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eFax Connector for Salesforce – User Guide

VERSION: 1.1

AUTHOR: Consensus Cloud Solutions, Inc.

DATE: 10/13/2022

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eFAX TAB

Important Tip!

- **For Adobe Reader X:** Add the **Forward** and **Back** navigation icons to your top toolbar. Then, when you click a **blue** linked number or word to navigate to a cross reference within this guide, you can click the **Back** button to go back where you were. (The **Forward** button takes you where you just left.)

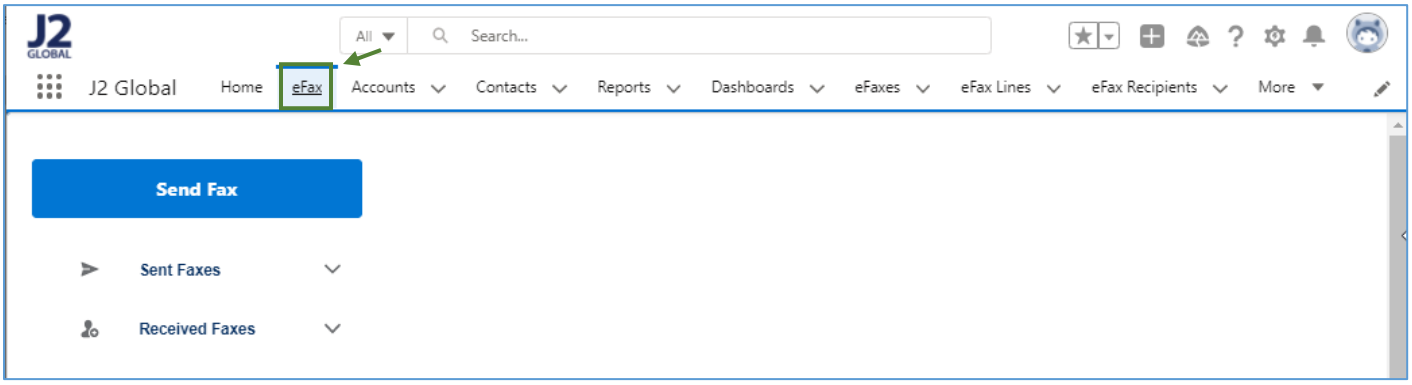


*Navigation buttons in the **Adobe Reader** toolbar*

> ✓**NOTE:** These buttons may already display if you have *Adobe Reader X*. For earlier versions of *Adobe Reader*, you can find the icons via **View > Page Navigation...**or…**View > Toolbars > Page Navigation**.

- **For Adobe Acrobat Pro DC:** When you click a **blue** linked number or word to navigate to a cross reference within this guide: Click **Alt + Left Arrow** on your keyboard—or the **View > Page Navigation > Previous View** menu in the top toolbar—to go back where you were. (**Alt + Right Arrow**—or the **View > Page Navigation > Next View**— takes you where you just left.)

About the *eFax Connector for Salesforce*



***eFax** tab*

Via the **eFax** tab in *Salesforce*, users of the *eFax Connector for Salesforce* integrated app can send and receive faxes.

What do you want to do?

- Switch from *Salesforce Lightning* to *Salesforce Classic*, or vice versa (pg. **2**).
- Send a fax (pg. **4**).
- View sent faxes (pg. **13**).
- View received faxes (pg. **25**).

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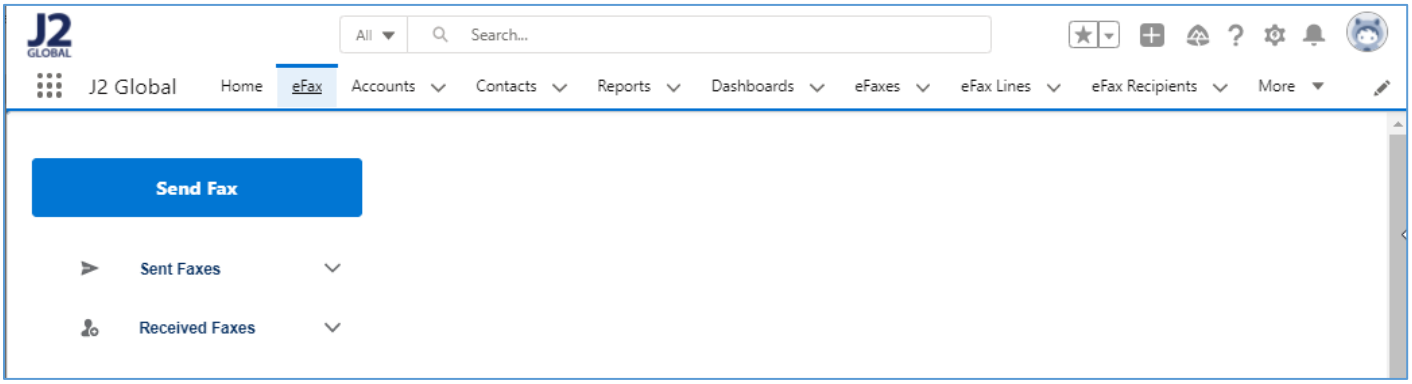
eFAX TAB (CONT.)

SWITCH TO SALESFORCE LIGHTNING OR SALESFORCE CLASSIC

There are two versions of Salesforce:

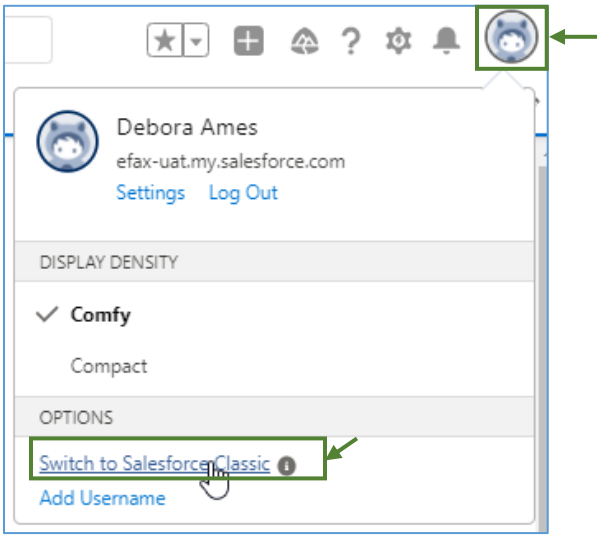
- *Salesforce Lightning* offers a new and improved interface with additional features that make it easier and more engaging for users.
- *Salesforce Classic* offers the original interface, updated but without some key areas offered in the above version.

If, when you log into Salesforce, the version that displays is *Salesforce Lightning*…



***eFax** tab (**Salesforce Lightning** version)*

…to switch to *Salesforce Classic*, click your **View Profile** icon, then the *Salesforce Classic* link.

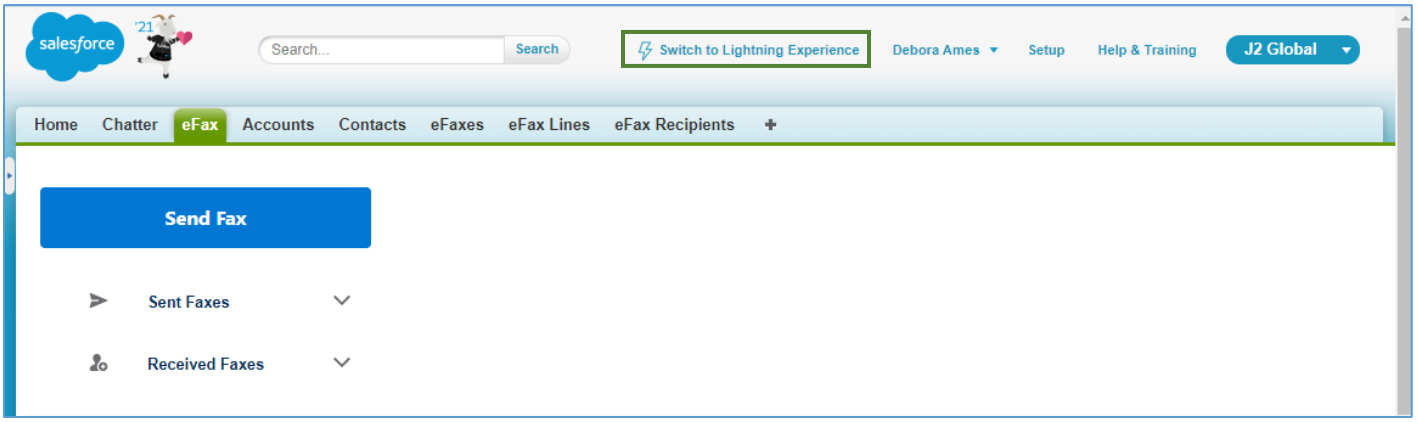


*Selecting to view **Salesforce Classic***

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eFAX TAB (CONT.)

SWITCH TO SALESFORCE LIGHTNING OR SALESFORCE CLASSIC (CONT.)



Salesforce Classic *version*

To switch back to *Salesforce Lightning*, click the **Switch to Lightning Experience** link at the top of the *Salesforce Classic* screen.



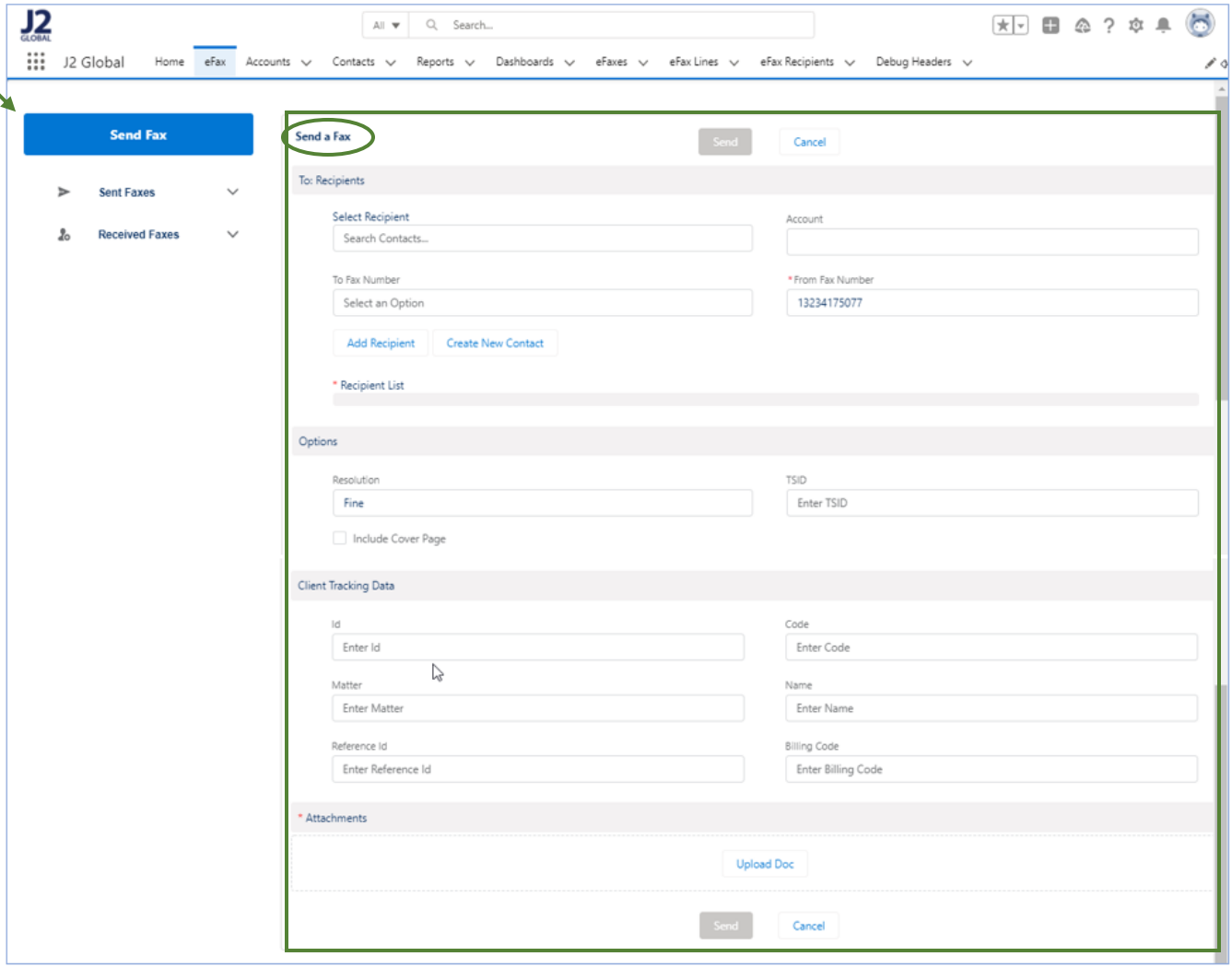
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eFAX TAB (CONT.)

SEND A FAX

To send a fax through the *eFax Connector for Salesforce*:

1. Click the **Send Fax** button in the left nav pane of the **eFax** tab. The **Send a Fax** screen appears.



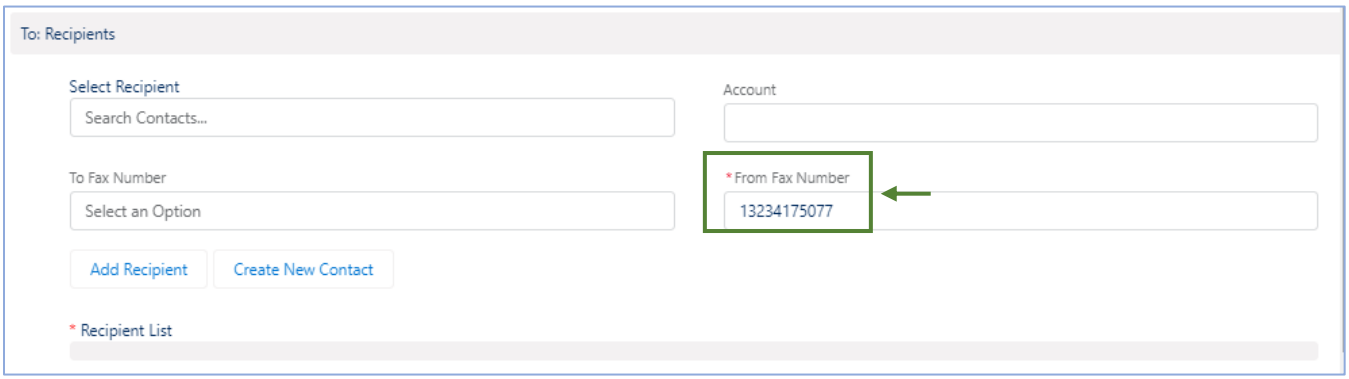
***Send a Fax** screen*

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eFAX TAB (CONT.)

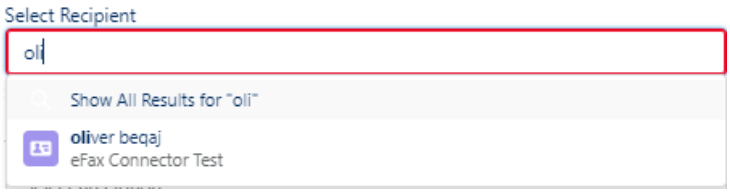
SEND A FAX (Cont.)

- In the **To: Recipients** pane: Your primary fax number auto-displays in the **From: Recipient** field (*If you have others, you may click to choose another*.)



***To: Recipients** pane*
(Your fax number already displays.)

To continue:

Actions	Instructions
1	In the **Add Recipient** textbox: Enter and select a contact's name.  *Search for and select a name*

Continued on next page

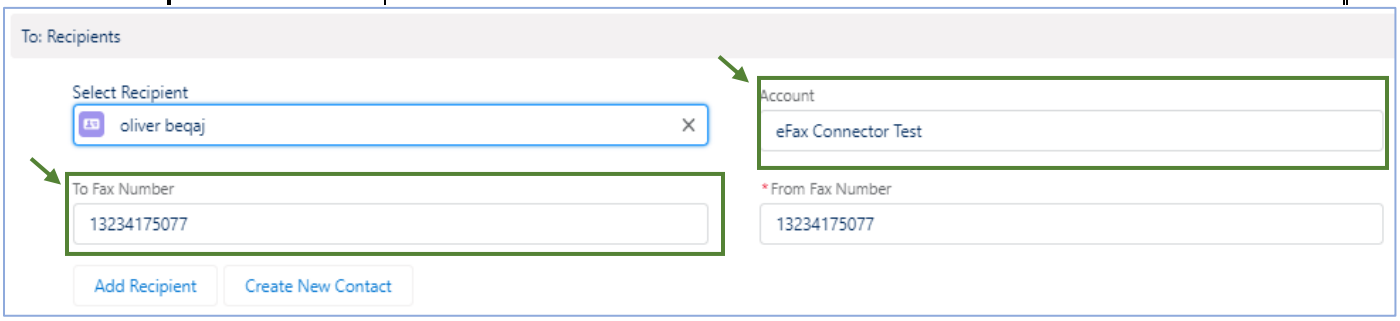
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eFAX TAB (CONT.)

SEND A FAX (Cont.)

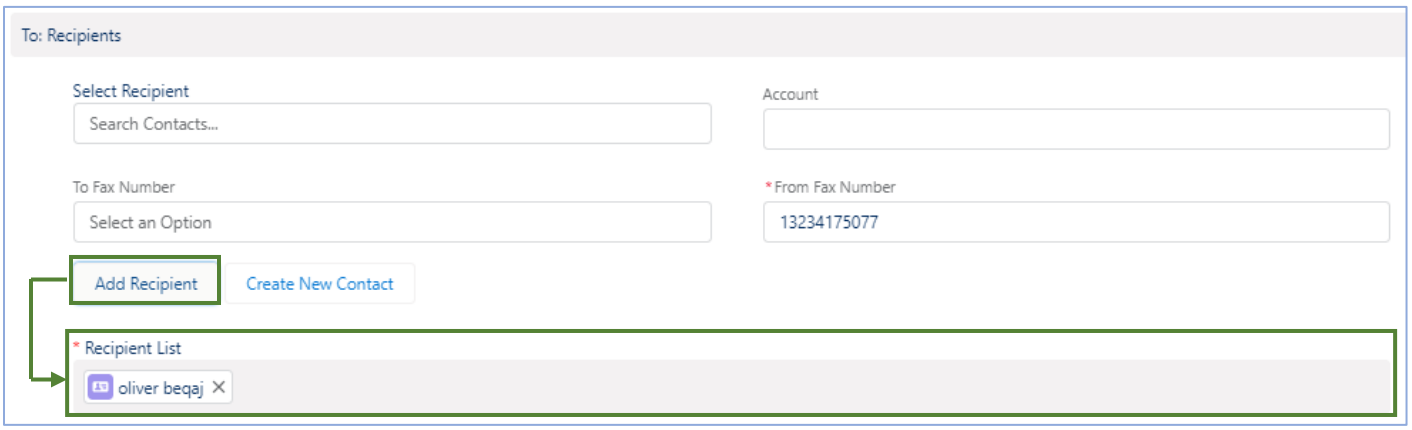
- In the **To: Recipients** pane: (Cont.)

Actions	Instructions
1 (Cont.)	Their name and number appear in the ***Account*** *and* ***To: Recipient*** *fields*.)



Selected recipient's ***Account*** *name and* ***To: Fax Number***

2	Click the **Add Recipient** button. The contact's name displays in the **Recipients List** pane. (*You may add more recipients, if you wish*.)



Clicking ***Add Recipient*** *displays the contact's name in the* ***Recipient List*** *pane*

Continued on next page

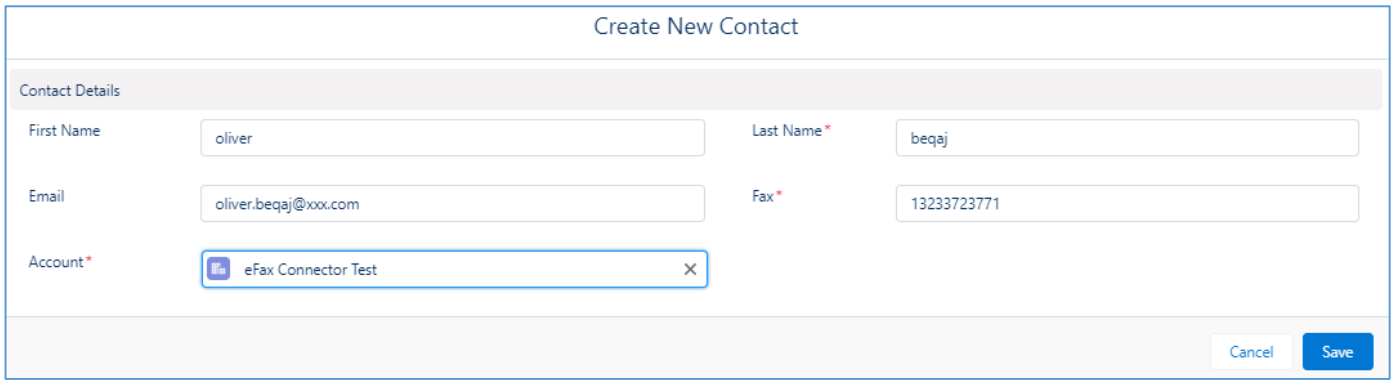
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eFAX TAB (CONT.)

SEND A FAX (Cont.)

- In the **To: Recipients** pane: (Cont.)

Actions	Instructions
2 (Cont.)	✓ **NOTE:** If the recipient is not already a contact in the system: a. Click the **Create New Contact** button.  b. In the dialog: Enter the contact's name, email address, and fax number—and in the **Account** field, enter the contact's organization-account name. Then, click the **Save** button. c. In the **To: Recipients** pane, click the **Add Recipient** button. The contact's name appears in the **Recipient List** pane (see the 2nd screenshot on the previous page).



Adding a new contact

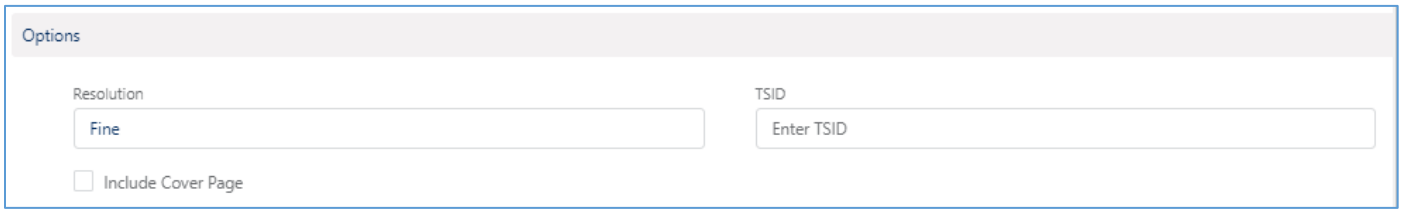
Continued on next page

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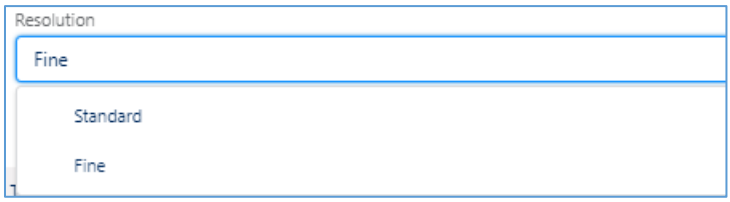
eFAX TAB (CONT.)

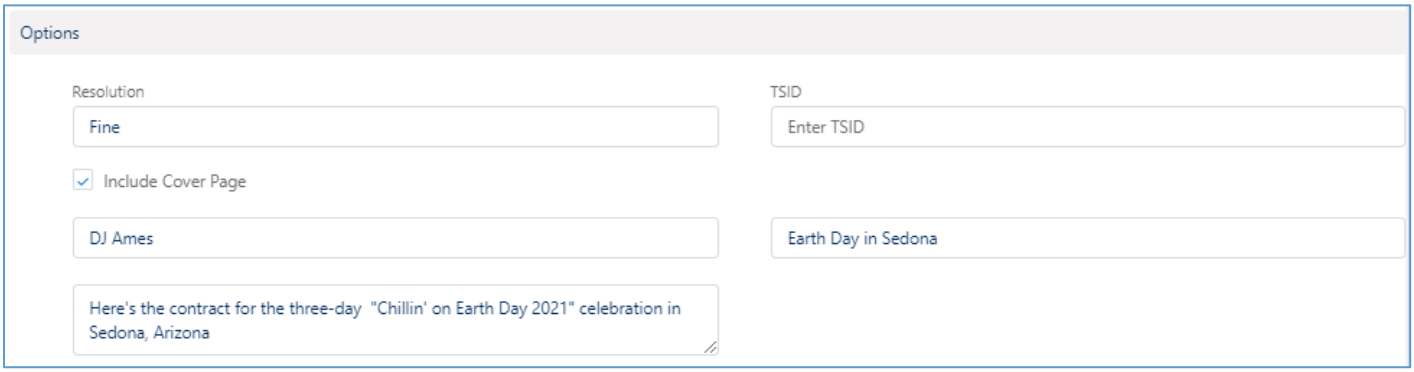
SEND A FAX (Cont.)

- In the **Options** pane:



***Options** pane*

Actions	Instructions
1	Click the **Resolution** textbox, and select **Standard** or **Fine**.  *Select fax resolution*
2	In the **TSID** textbox, enter your transmitting subscriber's ID (*20-character limit*).
3	To include a cover page: Check the **Include Cover Page** box—and in the dialog, enter your name, subject, and a brief message.



Cover-page information

Continued on next page

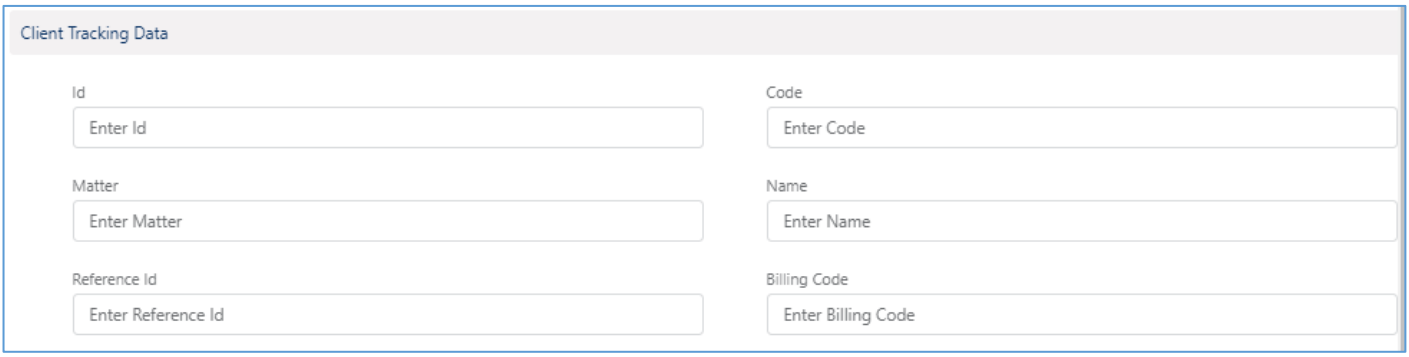
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eFAX TAB (CONT.)

SEND A FAX (Cont.)

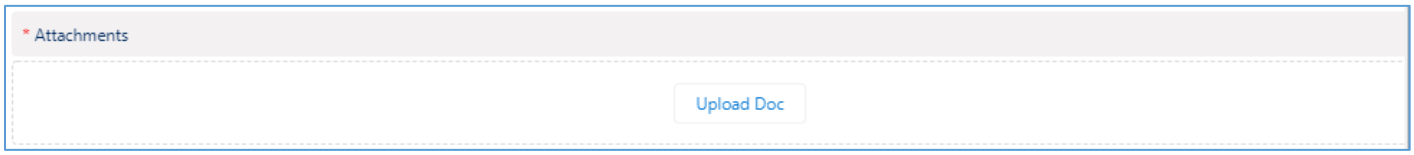
- In the **Client-Tracking Data** pane: If you wish, enter any data you would like to be tracked.

> ✓**NOTE:** Any data you enter is passed to the `client_data` object in the API.
>
> - **ID:** The user's ID—or other ID on the platform.
> - **Code:** An internal ID of the fax
> - **Matter:** The form name, or other info, about the fax you are sending
> - **Name:** The fax recipient's name
> - **Reference ID:** An internal ID of the fax
> - **Billing ID:** A fax ID used in billing the sender/department and in billing reports



***Client-Tracking Data** pane*

- In the **Attachments** pane: Click the **Upload Doc** button. In the **Open** dialog, navigate to and select the docs you want to attach (*at least 1; 10 maximum; 4mb maximum with either*), then click the **Open** button.[1]



***Attachments** pane*

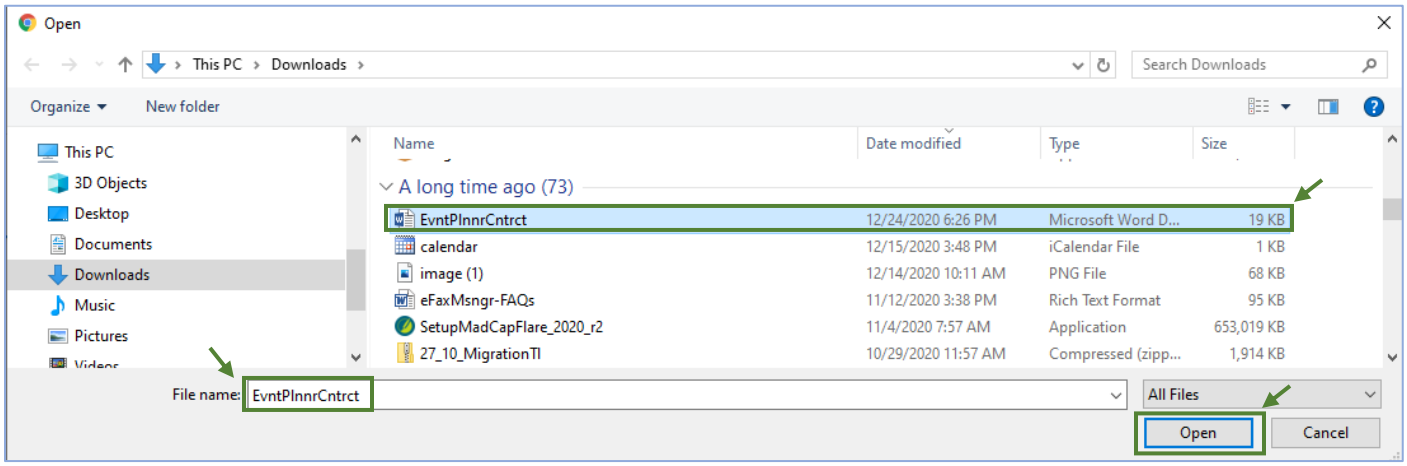
[1] If you need more than 4mb, contact your *eFax Connector for Salesforce* administrator.

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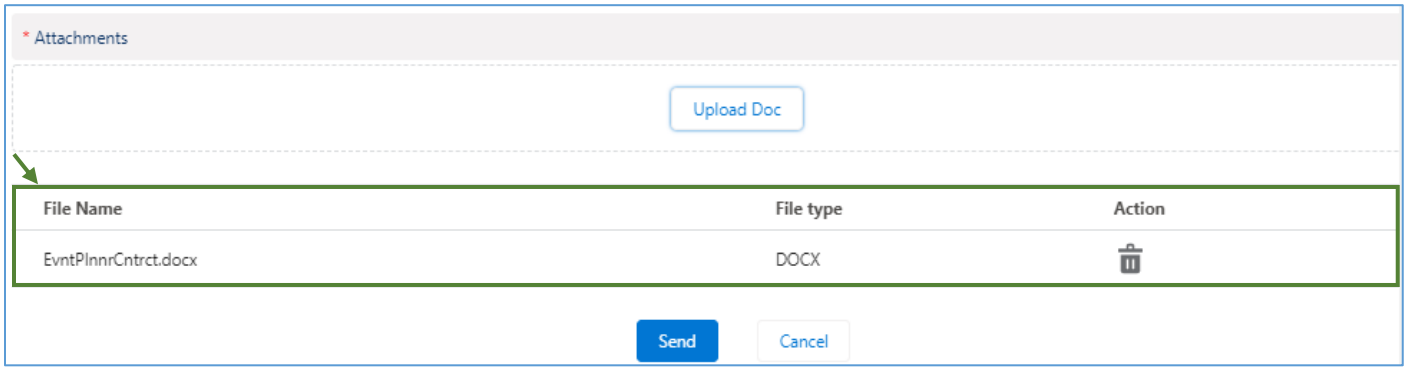
eFAX TAB (CONT.)

SEND A FAX (Cont.)

- In the **Attachments** pane: (Cont.)



*Selecting **EvntPlnnrCntrct***



Selected attachment

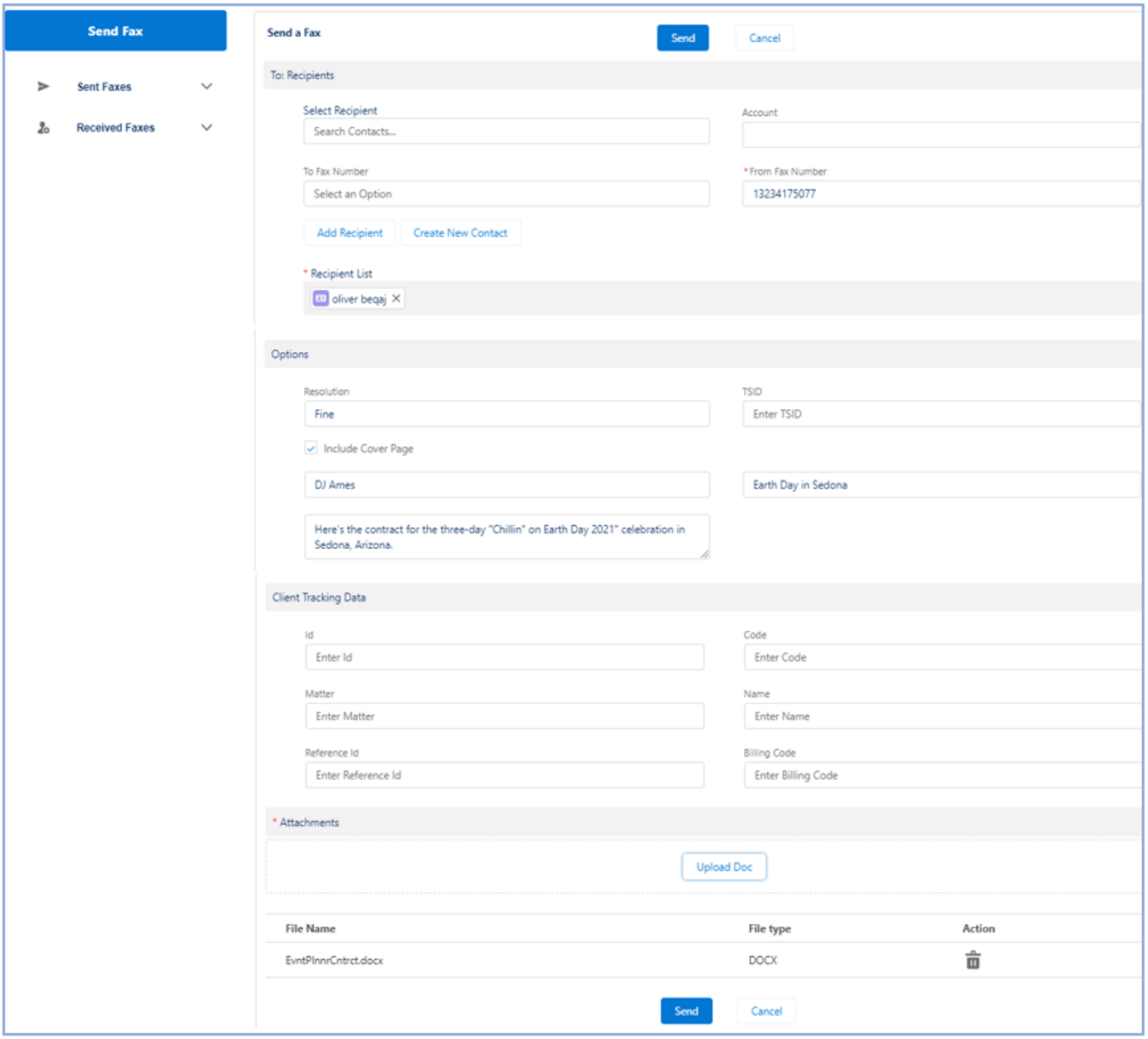
2. Click the **Send** button…

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eFAX TAB (CONT.)

SEND A FAX (Cont.)

…(*then the square, at the prompt, to exit the confirmation*).



*Populated **Send a Fax** screen*

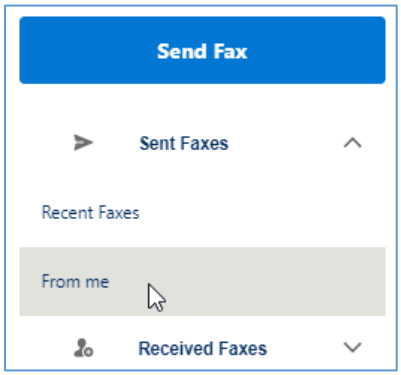


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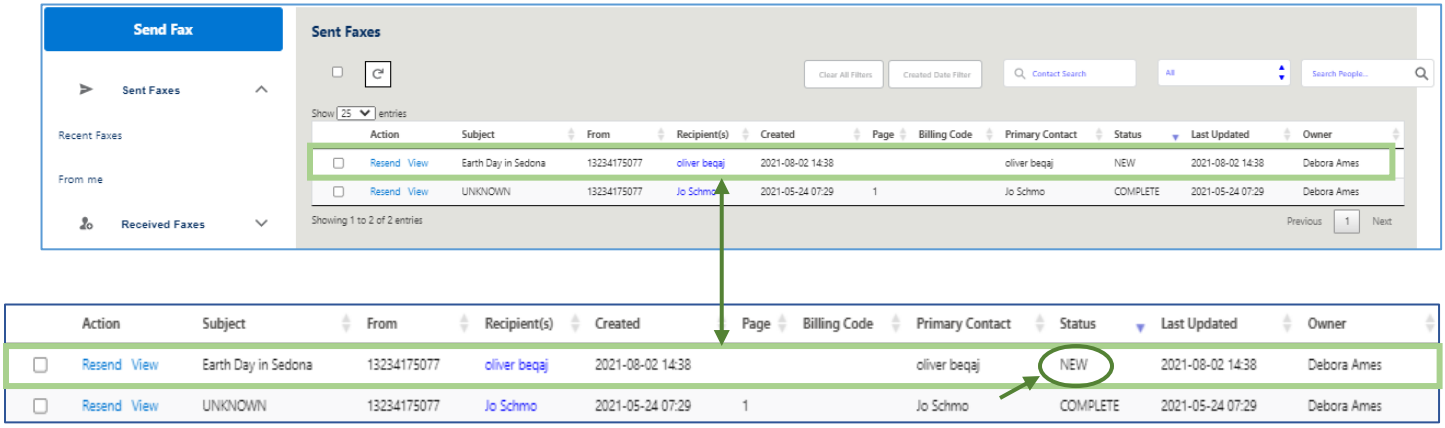
eFAX TAB (CONT.)

SEND A FAX (Cont.)

3. To see where the fax copy is stored: Click **Sent Faxes** in the left nav pane, then **From Me**. (You can also click Recent Faxes, if you wish.)



The **Sent Faxes** screen refreshes accordingly, where the fax you just sent displays a **NEW** status (and you will be sent a notification when the fax transmission is completed).



Fax just now sent, with a status of NEW

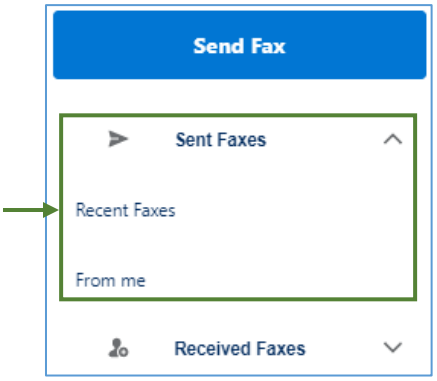
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eFAX TAB (CONT.)

VIEW SENT FAXES

What do you want to do?

- View recently sent faxes—or only the ones I sent (see below).
- Refresh the screen/information (pg. **15**).
- Change the owner of a sent fax (pg. **15**).
- View faxes, by date range (pg. **17**).
- Search for faxes sent to a particular contact (pg. **18**).
- Sort faxes, by pagination (pg. **19**).
- Filter faxes, by status (pg. **20**).
- Cancel a fax (pg. **21**).
- Search for faxes, by owner (pg. **21**).
- View a fax's details (pg. **22**).
- Resend a fax (pg. **24**).

Actions	Instructions
VIEW RECENTLY SENT FAXES—OR ONLY FAXES I'VE SENT	To view recently sent faxes—or those specifically sent by you: 1. Click **Sent Faxes** in the left nav pane, then either **Recent faxes** or **From me**.  *Accessing sent faxes*

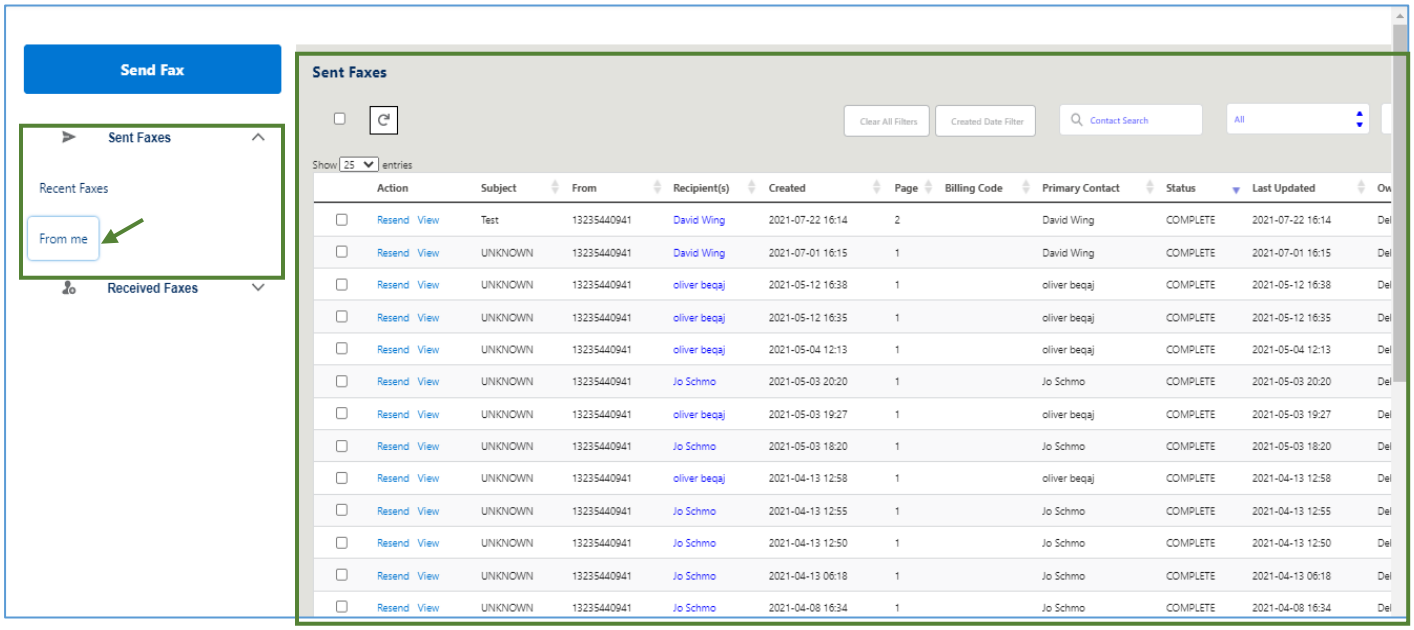
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eFAX TAB (CONT.)

VIEW SENT FAXES (CONT.)

Actions	Instructions
VIEW RECENTLY SENT FAXES OR ONLY FAXES I'VE SENT (CONT.)	The **Sent Faxes** screen refreshes accordingly. ✓**NOTE:** Most column information is self-explanatory (and may vary, based on what is configured). But, to explain current column information further:



Sent Faxes** screen > Faxes **From Me

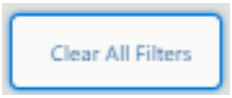
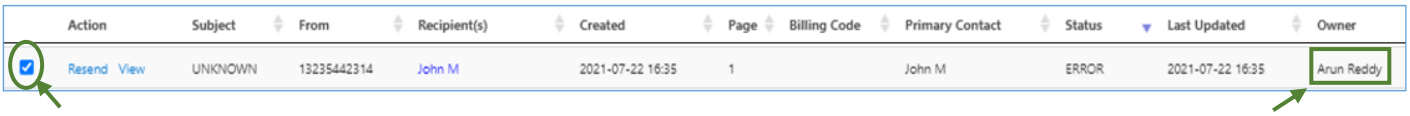
- **Recipient(s)** – Although one name displays, to see <u>all</u> recipients a fax was sent to, click its **View** link to reveal the fax's details page.
- **Status** – Displays **COMPLETE**, **ERROR**, **NEW**, **IN PROGRESS**, or **CANCELLED**.
- **Page** – Includes the cover page, if any.
- **Last Updated** – Displays the date and time a fax's details were last refreshed from *eFax*.
- **Owner** – Displays who owns the fax.

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eFAX TAB (CONT.)

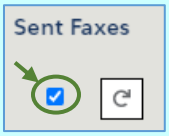
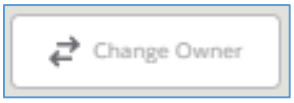
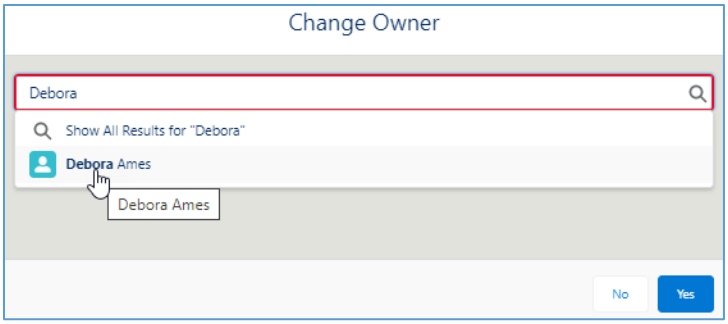
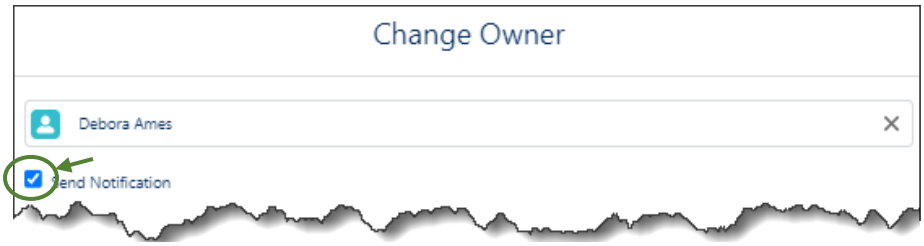
VIEW SENT FAXES (Cont.)

Actions	Instructions
VIEW RECENTLY SENT FAXES OR ONLY FAXES I'VE SENT (CONT.)	2. Click the **Clear All Filters** button at the top of the screen to re-display all faxes. 
REFRESH THE SCREEN	✓ **NOTE:** It refreshes for all faxes not in **COMPLETE** or **ERROR** status. To refresh screen information: Click the  icon at the top of the **Sent Faxes** screen (pg. **14**). (You can also click the checkboxes of certain faxes, then click the **Refresh** icon to refresh only those faxes.) Then, click the square to exit the confirmation prompt. 
CHANGE OWNER OF A SENT FAX	✓ **NOTE:** The **CHANGE OWNER** button only displays for the account administrator (and the instructions are the same if changing the owner of a received fax [via pg. **27**]). To change the owner of a sent fax: 1. Select the faxes you want to view (pg. **13**)—then: Check the box of the fax whose owner you want to change.  *Current owner is **Arun Reddy*** *Continued on next page*

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eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

Actions	Instructions
CHANGE OWNER OF A SENT FAX (CONT.)	✓ **NOTE:** To change the owners of: • Multiple faxes, check their individual boxes. • All faxes, check the box at the top of the screen.  2. Click the **Change Owner** button at the top of the **Sent Faxes** screen (pg. **14**).  3. In the dialog, enter and select a name in the search textbox.  *Search for another owner* 4. Check the **Send Notification** box, then click the **Yes** button.  *New owner is selected and will be notified by email*

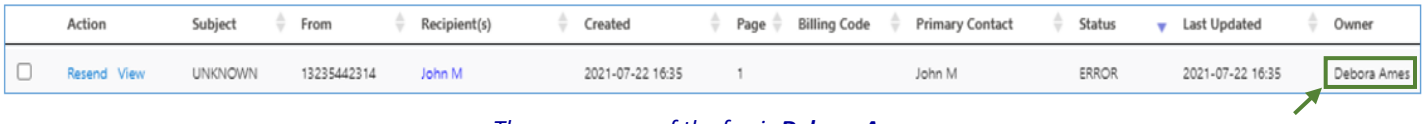
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eFAX TAB (CONT.)

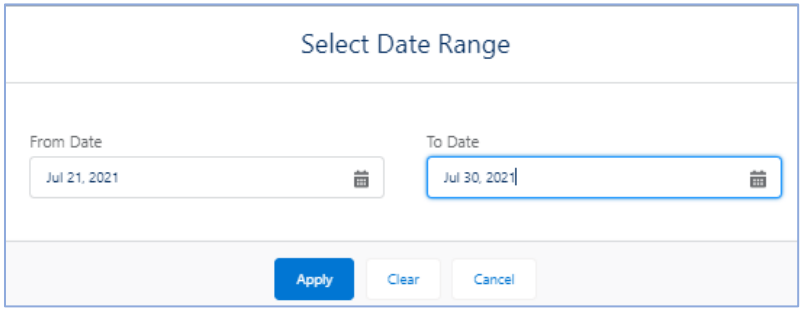
VIEW SENT FAXES (Cont.)

Actions	Instructions
CHANGE OWNER OF A SENT FAX (CONT.)	The **Send Faxes** screen reappears, displaying the new owner. (Click the square to exit the confirmation prompt.)



*The new owner of the fax is **Debora Ames***



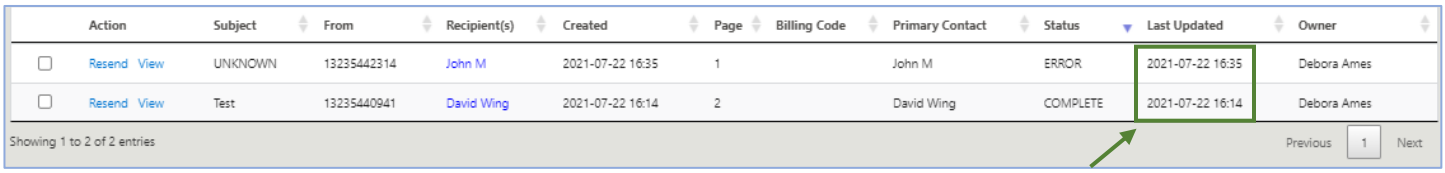
VIEW FAXES, BY DATE RANGE	To view faxes, by date range: 1. Select the faxes you want to view (pg. **13**)—then: Click the **Created-Date Filter** button at the top of the **Sent Faxes** screen (pg. **14**).  2. In the **Select a Date** dialog, select your start and end dates, then click **Apply**.  *Selecting **July 21, 2021** through **July 30, 2021*** *Continued on next page*

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eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

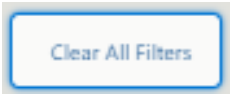
Actions	Instructions
VIEW FAXES, BY DATE RANGE (CONT.)	The **Send Faxes** screen refreshes accordingly.

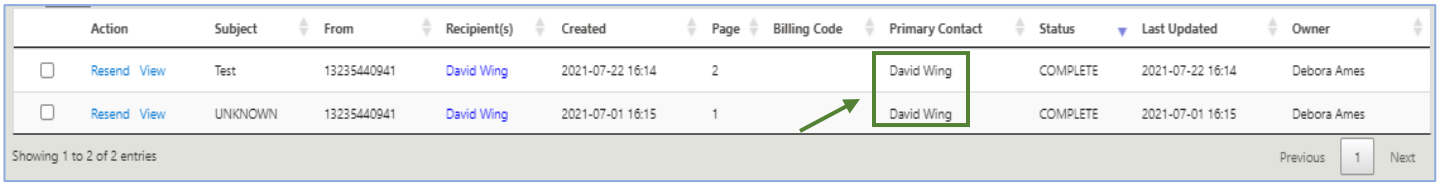


	Action	Subject	From	Recipient(s)	Created	Page	Billing Code	Primary Contact	Status	Last Updated	Owner
☐	Resend View	UNKNOWN	13235442314	John M	2021-07-22 16:35	1		John M	ERROR	2021-07-22 16:35	Debora Ames
☐	Resend View	Test	13235440941	David Wing	2021-07-22 16:14	2		David Wing	COMPLETE	2021-07-22 16:14	Debora Ames

Showing 1 to 2 of 2 entries — Previous 1 Next

*Completed faxes sent between **July 21. 2021** and **July 30, 2021***

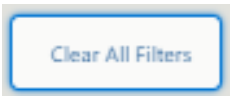
	3. Click the **Clear All Filters** button at the top of the screen to re-display <u>all</u> faxes. 
SEARCH FOR FAXES TO A PARTICULAR CONTACT	To search for faxes sent to a particular contact: 1. Select the faxes you want to view (pg. **13**)—then: Click the **Contact Search** textbox, enter a name, then press **Enter** on your keyboard.  The screen refreshes with the search results.



	Action	Subject	From	Recipient(s)	Created	Page	Billing Code	Primary Contact	Status	Last Updated	Owner
☐	Resend View	Test	13235440941	David Wing	2021-07-22 16:14	2		David Wing	COMPLETE	2021-07-22 16:14	Debora Ames
☐	Resend View	UNKNOWN	13235440941	David Wing	2021-07-01 16:15	1		David Wing	COMPLETE	2021-07-01 16:15	Debora Ames

Showing 1 to 2 of 2 entries — Previous 1 Next

*Faxes sent to the primary contact **David Wing**, display*

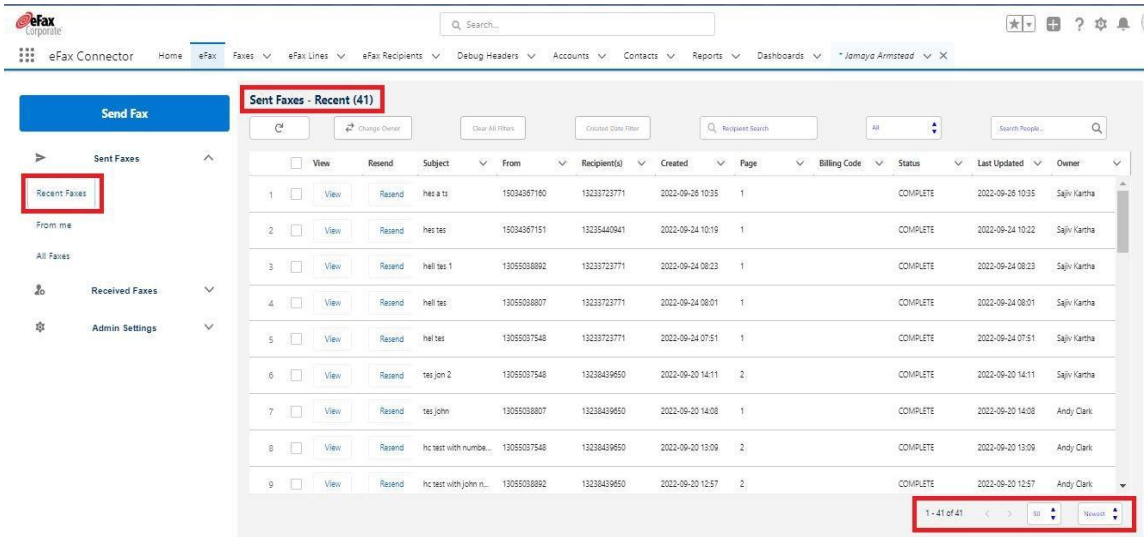
	2. Click the **Clear All Filters** button at the top of the screen to re-display <u>all</u> faxes. 

Continued on next page

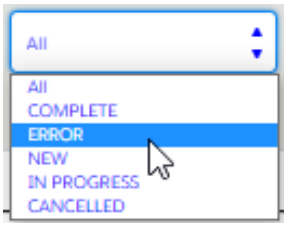
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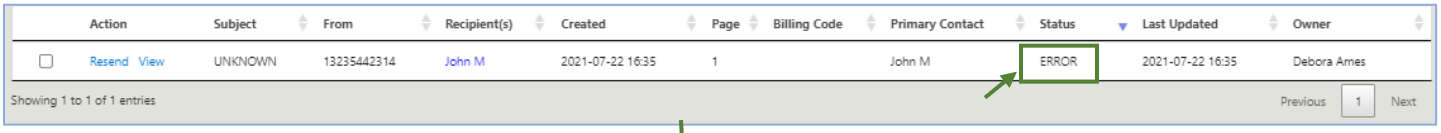
eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

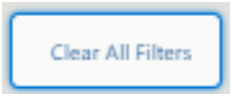
Actions	Instructions
SORT FAXES BY PAGINATION	To sort faxes by pagination: go to Recent Faxes, From Me, or All Faxes (this last is for Admins only). In the lower right hand corner of the page, *the count of the number of faxes on the page is shown, as well as the number of pages of faxes available. Information can be sorted in ascending or descending order, or oldest to newest, or vice versa.* 

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Actions	Instructions
FILTER FAXES, BY STATUS	To filter faxes by status: 1. Select the faxes you want to view (pg. **13**). 2. Click the **All** drop-down menu at the top of the **Sent Faxes** screen (pg. **14**), and select the relevant status.  *Select the statused faxes you want to view* The screen refreshes accordingly.



*All fax(es) in **ERROR** display*

	3. Click the **Clear All Filters** button at the top of the screen to re-display <u>all</u> faxes. 

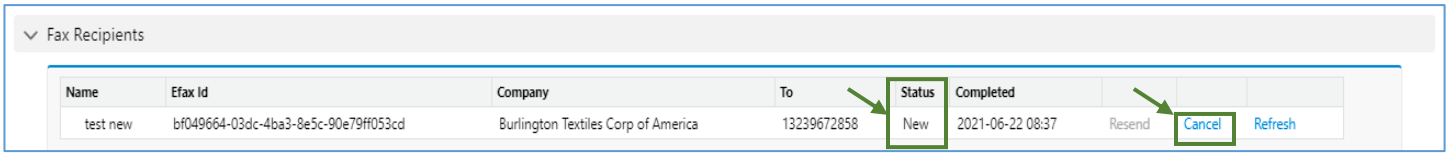
Continued on next page

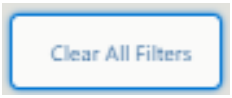
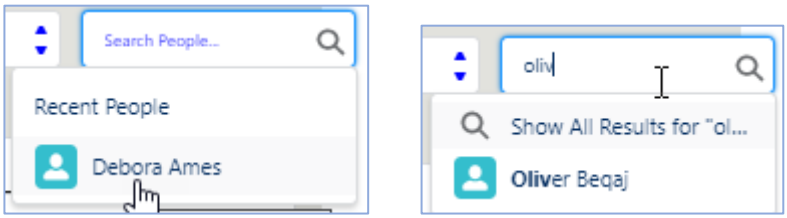
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eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

Actions	Instructions
CANCEL A FAX	If you want to cancel a fax after sending it (pg. 4), you can do so as long as its status is **New** or **In Progress**. After you click the **Send** button to transmit a fax, a separate window appears, displaying the fax's **Details** screen—and in the **Fax Recipients** pane at the bottom, the status of the fax displays. (If you've closed the record, see *View a Fax's Details* on pg. 22.) To cancel a **NEW** or **IN PROGRESS** fax: 1. Select the faxes you want to view (pg. 13), then click the **View** link of the fax you want to cancel. (Its status must be **NEW** or **IN PROGRESS**.) 2. On the fax's **Details** screen (pg. 23), scroll down to the **Fax Recipients** pane and click the **Cancel** link (then click the green square in the prompt at the top of the screen, to exit the confirmation. The status of the fax changes to **Cancelled**).



	3. Click the **Clear All Filters** button at the top of the screen to re-display <u>all</u> faxes. 
SEARCH FOR FAXES, BY OWNER	To search for faxes by owner: 1. Click the **Search People** textbox, and select or type in the owner's name.  *Select or type in a name*

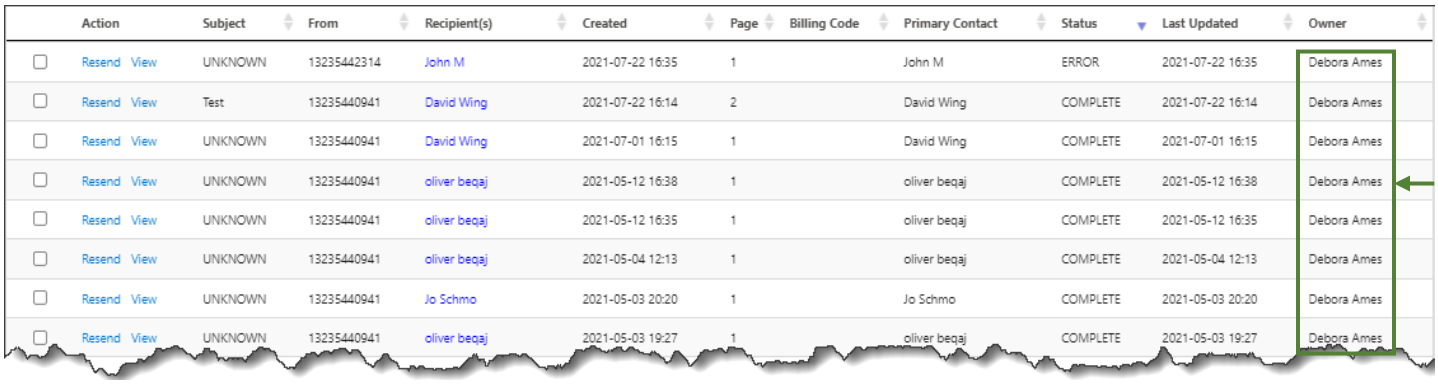
Continued on next page

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eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

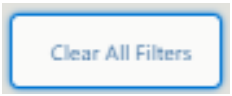
Actions	Instructions
SEARCH FOR FAXES, BY OWNER (CONT.)	The screen refreshes accordingly.



Action	Subject	From	Recipient(s)	Created	Page	Billing Code	Primary Contact	Status	Last Updated	Owner
Resend View	UNKNOWN	13235442314	John M	2021-07-22 16:35	1		John M	ERROR	2021-07-22 16:35	Debora Ames
Resend View	Test	13235440941	David Wing	2021-07-22 16:14	2		David Wing	COMPLETE	2021-07-22 16:14	Debora Ames
Resend View	UNKNOWN	13235440941	David Wing	2021-07-01 16:15	1		David Wing	COMPLETE	2021-07-01 16:15	Debora Ames
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-12 16:38	1		oliver beqaj	COMPLETE	2021-05-12 16:38	Debora Ames
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-12 16:35	1		oliver beqaj	COMPLETE	2021-05-12 16:35	Debora Ames
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-04 12:13	1		oliver beqaj	COMPLETE	2021-05-04 12:13	Debora Ames
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-05-03 20:20	1		Jo Schmo	COMPLETE	2021-05-03 20:20	Debora Ames
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-03 19:27	1		oliver beqaj	COMPLETE	2021-05-03 19:27	Debora Ames

*Faxes owned by **Debora Ames** display*

2. Click the **Clear All Filters** button at the top of the screen to re-display all faxes.



VIEW A FAX'S DETAILS

To view a fax's details:

1. Select the faxes you want to view (pg. **13**), then click the **View** link of the fax you want to see in detail.



Action	Subject	From	Recipient(s)	Created	Page	Billing Code	Primary Contact	Status	Last Updated	Owner
Resend View	Earth Day in Sedona	13234175077	oliver beqaj	2021-08-02 14:38			oliver beqaj	NEW	2021-08-02 14:38	Debora Ames
Resend View	UNKNOWN	13234175077	Jo Schmo	2021-05-24 07:29	1		Jo Schmo	COMPLETE	2021-05-24 07:29	Debora Ames

*Click the **View** link to see the fax's details*

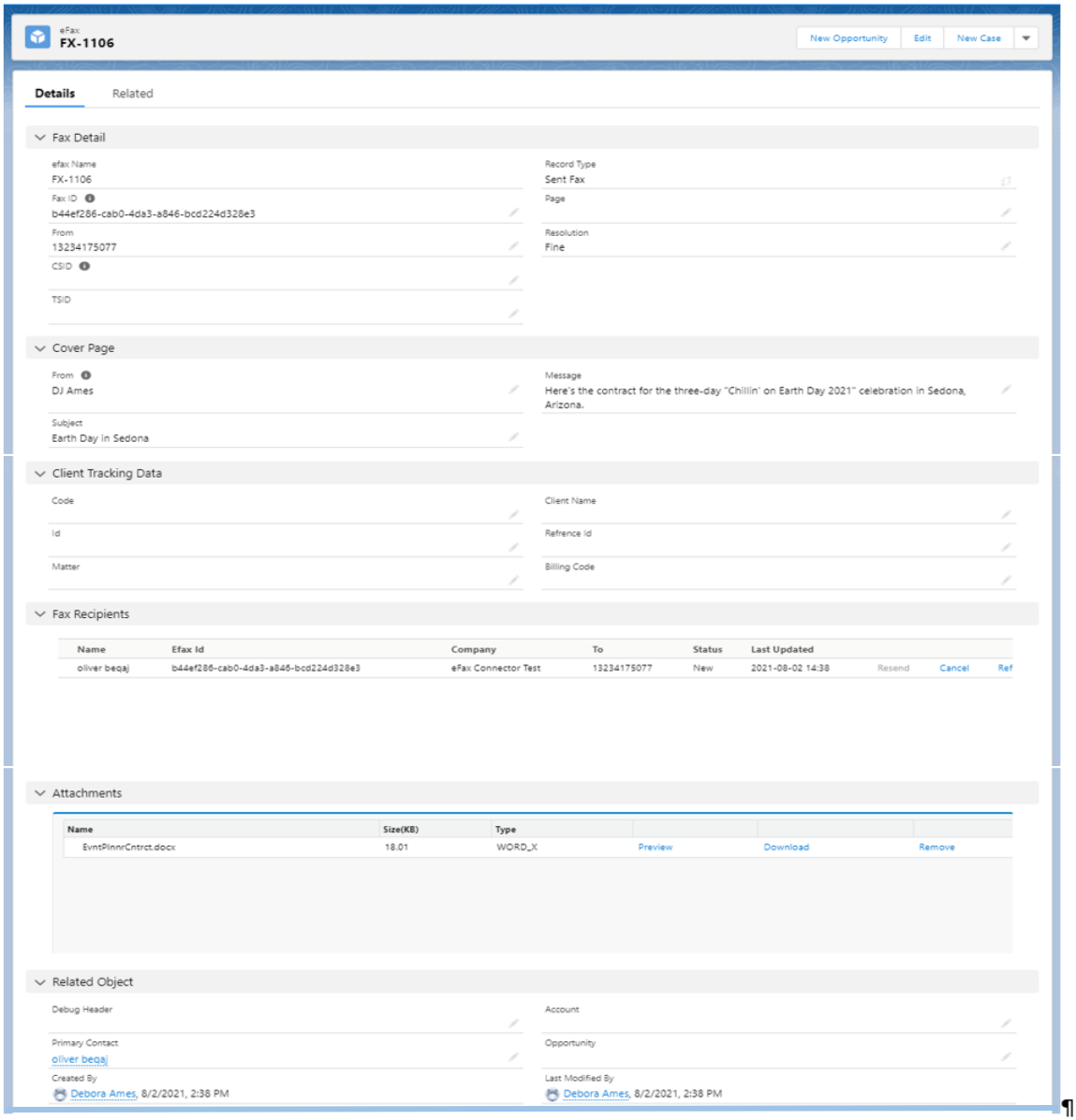
Continued on next page

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eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

Actions	Instructions
VIEW A FAX'S DETAILS (CONT.)	Its details and related information display. (*For more information, See Appendix A: Fax Details/Related Information of a Sent Fax on pg. **32**.*)



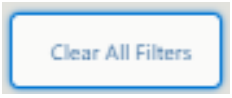
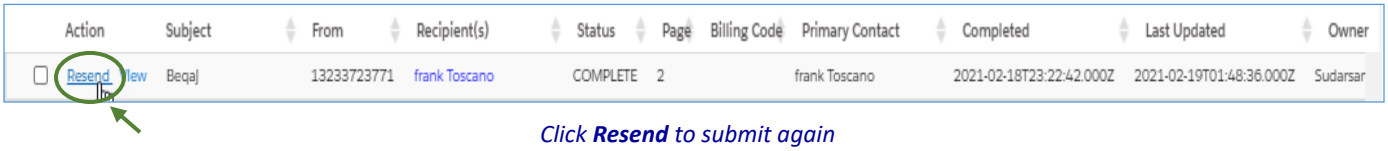
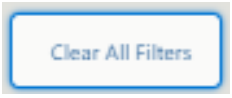
*Details record of **FX-1106***

Continued on next page

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eFAX TAB (CONT.)

VIEW SENT FAXES (CONT.)

Actions	Instructions
VIEW A FAX'S DETAILS (CONT.)	2. Back on the **Sent Faxes** screen (pg. **14**), click the **Clear All Filters** button (at the top of the screen) to re-display all faxes. 
RESEND A FAX	To resend a fax: 1. Select the faxes you want to view (pg. **13**), then click its **Resend** link.  *Click **Resend** to submit again* Its **Send a Fax** screen appears (pg. **4**), auto-populated with: ○ Your fax number in the **From: Recipient** field ○ The recipient(s) the fax was sent to ○ The fax's attachments See *Send a Fax* on pgs. **4-12** for instructions. 2. Back on the **Sent Faxes** screen (pg. **14**), click the **Clear All Filters** button (at the top of the screen) to re-display all faxes. 

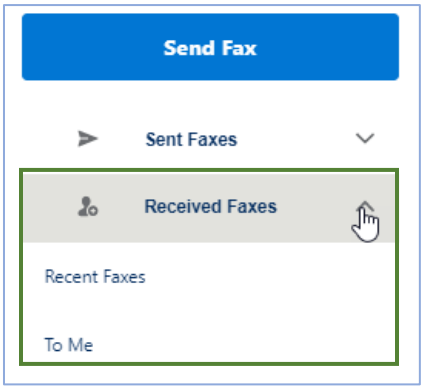
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eFAX TAB (CONT.)

VIEW RECEIVED FAXES

What do you want to do?

- View recently received faxes—or only the ones I received (see below).
- Refresh the screen/information (pg. **27**).
- Change the owner of a received fax (pg. **27**).
- Link a fax to your contacts (pg. **27**).
- View faxes, by date range (pg. **30**).
- Search for faxes, by sender TSID/phone number (pg. **30**).
- Sort faxes, by pagination (pg. **31**).
- Search for faxes, by owner (pg. **31**).
- View a fax's details (pg. **31**).

Actions	Instructions
VIEW RECENTLY RECEIVED FAXES—OR ONLY FAXES I'VE RECEIVED	To view recently received faxes—or those specifically received by you: 1. Click **Sent Faxes** in the left nav pane, then either **Recent faxes** or **From me**.  *Accessing sent faxes*

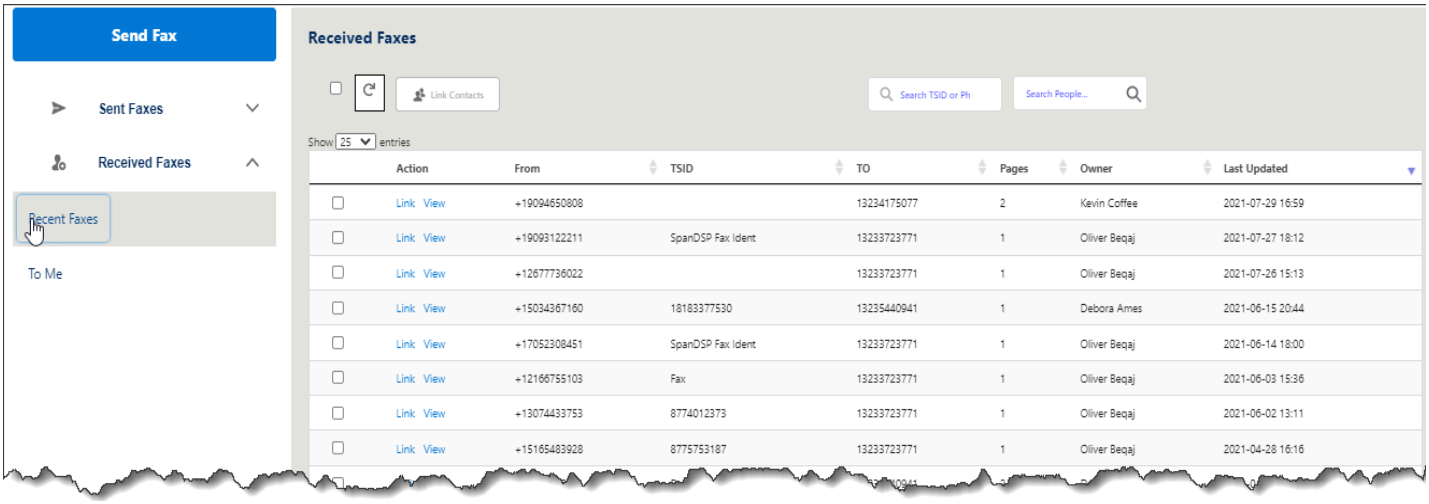
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eFAX TAB (CONT.)

VIEW RECEIVED FAXES (CONT.)

Actions	Instructions
VIEW RECENTLY RECEIVED FAXES—OR ONLY FAXES I'VE RECEIVED (CONT.)	The screen refreshes accordingly. ✓**NOTE:** Most column information is self-explanatory (and may vary, based on what is configured). But, to explain current column information further:



***Received Faxes** screen > Recently received faxes*

- **TSID** – Displays the transmitting ID of the fax sender.
- **Pages** – Includes the cover page, if any.
- **Completed** – Displays the date and time fax reception was completed.
- **Last Updated** – Displays the date and time a fax's details were last refreshed from *eFax*.
- **Owner** – Displays who owns the fax line the fax was sent to.

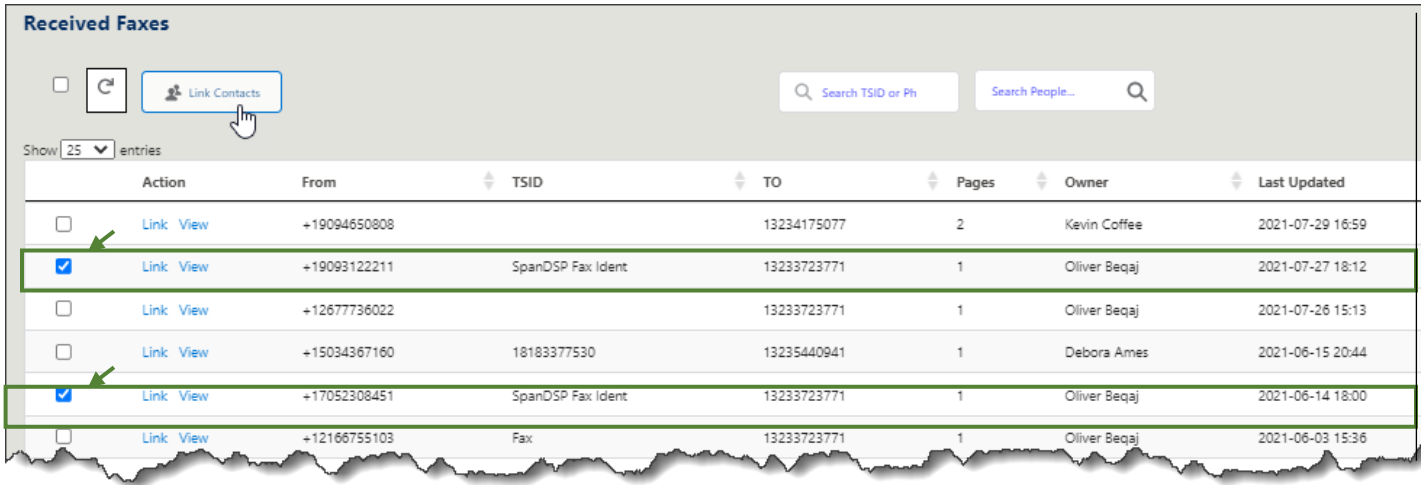
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eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

Actions	Instructions
REFRESH THE SCREEN	✓ **NOTE:** It refreshes for all faxes not in **COMPLETE** or **ERROR** status. To refresh screen information: Click the icon at the top of the **Received Faxes** screen (pg. **26**). (You can also click the checkboxes of certain faxes, then click the **Refresh** icon to refresh only those faxes.) Then, click the square to exit the confirmation prompt. Faxes refreshed successfully.
CHANGE OWNER OF A RECEIVED FAX	✓ **NOTE:** This button only displays for the account administrator. To change the owner of a received fax: Select the faxes you want to view (pg. **25**), then follow the same instructions stated for sent faxes, on pgs. **15-17**.
LINK A FAX TO YOUR CONTACTS	To associate a fax with one of more of your contacts: 1. Select the faxes you want to view (pg. **25**)—then: Check the box(es) of the fax(es) you want to link, and click the **Link Contacts** button. Link Contacts



Checking the fax(es) you want to link

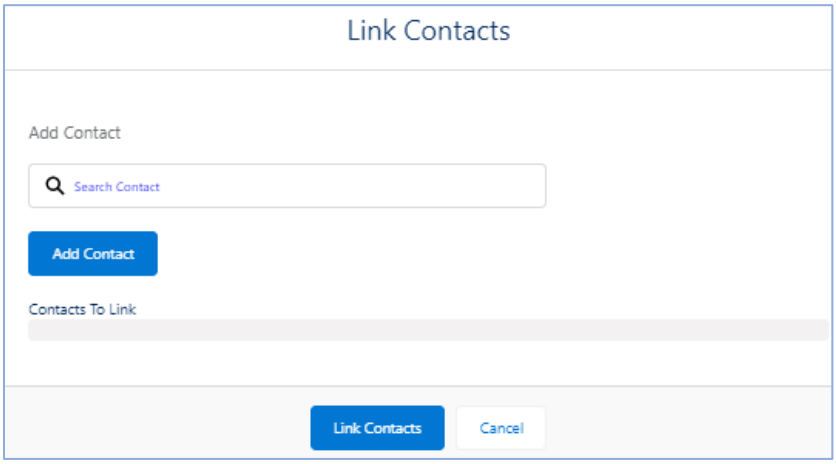
Continued on next page

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eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

Actions	Instructions
LINK A FAX TO YOUR CONTACTS (CONT.)	2. In the **Link Contacts** dialog:



***Link Contacts** dialog*

a. Enter the contact's name In the search textbox, then select it.



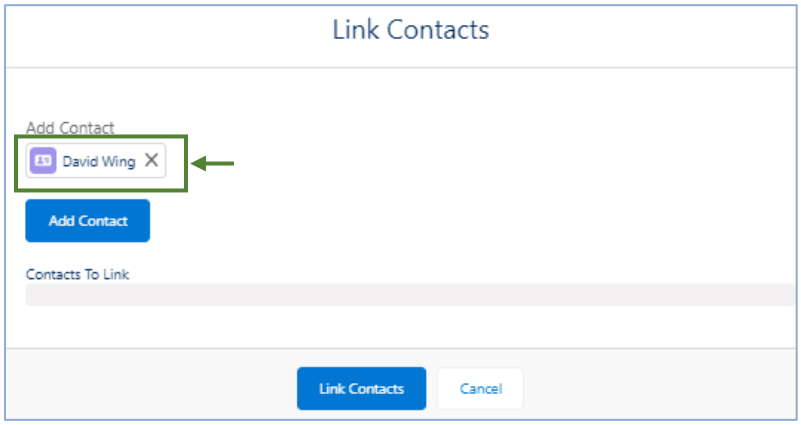
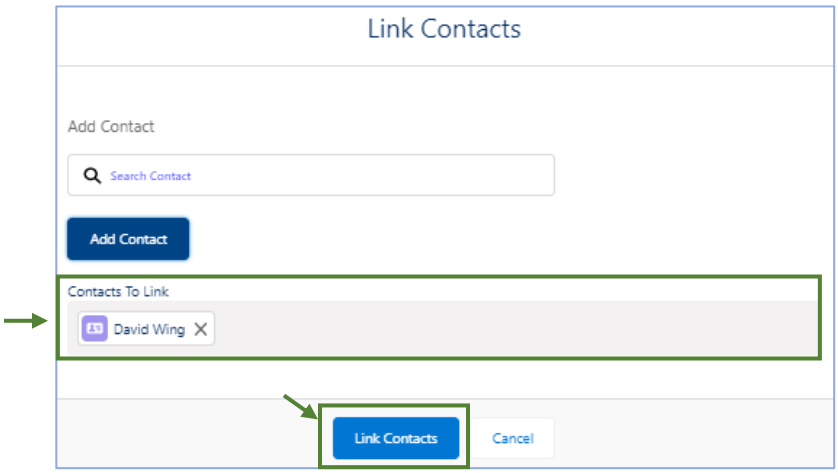
Searching for contact's name

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eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

Actions	Instructions
LINK A FAX TO YOUR CONTACTS (CONT.)	b. Click the **Add Contact** button. The name appears in the **Contacts to Link** pane.  *The selected contact's name…*  *…appears in the **Contacts to Link** pane* c. Repeat for any others you want to add/link—and when done, click the **Link Contacts** button.

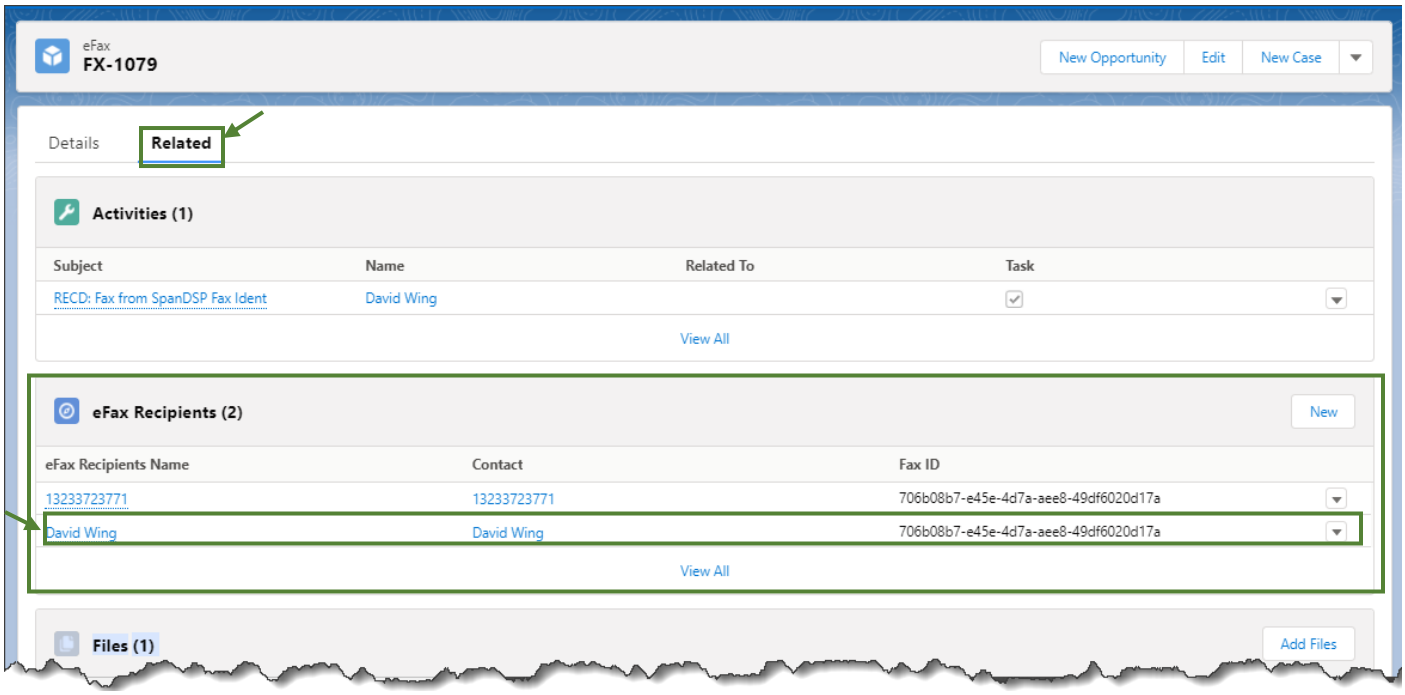
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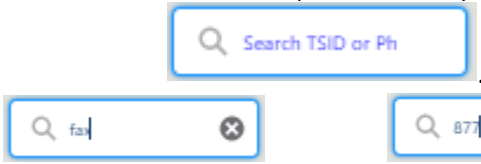
eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

Actions	Instructions
LINK A FAX TO YOUR CONTACTS (CONT.)	The contact's name appears in the **eFax Recipients** pane of the fax record's **Related** tab. *(For more information about the record, see Appendix B: Fax Details/Related Information of a Received Fax on pg. **37**.)*



*The name of the contact you linked to appears on the fax record's **Related** tab*

VIEW FAXES, BY DATE RANGE	To view faxes by date range: Select the faxes you want to view (pg. **25**)—then: Follow the same instructions stated for sent faxes, on pgs. **17-18**.
SEARCH FOR FAXES, BY SENDER TSID/PHONE NUMBER	To search for received faxes by a sender's transmitting ID (number/text) or their phone number: Select the faxes you want to view (pg. **25**)—then enter a partial TSID or phone number in the **Search TSID** textbox, and press **Enter** on your keyboard.  *Searching by TSID…* *…or by phone number*

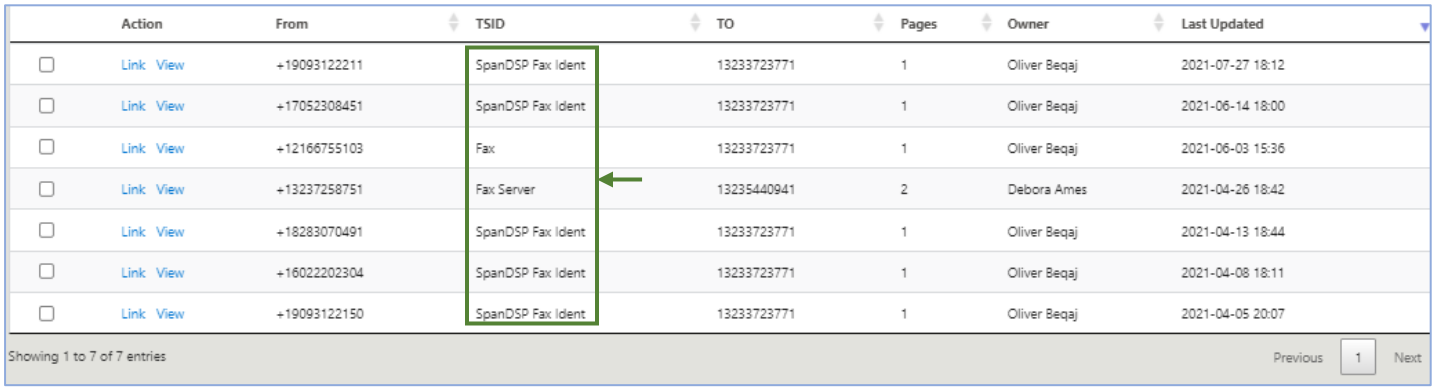
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eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

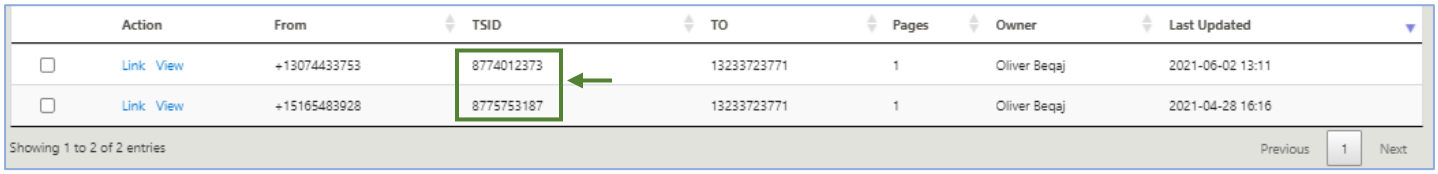
Actions	Instructions
SEARCH FOR FAXES BY SENDER TSID/PHONE NUMBER (CONT.)	The screen refreshes accordingly. (*To display all faxes again, click **X** to clear the search field*.)



	Action	From	TSID	TO	Pages	Owner	Last Updated
☐	Link View	+19093122211	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-07-27 18:12
☐	Link View	+17052308451	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-06-14 18:00
☐	Link View	+12166755103	Fax	13233723771	1	Oliver Beqaj	2021-06-03 15:36
☐	Link View	+13237258751	Fax Server	13235440941	2	Debora Ames	2021-04-26 18:42
☐	Link View	+18283070491	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-04-13 18:44
☐	Link View	+16022202304	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-04-08 18:11
☐	Link View	+19093122150	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-04-05 20:07

Showing 1 to 7 of 7 entries — Previous 1 Next

*Fax records found by TSIDs (keyword: **fax**)*



	Action	From	TSID	TO	Pages	Owner	Last Updated
☐	Link View	+13074433753	8774012373	13233723771	1	Oliver Beqaj	2021-06-02 13:11
☐	Link View	+15165483928	8775753187	13233723771	1	Oliver Beqaj	2021-04-28 16:16

Showing 1 to 2 of 2 entries — Previous 1 Next

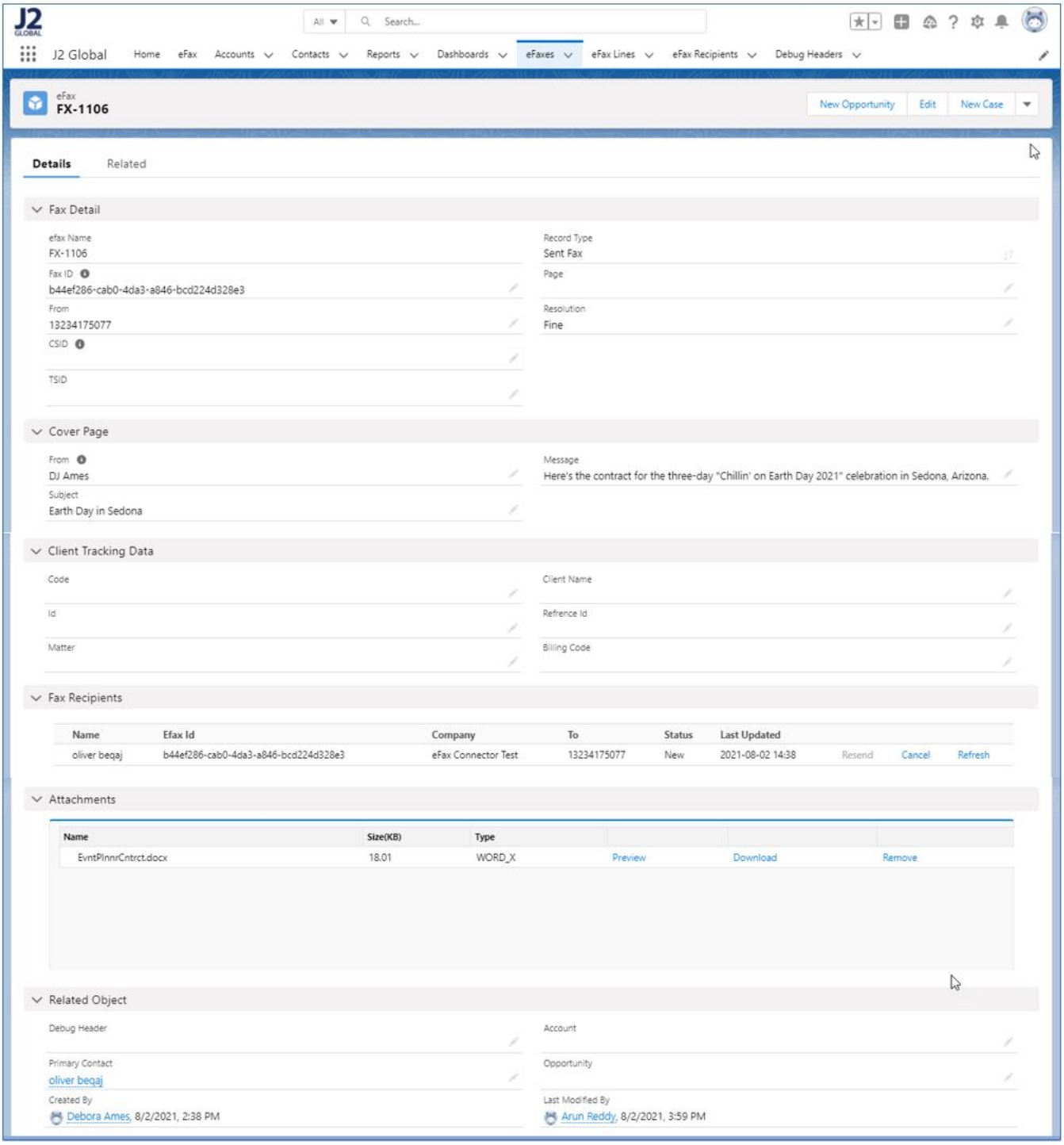
*Fax records found by phone number (keyword: **877**)*

SORT FAXES BY PAGINATION	To sort faxes by pagination: go to Recent Faxes, From Me, or All Faxes (this last is for Admins only). In the lower right hand corner of the page, *the count of the number of faxes on the page is shown, as well as the number of pages of faxes available. Information can be sorted in ascending or descending order, or oldest to newest, or vice versa.*
SEARCH FOR FAXES, BY OWNER	To search for faxes by owner: Follow the same instructions stated for sent faxes, on pgs. **21-21**.
VIEW A FAX'S DETAILS	To view a fax's details: Select the faxes you want to view (pg. **25**), then follow the same instructions stated for sent faxes, on pgs. **22-23**.

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Appendix A: Fax Details and Related Information of a Sent Fax

Sent Fax – Details Tab

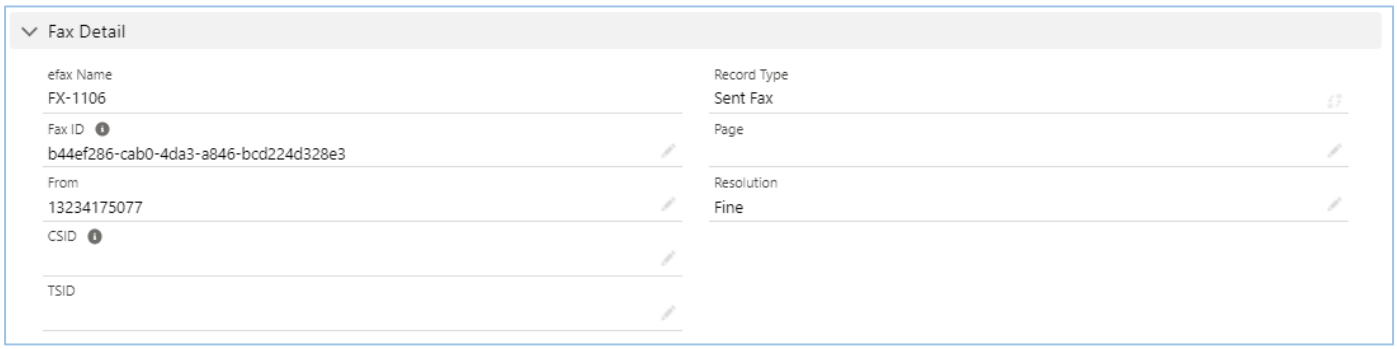


*A sent fax's (**FX-1106**) details*

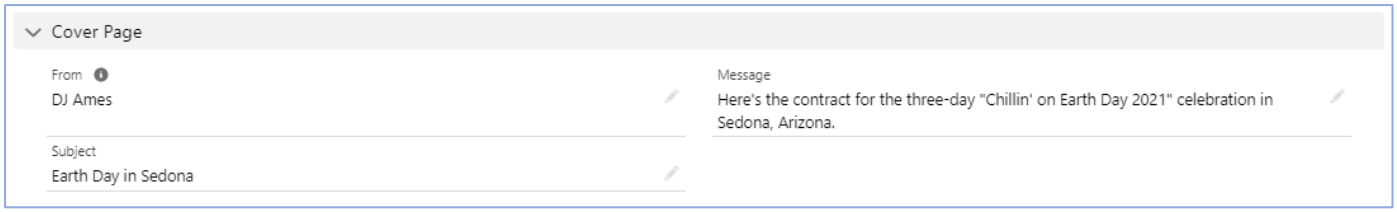
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Sent Fax – Details Tab (Cont.)

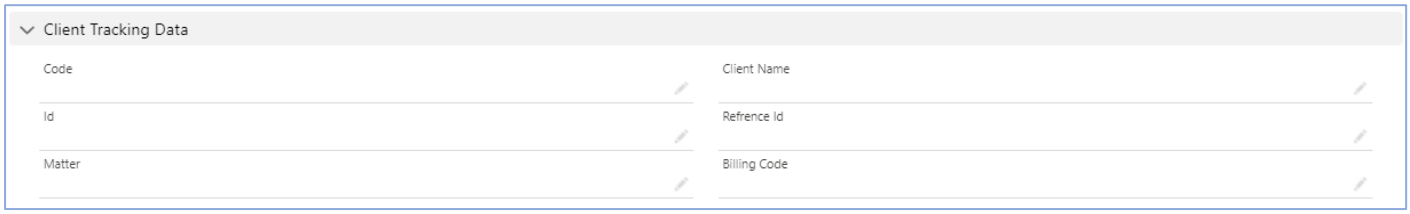
✓**NOTE:** Fax details may vary, depending on what the *Salesforce* account administrator has configured.



***Details > Fax Detail** pane*
Shows the fax name, type [**Sent**], and ID/process info[2]



***Details > Cover Page** pane*
Shows cover-page information

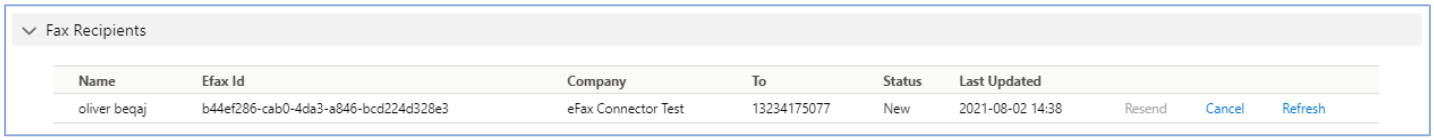


***Details > Client-Tracking Data** pane*
Shows client data that is tracked (see the **NOTE** on pg. 9 for field descriptions)

[2] **TSID** (if any) is the fax's transmitting ID. **CSID** (if any) is the character-set ID of the receiving fax medium.

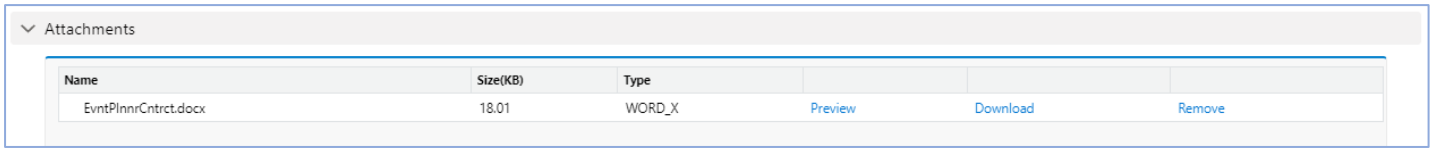
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Sent Fax – Details Tab (Cont.)



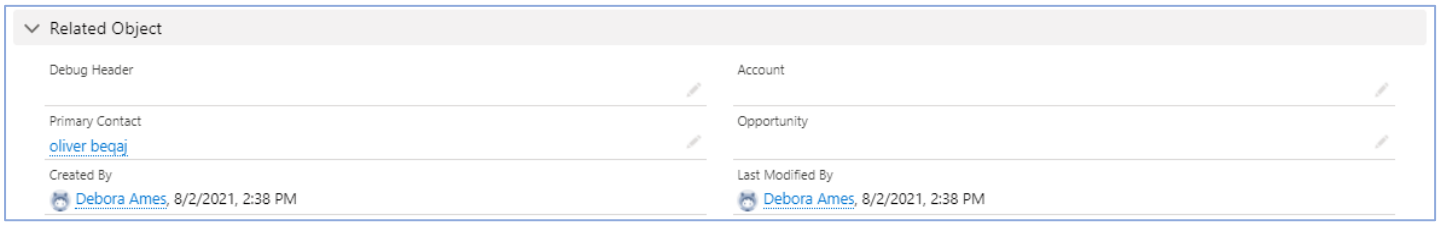
Details > Fax Recipients *pane*

Shows the recipient's name, ID/contact info, status (**NEW**); and date/time the fax was sent



Details > Attachments *pane*

Shows the attachment(s) name, size, and file type



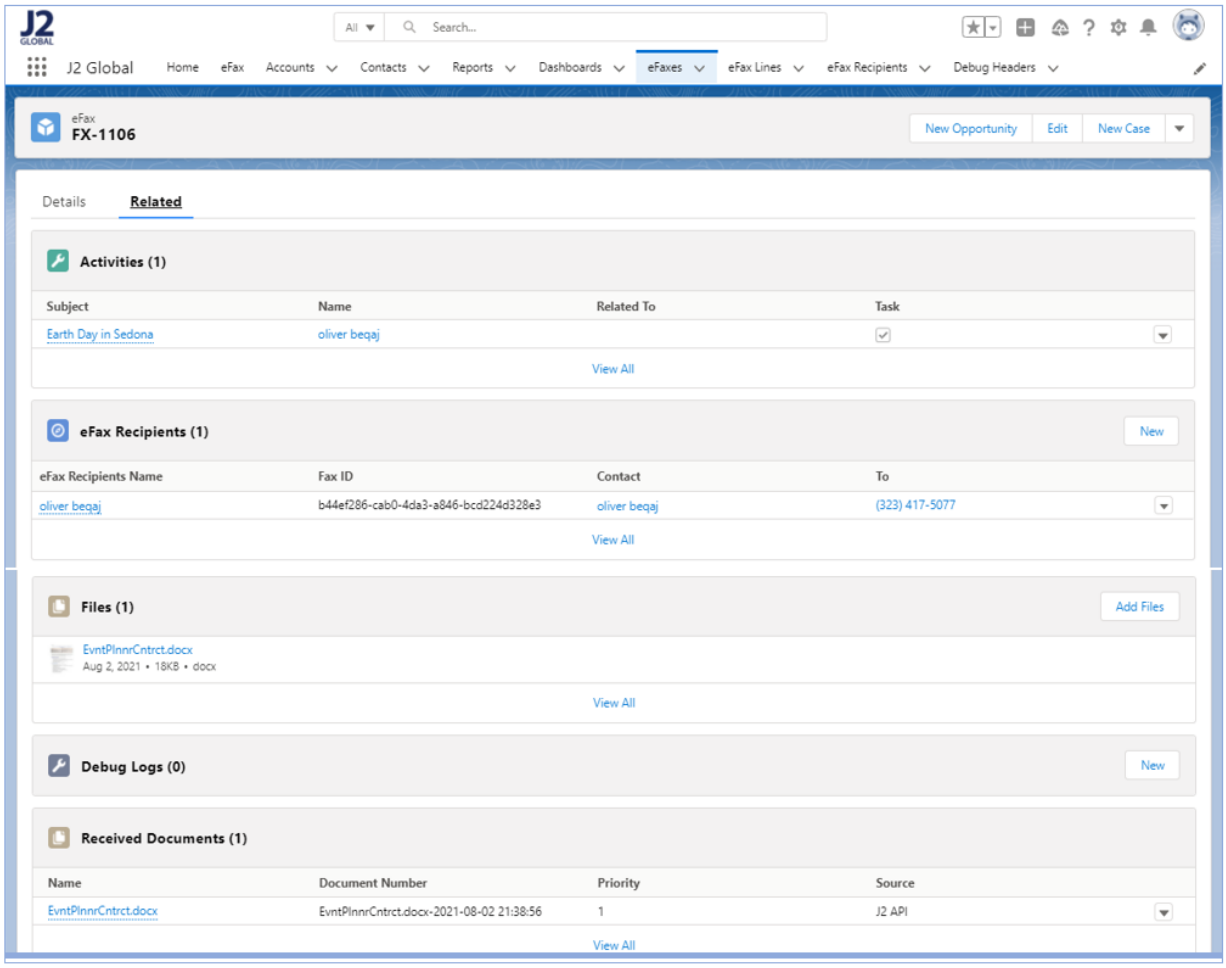
Details > Related Object *pane*

Shows the name of the fax's primary contact, who created the fax, and when it was last modified

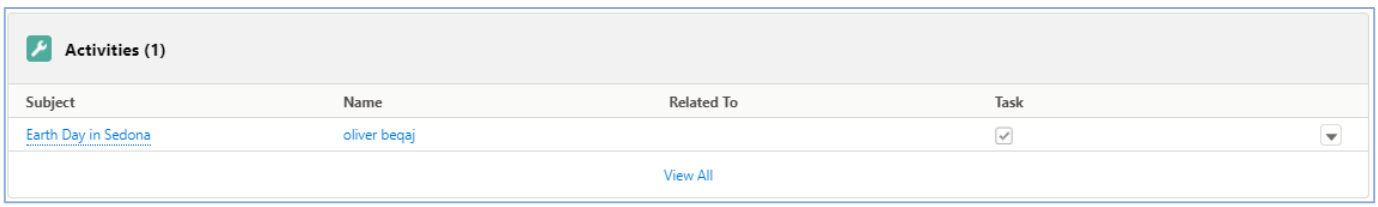
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Sent Fax – Related Tab

✓**NOTE:** Related fax information may vary, depending on what the *Salesforce* account administrator has configured.



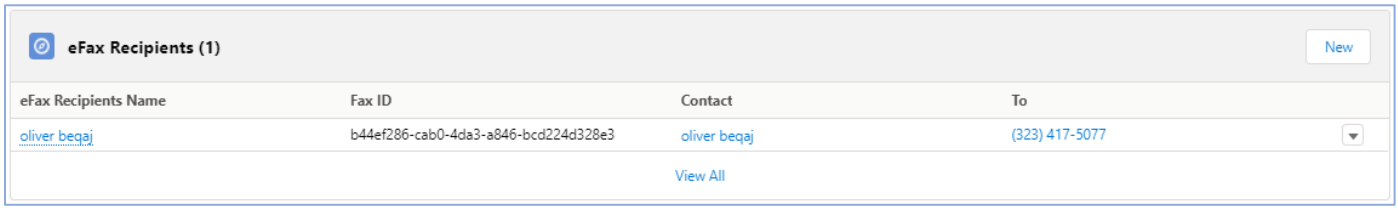
*A sent fax's (**FX-1106**) "related" information*



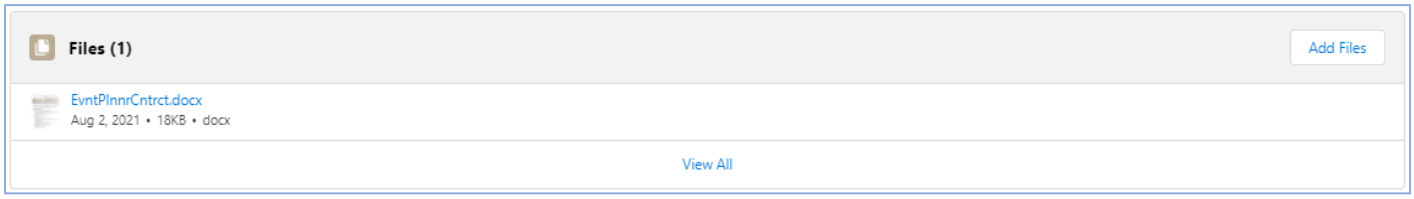
***Related (Info) > Activities** pane*
Shows activities related to the sent fax

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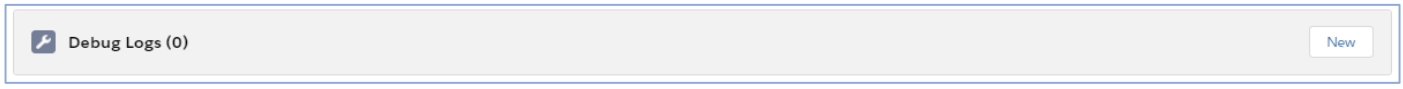
Sent Fax – Related Tab (Cont.)



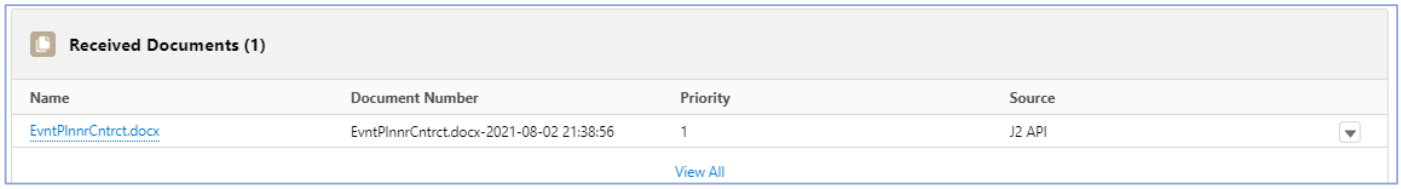
Related (Info) > eFax Recipients *pane*
Shows the recipient's name, ID/contact info, and fax number



Related (Info) > Files *pane*
Shows the file(s) attached to the fax



Related (Info) > Debug Logs *pane*
Shows any errors (e.g., faxes over 4mb in size [which you then have to view in your *eFax Corporate* account]) that occurred in *Salesforce* during record creation or update.



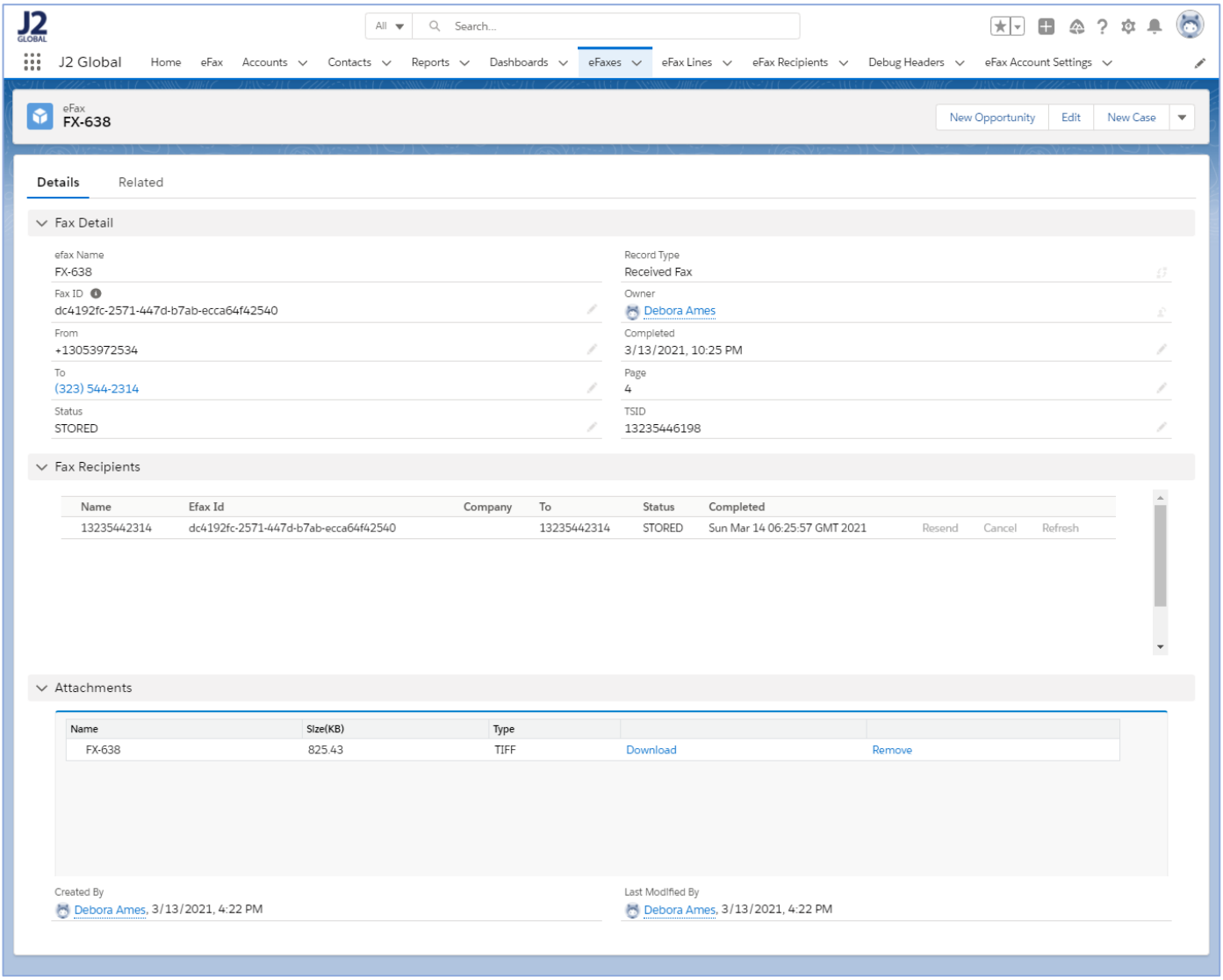
Related (Info) > Received Documents pane
Shows the document(s) received by the fax recipient

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Appendix B: Fax Details and Related Information of a Received Fax

Received Fax – Details Tab

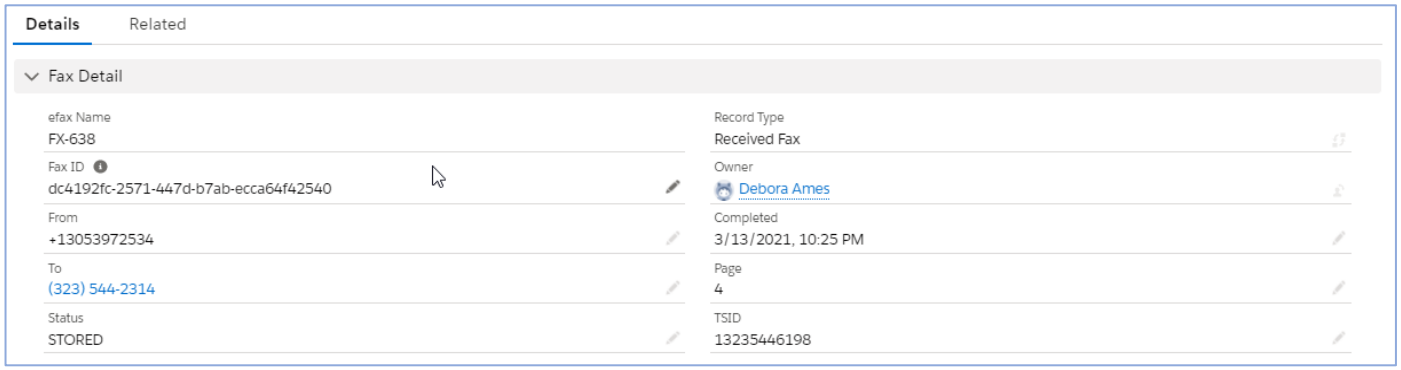
✓**NOTE:** Fax details may vary, depending on what the *Salesforce* account administrator has configured.



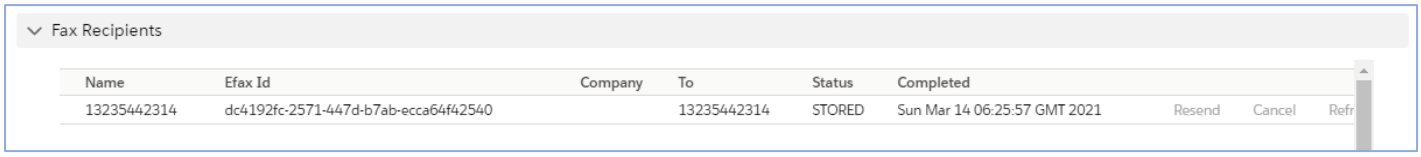
*A received fax's (**FX-638**) details*

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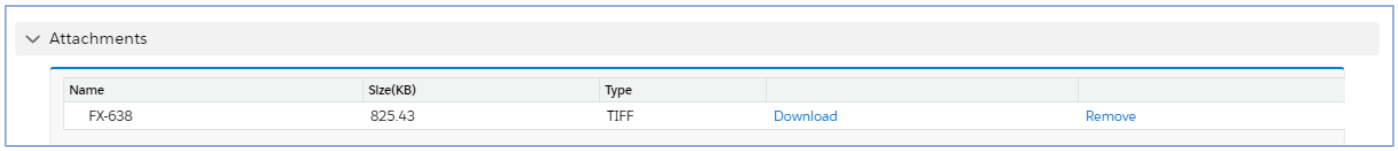
Received Fax – Details Tab (Cont.)



***Details > Fax Detail** pane*
Shows the fax name, type (**Received**), ID info, number of pages, and status (**STORED**)



***Details > Fax Recipients** pane*
Shows the recipient's name, ID/contact info, status [**STORED**]; and date/time the fax was received



***Details > Attachments** pane*
Shows the attachment(s) sent with the fax

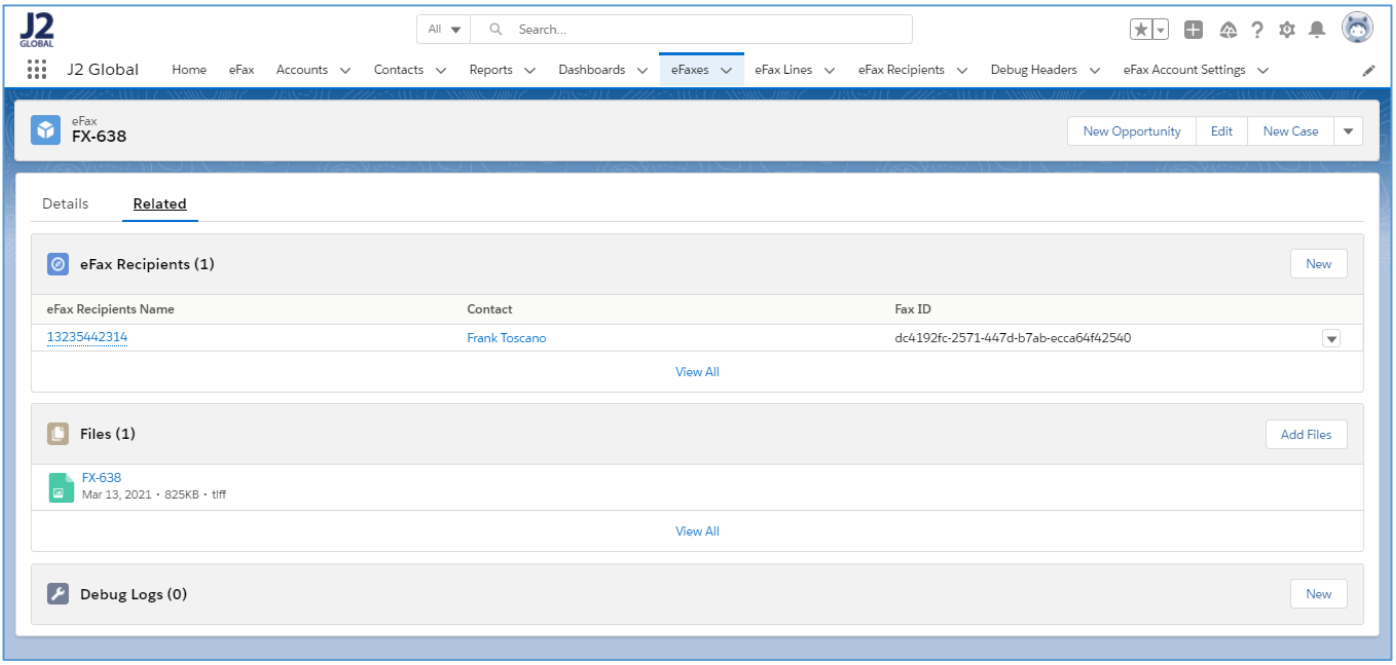


***Details > Created/Modified by** pane*
Shows who created and last modified this fax

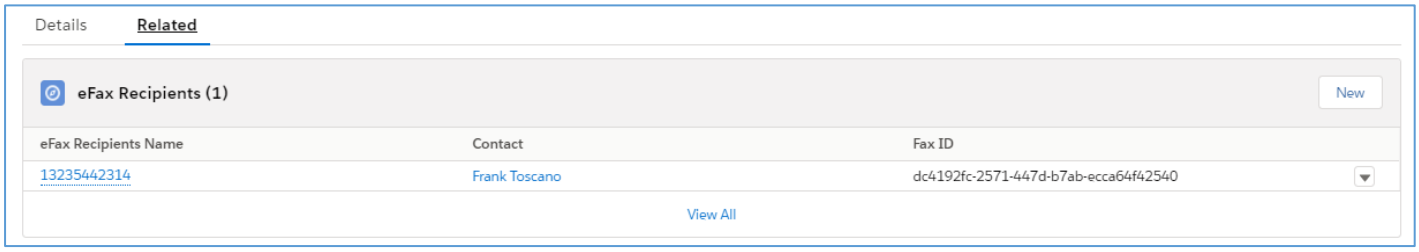
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Received Fax – Related Tab

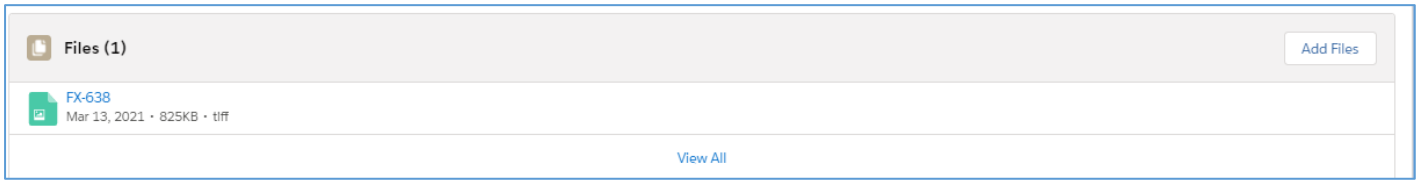
✓**NOTE:** Related fax information may vary, depending on what the *Salesforce* account administrator has configured.



*A received fax's (**FX-638**) "related" information*



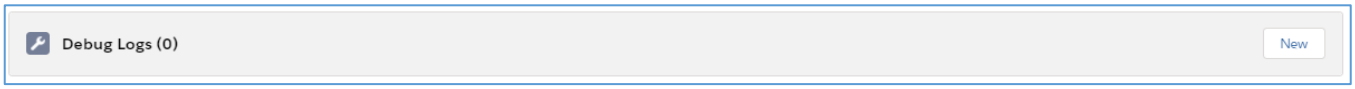
***Related (Info) > eFax Recipients** pane*
Shows the recipient's name and fax ID



***Related (Info) > Files** pane*
Shows the file(s) attached to the fax

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Received Fax – Related Tab (Cont.)

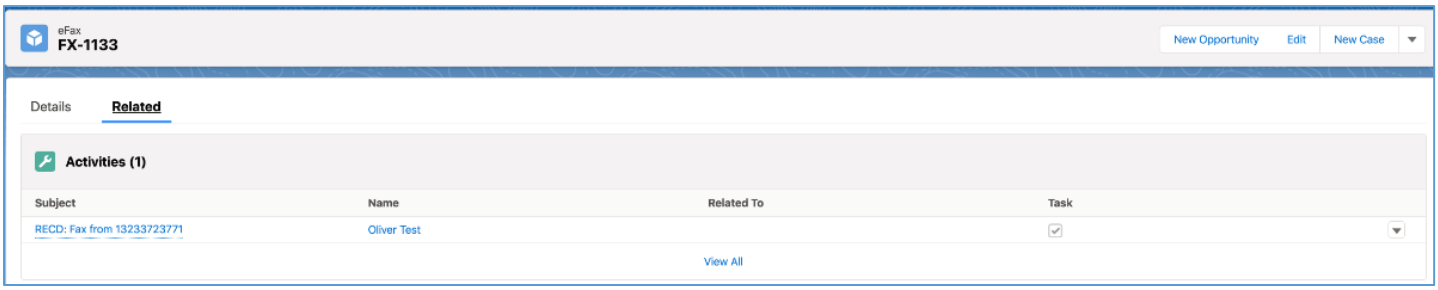


Related (Info) > Debug Logs *pane*
Shows any errors (e.g., faxes over 4mb in size [which you then have to view in your *eFax Corporate* account]) that occurred in *Salesforce* during record creation or update.

****

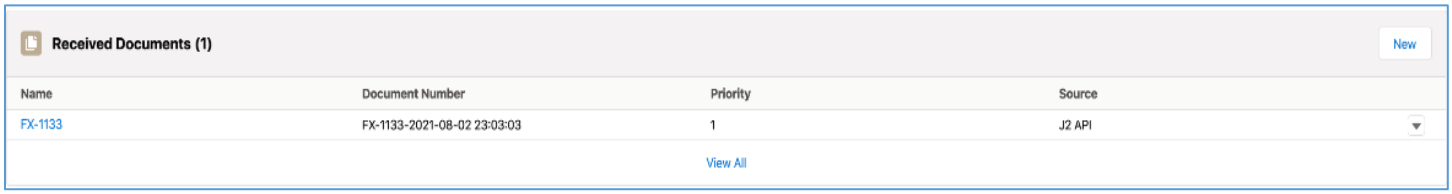
Depending on the configuration, you may also see:

- An **Activities** pane



Related (Info) > Activities *pane*
Shows activities related to the received fax

- A **Received Documents** pane



Related (Info) > Received Documents *pane*
Shows the document(s) received by the fax recipient

Revision History

Version	Date	Description
1.0	November 16, 2021	First release
1.1	October 13, 2022	Changes for software upgrade

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