Fusion FAX:
Admin User Guide
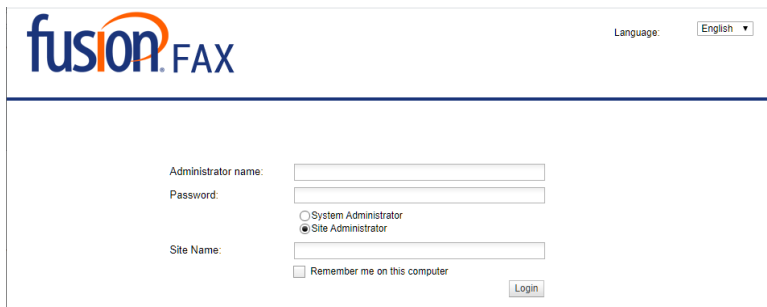
fusion connect.

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About Fusion Fax

Fusion Fax allows users to manage, send, and receive faxes from an authorized email address or through the Fusion Fax Portal.

There are two separate web logins – one for Users and one for Administrators. This guide covers the functionality available to *Administrators*.
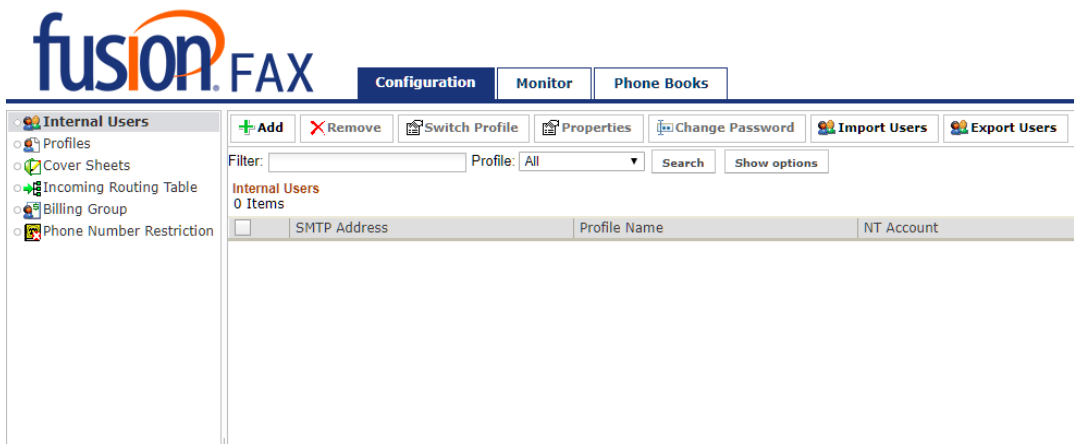
Logging In

To log in as an administrator, go to the web site: https://faxadmin.fusionconnect.com/

- • **Administrator Name:** Administrator ID
- • **Password:** Administrator Password
- • **Site Name:** Site Name ID

Note: You must log in as a Site Administrator. If System Administrator is accidently selected, you will not be able to log in to the portal.

Once you are logged in, you will be presented with the following screen:

Across the top, there are three sections available to administrators: **Configuration, Monitor,** and **Phone Book**. Each of these sections will be reviewed in separates section below. Functions within the specific modules are listed down the left hand window

Internal Users

This section list all user accounts associated with the account. Administrators are able to manage the properties and profile of users.

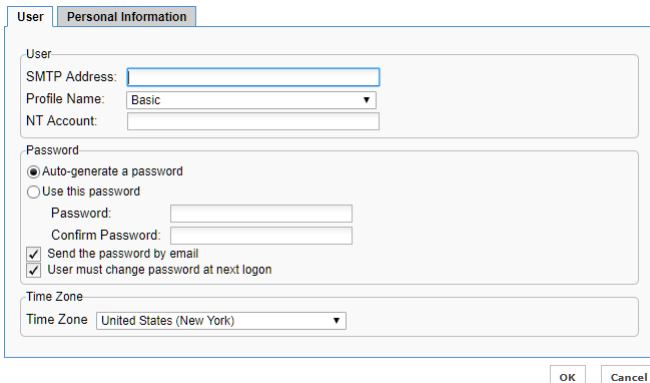Functions available to the administrator within this menu are:

- **Add:** Add a new User
- **Remove:** Remove User(s)
- **Switch Profile:** change the profile settings between two users
- **Properties:** Change the properties of a User
- **Change Password:** Change the password of a User

Note: The User ID must be selected before the above options will be available. To Switch Profiles, two User IDs must be selected

Note: Users can be filtered using the filter bar. Wildcards ("*") are required if the match is not exact

Creating a New User

To create a new Fusion Fax user, select ➕**Add** from the top of the page. You will then be presented with the following screen:

When creating a new user, the administrator is presented following fields

User:

User:

- **SMTP Address:** user email address
- **Profile Name:** select the profile from the drop down menu. By default, the **Basic** profile is selected. For more information, please see the Profiles section of this guide.
- **NT Account:** optional field

Password:

- **Auto-generate a password:** The system will automatically create a new password for the user
- **Use this password:** Allows the administrator to manually enter a password for the user

- **Send the password by email:** Emails the password directly to the user. Users will receive an automated email from support@fusionconnect.com providing them with their username and password.
- **User must change password at next logon:** The user will be required to change their password the next time they log onto their portal. New passwords created by users must have 8 a minimum characters, including at least 1 upper case letter and 1 number

Time Zone
- **Time Zone:** Allows the administrator to specify the time zone of the user

Personal Information

Personal information allows the administrator to enter information about the user.

Once the information have been entered, select OK

Profiles

Profiles determine the setting for Users, including cover sheets available, phone books, etc. Administrators have the ability to customize the Profiles available to Users

Functions within this menu are:

- **Add:** Create a new profile
- **Add From:**
- **Remove:** Delete a profile
- **Properties:** Review the properties of a profile

Profile Properties – Profile

Profile Properties include the following sections:

- **Profile Name:** Name of the profile.
- **Organization Information:** This section allows the administrator to prepopulate and override user information allowing for a consistent template.
- **Phone Number Information:** This section overrides the phone number information.
- **Time Zone:** Overrides the User's Time Zone

Profile Properties – Cover Sheets

Administrators can select the cover sheets available to different profiles, in addition to the selecting the default Cover Sheet.

- **Add:** Add a previously created cover sheet to the available cover sheets for the profile
- **Remove:** Remove the cover sheet from the available cover sheets for the profile
- **Properties:** Properties of the selected cover sheet

Profile Properties – Phone Books

- o Administrators can select phone books available to different profiles (see Phone Books)

Profile Properties – Billing Codes

In this section, administrators can change the profile properties for:

- Sender Billing Code
  - o Billing Code Required
  - o Validate Billing Code
  - o Disclose Billing Group
  - o Billing Code Group
- Recipient Billing Code
  - o Billing Code Required
  - o Validate Billing Code
  - o Billing Code Group
- System Billing Code

Profile Properties – Fax Options

This section allows the administrator to change the Fax Options for the Profile Setting

Profile Properties – Security

This section allows the administrator to change the security options for the Profile Setting

The administrator has several options available, including whether to require cover sheets; and what users can override in terms of company information.

NOTE: To allow Users to send faxes directly from an email client, the **SMTP message require authentication** option must be unchecked.

Profile Properties – Notification

This section determines how notifications are applied for the specified Profile

Profile Table Lookup

This section allows the Administrator to look up the different profiles created within the Web Portal

Cover Sheets

This section allows the Administrator to manage the cover sheets available for the User profiles. This section contains the following sections:

- **Add:** Add a new cover sheet.
  - o **NOTE:** see *Fusion Cover Sheet Editor Guide* for details on creating and editing cover sheets.
- **Remove:** Delete selected cover sheet(s).
- **Save As:** Create a copy of a current cover sheet
- **Update:** Maintain the same name for a selected cover sheet from an updated .cse. file
- **Rename:** Change the name of a selected cover sheet

Incoming Routing Table

The incoming routing table determines where new faxes will be sent when they arrive.   When selecting this tab, you will see the DID associated with your FusionFax account. To change the properties of the routing, select the DID followed by **Properties**

The **Properties** section will allow you to send emails to different email addresses when inbound faxes are received. To add another email address, select **Add**. Enter the email information in the **Filter** Field and select **Add to List**. To **Remove** a user, select the user and then select **Remove.**

Once the users have been selected, click on **Test Routing Table**. Enter the DID and select **Test**. The results of where the inbound faxes will be routed are then listed.

Billing Group

Phone Number Restrictions

This section allows administrators to set restrictions on fax usage (i.e. No international, etc.)

Monitor

Inbound History

The Inbound History folder provides an overview of all inbound faxes received. Individual faxes can be selected to view details, including:

- • **Fax Properties:**
- • **Routed To:**
- • **Event Log:**

Outbound History

The Inbound History folder provides an overview of all inbound faxes received. Individual faxes can be selected to view details, including:

- • **Fax Properties:**
- • **Feedback Sent To:**
- • **Event Log:**

Outgoing Queue

This section shows faxes are currently being transmitted.

Reports

Phone Books

A Web Phone Book stores contact information about recipients to whom you are addressing faxes. This information can include a contact's name, fax number, address, company and business address, etc.

There are two types of Phone Books:

- Public (corporate) Phone Book: assigned by administrators through the profile properties (accessible to all users having this profile).
- Personal (private) Phone Book: accessible and manageable only by Users within their Web Portal.

Once a new phone book has been selected, contact information can be entered. The default information is:

- **Display Name:** Required field
- **Company:**
- **Fax:** Required field

Additional details can be entered by clicking **Show Details.** The Additional details section has two tabs:

- General
    - **Display Name:** Required Field
    - **Phone:**
    - **Pager:**
    - **Cellular:**
    - **Fax:** Required Field
    - **E-Mail:**
- Organizational Information
    - **Job Title:**
    - **Company:**
    - **Street:**
    - **City:**
    - **State/Province:**
    - **ZIP/Postal Code:**
    - **Country:**
    - **Billing Code:**
    - **Sub Billing Code:**

Contacts can also be imported from several different contact management programs through the **Import Contacts** button.

Import Contacts

Only the CSV file format (Comma Separated Values) from the services listed below is supported for importing contacts.

Select the service you are importing contacts from:
- ⦿ Microsoft Outlook (using CSV) - EN
- ○ Outlook Express (using CSV) - EN
- ○ IBM Notes (using CSV) - EN
- ○ Microsoft Outlook (using CSV) - FR
- ○ IBM Notes (using CSV) - FR
- ○ Microsoft Outlook (using CSV) - DE
- ○ IBM Notes (using CSV) - DE

Choose the file to import

Choose File | No file chosen

Select the option for the contacts in the CSV file that may already exist: Merge ▼

Import | Cancel