



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

eFax Connector for Salesforce – User Guide

VERSION: 1.1

AUTHOR: Consensus Cloud Solutions, Inc.

DATE: 11/7/2022

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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.)

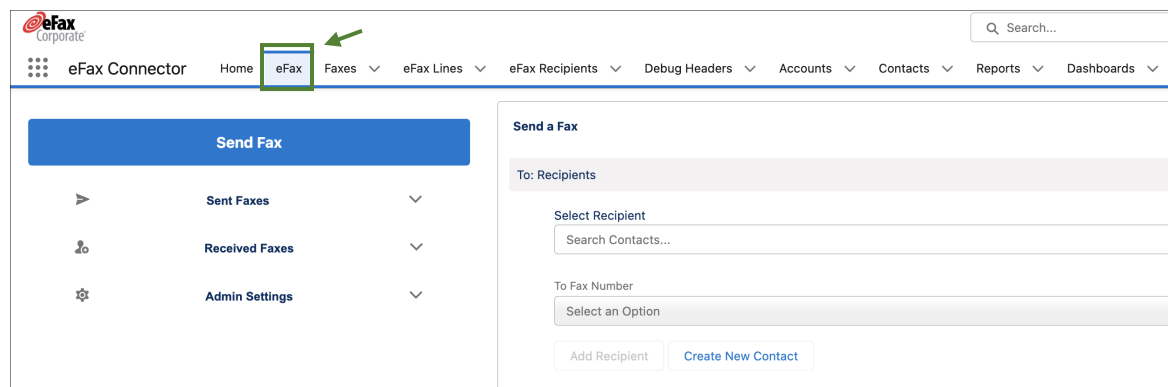


Navigation buttons in the **Adobe Reader** toolbar

✓ **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. [12](#)).
- View received faxes (pg. [24](#)).

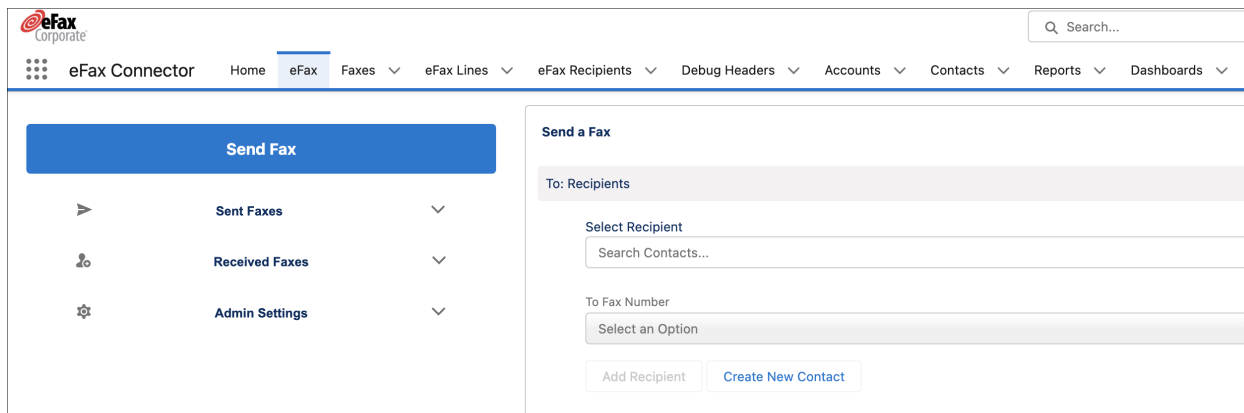
eFAX TAB (CONT.)

SWITCH TO SALESFORCE LIGHTNING OR SALESFORCE CLASSIC

There are two versions of Salesforce:

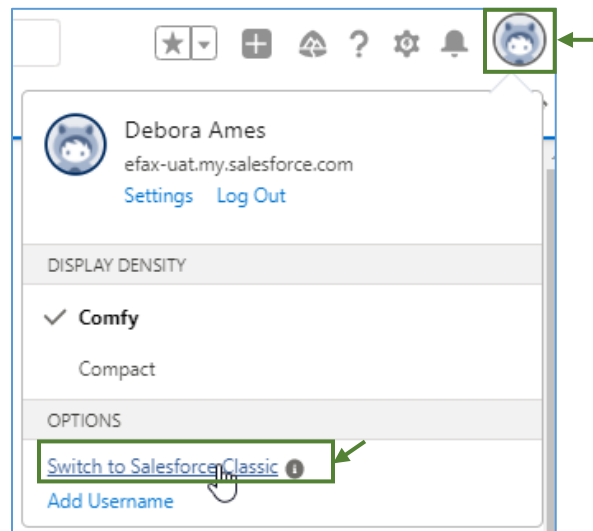
- *Salesforce Lightning* offers a new and improved interface with additional features that make it easier and more engaging for users.
- *Salesforce Classic* offers the original interface, updated but without some key areas offered in the above version.

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

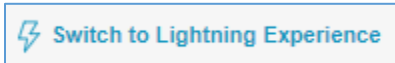
eFAX TAB (CONT.)

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.



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.

The screenshot displays the eFax Corporate web interface. The left navigation pane shows the 'Send Fax' button highlighted with a green arrow. The top navigation bar includes a search bar and various menu items. The 'Send a Fax' button is circled in green. The main content area is titled 'Send a Fax' and contains the following sections:

- To: Recipients**: Includes a 'Select Recipient' dropdown, a 'Search Contacts...' input field, a 'To Fax Number' dropdown, and a '* From Fax Number' field with the value '13233723771'. There are also 'Add Recipient' and 'Create New Contact' buttons.
- * Recipient List**: A section for listing recipients.
- Options**: Includes a 'Resolution' dropdown set to 'Fine', a 'TSID' field with the placeholder 'Enter TSID', and a checkbox for 'Include Cover Page'.
- Client Tracking Data**: Includes fields for 'Id' (placeholder 'Enter Id'), 'Matter' (placeholder 'Enter Matter'), 'Reference Id' (placeholder 'Enter Reference Id'), 'Code' (placeholder 'Enter Code'), 'Name' (placeholder 'Enter Name'), and 'Billing Code' (placeholder 'Enter Billing Code').
- * Attachments**: A section for uploading attachments, with buttons for 'Upload from Salesforce' and 'Upload from Local Directory'.

At the bottom right of the form are 'Send' and 'Cancel' buttons.

Send a Fax screen

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

Select Recipient
Search Contacts...

To Fax Number
Select an Option

Account

* From Fax Number
13234175077

Add Recipient Create New Contact

* Recipient List

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. Select Recipient oli Show All Results for "oli" oliver beqaj eFax Connector Test <i>Search for and select a name</i>

Continued on next page

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.)

To: Recipients

Select Recipient
oliver beqaj

To Fax Number
13234175077

Add RecipientCreate New Contact

Account
eFax Connector Test

* From Fax Number
13234175077

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.)

To: Recipients

Select Recipient
Search Contacts...

To Fax Number
Select an Option

Add RecipientCreate New Contact

Account

* From Fax Number
13234175077

* Recipient List
oliver beqaj

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

Continued on next page

eFAX TAB (CONT.)**SEND A FAX (Cont.)**

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

Actions	Instructions
2 (Cont.)	✓ NOTE: If the recipient is <u>not already a contact</u> in the system: - Click the Create New Contact button.  - 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. - 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).

Create New Contact

Contact Details

First Name	oliver	Last Name *	beqaj
Email	oliver.beqaj@xxx.com	Fax *	13233723771
Account *	 eFax Connector Test ×		

Cancel Save

Adding a new contact

--	--

Continued on next page

eFAX TAB (CONT.)

SEND A FAX (Cont.)

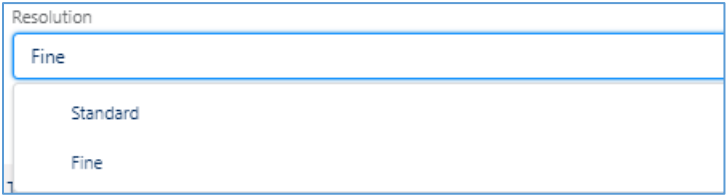
- In the **Options** pane:

Options

Resolution TSID

☐ Include Cover Page

Options pane

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

Options

Resolution TSID

☒ Include Cover Page

*Cover-page information**Continued on next page*

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 Code:** A fax ID used in billing the sender/department and in billing reports

The screenshot shows a form titled "Client Tracking Data" with six input fields arranged in two columns. The left column contains fields for "Id", "Matter", and "Reference Id", each with a placeholder text "Enter [field name]". The right column contains fields for "Code", "Name", and "Billing Code", each with a placeholder text "Enter [field name]".

Client-Tracking Data pane

- In the **Attachments** pane: Click **Upload from Local Directory** to select a document from your local drive or network, or click **Upload from Salesforce** to upload from your Salesforce library. 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

The screenshot shows a dialog box titled "* Attachments". It contains two buttons at the top: "Upload from Salesforce" and "Upload from Local Directory". At the bottom, there are two buttons: "Send" and "Cancel".

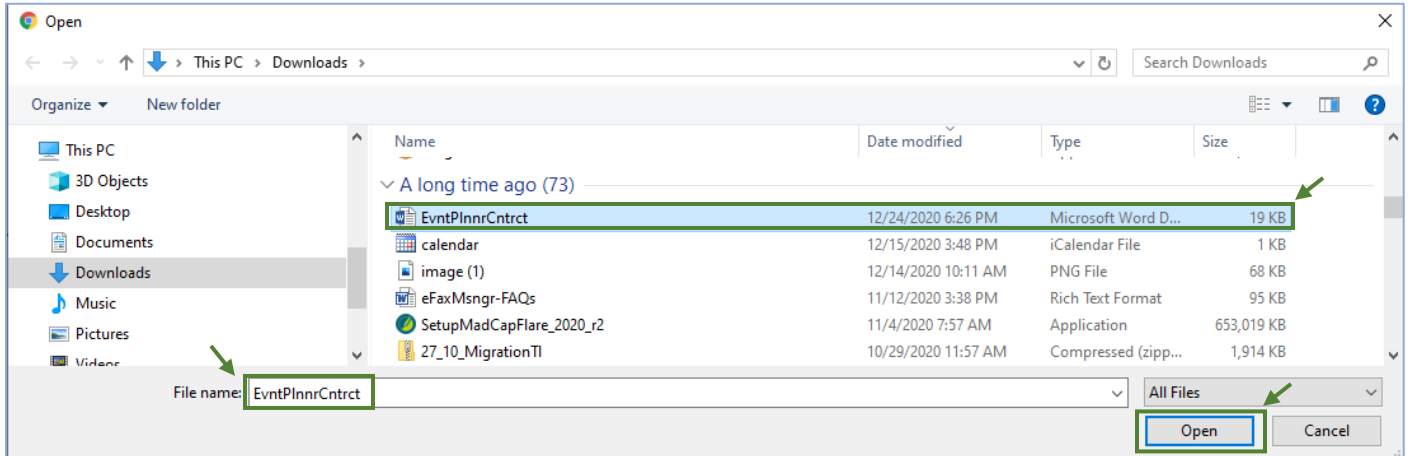
Attachments pane

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

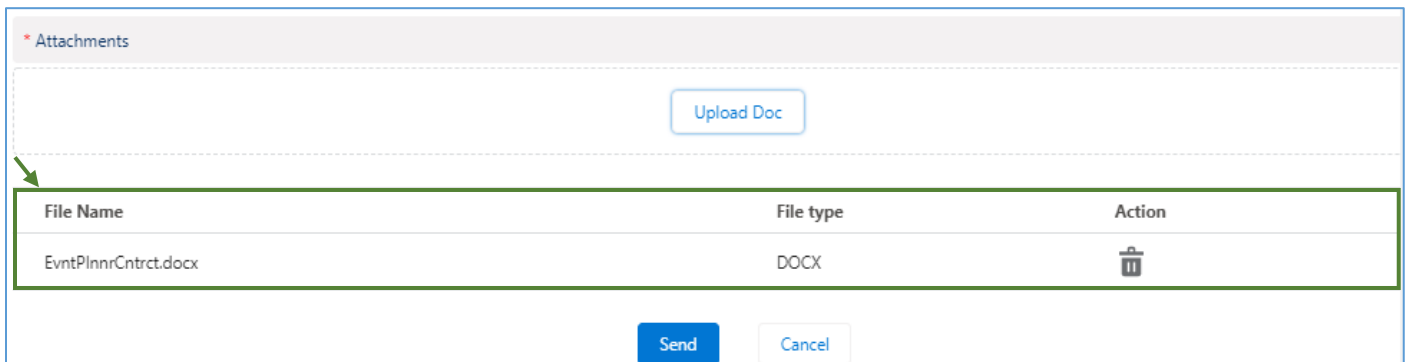
eFAX TAB (CONT.)

SEND A FAX (Cont.)

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



Selecting *EvtPlnnrCntrct* from a local directory



Selected attachment

2. Click the **Send** button...

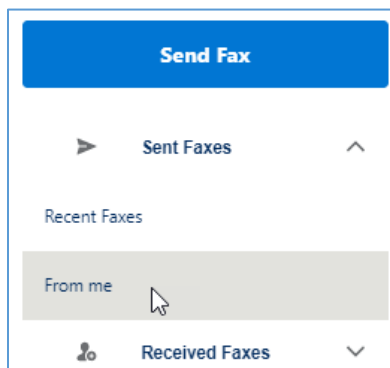
...(then the square, at the prompt, to exit the confirmation).



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).

Sent Faxes											
Send Fax Sent Faxes Recent Faxes From me Received Faxes Clear All Filters Created Date Filter Contact Search All Search People...											
Showing 25 entries											
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	
Showing 1 to 2 of 2 entries											
Previous 1 Next											

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

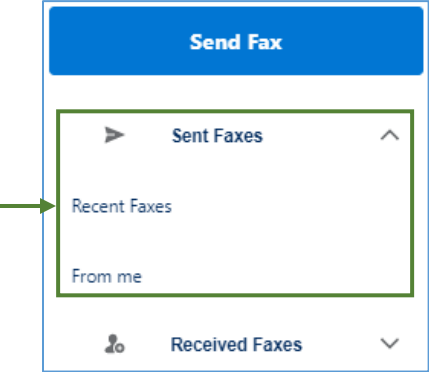
Fax just now sent, with a status of NEW

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. 14).
- Change the owner of a sent fax (pg. 14).
- View faxes, by date range (pg. 16).
- Search for faxes sent to a particular contact (pg. 17).
- Sort faxes, by pagination (pg. 18).
- Filter faxes, by status (pg. 19).
- Cancel a fax (pg. 20).
- Search for faxes, by owner (pg. 20).
- View a fax’s details (pg. 21).
- Resend a fax (pg. 23).

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.  <i>Accessing sent faxes</i>

Continued on next page

eFAX TAB (CONT.)

VIEW SENT FAXES (CONT.)

Actions

**VIEW RECENTLY SENT
FAXES OR ONLY
FAXES I'VE SENT
(CONT.)**

Instructions

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:

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	Del
Resend View	UNKNOWN	13235440941	David Wing	2021-07-01 16:15	1		David Wing	COMPLETE	2021-07-01 16:15	Del
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-12 16:38	1		oliver beqaj	COMPLETE	2021-05-12 16:38	Del
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-12 16:35	1		oliver beqaj	COMPLETE	2021-05-12 16:35	Del
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-04 12:13	1		oliver beqaj	COMPLETE	2021-05-04 12:13	Del
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-05-03 20:20	1		Jo Schmo	COMPLETE	2021-05-03 20:20	Del
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-05-03 19:27	1		oliver beqaj	COMPLETE	2021-05-03 19:27	Del
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-05-03 18:20	1		Jo Schmo	COMPLETE	2021-05-03 18:20	Del
Resend View	UNKNOWN	13235440941	oliver beqaj	2021-04-13 12:58	1		oliver beqaj	COMPLETE	2021-04-13 12:58	Del
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-04-13 12:55	1		Jo Schmo	COMPLETE	2021-04-13 12:55	Del
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-04-13 12:50	1		Jo Schmo	COMPLETE	2021-04-13 12:50	Del
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-04-13 06:18	1		Jo Schmo	COMPLETE	2021-04-13 06:18	Del
Resend View	UNKNOWN	13235440941	Jo Schmo	2021-04-08 16:34	1		Jo Schmo	COMPLETE	2021-04-08 16:34	Del

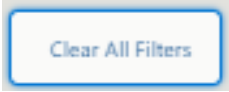
Sent Faxes screen > Faxes From Me

- **Recipient(s)** – Although one name displays, to see all 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.

Continued on next page

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 <u>all</u> 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. 13). (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 <u>account administrator</u> (and the instructions are the same if changing the owner of a received fax [via pg. 26]). To change the owner of a sent fax: 1. Select the faxes you want to view (pg. 12)—then: Check the box of the fax whose owner you want to change.

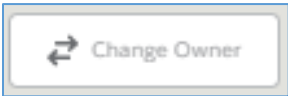
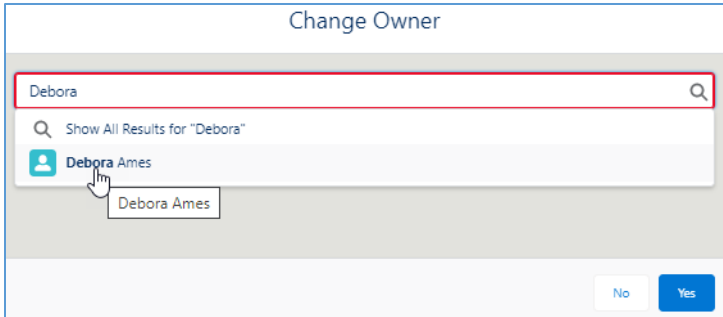
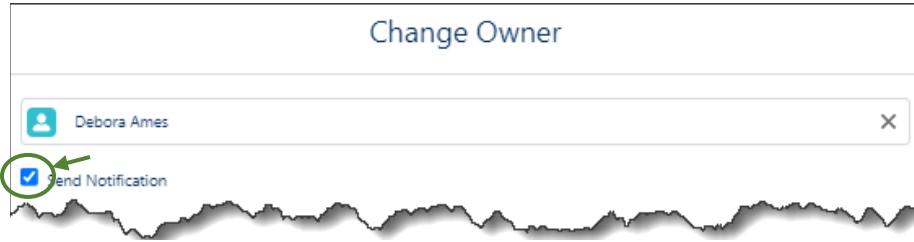
Action	Subject	From	Recipient(s)	Created	Page	Billing Code	Primary Contact	Status	Last Updated	Owner
 Resend View	UNKNOWN	13235442314	John M	2021-07-22 16:35	1		John M	ERROR	2021-07-22 16:35	Arun Reddy

Current owner is **Arun Reddy**

Continued on next page

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. 13). 
	3. In the dialog, enter and select a name in the search textbox.  <i>Search for another owner</i>
	4. Check the Send Notification box, then click the Yes button.  <i>New owner is selected and will be notified by email</i>

Continued on next page

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.)

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

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

Owner changed successfully.

**VIEW FAXES,
BY DATE RANGE**

To view faxes, by date range:

1. Select the faxes you want to view (pg. 12)—then: Click the **Created-Date Filter** button at the top of the **Sent Faxes** screen (pg. 13).

Created Date Filter

2. In the **Select a Date** dialog, select your start and end dates, then click **Apply**.

Select Date Range

From Date

Jul 21, 2021

To Date

Jul 30, 2021

Apply

Clear

Cancel

*Selecting **July 21, 2021** through **July 30, 2021***

Continued on next page

eFAX TAB (CONT.)

VIEW SENT FAXES (Cont.)

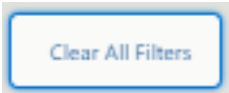
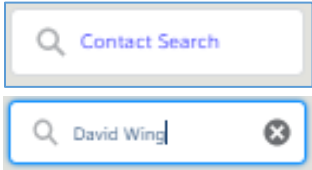
Actions	Instructions
VIEW FAXES, BY DATE RANGE (CONT.)	The Send Faxes screen refreshes accordingly.

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

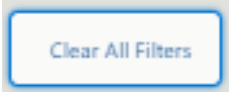
	3. Click the Clear All Filters button at the top of the screen to re-display <u>all</u> faxes. 
SEARCH FOR FAXES TO A PARTICULAR CONTACT	To search for faxes sent to a particular contact: 1. Select the faxes you want to view (pg. 12)—then: Click the Contact Search textbox, enter a name, then press Enter 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

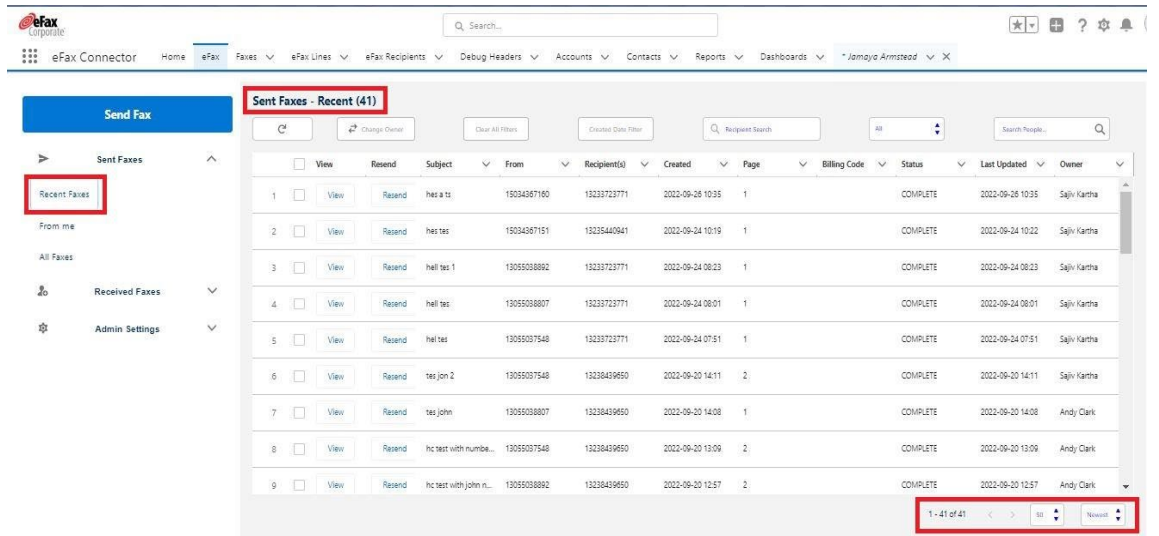
*Faxes sent to the primary contact **David Wing**, display*

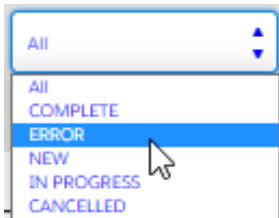
	2. Click the Clear All Filters button at the top of the screen to re-display <u>all</u> faxes. 
--	---

Continued on next page

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, <i>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.</i> 

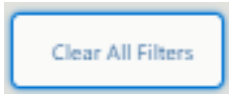
Actions	Instructions
FILTER FAXES, BY STATUS	To filter faxes by status: 1. Select the faxes you want to view (pg. 12). 2. Click the All drop-down menu at the top of the Sent Faxes screen (pg. 13), and select the relevant status.  <i>Select the statused faxes you want to view</i> The screen refreshes 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

Showing 1 to 1 of 1 entries

Previous 1 Next

*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. 
--	--

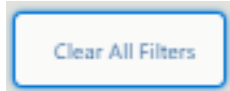
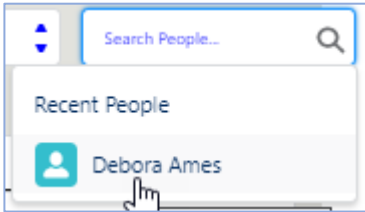
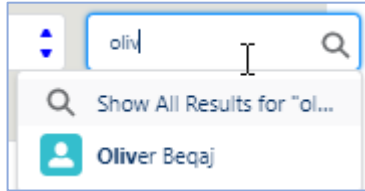
Continued on next page

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 <i>View a Fax's Details</i> on pg. 21.) To cancel a NEW or IN PROGRESS fax: 1. Select the faxes you want to view (pg. 12), 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. 22), 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).

Fax Recipients							
Name	Efax Id	Company	To	Status	Completed		
test new	bf049664-03dc-4ba3-8e5c-90e79ff053cd	Burlington Textiles Corp of America	13239672858	New	2021-06-22 08:37	Resend	Cancel Refresh

	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

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 <u>all</u> faxes. Clear All Filters
VIEW A FAX'S DETAILS	To view a fax's details: 1. Select the faxes you want to view (pg. 12), 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

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. 31.)

The screenshot displays the 'Details' tab for a specific fax record (FX-1106). The interface includes a header with the eFax logo and a navigation bar with buttons for 'New Opportunity', 'Edit', and 'New Case'. The main content area is divided into several sections:

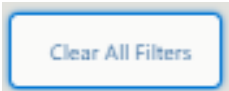
- Fax Detail:** Fields include eFax Name (FX-1106), Fax ID (b44ef286-cab0-4da3-a846-bcd224d328e3), From (13234175077), CSID, TSID, Record Type (Sent Fax), Page, and Resolution (Fine).
- Cover Page:** Fields include From (DJ Ames), Subject (Earth Day in Sedona), and Message (Here's the contract for the three-day "Chillin' on Earth Day 2021" celebration in Sedona, Arizona).
- Client Tracking Data:** Fields include Code, Id, Matter, Client Name, Reference Id, and Billing Code.
- Fax Recipients:** A table listing recipients with columns for Name, Efax Id, Company, To, Status, Last Updated, and actions (Resend, Cancel, Ref).
- Attachments:** A table listing attachments with columns for Name, Size(KB), Type, and actions (Preview, Download, Remove).
- Related Object:** Fields include Debug Header, Primary Contact (oliver beqaj), Created By (Debra Ames, 8/2/2021, 2:38 PM), Account, Opportunity, and Last Modified By (Debra Ames, 8/2/2021, 2:38 PM).

Details record of FX-1106

Continued on next page

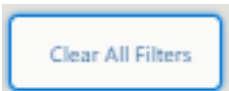
eFAX TAB (CONT.)

VIEW SENT FAXES (CONT.)

Actions	Instructions
VIEW A FAX'S DETAILS (CONT.)	2. Back on the Sent Faxes screen (pg. 13), click the Clear All Filters button (at the top of the screen) to re-display <u>all</u> faxes. 
RESEND A FAX	To resend a fax: 1. Select the faxes you want to view (pg. 12), then click its Resend link.

Action	Subject	From	Recipient(s)	Status	Page	Billing Code	Primary Contact	Completed	Last Updated	Owner
☐ Resend View	Beqaj	13233723771	frank Toscano	COMPLETE	2		frank Toscano	2021-02-18T23:22:42.000Z	2021-02-19T01:48:36.000Z	Sudarsar

*Click **Resend** to submit again*

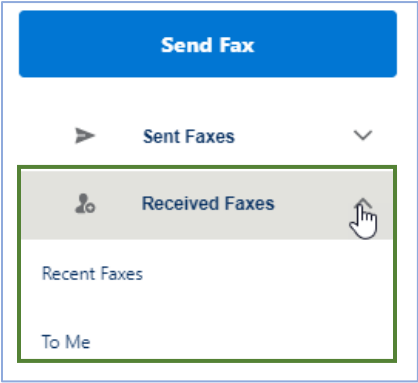
	Its Send a Fax screen appears (pg. 4), auto-populated with: ○ Your fax number in the From: Recipient field ○ The recipient(s) the fax was sent to ○ The fax's attachments See <i>Send a Fax</i> on pgs. 4-12 for instructions. 2. Back on the Sent Faxes screen (pg. 13), click the Clear All Filters button (at the top of the screen) to re-display <u>all</u> faxes. 
--	---

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. 26).
- Change the owner of a received fax (pg. 26).
- Link a fax to your contacts (pg. 26).
- View faxes, by date range (pg. 29).
- Search for faxes, by sender TSID/phone number (pg. 29).
- Sort faxes, by pagination (pg. 30).
- Search for faxes, by owner (pg. 30).
- View a fax’s details (pg. 30).

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.  <i>Accessing sent faxes</i>

Continued on next page

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

Search TSID or Ph Search People...

Show 25 entries

Action	From	TSID	TO	Pages	Owner	Last Updated
☐ Link View	+19094650808		13234175077	2	Kevin Coffee	2021-07-29 16:59
☐ Link View	+19099122211	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-07-27 18:12
☐ Link View	+12677736022		13233723771	1	Oliver Beqaj	2021-07-26 15:13
☐ Link View	+15034367160	18183377530	13235440941	1	Debora Ames	2021-06-15 20:44
☐ 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	+13074433753	8774012373	13233723771	1	Oliver Beqaj	2021-06-02 13:11
☐ Link View	+15165483928	8775753187	13233723771	1	Oliver Beqaj	2021-04-28 16:16

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.

Continued on next page

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. 25). (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 RECEIVED FAX	✓ NOTE: This button only displays for the <u>account administrator</u>. To change the owner of a received fax: Select the faxes you want to view (pg. 24), then follow the same instructions stated for sent faxes, on pgs. 14-17.
LINK A FAX TO YOUR CONTACTS	To associate a fax with one of more of your contacts: Select the faxes you want to view (pg. 24)—then: Check the box(es) of the fax(es) you want to link, and click the Link Contacts button. 

Received Faxes

☐  

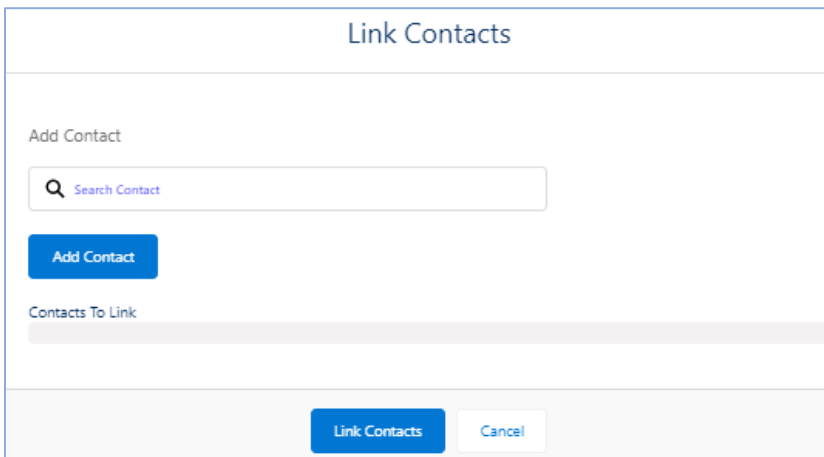
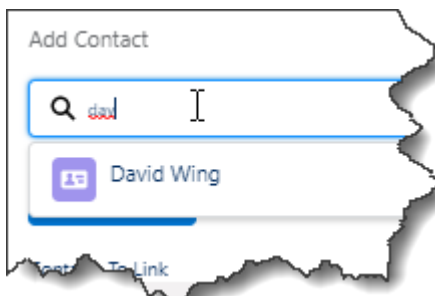
Show 25 entries

	Action	From	TSID	TO	Pages	Owner	Last Updated
☐	Link View	+19094650808		13234175077	2	Kevin Coffee	2021-07-29 16:59
☒	Link View	+19093122211	SpanDSP Fax Ident	13233723771	1	Oliver Beqaj	2021-07-27 18:12
☐	Link View	+12677736022		13233723771	1	Oliver Beqaj	2021-07-26 15:13
☐	Link View	+15034367160	18183377530	13235440941	1	Debora Ames	2021-06-15 20:44
☒	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

Checking the fax(es) you want to link

Continued on next page

eFAX TAB (CONT.)**VIEW RECEIVED FAXES (Cont.)**

Actions	Instructions
LINK A FAX TO YOUR CONTACTS (CONT.)	2. In the Link Contacts dialog:  <i>Link Contacts dialog</i> a. Enter the contact's name in the search textbox, then select it.  <i>Searching for contact's name</i>

Continued on next page

eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

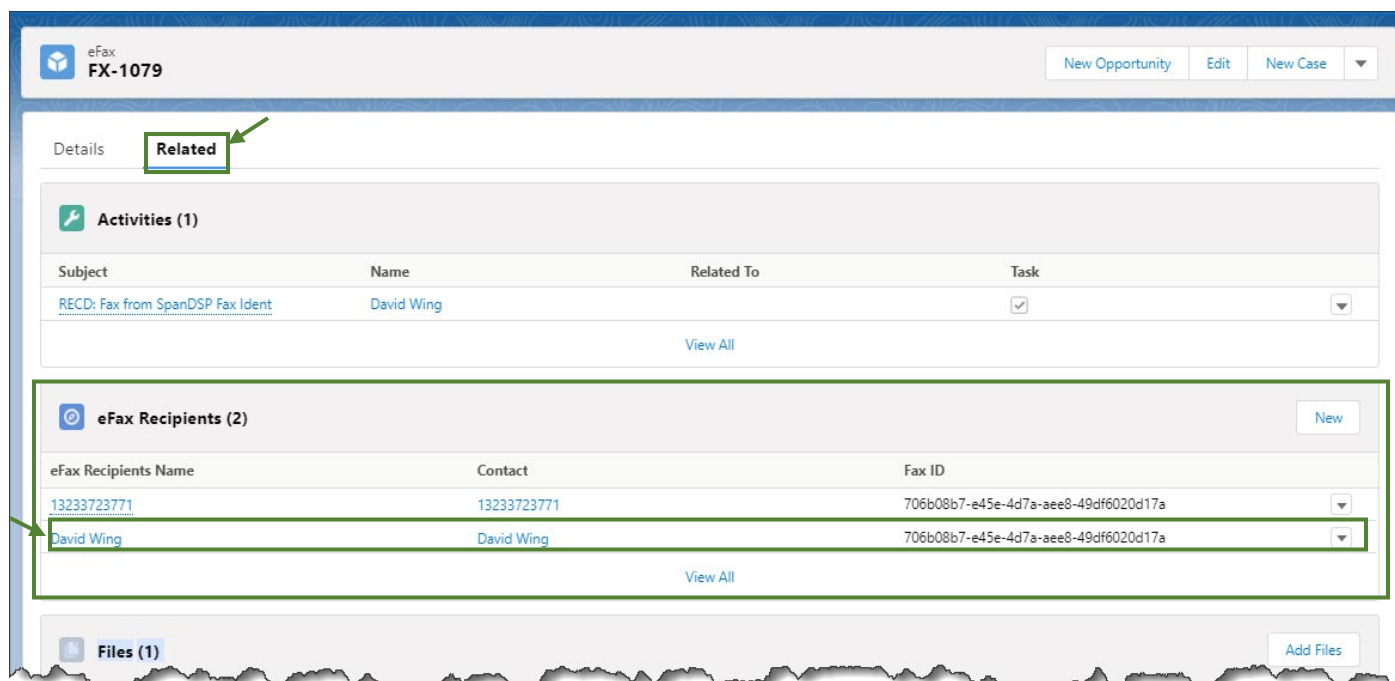
Actions	Instructions
LINK A FAX TO YOUR CONTACTS (CONT.)	b. Click the Add Contact button. The name appears in the Contacts to Link pane. Link Contacts Add Contact David Wing X Add Contact Contacts To Link Link Contacts Cancel <i>The selected contact's name...</i> Link Contacts Add Contact Search Contact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

Continued on next page

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. <i>(For more information about the record, see Appendix B: Fax Details/Related Information of a Received Fax on pg. 36.)</i>



*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. 24)—then: Follow the same instructions stated for sent faxes, on pgs. 16-18.
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. 24)—then enter a partial TSID or phone number in the Search TSID textbox, and press Enter on your keyboard. <i>Searching by TSID...</i> <i>...or by phone number</i>

Continued on next page

eFAX TAB (CONT.)

VIEW RECEIVED FAXES (Cont.)

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

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, <i>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.</i>
SEARCH FOR FAXES, BY OWNER	To search for faxes by owner: Follow the same instructions stated for sent faxes, on pgs. 20-21 .
VIEW A FAX'S DETAILS	To view a fax's details: Select the faxes you want to view (pg. 24), then follow the same instructions stated for sent faxes, on pgs. 21-23 .

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

Sent Fax – Details Tab

J2 GLOBAL | Home | eFax | Accounts | Contacts | Reports | Dashboards | **eFaxes** | eFax Lines | eFax Recipients | Debug Headers

eFax FX-1106 | New Opportunity | Edit | New Case

Details | Related

Fax Detail

efax Name FX-1106	Record Type Sent Fax
Fax ID b44ef286-cab0-4da3-a846-bcd224d328e3	Page
From 13234175077	Resolution Fine
CSID	
TSID	

Cover Page

From DJ Ames	Message Here's the contract for the three-day "Chillin' on Earth Day 2021" celebration in Sedona, Arizona.
Subject Earth Day in Sedona	

Client Tracking Data

Code	Client Name
Id	Reference Id
Matter	Billing Code

Fax Recipients

Name	Efax Id	Company	To	Status	Last Updated	
oliver beqaj	b44ef286-cab0-4da3-a846-bcd224d328e3	efax Connector Test	13234175077	New	2021-08-02 14:38	Resend Cancel Refresh

Attachments

Name	Size(KB)	Type			
EvtPinnrCntrct.docx	18.01	WORD_X	Preview	Download	Remove

Related Object

Debug Header	Account
Primary Contact oliver beqaj	Opportunity
Created By Debra Ames, 8/2/2021, 2:38 PM	Last Modified By Arun Reddy, 8/2/2021, 3:59 PM

A sent fax's (FX-1106) details

Sent Fax – Details Tab (Cont.)

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

Fax Detail	
efax Name FX-1106	Record Type Sent Fax
Fax ID ⓘ b44ef286-cab0-4da3-a846-bcd224d328e3	Page
From 13234175077	Resolution Fine
CSID ⓘ	
TSID	

Details > Fax Detail pane

Shows the fax name, type [Sent], and ID/process info²

Cover Page	
From ⓘ DJ Ames	Message Here's the contract for the three-day "Chillin' on Earth Day 2021" celebration in Sedona, Arizona.
Subject Earth Day in Sedona	

Details > Cover Page pane

Shows cover-page information

Client Tracking Data	
Code	Client Name
Id	Reference Id
Matter	Billing Code

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.

Sent Fax – Details Tab (Cont.)

Fax Recipients									
Name	Efax Id	Company	To	Status	Last Updated				
oliver beqaj	b44ef286-cab0-4da3-a846-bcd224d328e3	eFax Connector Test	13234175077	New	2021-08-02 14:38		Resend	Cancel	Refresh

Details > Fax Recipients pane

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

Attachments									
Name	Size(KB)	Type							
EvtPlnnrCntrct.docx	18.01	WORD_X					Preview	Download	Remove

Details > Attachments pane

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

Related Object			
Debug Header		Account	
Primary Contact		Opportunity	
oliver beqaj			
Created By		Last Modified By	
Debra Ames , 8/2/2021, 2:38 PM		Debra Ames , 8/2/2021, 2:38 PM	

Details > Related Object pane

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

Sent Fax – Related Tab

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

Activities (1)

Subject	Name	Related To	Task
Earth Day in Sedona	oliver beqaj		☒

[View All](#)

eFax Recipients (1)

eFax Recipients Name	Fax ID	Contact	To
oliver beqaj	b44ef286-cab0-4da3-a846-bcd224d328e3	oliver beqaj	(323) 417-5077

[View All](#)

Files (1)

Name	Size	Created
EvtntPlnnrCntrct.docx	18KB	Aug 2, 2021

[View All](#)

Debug Logs (0)

Received Documents (1)

Name	Document Number	Priority	Source
EvtntPlnnrCntrct.docx	EvtntPlnnrCntrct.docx-2021-08-02 21:38:56	1	J2 API

[View All](#)

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

Activities (1)			
Subject	Name	Related To	Task
Earth Day in Sedona	oliver beqaj		☒
View All			

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

Sent Fax – Related Tab (Cont.)

eFax Recipients (1) New			
eFax Recipients Name	Fax ID	Contact	To
oliver beqaj	b44ef286-cab0-4da3-a846-bcd224d328e3	oliver beqaj	(323) 417-5077
View All			

Related (Info) > eFax Recipients pane

Shows the recipient's name, ID/contact info, and fax number

Files (1) Add Files	
EvtntPlnnrCtrct.docx Aug 2, 2021 • 18KB • docx	
View All	

Related (Info) > Files pane

Shows the file(s) attached to the fax

Debug Logs (0) New	
---------------------------------	--

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.

Received Documents (1)			
Name	Document Number	Priority	Source
EvtntPlnnrCtrct.docx	EvtntPlnnrCtrct.docx-2021-08-02 21:38:56	1	J2 API
View All			

Related (Info) > Received Documents pane

Shows the document(s) received by the fax recipient

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.

eFax
FX-638

Details Related

▼ Fax Detail

eFax Name	FX-638	Record Type	Received Fax
Fax ID	dc4192fc-2571-447d-b7ab-ecca64f42540	Owner	Debora Ames
From	+13053972534	Completed	3/13/2021, 10:25 PM
To	(323) 544-2314	Page	4
Status	STORED	TSID	13235446198

▼ Fax Recipients

Name	Efax Id	Company	To	Status	Completed	
13235442314	dc4192fc-2571-447d-b7ab-ecca64f42540		13235442314	STORED	Sun Mar 14 06:25:57 GMT 2021	Resend Cancel Refresh

▼ Attachments

Name	Size(KB)	Type		
FX-638	825.43	TIFF	Download	Remove

Created By: Debora Ames, 3/13/2021, 4:22 PM

Last Modified By: Debora Ames, 3/13/2021, 4:22 PM

A received fax's (FX-638) details

Received Fax – Details Tab (Cont.)

Details		Related
▼ Fax Detail		
efax Name	Record Type	
FX-638	Received Fax	
Fax ID ⓘ	Owner	
dc4192fc-2571-447d-b7ab-ecca64f42540	Debra Ames	
From	Completed	
+13053972534	3/13/2021, 10:25 PM	
To	Page	
(323) 544-2314	4	
Status	TSID	
STORED	13235446198	

Details > Fax Detail pane

Shows the fax name, type (**Received**), ID info, number of pages, and status (**STORED**)

▼ Fax Recipients									
Name	Efax Id	Company	To	Status	Completed				
13235442314	dc4192fc-2571-447d-b7ab-ecca64f42540		13235442314	STORED	Sun Mar 14 06:25:57 GMT 2021	Resend	Cancel	Refr	

Details > Fax Recipients pane

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

▼ Attachments				
Name	Size(KB)	Type		
FX-638	825.43	TIFF	Download	Remove

Details > Attachments pane

Shows the attachment(s) sent with the fax

Created By	Last Modified By
Debra Ames , 3/13/2021, 4:22 PM	Debra Ames , 3/13/2021, 4:22 PM

Details > Created/Modified by pane

Shows who created and last modified this fax

Received Fax – Related Tab

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

The screenshot displays the Salesforce interface for a received fax (FX-638). The top navigation bar includes the J2 Global logo and various menu items. The main content area is divided into three sections: 'eFax Recipients (1)', 'Files (1)', and 'Debug Logs (0)'. The 'eFax Recipients' section contains a table with columns for 'eFax Recipients Name', 'Contact', and 'Fax ID'. The 'Files' section shows a file named 'FX-638' with a date of 'Mar 13, 2021' and a size of '825KB'.

eFax Recipients Name	Contact	Fax ID
13235442314	Frank Toscano	dc4192fc-2571-447d-b7ab-ecca64f42540

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

The screenshot shows the 'Related (Info) > eFax Recipients' pane. It contains a table with the following data:

eFax Recipients Name	Contact	Fax ID
13235442314	Frank Toscano	dc4192fc-2571-447d-b7ab-ecca64f42540

Related (Info) > eFax Recipients pane

Shows the recipient's name and fax ID

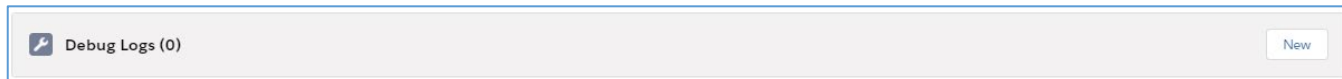
The screenshot shows the 'Related (Info) > Files' pane. It contains a table with the following data:

File Name	Date	Size
FX-638	Mar 13, 2021	825KB

Related (Info) > Files pane

Shows the file(s) attached to the fax

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:

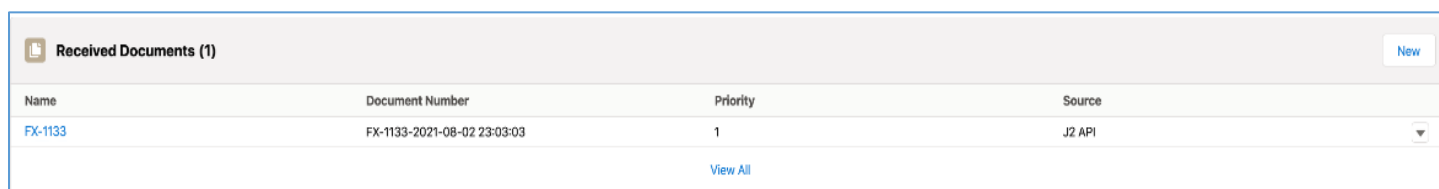
- An **Activities** pane



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	November 7, 2022	Changes for software upgrade