



700 S. Flower St., Suite 1500 ▪ Los Angeles CA 90017 ▪ tel: 323.860.9200 ▪ fax: 323.860.9201

## eFax Connector for Salesforce – Administrator's Guide

**VERSION: 1.6**

**AUTHOR:** Consensus Cloud Solutions, Inc.

**DATE:** 10/31/2023

## Legal Notice

© 2023 Consensus Cloud Solutions Inc. or its subsidiaries (collectively, "Consensus"). All rights reserved. eFax®, eFax Corporate®, and eFax Messenger® are trademarks of Consensus Cloud Solutions, Inc. These materials are confidential and access-restricted. Use and distribution is limited solely to authorized personnel and select partners of Consensus Cloud Solutions Inc. (CCSI). CCSI strictly prohibits the use, disclosure, reproduction, modification, transfer, or transmittal of these materials for any purpose in any form and by any means without prior written permission.

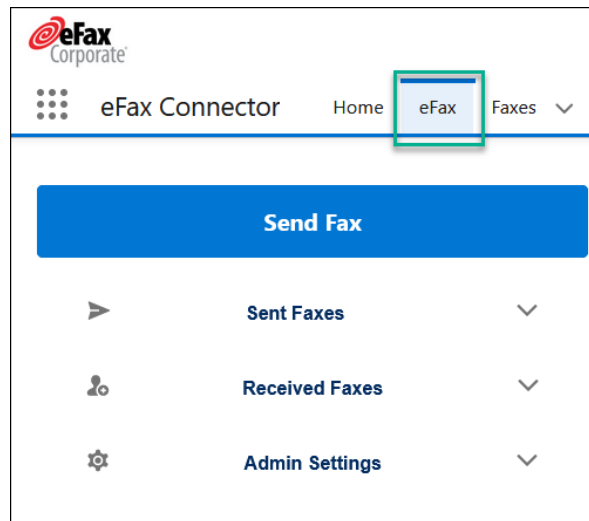
# CONTENTS

<b>What’s New</b>	<b>1</b>
<b>eFax Tab</b>	<b>1</b>
<b>ADMIN SETTINGS</b>	<b>2</b>
<b>Link or Unlink the eFax Corporate Account</b>	<b>2</b>
<b>Configure the eFax Corporate Account</b>	<b>5</b>
Run a Batch	7
Batch Errors	11
<b>Manage Users</b>	<b>12</b>
<b>Manage Fax Lines</b>	<b>17</b>
<b>Revision History</b>	<b>25</b>

## What’s New

The **Admin Settings > Configure eFax Account** section has a new **Batch** process that, running in the background, establishes API calls to the eFax source system, retrieves the data, and updates it into Salesforce objects. For detailed information, see *Run a Batch* on pg. [7](#).

## eFAX TAB



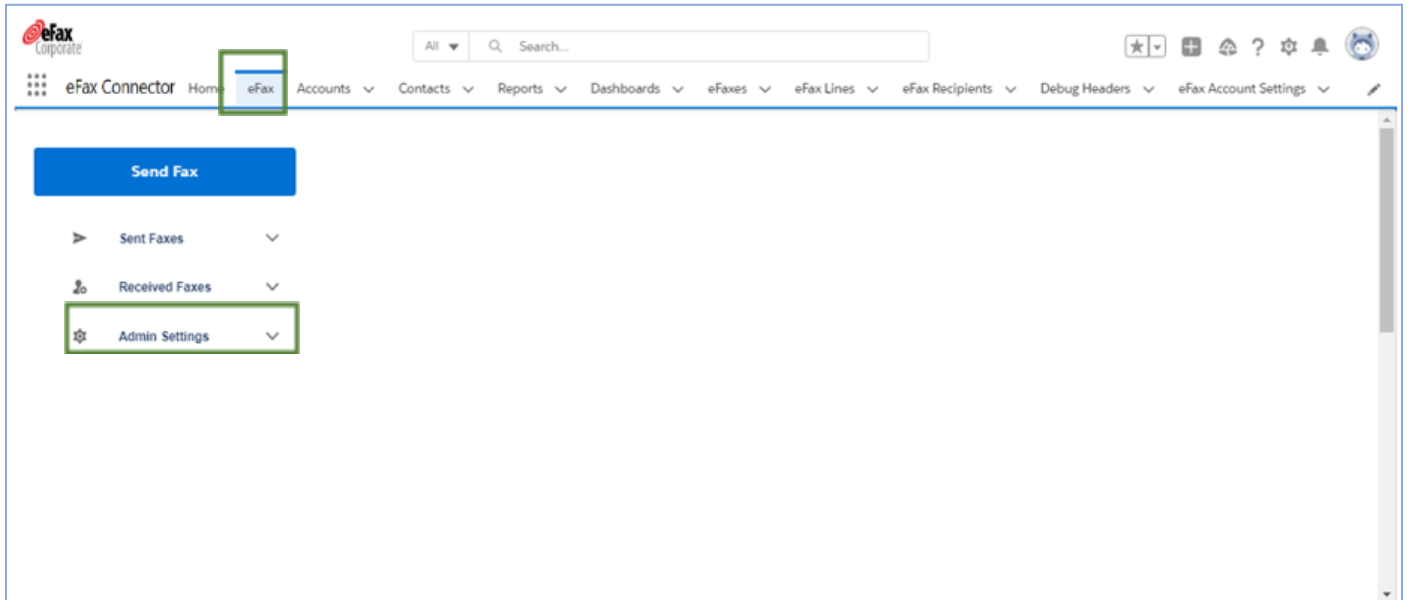
*eFax tab*

On the **eFax** tab in Salesforce:

- Users of this *eFax Connector for Salesforce* integrated app can send and receive faxes.
- The *eFax Connector for Salesforce* administrator can:
  - Link their eFax Corporate account to the Salesforce app, and configure the account.
  - Manage users (add them, enable/disable their **Send/Fax** privileges, and more).
  - Manage fax lines (assign or unassign fax lines to users).

This guide is for *eFax Connector for Salesforce* administrators. (For users, see the *eFax Connector for Salesforce – User’s Guide*).

## ADMIN SETTINGS



### *eFax (tab) > Admin Settings*

*What do you want to do?*

- Link or unlink the eFax Corporate account to/from Salesforce (see below).
- Configure the eFax Corporate account (pg. [5](#)).
  - Run a batch (pg. [7](#)).
- Manage users (pg. [11](#)).
- Manage fax lines (pg. [16](#)).

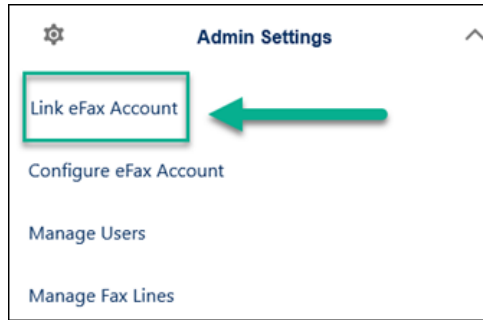
### Link or Unlink the eFax Corporate Account

#### ✓ NOTES:

- If you do not see the *eFax* tab (see above screenshot) when you access Salesforce, please contact your eFax Corporate administrator.
- Also, should you have to change the API key or the admin ID (see the first and third rows in the table on pg. [4](#)), you will also have to unlink, then relink, the account.

- To link the Salesforce app to your eFax Corporate account:
  1. Under **Admin Settings** on the **eFax** tab (pg. 2), click **Link eFax Account**.

✓ **NOTE:** Your eFax account should already be linked when you access Salesforce. If it is, you will see **Link eFax Account** under **Admin Settings**.



*Admin Settings > Link eFax Account*

2. In the dialog, enter the required credentials.

The image shows a dialog box titled 'Link Efax Account'. It contains five input fields: 'App Id', 'API Key', 'Corp Id', 'Admin Id', and 'Admin Password'. The 'Admin Password' field has a small icon for password visibility. At the bottom right, there are two buttons: 'Cancel' and 'Link Account'.

*Linking the eFax Corporate account to the Salesforce app*

Field	Description/Instructions
<b>App(lication) ID</b>	As assigned to the company during API sign-up and account configuration, enter the application ID for your eFax Corporate account. .

*Continued on next page*

## Link or Unlink Your eFax Corporate Account (Cont.)

- To link the Salesforce app to your eFax Corporate account (Cont.):

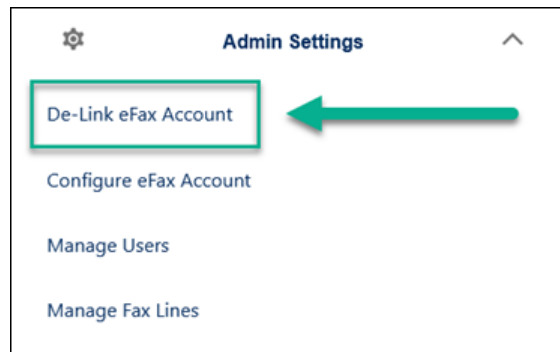
Field	Description/Instructions
<b>API Key</b>	Enter the assigned API key for your eFax Corporate account. (Along with the <b>App ID</b> , authenticates access to the <i>eFax Enterprise API</i> ).
<b>Corp(orate) ID</b>	Enter your five-digit eFax Corporate account ID (e.g., 73548).
<b>Admin(istrator) ID</b>	Your username
<b>Admin Password</b>	(Self-explanatory)

3. Click the **Link Account** button to finish.

- To unlink the Salesforce app from your eFax Corporate account:

✓ **NOTE:** Your eFax account should already be linked when you access Salesforce. If it isn't, you will see **De-Link eFax Account** under **Admin Settings**.

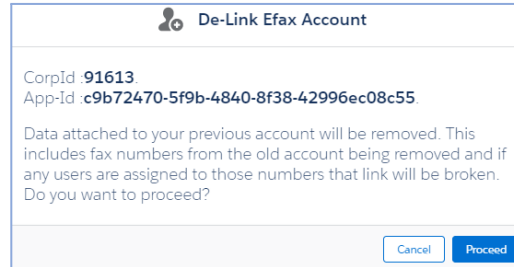
1. Under **Admin Settings** on the eFax tab (pg. 2), click **De-Link eFax Account**.



***eFax tab > Admin Settings > Delink eFax Account link***

## Link or Unlink Your eFax Corporate Account (Cont.)

- To unlink the Salesforce app from your eFax Corporate account: (Cont.)
  2. On the **De-Link eFax Account** dialog, click **Delink Account**, then **Proceed**.



**De-Link Efax Account**

CorpId :91613  
App-Id :c9b72470-5f9b-4840-8f38-42996ec08c55

Data attached to your previous account will be removed. This includes fax numbers from the old account being removed and if any users are assigned to those numbers that link will be broken. Do you want to proceed?

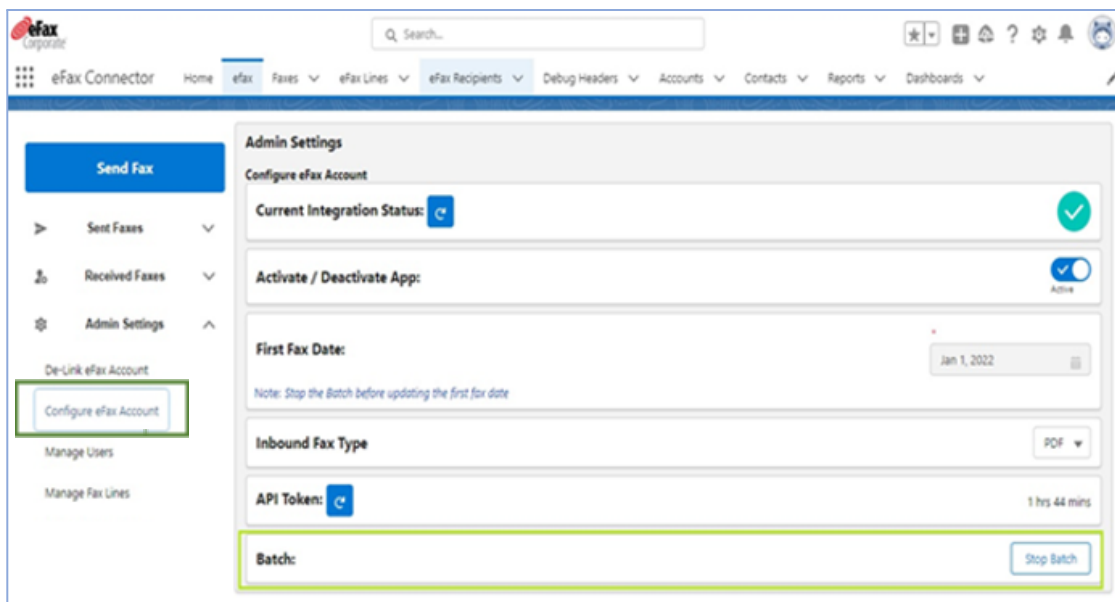
### *Unlinking eFax Corporate from Salesforce*

✓ **NOTE:** If you unlink the **eFax Corporate** account, users will see this system message when they log into **Salesforce**: *The Account has been temporarily disabled. Please contact the system administrator.*

## Configure the eFax Corporate Account

To configure the eFax Corporate account after linking it to the Salesforce application:

1. Under **Admin Settings** on the **eFax** tab (pg. 2), click **Configure eFax Account**.



The screenshot shows the eFax Corporate Admin Settings interface. The left sidebar has a green box around the 'Configure eFax Account' option. The main pane shows the 'Configure eFax Account' settings:

- Current Integration Status:** [Refresh] [Green Checkmark]
- Activate / Deactivate App:** [Active] [Toggle On]
- First Fax Date:** Jan 1, 2022 [Calendar Icon]
- Note:** Stop the Batch before updating the first fax date
- Inbound Fax Type:** PDF [Dropdown]
- API Token:** [Refresh] [1 hrs 44 mins]
- Batch:** [Stop Batch]

### *Admin Settings > Configure eFax Account pane*



## Configure the eFax Corporate Account (Cont.)

2. See/provide the following information.

<p><b>Current Integration Status</b></p>	<p>Shows the current health (status) of the <i>eFax Enterprise API</i>. (If an <b>X</b> shows, click the <b>Refresh</b> icon to get the latest update.)</p>
<p><b>Activate/Deactivate App</b></p>	<p>Toggle the button on or off to temporarily prevent (or not) eFax Corporate users from accessing Salesforce. (Users are prompted to contact you for activation.)</p>
<p><b>First Fax Date</b></p>	<p>The date defaults to when you linked the eFax Corporate account to Salesforce—this is also the date from which Salesforce manages and monitors faxes. (You may click the textbox or calendar icon to change the date.)</p> <div data-bbox="605 743 1382 877" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>✓ <b>NOTE:</b> Batches pick data from revised dates to update Salesforce. Modify this date only if the user uses the <b>Stop Batch</b> option.</p> </div> <div data-bbox="805 921 1203 1436" style="text-align: center; margin: 10px 0;"> <p>The screenshot shows a date picker interface. At the top, it displays 'Feb 18, 2021' with a calendar icon. Below is a monthly calendar for February 2021. The date '18' is highlighted with a blue circle. Other dates are visible in a standard grid format. At the bottom of the calendar, the word 'Today' is displayed.</p> </div> <p style="text-align: center; color: blue;"><i>You can change the date faxes are managed/monitored, if you wish</i></p> <div data-bbox="578 1530 1440 1608" style="background-color: #2e8b57; color: white; padding: 5px; margin: 10px 0;"> <p>First Fax Date has been set successfully. <span style="float: right; border: 1px solid white; padding: 2px 5px;">✕</span></p> </div> <p>If you change the date, click the square to exit the confirmation prompt.</p>

*Continued on next page*

## Configure the eFax Corporate Account (Cont.)

<b>Inbound Fax Type</b>	Select the file type for inbound faxes (PDF or TIFF).
<b>API Token</b>	<p>Indicates the age of the current token API in use.</p> <div data-bbox="592 464 1404 659" style="border: 1px solid black; padding: 5px; background-color: #e0f7fa;"> <p>✓ <b>NOTE:</b> The <b>Admin Settings -&gt; API Token</b> option allows a manual refresh of the token. However, you do not need to refresh the API token manually; the batch process automatically refreshes the token before the stipulated 24 hours.</p> </div> <p>If you refresh the token, click the square to exit the confirmation prompt.</p> <div data-bbox="576 747 1437 827" style="border: 1px solid black; padding: 5px; background-color: #28a745; color: white; display: flex; justify-content: space-between; align-items: center;"> <span>Access token has been refreshed successfully.</span> <span>✕</span> </div>
<b>Batch</b>	<p>Batches run in the background. They establish API calls to the eFax source system, retrieve data, and update Salesforce. When the user clicks <b>Start Batch</b>, it starts running in the backend, and the button changes to <b>Stop Batch</b>, indicating that the batch is running; and the user can stop it, if required. (See <i>Run the Batch</i>, below.)</p>

### RUN A BATCH

When you run a batch, the process (which runs in the background) establishes API calls to the eFax source system, retrieves the data, and updates it into Salesforce objects.

✓ **NOTE:** In the left navigation pane, **Admin Settings > Manage Users** and **Admin Settings > Manage Fax Lines** can not be used when a batch is in process.

To do so:

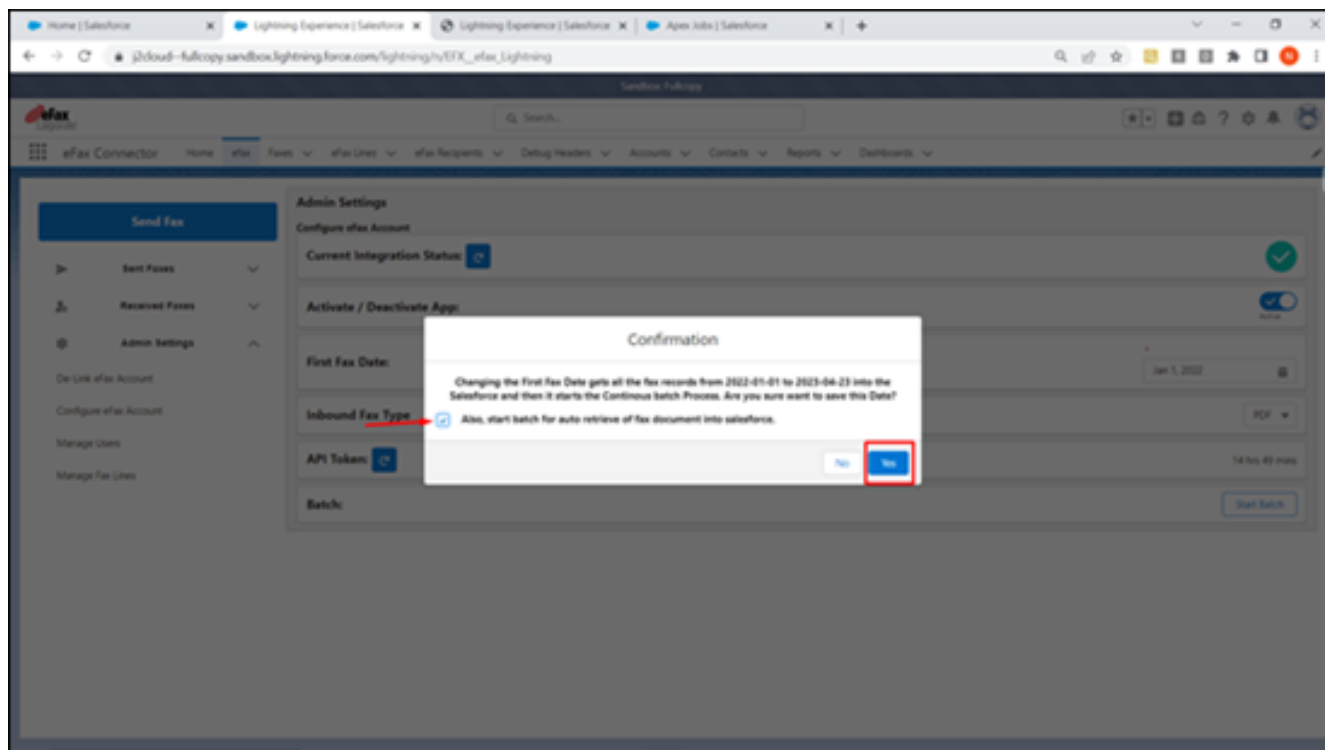
1. Under **Admin Settings** on the **eFax** tab (pg. 2), click **Configure eFax Account**, then **Batch**, then the **Start Batch** button. (Once you click it, it changes to **Stop Batch** [if you wish].)



## Configure the eFax Corporate Account (Cont.)

### RUN A BATCH (CONT.)

- At the confirmation prompt:
  - If you check the box, then click **Yes**, the **Received Document** batch also starts in the background.



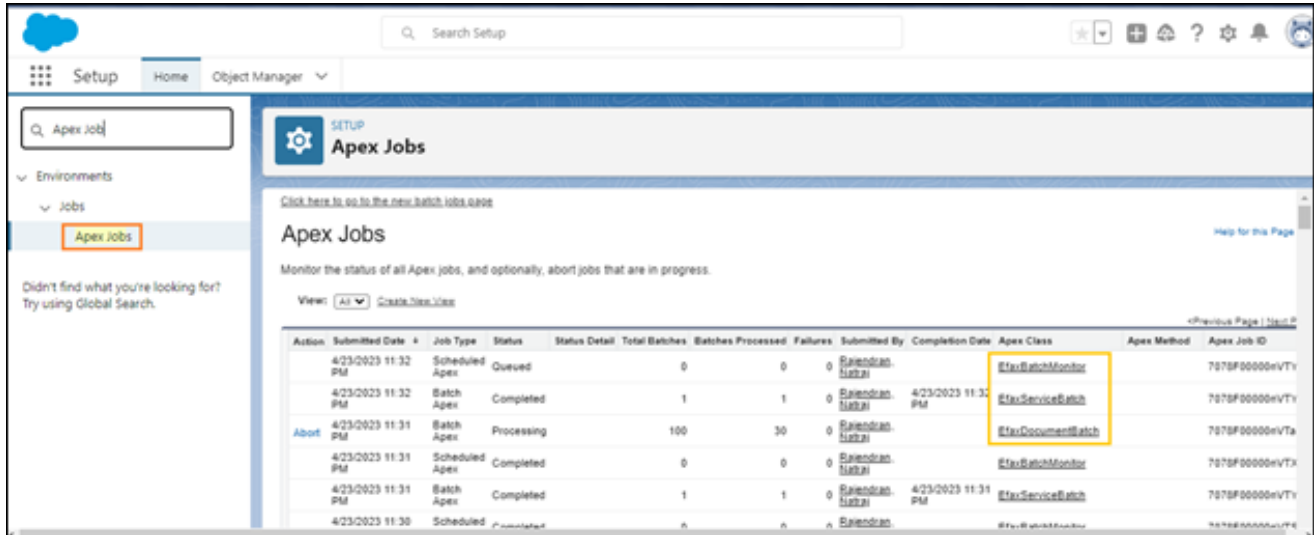
*Confirm auto-retrieval of documents into Salesforce*

- If you don't check the box before running the batch, then `EfaxDocumentBatch` doesn't run. Only `EfaxBatchMonitor` and `EfaxServiceBatch` do.

## Configure the eFax Corporate Account (Cont.)

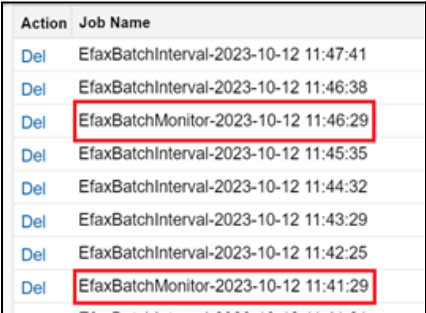
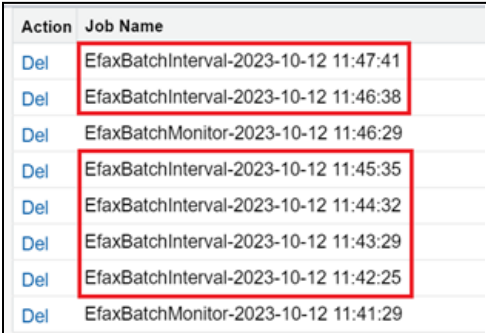
### RUN A BATCH (CONT.)

- Once the batches start, to see jobs running in the Apex jobs in Salesforce: Navigate to the **Setup** tab—and in the quick-find box, search for **Apex Jobs**.



Viewing batch jobs in Salesforce Apex

The following table describes each Apex job type.

Apex Job	Description																		
EfaxBatchMonitor	When the batch is initiated, EfaxBatchMonitor is scheduled to monitor the processing at five minute intervals to confirm EfaxServiceBatch is running. Once EfaxServiceBatch completes the processing of all the fax data received, this scheduled apex triggers the EfaxServiceBatch after a one minute interval.																		
EfaxServiceBatch	Retrieves the fax data by establishing API calls to bring in all the data except the documents associated with the faxes.																		
EfaxDocumentBatch	Establishes API calls for each of the fax IDs received from EfaxServiceBatch and retrieves the documents. Large numbers of faxes are retrieved in chunks of 100.																		
EfaxBatchMonitor	<p>When the batch is triggered, EfaxBatchMonitor is scheduled with the name EfaxBatchMonitor with 5 minute intervals to see if EfaxServiceBatch is running. If the EfaxServiceBatch is aborted for any reason, this job will trigger the EfaxServiceBatch and it is rescheduled to execute after 5 minutes.</p>  <table border="1" data-bbox="805 919 1227 1230"> <thead> <tr> <th>Action</th> <th>Job Name</th> </tr> </thead> <tbody> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:47:41</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:46:38</td></tr> <tr><td>Del</td><td>EfaxBatchMonitor-2023-10-12 11:46:29</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:45:35</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:44:32</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:43:29</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:42:25</td></tr> <tr><td>Del</td><td>EfaxBatchMonitor-2023-10-12 11:41:29</td></tr> </tbody> </table>	Action	Job Name	Del	EfaxBatchInterval-2023-10-12 11:47:41	Del	EfaxBatchInterval-2023-10-12 11:46:38	Del	EfaxBatchMonitor-2023-10-12 11:46:29	Del	EfaxBatchInterval-2023-10-12 11:45:35	Del	EfaxBatchInterval-2023-10-12 11:44:32	Del	EfaxBatchInterval-2023-10-12 11:43:29	Del	EfaxBatchInterval-2023-10-12 11:42:25	Del	EfaxBatchMonitor-2023-10-12 11:41:29
Action	Job Name																		
Del	EfaxBatchInterval-2023-10-12 11:47:41																		
Del	EfaxBatchInterval-2023-10-12 11:46:38																		
Del	EfaxBatchMonitor-2023-10-12 11:46:29																		
Del	EfaxBatchInterval-2023-10-12 11:45:35																		
Del	EfaxBatchInterval-2023-10-12 11:44:32																		
Del	EfaxBatchInterval-2023-10-12 11:43:29																		
Del	EfaxBatchInterval-2023-10-12 11:42:25																		
Del	EfaxBatchMonitor-2023-10-12 11:41:29																		
EfaxBatchInterval	<p>This is also the EfaxBatchMonitor Class, but it is scheduled with a different name as EfaxBatchInterval. After processing all the efax lines through the EfaxServiceBatch, this EfaxBatchInterval is scheduled with a one minute interval, so that it won’t trigger immediately and send the API calls to the eFax server continuously.</p>  <table border="1" data-bbox="737 1478 1219 1808"> <thead> <tr> <th>Action</th> <th>Job Name</th> </tr> </thead> <tbody> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:47:41</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:46:38</td></tr> <tr><td>Del</td><td>EfaxBatchMonitor-2023-10-12 11:46:29</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:45:35</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:44:32</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:43:29</td></tr> <tr><td>Del</td><td>EfaxBatchInterval-2023-10-12 11:42:25</td></tr> <tr><td>Del</td><td>EfaxBatchMonitor-2023-10-12 11:41:29</td></tr> </tbody> </table>	Action	Job Name	Del	EfaxBatchInterval-2023-10-12 11:47:41	Del	EfaxBatchInterval-2023-10-12 11:46:38	Del	EfaxBatchMonitor-2023-10-12 11:46:29	Del	EfaxBatchInterval-2023-10-12 11:45:35	Del	EfaxBatchInterval-2023-10-12 11:44:32	Del	EfaxBatchInterval-2023-10-12 11:43:29	Del	EfaxBatchInterval-2023-10-12 11:42:25	Del	EfaxBatchMonitor-2023-10-12 11:41:29
Action	Job Name																		
Del	EfaxBatchInterval-2023-10-12 11:47:41																		
Del	EfaxBatchInterval-2023-10-12 11:46:38																		
Del	EfaxBatchMonitor-2023-10-12 11:46:29																		
Del	EfaxBatchInterval-2023-10-12 11:45:35																		
Del	EfaxBatchInterval-2023-10-12 11:44:32																		
Del	EfaxBatchInterval-2023-10-12 11:43:29																		
Del	EfaxBatchInterval-2023-10-12 11:42:25																		
Del	EfaxBatchMonitor-2023-10-12 11:41:29																		

**✓ NOTES:**

- For every fax record, there will be an API request (sent from Salesforce) to retrieve that fax document.
- For the initial retrieval of fax documents, it will take around 40 minutes per 1000 fax documents.

## Configure the eFax Corporate Account (Cont.)

### BATCH ERRORS

For any error during a batch run, an email is triggered to the system administrator who started the batch. Typical error conditions, and their corresponding emails, are highlighted below:

#### ERROR 1: WHEN THE BULK BATCH ENCOUNTERS ERRORS

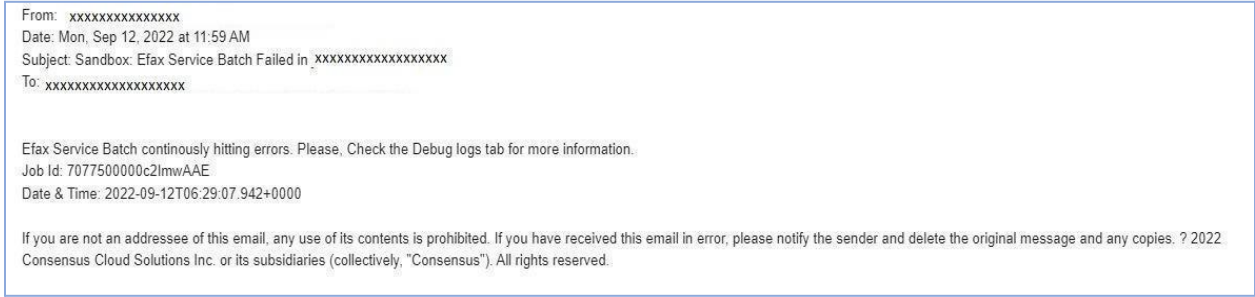
```

From: xxxxxxxxxxxxxxxxxxxx
Date: Thu, 1 Sep 2022, 4:44 pm
Subject: Bulk Batch Failed in xxxxxxxxxxxxxxxxxxxx
To: xxxxxxxxxxxxxxxxxxxx

Bulk Batch for retrieving eFaxes is failed to some errors. Please, Check the Debug logs tab for more information.
Job Id: 7075g00004C4twzAAB
Date & Time: 2022-09-01T11:14:08.850+0000
    
```

<b>From</b>	The system administrator
<b>To</b>	The system administrator who ran the batch
<b>Subject</b>	'Bulk Batch failed in <<the org name>>
<b>Action required</b>	These errors depend on each customer’s org and validations across the standard objects. They should reach out to the eFax Connector Technical Support team with the error mail and the debug log.

**ERROR 2: WHEN THE eFAX SERVICE BATCH ENCOUNTERS ERRORS**

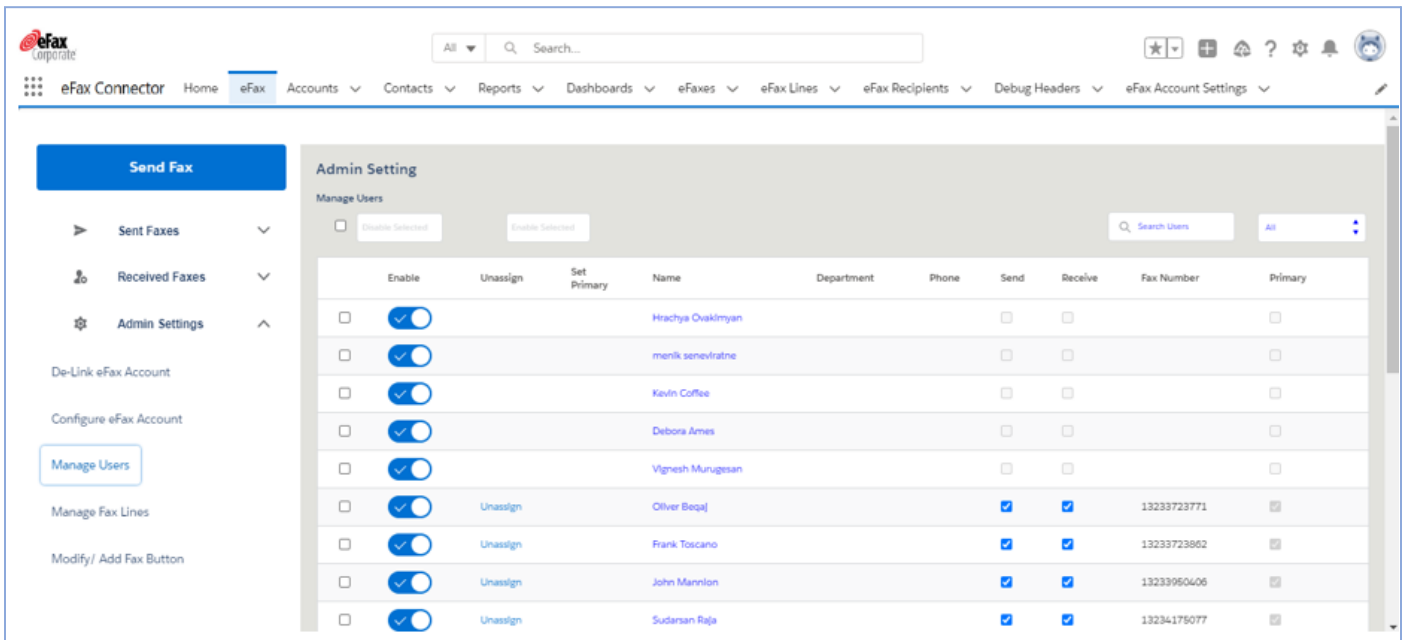


<b>From</b>	The system administrator
<b>To</b>	The system administrator who ran the batch
<b>Subject</b>	eFax Service Batch Failed in <<the org name>>
<b>Action required</b>	For such cases, when the batch runs again after the completion of one cycle, the error gets automatically resolved. In case there are more than four mails with the same content, it needs to be sent to the Technical Support team with the debug logs.

**Manage Users**

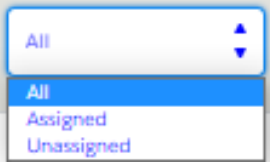
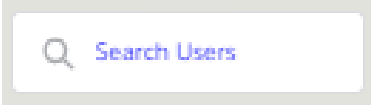

In the **Manage Users** pane, you can link Salesforce users to eFax Corporate users, enable/disable their **Send/Fax** privilege(s), and more. To do so:

1. Under **Admin Settings** on the **eFax** tab (pg. 2), click **Manage Users**.



*Admin Settings > Manage Users pane*

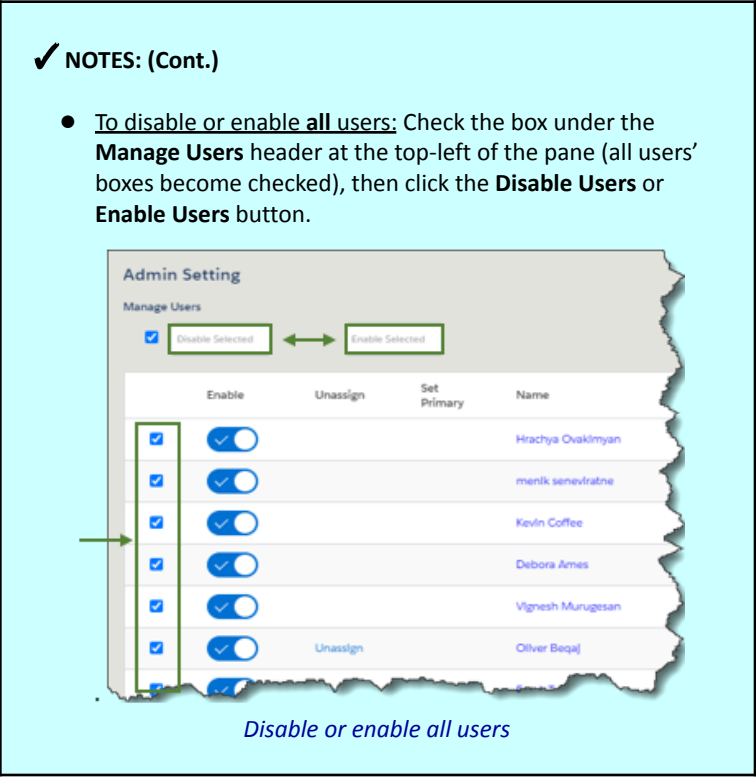
2. See the table below for field descriptions/instructions.

Action	Instructions
<p><b>Show Assigned, Unassigned, or All Users</b></p>	<p>Click the drop-down arrow to display the users you want to view.</p> 
<p><b>Search for a User</b></p>	<p>Enter their partial/full name in the <b>Search Users</b> textbox, and press <b>Enter</b>.</p> 
<p><b>Enable or Disable a User’s Fax Capability</b></p>	<p>Toggle a user’s <b>Enable</b> button on or off to turn on (or not) their fax capability.</p>  <ul style="list-style-type: none"> <li>• <u>If you toggle the button off (i.e., disable their fax capability):</u> Any fax lines the user has are unlinked, and the ones they owned return to unowned status.</li> <li>• <u>To disable or enable multiple users:</u> Check the individual boxes of those you want to enable or disable—then under the <b>Manage Users</b> header at the top-left of the pane, click <b>Disable Users</b> or <b>Enable Users</b> button.</li> </ul> <p style="text-align: center;"><i>Disable or enable multiple users</i></p>

*Continued on next page*



## Manage Users (Cont.)

Action	Instructions
<p><b>Enable or Disable a User’s Fax Capability (Cont.)</b></p>	<p>✓ <b>NOTES: (Cont.)</b></p> <ul style="list-style-type: none"> <li>To disable or enable <b>all</b> users: Check the box under the <b>Manage Users</b> header at the top-left of the pane (all users’ boxes become checked), then click the <b>Disable Users</b> or <b>Enable Users</b> button.</li> </ul>  <p><i>Disable or enable all users</i></p>

Enable	Unassign	Set Primary	Name	Department	Phone	Send	Receive	Fax Number	Primary
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Debra Ames			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Vignesh Murugesan			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Oliver Beqaj			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13233723771	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Frank Toscano			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13233723862	<input checked="" type="checkbox"/>

<p><b>Grant Send/Receive Privileges to a User</b></p>	<p>Check a user’s <b>Send</b> and/or <b>Receive</b> box(es) to let them (or not) send faxes and/or view received faxes.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>✓ <b>NOTE:</b> If either box is unchecked, the user is prompted to contact you.</p> </div>
---	--

*Continued on next page*

## Manage Users (Cont.)

Action	Instructions
--------	--------------

Enable	Unassign	Set Primary	Name	Department	Phone	Send	Receive	Fax Number	Primary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vignesh Murugesan			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Oliver Beqaj			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13233723771	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Frank Toscano			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13233723862	<input checked="" type="checkbox"/>

### Unassign a Fax Line from a User

Click the **Unassign** link to disassociate a fax line from a user.

✓ **NOTES:**

- It only displays if the user’s **Fax Number** field is populated; if unassigned, the fax line is returned to unowned status and the user line-item no longer displays.
- Also, if assigned as **Owner** to more than one fax line [see *Manage Fax Lines*, on pg. [16](#)], a user will be listed more than once.

Enable	Unassign	Set Primary	Name	Department	Phone	Send	Receive	Fax Number	Primary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Debora Ames			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235442314	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Debora Ames			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235446198	<input type="checkbox"/>

### Set a User’s Primary Number

A user will be listed more than once if they have more than one fax number—and one of them will already be checked as the primary number for sending/receiving faxes.

- ✓ **NOTE:** Also, if assigned as **Owner** to more than one fax line [see *Manage Fax Lines*, on pg. [16](#)], a user will be listed more than once.

*Continued on next page*

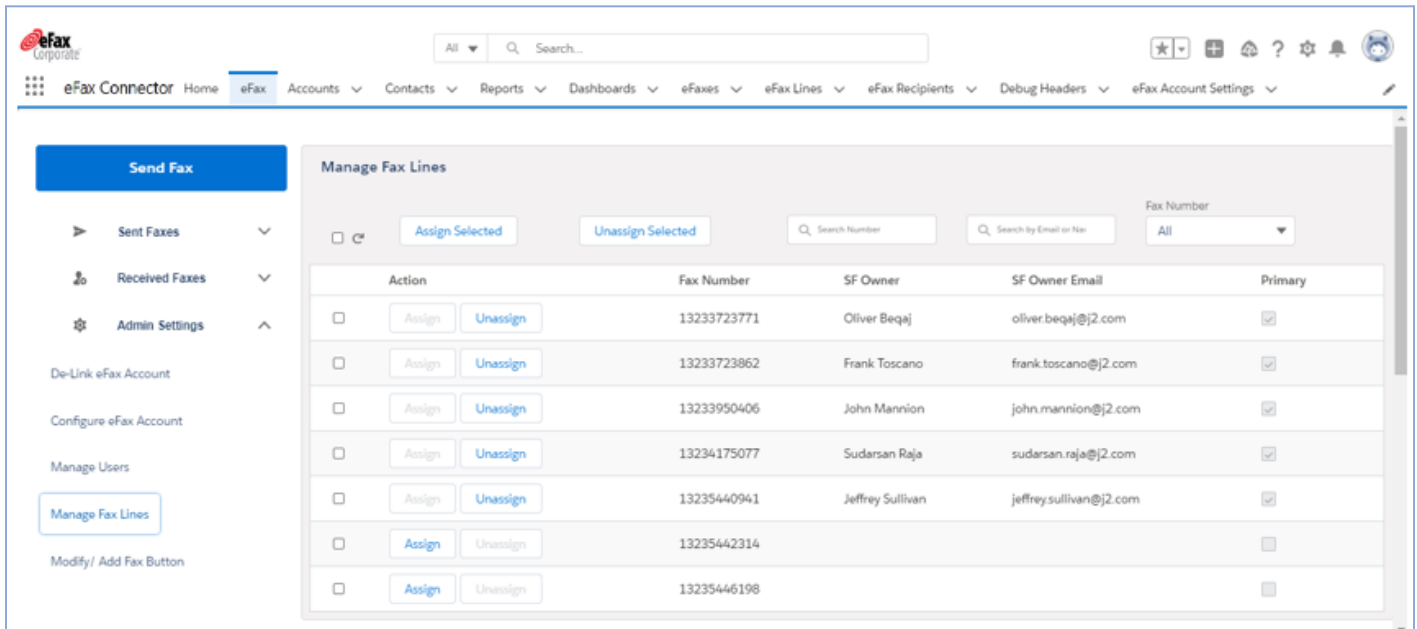
## Manage Users (Cont.)

Action	Instructions
<p><b>Set a User’s Primary Number (Cont.)</b></p>	<p>To select another number as the primary number:</p> <ol style="list-style-type: none"> <li>1. Click its <b>Set</b> box (which only displays if the user owns multiple numbers).</li> <li>2. Then, click <b>Yes</b> at the first confirmation prompt (then the green square [shown further below], to exit the second prompt).</li> </ol> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center; font-weight: bold;">Confirmation</p> <hr/> <p style="text-align: center;">Are you sure want to set this Fax Number as Primary?</p> <div style="text-align: right;"> <input type="button" value="No"/> <input type="button" value="Yes"/> </div> </div> <p style="text-align: center;"><i>Click <b>Yes</b>, to confirm</i></p>

Enable	Unassign	Set Primary	Name	Department	Phone	Send	Receive	Fax Number	Primary
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Is Updated Successfully.				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13233950406	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Sudarsan Raja			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13234175077	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Jeffrey Sullivan			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235440941	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Debra Ames			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235442314	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Debra Ames			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235446198	<input checked="" type="checkbox"/>

*The other number is now checked as the user’s **Primary** number (and **Set** appears next to any others they have)*

## Manage Fax Lines



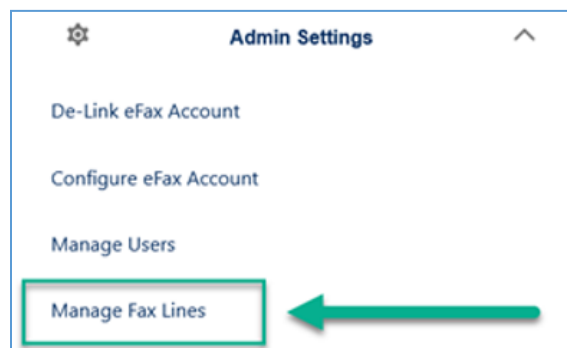
### *Admin Settings > Manage Fax Lines pane*

The **Manage Fax Lines** pane contains fax-line numbers associated with the linked eFax Corporate account.

✓ **NOTE:** These numbers pull from your eFax Corporate account. If you need more numbers, log into your account to add them.

You can assign/unassign one or more lines to any Salesforce user. To do so:

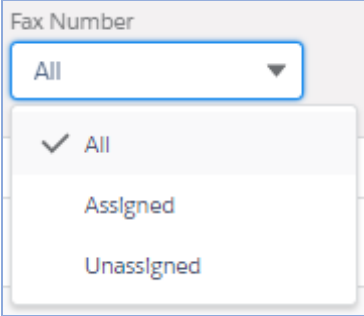
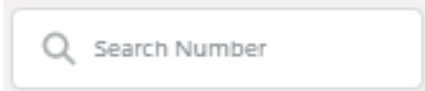
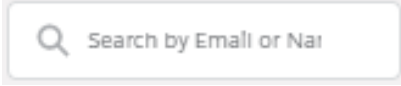

1. Under **Admin Settings** on the **eFax** tab (pg. 2), click **Manage Users**.



### *eFax tab > Admin Settings > Manage Fax Lines link*

## Manage Fax Lines (Cont.)

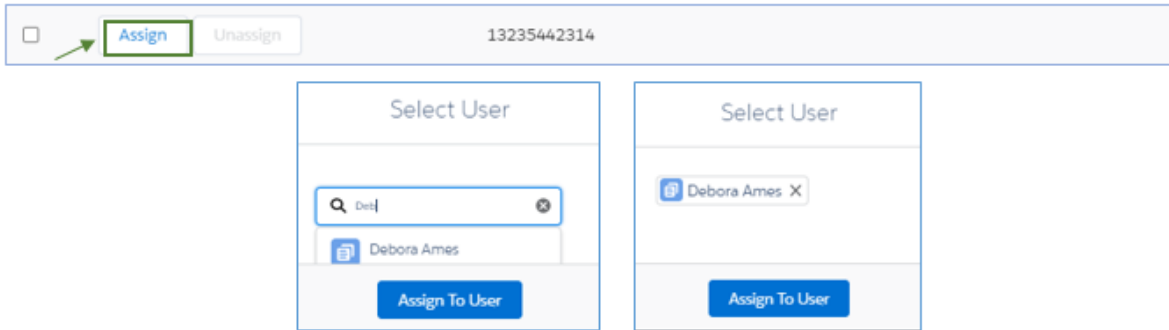
2. See the table below to provide the following information.

Action	Instructions
<p><b>Show Assigned, Unassigned, or All Fax Numbers</b></p>	<p>Click the drop-down arrow to display the fax numbers you want to view.</p> 
<p><b>Search for a Fax Number</b></p>	<p>Enter the partial/full number in the <b>Search Number</b> textbox, and press <b>Enter</b>.</p> 
<p><b>Search for a User</b></p>	<p>Enter their partial/full email address or name in the <b>Search by Email or No.</b> textbox, and press <b>Enter</b>.</p> 
<p><b>Assign a Fax Number to a User</b></p>	<div style="border: 1px solid black; background-color: #e0f7fa; padding: 10px; margin-bottom: 10px;"> <p>✓ <b>NOTE:</b> All the account’s fax numbers are already listed; you just have to assign users to them.</p> </div> <ul style="list-style-type: none"> <li>• <b>To assign a single fax number to one user:</b> (To assign <b>multiple</b> fax lines to <b>one</b> user, see page <a href="#">19</a>.)             <ol style="list-style-type: none"> <li>a. In the <b>Action</b> column, click the <b>Assign</b> button.</li> </ol> </li> </ul> 

*Continued on next page*

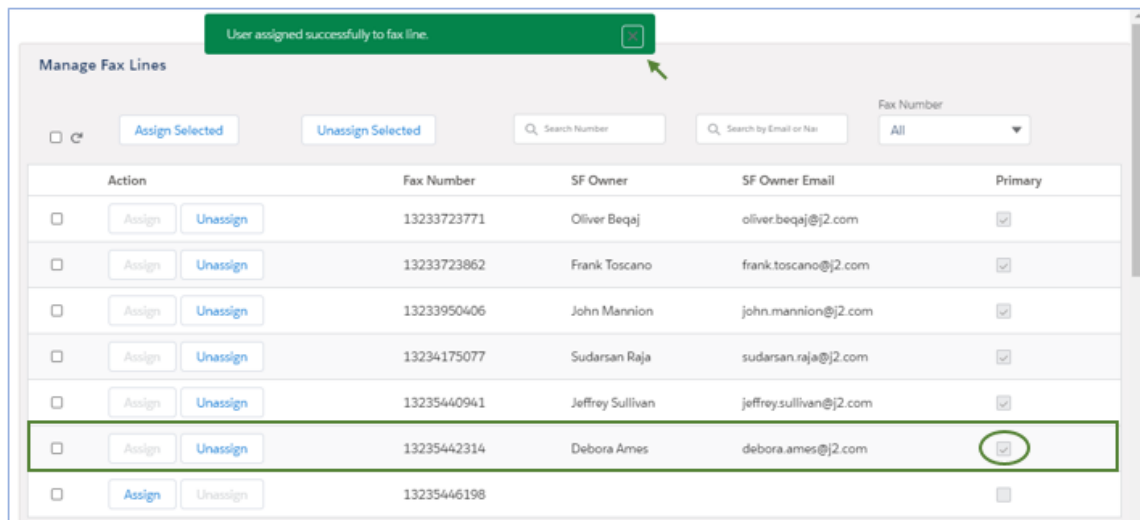
## Manage Fax Lines (Cont.)

Action	Instructions
Assign a Fax Number to a User (Cont.)	<ul style="list-style-type: none"> <li>To assign a single fax number to one user: (Cont.)                             <ol style="list-style-type: none"> <li>In the <b>Select User</b> dialog: Search for and select a user, then click <b>Assign User</b>.</li> </ol> </li> </ul>



*Searching for and selecting a user*

- At the confirmation prompt: Click the square, to exit.



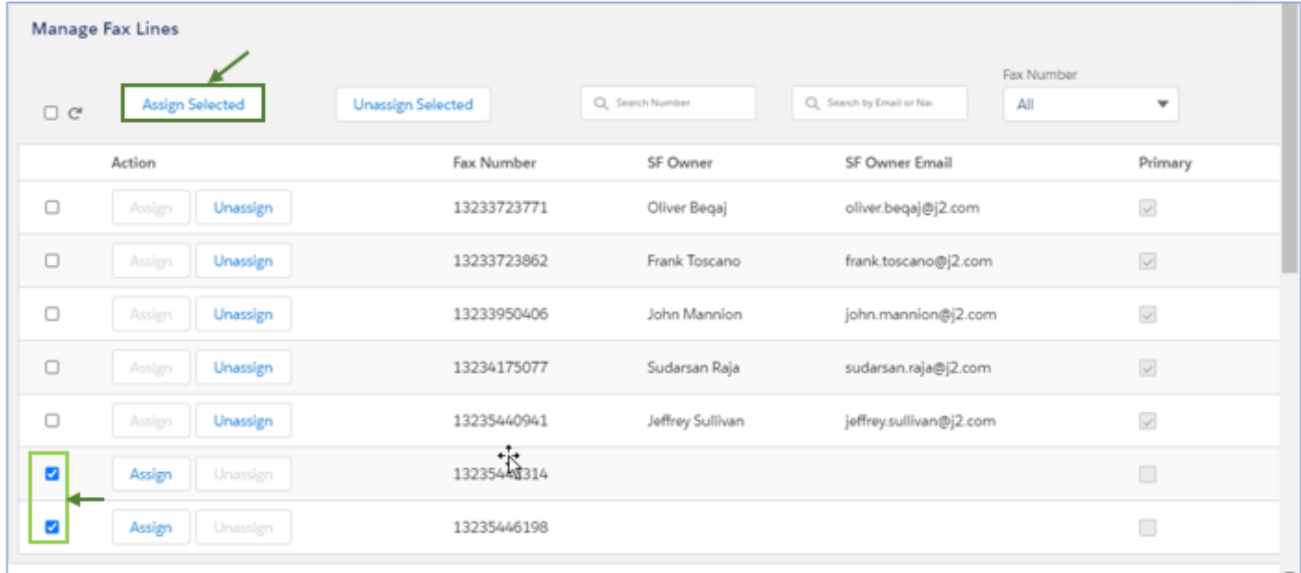
### ✓ NOTES:

- If a user only owns one fax line, then their **Primary (Number)** box is auto-checked. (If they own more than one, then to set another number as the **Primary**, see **Set a User’s Primary Fax Number** on page [14](#).)

*Continued on next page*

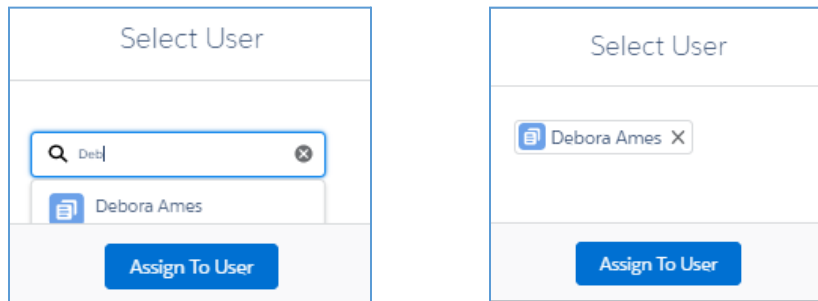
## Manage Fax Lines (Cont.)

Action	Instructions
<b>Assign a Fax Number to a User (Cont.)</b>	<ul style="list-style-type: none"> <li>To assign <b>multiple</b> fax numbers to <b>one</b> user:                             <ol style="list-style-type: none"> <li>In the <b>Manage Fax Lines</b> pane, check the boxes of the numbers you want to assign, and then click the <b>Assign Selected</b> button at the top of the pane.</li> </ol> </li> </ul>



### Assigning two numbers to a single user

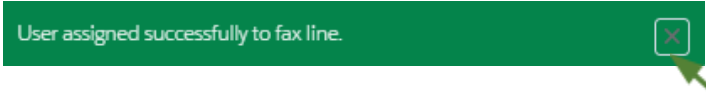
- In the **Select User** dialog, search for and select a user; then click **Assign User**.



Look for and select a user, then click **Assign to User**

Continued on next page

## Manage Fax Lines (Cont.)

Action	Instructions
<b>Assign a Fax Number to a User (Cont.)</b>	<ul style="list-style-type: none"> <li>• <u>To assign multiple fax numbers to one user: (Cont.)</u> <ol style="list-style-type: none"> <li>At the confirmation prompt: Click the square, to exit.</li> </ol>  <p>In addition:</p> <ul style="list-style-type: none"> <li>• If the user is <u>already listed</u> (in the <b>Manage Fax Lines</b> pane) with a <u>single</u> number, then that number remains checked as the <b>Primary</b> number.</li> <li>• If the user is <u>not already listed</u>, then the first number you selected for the user is <u>auto-checked</u> as the <b>Primary</b> number.</li> </ul> </li> </ul>

Enable	Unassign	Set Primary	Name	Department	Phone	Send	Receive	Fax Number	Primary
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Debra Ames			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235442314	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unassign	Debra Ames			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13235446198	<input type="checkbox"/>

*If assigning multiple numbers to a user, the first one selected is auto-checked as the primary number*

Action	Instructions
<b>Unassign a Fax Number from a User</b>	<ul style="list-style-type: none"> <li>• <u>To unassign a single fax number from one user: (To unassign all fax lines from all users, see page 22.)</u> <ol style="list-style-type: none"> <li>Click the <b>Unassign</b> button.</li> </ol> </li> </ul>

<input type="checkbox"/>	Assign	Unassign	13235442314	Debra Ames	debra.ames@j2.com	<input checked="" type="checkbox"/>
--------------------------	--------	----------	-------------	------------	-------------------	-------------------------------------

*Click **Unassign...***

*Continued on next page*

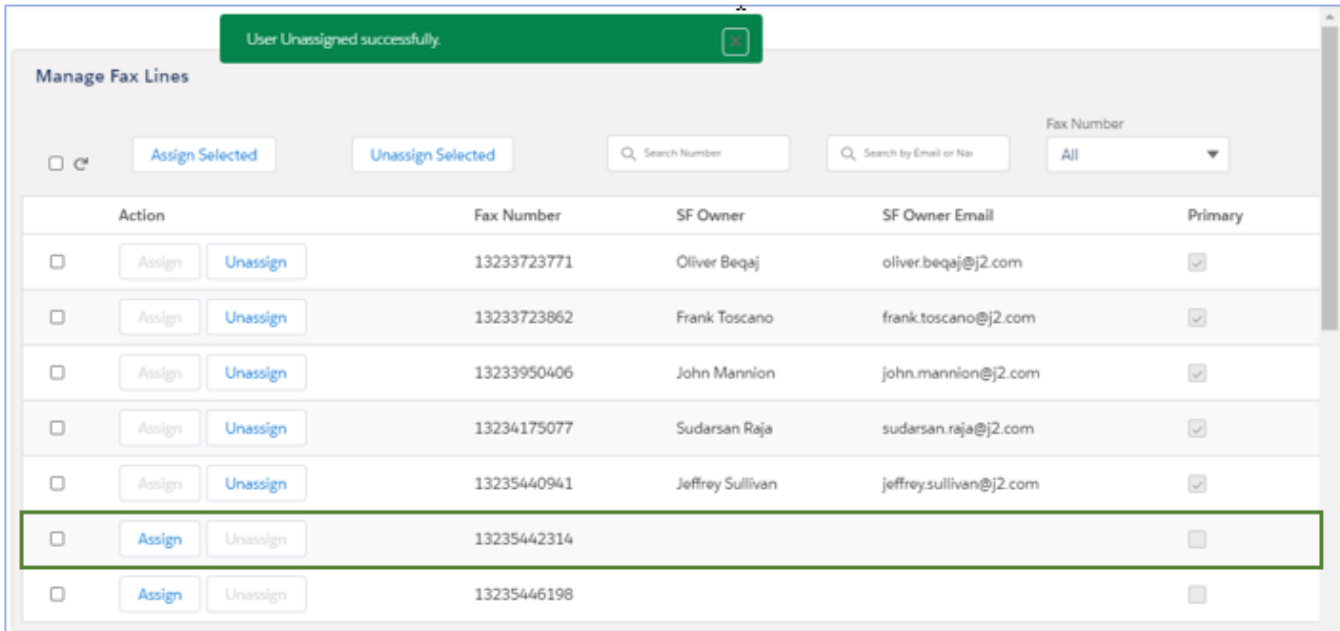


## Manage Fax Lines (Cont.)

Action	Instructions
<b>Unassign a Fax Number to a User (Cont.)</b>	<ul style="list-style-type: none"> <li>To <u>unassign a single fax number from one user: (Cont.)</u> <ol style="list-style-type: none"> <li>Click <b>Yes</b> at the first confirmation prompt (then the green square, to exit the second prompt). The user’s name no longer appears next to that fax line, and the number returns to unowned status.</li> </ol> </li> </ul>



...then **Yes** at the confirmation prompt



User’s name no longer appears next to the unassigned number

Continued on next page

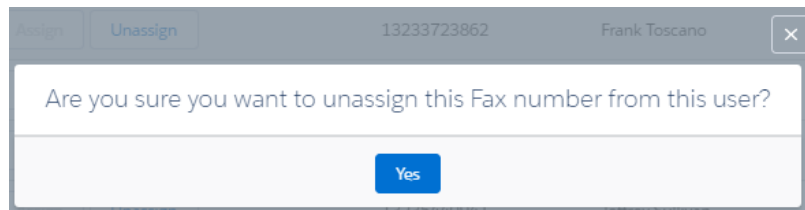
## Manage Fax Lines (Cont.)

Action	Instructions
<b>Unassign a Fax Number from a User (Cont.)</b>	<ul style="list-style-type: none"> <li>To unassign <b>all</b> fax numbers from <b>all</b> users:                             <ol style="list-style-type: none"> <li>Under the <b>Manage Fax Lines</b> header at the top-left of the pane: Check the box (all users’ boxes are auto-checked), then click the <b>Unassign Selected</b> button.</li> </ol> </li> </ul>

Action	Fax Number	SF Owner	SF Owner Email	Primary
<input checked="" type="checkbox"/> Assign Unassign	13233723771	Oliver Beqaj	oliver.beqaj@j2.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Assign Unassign	13233723862	Frank Toscano	frank.toscano@j2.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Assign Unassign	13233950406	John Mannion	john.mannion@j2.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Assign Unassign	13234175077	Sudarsan Raja	sudarsan.raja@j2.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Assign Unassign	13235440941	Jeffrey Sullivan	jeffrey.sullivan@j2.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Assign Unassign	13235442314	Debora Ames	debora.ames@j2.com	<input checked="" type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13235446198	Debora Ames	debora.ames@j2.com	<input type="checkbox"/>

*Unassigning all numbers from all users*

b. Click **Yes** at the first confirmation prompt...



*Click **Yes** at the confirmation*

*Continued on next page*

## Manage Fax Lines (Cont.)

Action	Instructions
<b>Unassign a Fax Number from a User (Cont.)</b>	<ul style="list-style-type: none"> <li>To unassign <b>all</b> fax numbers from <b>all</b> users: (Cont.) ...then the green square, to exit the second prompt. The users’ names no longer appears next to that fax line, and the number returns to unowned status.</li> </ul>

The screenshot shows the 'Manage Fax Lines' interface. At the top, a green notification banner reads 'User Unassigned successfully.' Below this, there are buttons for 'Assign Selected' and 'Unassign Selected', along with search fields for 'Search Number' and 'Search by Email or Name', and a 'Fax Number' dropdown menu set to 'All'. The main part of the interface is a table with the following columns: Action, Fax Number, SF Owner, SF Owner Email, and Primary. The table contains seven rows, each representing a fax number that is currently unassigned. Each row has an 'Assign' button and an 'Unassign' button in the 'Action' column, and a checkbox in the 'Primary' column. The 'SF Owner' and 'SF Owner Email' columns are empty for all rows, indicating that the numbers are unassigned.

Action	Fax Number	SF Owner	SF Owner Email	Primary
<input type="checkbox"/> Assign Unassign	13233723771			<input type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13233723862			<input type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13233950406			<input type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13234175077			<input type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13235440941			<input type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13235442314			<input type="checkbox"/>
<input type="checkbox"/> Assign Unassign	13235446198			<input type="checkbox"/>

*Users’ names no longer appear next to the unassigned number*

## Revision History

Version	Date	Description
1.0	November 16, 2021	First release.
1.1	November 7, 2022	Changes for software upgrade.
1.2	February 23, 2023	New features (auto refresh, new contact creation with record type) and some patches included.
1.3	April 25, 2023	Updated <i>Additional Admin Settings</i> section.
1.4	June 7, 2023	Added content for <b>Batch File Size</b> and <b>UI File Size</b> options.
1.5	July 18, 2023	Removed references to <b>Modify/Add Fax</b> button.
1.6	October 31, 2023	Updated the <b>Run a Batch</b> section.