click **Done**. After the RightFax form opens, you may choose to add e-mail addresses to your recipient list in addition to fax addresses.

If you select one or more contacts in your Contacts folder before clicking the **New Fax to Contact** button, the RightFax form will automatically use the fax addresses of the selected contacts.



The screenshot shows the 'Untitled - RightFax Advanced Form (Rich Text)' dialog box. It features a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with icons for Send, Copy, Paste, Undo, Redo, and other actions. The main area is divided into several sections:

- Accounting:** Two 'NOTUSED:' fields with a 'Lookup >>' button.
- From:** Fields for Name (Doe, Jane), Private Fax Number ((520) 555-1212), Voice Number ((520) 555-1000), and Company Fax Number ((520) 555-1001).
- Options:** A list of checkboxes: Fine mode, Use cover sheet, Hold for preview, Use smart resume, Convert SMTP Addresses To SecureDocs Recipients, and Delay send. Below these are dropdown menus for time (11:07:15 AM) and date (5/ 2/2003).
- Other Options:** A checkbox for 'Use form:' with a dropdown menu showing 'COPY'. Below are fields for 'Recipient Fax ID:' and 'Cover Sheet File:' (fcs.pcl).
- Buttons:** 'Store As Default' and 'View online help'.

Annotations on the left side of the form include:

- Address and compose message
- Configure server information
- List library documents
- Enter billing codes
- Enter your contact information to display on the cover sheet
- Select overlay form
- ID of receiving fax machine

Annotations on the right side of the form include:

- List billing codes
- Set document conversion options
- View online help
- Select fax resolution
- Use a cover sheet
- View before sending
- Use Smart-Resume
- Send via Certified Delivery
- Send at specified time/date
- Save current settings as default
- Select cover sheet

To Send a Document Using the RightFax Form

- 1 On the **Message** tab, add one or more additional fax or e-mail addresses in the **To:** and **CC:** fields (For information on creating fax addresses in Outlook, see *Addressing Documents to Fax Numbers* below.)
- 2 Complete the **Subject** line, the message body, and add any desired file attachments. Text in the **Subject** line will be placed in the **Notes** section of the fax cover sheet. File attachments will be converted to graphic images and automatically appended to the end of the document in the order they appear in the message.
- 3 Click the **Advanced Faxing Options** tab. Add any desired library documents, billing codes, or overlay forms, and select any transmission options you want.
- 4 When the address and all desired options have been completed, click the **Send** button.

Addressing Documents to Fax Numbers

The RightFax form supports two different address formats for addressing faxes: the FAX format, and the RFAX format. For information on which of these formats you should use, contact your RightFax administrator.

To Send a Document to a Fax Number Using the FAX Addressing Format

- 1 Specify a destination name and fax number in the **To:** or **Cc:** box of a new message using this format:
[FAX:*Name@FaxNumber*]
(You must include both the *Name* and *FaxNumber* as well as the enclosing square brackets.)
- 2 Separate multiple FAX addresses with semicolons.

Example:

[FAX:Jane Doe@555-1212];[FAX:John Smith@(520)555-1000]

To Send a Document to a Fax Number Using the RFAX Addressing Format

- 1 Specify a destination name and fax number in the **To:** or **Cc:** box of a new message using this format:
[RFAX:*Name@/FN=FaxNum*]
(You must include the opening and closing square brackets.)
- 2 The name and fax number are required. You can also add these parameters for display on the cover sheet:


SMS Number	/SMS= <i>Number</i> (replaces /FN for a fax number)
Billing code 1	/AN= <i>Code</i>
Billing code 2	/MN= <i>Code</i>
City and state	/CI= <i>City, State</i>
Company	/CO= <i>Company</i>
Voice phone number	/VN= <i>Number</i>
- 3 Separate multiple RFAX addresses with semicolons.

Example:

[RFAX:Jane Doe@/FN=555-1212/VN=555-2345/CO=Acme, Inc.]

To Send a Document to a Contact in Your Outlook Contacts List

- 1 Click the **To:** button to open the **Select Names** dialog box and show the names in your Contacts list.
- 2 Select one or more Business Fax or Home Fax entries.

Alternatively, you can select one or more contacts from your Contacts folder and click the **New Fax to Contact** button  in the Outlook toolbar (if it has been installed.)

Adding a Cover Sheet

To Include a Cover Sheet with Your Document

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Select the **Use cover sheet** option.
- 3 In the **Cover Sheet File** box, type the file name of the cover sheet to use (including the .PCL or .DOC file extension), or select a cover sheet file from the list.
- 4 In the **From** group box, enter your name, fax number, voice number, and your organization's fax number.

Attaching Library Documents

Library documents are frequently used documents that your fax administrator has stored on the server for easy access. Marketing materials, price lists, and product specifications are commonly stored as library documents.

To Attach Library Documents

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Click the **Show the Select Library Document Dialog** button. This opens a list of the library documents on your network.
- 3 Double-click each library document that you want to attach. Each selected attachment is displayed in the **Selected Attachments** list. Library documents will be added to the end of the document in the order they appear in the **Selected Attachments** list.

Adding Overlay Forms

Overlay forms are image files that combine with your document so the two images appear together. Company letterhead is a commonly used overlay form. You can add one overlay form per document.

To Add an Overlay Form to Your Document

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Select the **Use Form** option, and then select the overlay form you want from the list.
On the Standard form, type the ID of the overlay form to use in the **Form Overlay Code** box.

Assigning Billing Codes

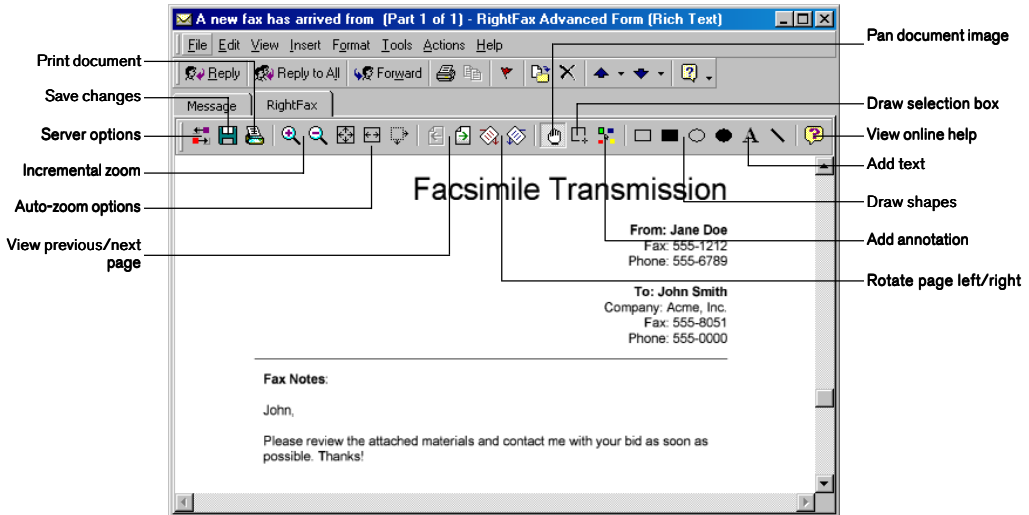
Billing codes may be used by the RightFax administrator to identify the sender, the recipient, or the content of documents. Billing codes do not normally appear in your documents but are stored with each document on the server.

To Assign Billing Codes to Your Document

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Under **Accounting**, enter one or two billing codes.
If you are using the Advanced form, you can click **Lookup** to select from a list of available billing codes.

Viewing Fax Documents

When the RightFax form is installed, Outlook messages containing received fax documents are automatically displayed in the RightFax fax viewer. When you open the message, the fax will be displayed.



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