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EFAX CONNECTOR ADD ON FOR HEALTHCLOUD USER GUIDE

VERSION: 1.0

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GENERAL INFORMATION

This document describes basic functionality of the eFax Connector Add On for HealthCloud app.

PREREQUISITES

Both the standard eFax Connector for Salesforce and the eFax Connector Add On for HealthCloud must be installed and configured prior to use. Refer to the eFax Connector HealthCloud Installation Guide for details; you will find this guide in **the Resources & Documentation** section of the AppExchange for the standard eFax Connector by Consensus Cloud Solutions, Inc.

EFAX CONNECTOR ADD ON FOR HEALTHCLOUD USER GUIDE

The following sections provide basic information on using the eFax Connector for HealthCloud app. Additional details may be found in the eFax Connector User Guide.

SEND A FAX

When sending a fax, you may add recipients, provide fax options, add tracking info, and add attachments. After sending the fax, a record is created in the “Received Documents” tab of the user to whom the fax was sent.

Send a Fax - Add Recipient(s)

Add recipient information in the **To Recipients** pane. You may add recipients directly or through your Contacts List.

The screenshot shows the eFax Corporate web interface. The top navigation bar includes a search bar and various menu items like Home, eFax, Faxes, eFax Lines, eFax Recipients, Debug Headers, Accounts, Contacts, Reports, and Dashboards. The left sidebar has a 'Send Fax' button and sections for 'Sent Faxes', 'Received Faxes', and 'Admin Settings'. The main content area is titled 'Send a Fax' and contains several input fields: 'To: Recipients' (a search bar), 'Select Recipient' (a dropdown menu), 'Account' (a text field), 'To Fax Number' (a dropdown menu), 'From Fax Number' (a dropdown menu with the value '13233950406'), and a 'Recipient List' showing 'Arun Reddy' with a close button. There are also 'Add Recipient' and 'Create New Contact' buttons.

Send a Fax - Provide Options information

Options include fax resolution, including a cover page, and From and Message text fields.

The screenshot shows the 'Options' pane in the eFax Corporate web interface. The pane has a sidebar with links for 'Configure eFax Account', 'Manage Users', 'Manage Fax Lines', and 'Modify/Add Fax Button'. The main area contains several input fields: 'Resolution' (a dropdown menu set to 'Fine'), 'TSID' (a text field with the placeholder 'Enter TSID'), 'Include Cover Page' (a checked checkbox), 'From' (a text field), 'Message' (a text area), and 'test fnc Nov4' (a text field).

Send a Fax - Input Client Tracking Data

Add Client Tracking Data, and add any attachments to the fax using the file upload mechanism in **Upload from Local Directory**.

Client Tracking Data

Id: Code:

Matter: Name:

Reference Id: Billing Code:

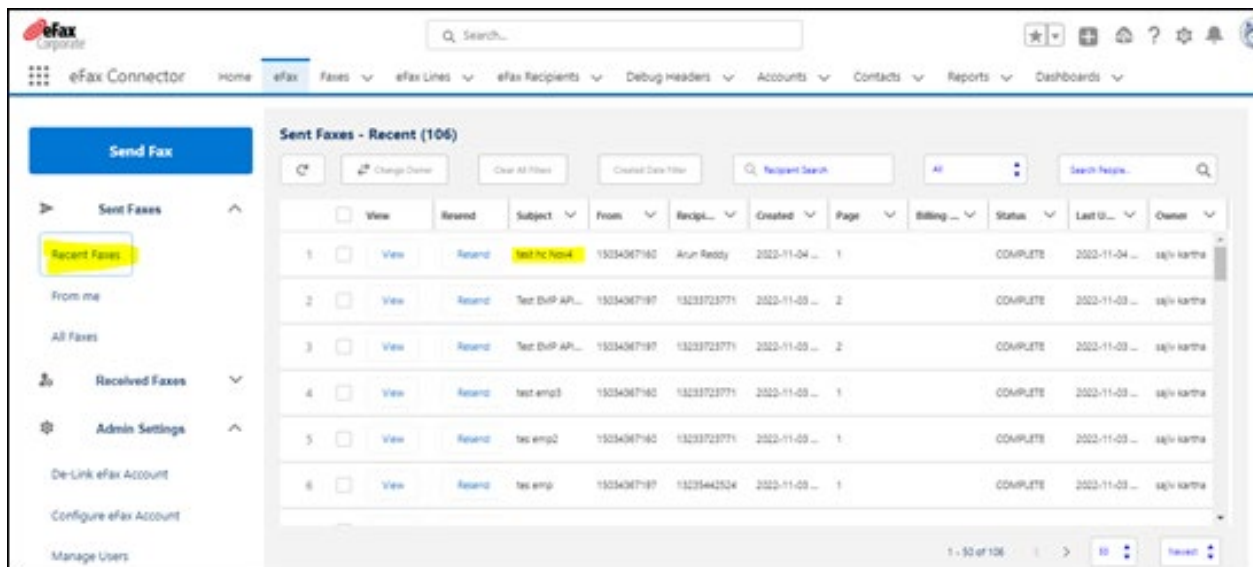
* Attachments

Once the file is selected from the local directory, file information displays in the section above the **Send** Button.

* Attachments

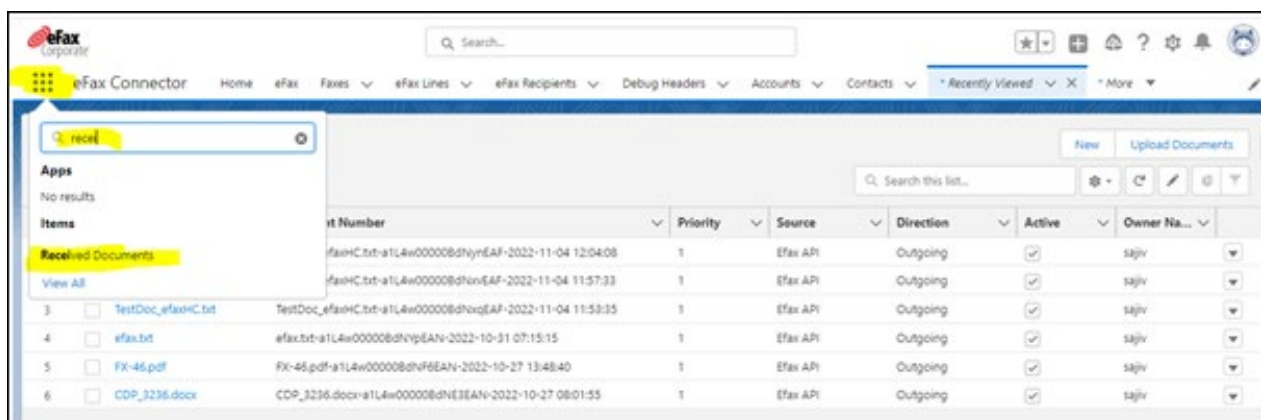
File Name	File type	Action
TestDoc_efaxHC.txt	TXT	

Click **Send** to send the fax. The **Sent Faxes** section shows the details of the fax just sent on the top of the list.

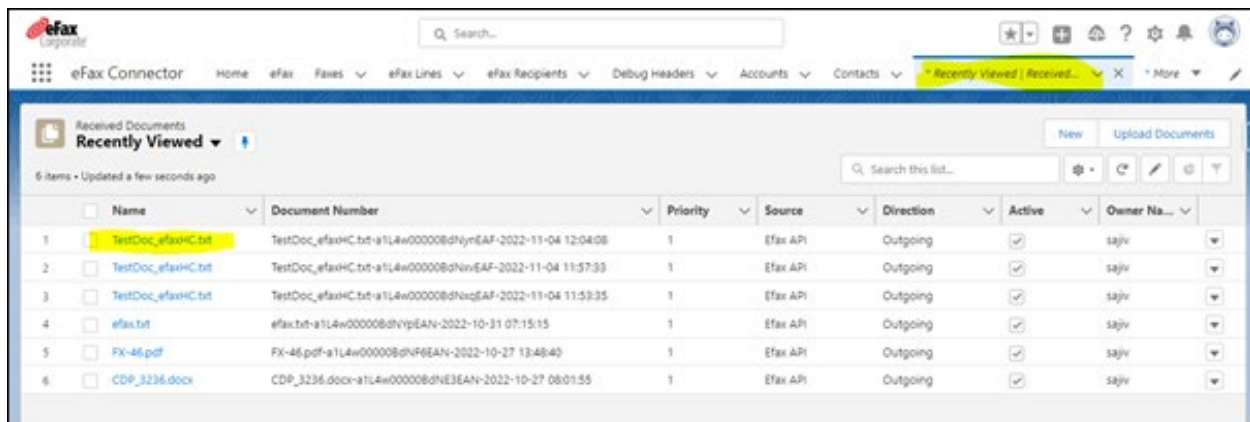


RECEIVED DOCUMENT TAB

In the app, search for **Received Documents**.



The **Received Documents** tab shows all faxes that were sent to this user.



The screenshot shows the eFax Connector interface. The top navigation bar includes 'eFax Connector', 'Home', 'eFax', 'Faxes', 'eFax Lines', 'eFax Recipients', 'Debug Headers', 'Accounts', 'Contacts', and a highlighted 'Recently Viewed / Received...' tab. Below the navigation bar, the 'Received Documents' section is active, showing 'Recently Viewed' with a dropdown arrow. It indicates '6 items • Updated a few seconds ago'. A search bar 'Search this list...' is present. The table below lists the received documents with columns: Name, Document Number, Priority, Source, Direction, Active, and Owner Name.

	Name	Document Number	Priority	Source	Direction	Active	Owner Name
1	TestDoc_efaxHC.txt	TestDoc_efaxHC.txt-a1L4w00000dNymEAF-2022-11-04 12:04:08	1	Efax API	Outgoing	✓	sajiv
2	TestDoc_efaxHC.txt	TestDoc_efaxHC.txt-a1L4w00000dNymEAF-2022-11-04 11:57:33	1	Efax API	Outgoing	✓	sajiv
3	TestDoc_efaxHC.txt	TestDoc_efaxHC.txt-a1L4w00000dNymEAF-2022-11-04 11:53:35	1	Efax API	Outgoing	✓	sajiv
4	efax.txt	efax.txt-a1L4w00000dNymEAN-2022-10-31 07:15:15	1	Efax API	Outgoing	✓	sajiv
5	PX-46.pdf	PX-46.pdf-a1L4w00000dNymEAN-2022-10-27 13:48:40	1	Efax API	Outgoing	✓	sajiv
6	CDP_3236.docx	CDP_3236.docx-a1L4w00000dNymEAN-2022-10-27 08:01:55	1	Efax API	Outgoing	✓	sajiv