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MyFaxCentral User Administration Guide

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Introduction

Management of Users

MyFaxCentral User Administration is the set of tools which is provided to enable one or more account administrators to manage multiple MyFax users in a single MyFax account.

Features are provided that securely enable an administrator to add and remove users, modify user settings, and even designate other users as additional administrators permanently or on a temporary basis.

Your account will initially be configured with a single administrator, however multiple administrators can exist, all with equal administrative access to the system. This provides the ability to have multiple individuals responsible for user management for larger user base deployments.

Corporate Resources

If you require bulk upload of users, or require bulk changes to your user base, Project Management and Account Executive teams are available to assist with adjustments and determine the configuration which best meets your needs.

As your user base grows these teams can help assist or provide best practice solutions for any additional settings or account options which may require adjustment. These teams will work with you to provide a plan for easily managing and deploying large scale changes.

Note: Adding additional users or fax numbers will result in billing implications. To better understand and manage the cost associated with adding users or additional fax numbers, please contact your Account Executive or the Project Management resources.

Warning: Removing a user or fax number will result in the loss of reporting history and availability of fax images. Before removing a user or fax number ensure you have exported any items of interest. Details on the export of reporting information or received faxes for a user can be found in the "MyFax User Guide".

MyFaxCentral Common Controls

Navigation Controls

Page navigation controls are provided to make it easy to manage some of the longer MyFaxCentral reporting screens, such as the **User Administration** page.

Users 1-2 of 2 Display per page

Page of 1 >> [First](#) | [Previous](#) | [Next](#) | [Last](#)

You can adjust how many items are displayed on a given page, and easily see what page of information you are currently viewing. Use the First, Previous, Next, and Last buttons to move from page to page quickly and easily.

Searching for Users

If you have many users in your environment, it may be easiest to locate a specific user by searching for them based on one of the following properties:

- **UserID** – The unique user number for each user in the account.
- **Name** – The full name of the user.
- **Email** – The primary email address for the user.
- **Fax Number** – The fax number or numbers to which the user can receive faxes.
- **User Type** – This field indicates if a user has been granted administrative privileges.

Search for:

The above properties can be qualified as the following, depending on the value type:

- **Equals** – Returns only an exact match of the search.
- **Between** – Returns any value within the range entered.
- **Start With** – Returns any item which begins with exactly the value provided.
- **Contains** – Returns any item which contains the provided information as part of its value

Customize View

You can use the options in the Customize View menu to change which columns are displayed. Click on **Show Options** if the column selection checkboxes are not visible, as shown below:

Customize View HIDE OPTIONS ^

<input checked="" type="checkbox"/> User ID	<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Fax Number	<input checked="" type="checkbox"/> User Type	<input type="checkbox"/> Sending Email
<input type="checkbox"/> Confirmation Email	<input type="checkbox"/> Receiving Email	<input type="checkbox"/> Password Protection	<input type="checkbox"/> From	<input type="checkbox"/> Billing Code	<input type="checkbox"/> Billing Code Use
<input type="checkbox"/> Default Cover	<input type="checkbox"/> Corporate Cover	<input type="checkbox"/> Confirm Success	<input type="checkbox"/> Storage Period	<input type="checkbox"/> Delivery Type	<input type="checkbox"/> Preview GIF
<input type="checkbox"/> Confirm Failure	<input type="checkbox"/> Include Cost	<input type="checkbox"/> Usage Limit	<input type="checkbox"/> Limit Period	<input type="checkbox"/> Storage Locked	

Check the boxes beside the names of the columns that you wish to see, and click the **Update** button. You can click **Hide Options** when you are done to hide list of checkboxes.

MyFaxCentral User Administration

As a user with administrative privileges, all the features of MyFaxCentral User Administration are conveniently found in the **User Administration** menu item in the **My Account** sidebar menu. Click on the User Administration menu option in the My Account sidebar menu. You will see the User Administration page.

User Administration

Search for:

User Accounts

User Id	Name	Email	Fax Number	User Type
2829176	John Smith	smith@company.com	(613) 249-7083	A
3014869	Jane Doe	jane@company.com	(306) 205-4204	N

Users 1-2 of 2 Display 10 per page Page 1 of 1 >> [First](#) | [Previous](#) | [Next](#) | [Last](#)

Customize View SHOW OPTIONS

This view provides a list of the individual user accounts within your MyFax account. From here, you can access the functionality that MyFaxCentral User Administration provides.

The Account Administrator is generally initially shown at the top. Any additional users are shown below, and the user type is indicated as either administrator or non-administrator. Only administrators have access rights to the settings described in this document.

Search options are provided at the top and navigation controls are provided at the bottom of the page to accommodate long user lists.

The fields that are displayed for every user are selectable in the **Customize View** section at the bottom of the page. These fields are as follows:

- **UserID** – The unique user number for each user in the account.
- **Name** – The full name of the user.
- **Email** – The primary email address for the user. This is the address to which notifications are sent, and is also the first address listed in the Sending Email Addresses.
- **Fax Number** – The fax number or numbers to which the user can receive faxes. It is presented as a drop-down list in this view, so that all the fax numbers a user has can be viewed.
- **User Type** – This field indicates if a user has been granted administrative privileges, **"A"** for administrator and **"N"** for non-administrative user.
- **Sending Email** – The email addresses from which the user can send faxes. It is presented as a drop-down list, since a user can have up to five addresses.
- **Confirmation Email** – The email address to which success and failure delivery confirmations are sent if this setting is configured.

- **Receiving Email** – The email addresses to which received faxes for the user are delivered. It is presented as a drop-down list, since a user can have up to five receiving email addresses per fax number. The email addresses that are listed correspond to the first fax number for the user.
- **Password Protection** – This legacy feature indicates if the user must enter their MyFax account password in the first line of the body when sending faxes by email.
- **From** – The default value of the user’s “From Name” field.
- **Billing Code** – The default value for the user’s billing code.
- **Billing Code Use** – This field shows how the user’s billing code must be set up to be used. Possible values are “Default”, “Required”, or “Fixed”.
- **Default Cover** – The name of the default cover page selected for the user. If no cover page is selected by default, this field displays “None”.
- **Corporate Cover** – Indicates if the user must use the Corporate Cover Page (ie. Administrator enforced cover page).
- **Confirm Success** – Indicates if the user receives email confirmations for successful fax deliveries.
- **Confirm Failure** – Indicates if the user receives email confirmations for failed fax deliveries.
- **Storage Period** – Indicates number of days that received faxes are stored online for retrieval.
- **Delivery Type** – Indicates the method (Notify PDF, Notify TIF, Email PDF, Email TIF, neither PDF, neither TIF) of the received fax via email to the specified email address(es).
- **Preview GIF** – Indicates if the first page of the received fax will be included in the body of the email as an image.
- **Include Cost** – Indicates if user can view the cost of the MyFax services.
- **Usage Limit** – Displays the dollar amount of any usage limit set for the user.
- **Limit Period** – Indicates if the usage limit is “Per Month” or “One Time”.
- **Storage Locked** – Indicates if an administrator has limited user access to make changes to their storage period settings.

Adding New Users

You can add users to an existing account, each with their own fax numbers, and individualized settings. When a user is first added to an account, the user’s account inherits its settings from the account administrator’s settings.

Perform the following steps to add new users one at a time:

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Click on the **Add New User** button.
3. Enter the first and last name of the user in the **First and Last Name** field.
4. Enter the email address of the user in the **Email Address** field.

5. Use the **Fax Number** drop-down list to select the area code for the user's fax number.
6. Click on the **Add New User** button to create the user account. Click on **Cancel** to return to the user list view without adding a user account.

The email address that you enter is used by the system as the authorized address from which the user may send faxes, Faxes that are received on the user's fax number are sent to that email address as well. Success and failure confirmations and other system notifications are also sent there.

When the user account is created, you are presented with the User Profile view for the new user. You can use this profile to make any desired changes to the user configuration.

The user automatically receives a welcome email from the system. This welcome email contains the user's account number and fax number, as well as links to helpful information to get started faxing.

Note: To ensure you are receiving the best billing and solution options, or to alter default new account setup options, you may wish to discuss any account changes with your Account Executive prior to making any large scale changes.

Exporting the User List

You can export a list of users from MyFax and store the list on your computer. This list includes the available fields in the MyFaxCentral User Administration screen.

Perform the following steps to export the user list:

1. Click on **User Administration** in the **MyAccount** sidebar menu.
2. Click on the **Export Report** button.
3. Choose whether to open or save the file.
4. If you choose to save, choose the location to save, using the file browser controls, and click **Save**.
5. If you choose to open, the file opens in the application associated with CSV (Comma Separated Values) files on your computer, typically Microsoft Excel.

Resetting Passwords

The administrator has the ability to reset the user's password. When the administrator resets a user's password, an email is sent out to the user's primary email address, containing a temporary password that the user must now enter to access their account. The user will be prompted to update their temporary password the first time they access their account with the temporary password.

A password reset can be performed for all users within an account simultaneously. The following instructions detail how to reset all users' passwords at once. For instructions on resetting an individual user's password, see the "User Profile" section of this document.

Warning: If you have integrated any your accounts with a custom application using MyFax Web Services via XML, please note that resetting passwords may adversely affect the operation of any application which accesses fax services using the account. Ensure you know the use of an account before resetting the password.

Resetting All Users' Passwords

Users designated as administrators are not affected by this functionality. Administrators' passwords can only be set individually, as described in the "User Profile" section.

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Click **Reset All Users' Passwords**.
3. On the confirmation pop-up window, click **OK** to send a password change email to all users, or **Cancel** to cancel with no changes.

All user passwords in the account are reset, and a password change email is sent to each user. Each user must reset their own password to be able to log in again.

User Profile

From **User Administration** select the User ID of the account which you wish to update. All access to a user's settings and preferences starts at the **User Profile** screen. This is where the basic information about the user is maintained, including the user's name, primary email address, and fax numbers, as shown below.

User Profile

User Identification:

First and Last Name:

Email Address:

User is an Administrator:

Set Password

To help protect your account better, all new passwords must follow specific security guidelines. [Click here to view these guidelines now.](#)

Changing the user's password here will result in a temporary password that the user will have to reset the next time they log in. If you prefer, you can have the system send the user a system-generated temporary password by email, by clicking the Requested Password Change button below.

New Password:

Retype New Password:

Fax Numbers

Current Fax Number(s):

Add New Fax Number:

Online Time Zone Setting

Time Zone:

This determines the time zone used in the Inbox, Outbox, and Sent Faxes pages. The time zone used in the fax header is set independently in Send Preferences.

SMS Mobile Device Settings

Entering your mobile device (cell phone, etc.) number here will let you receive SMS text notifications of sent and received faxes.

Mobile Provider Country:

Mobile Provider Name:

Mobile Number:

The country code for the Mobile Number does not need to be included. It will be assumed to be "1". Go to Send Preferences or Receive Preferences to enable sending SMS notifications.

Security Question

Please select a security question and provide your answer here. You may be asked to provide the answer to this question when you contact MyFax by telephone, in order to help us to confirm your identity.

Select a question

Answer:

Resend System Emails

Perform the following steps to access the User Profile view:

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Locate the user in the User Accounts list. Click on the **User ID** for the desired user.

Once you are in the User Profile view, you can click on any of the links near the top of the page to switch to any of the other views: **Send Preferences**, **Receive Preferences**, **User Settings**, or **User Inbox**. These links are shown in the image below:

The screenshot shows the 'User Administration' page. At the top, there is a header with 'User Administration' on the left and a link 'Return to Main User Administration Page' on the right. Below the header is a summary bar for the selected user: 'User ID: 3014869', 'Name: Jane Doe', 'Fax Number: (306) 205-4204', and a 'Delete User' button. Below this bar are navigation links: 'User Profile', 'Send Preferences', 'Receive Preferences', 'User Settings', and 'User Inbox'. The 'User Profile' section is active and shows a 'User Identification' header. Underneath, there are three fields: 'First and Last Name' with the value 'Jane Doe', 'Email Address' with the value 'jane@company.com', and 'User is an Administrator' with an unchecked checkbox.

The following instructions assume that you have already selected the **User Profile** of the desired user.

User Identification

Change a user's name

Perform the following steps to change a user's name:

1. Type in the new name for the user in the **First and Last Name** field.
2. Click the **Update** button at the very bottom of the page.

Change a user's email address

Perform the following steps to change a user's email address:

1. Type the new email address in the **Email Address** field.
2. Click the **Update** button at the very bottom of the page.

Note: To temporarily disable a user from sending faxes, you may choose to change the email address on the account to one which is not valid (i.e. jane_disabled@company.dom). This will update the primary email address associated with the send preferences.

Change a user's administrative access

Perform the following steps to change a user's administrative access:

Any user can be made an administrator by checking the **User is an Administrator** checkbox. When this box is checked, it means the user is an administrator. When the box is unchecked, it means the user is not an administrator.

1. Check or uncheck the User is an Administrator checkbox as desired.
2. Click the **Update** button at the very bottom of the page.

Set Password

Perform the following steps to alter or update a user's password:

Set Password

To help protect your account better, all new passwords must follow specific security guidelines. [Click here to view these guidelines now.](#)

Changing the user's password here will result in a temporary password that the user will have to reset the next time they log in. If you prefer, you can have the system send the user a system-generated temporary password by email, by clicking the Requested Password Change button below.

New Password:

Retype New Password:

1. Enter the password you wish to use for the current user in the **New Password** field.
2. Re-enter the password to confirm the value in the **Retype New Password** field.
3. Click the **Update** button at the bottom of the page.

A notification will be provided to the user and they will be able to initially access their account with the password which the administrator provided. Additionally a password can automatically be generated by the system, more information can be found in the "Resetting an Individual User's Password" section of this document.

Fax Numbers

Fax Numbers

Current Fax Number(s):

Add New Fax Number:

Perform the following steps to alter a user's fax number:

Delete a fax number

1. If multiple fax numbers exist for the user, select the fax number you wish to delete from the **Current Fax Number(s)** drop-down list.
2. Click the **Delete** button next to the drop-down list.
3. On the confirmation pop-up window, click **OK** to delete the fax number or **Cancel** to cancel with no changes.

Warning: Once a fax number has been deleted, it cannot be returned to you. Please ensure you will not require this fax number in the future before deleting it from the account. Additionally, the history/reporting information for faxes associated with the number will also be permanently lost.

Add a fax number

A user can have more than one fax number. When a new fax number is added to a user account additional setup and subscription fees may be applicable. When a new fax number is added, the fax delivery email address will be initially copied from the primary email address. This may be subsequently changed in the user's Receive Preferences.

1. Select the area code in which you want the new fax number from the **Add New Fax Number** drop-down list.
2. Click the **Add** button next to the drop-down list.
3. On the confirmation pop-up window, click **OK** to add the fax number or **Cancel** to stop with no changes.

Note: If you have accidentally added a fax number, you can remove it immediately, however billing charges will apply. You may wish to confirm with MyFax billing which charges have been incurred on your account.

Online Time Zone Setting

Users within your organization may be geographically diverse, and therefore may require their accounts to be configured for different time zones. These time zone settings are applied to fax information and as it relates to sent and received faxes for this user. Ensure the time zone is set appropriately for your users.

Note: The time zone setting in the fax header is set independently in **Send Preferences**.

Online Time Zone Setting

Time Zone:

This determines the time zone used in the Inbox, Outbox, and Sent Faxes pages. The time zone used in the fax header is set independently in Send Preferences.

After you have entered the desired setting, click the **Update** button at the bottom of the page to save your changes.

SMS Mobile Device Settings

You may desire your users to receive notification of fax reception or delivery provided to them via SMS message to their mobile phone. This is provided in addition to the email notifications and does not include the fax image itself. The notifications which are delivered to the user via SMS are configured in the Send Preferences and Receive Preferences. However, before enabling the notifications, the mobile device information must be entered as shown below.

SMS Mobile Device Settings

Entering your mobile device (cell phone, etc.) number here will let you receive SMS text notifications of sent and received faxes.

Mobile Provider Country:

Mobile Provider Name:

Mobile Number:

The country code for the Mobile Number does not need to be included. It will be assumed to be "1". Go to Send Preferences or Receive Preferences to enable sending SMS notifications.

The following information is required to configure SMS mobile device settings:

- **Mobile Provider Country** – Country in which your mobile provider operates.
- **Mobile Provider Name** – The name of the carrier who provides mobile service.
- **Mobile Number** – The phone number of the device to receive the notification, starting with area code (country code is not required).

After you have entered the desired settings, click the **Update** button at the bottom of the page to save your changes.

Security Question

In order to provide an additional level of security in the event a user password is lost or forgotten, the following information is required. MyFax customer support will confirm this information before making any account adjustments.

Security Question

Please select a security question and provide your answer here. You may be asked to provide the answer to this question when you contact MyFax by telephone, in order to help us to confirm your identity.

Select a question

Answer:

After you have selected the desired question and entered an appropriate answer, click the **Update** button at the bottom of the page to save your changes.

System Emails

Resetting an Individual User's Password

Perform the following steps to reset an individual user's password. For more information or for details on resetting all users' passwords, see the previous section of this document "Resetting Passwords".

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Locate the user in the User Accounts list. Click on the **User ID** for the desired user.
3. On the User Profile view, click on the **Request Password Change** button.
4. On the confirmation pop-up window, click **OK** to send the user a password change email, or **Cancel** to cancel with no changes.

Resend the User's Welcome Email

If a user should lose his or her account information, you can quickly send it to the user by resending the original welcome email that they received when the user account was created. This email includes the user id and fax number.

Perform the following steps to resend a user's welcome email:

1. Click on the **Resend User Welcome Email** button.
2. On the confirmation pop-up window, click **OK** to resend the user's welcome email, or **Cancel** to cancel with no changes.

Note: This also resets the user password, and a temporary password will be included in the welcome email. The user will be asked to change their password the first time they log in.

Disabling System Emails

Some corporations choose not to deliver the System Emails outlined above to their users, as they do not require or would prefer to offer a more direct method of providing this information. The ability to disable this functionality is not a feature which is directly accessible by the MyFax account administrators, but is functionality which can be coordinated directly with your Account Executive.

If you are attempting to resend welcome emails or reset your user passwords, and they are not receiving these emails, please confirm with Customer Support or your Account Representative that Automated Messages have not been disabled for your account.

Send Preferences

This is where the user's preferences pertaining to sending faxes are maintained.

[User Profile](#) | [Send Preferences](#) | [Receive Preferences](#) | [User Settings](#) | [User Inbox](#)

Send Preferences

Email Addresses Used for Sending Faxes

You can send faxes from up to 5 different email addresses

Send faxes from (max 5):

* jane@company.com	Remove
--------------------	--------

* Default address, cannot remove

Add new email address to list:

Manage Cover Pages

Select your default cover page and press Update.

Default Cover Page:

Default Cover Page: * None

* Indicates that it cannot be removed.

Add a New Cover Page

File to Upload:

Cover Page Name:

Share cover page with all users.

Default Paper Size

Select your default paper size for sending a Fax.

Letter (8.5" x 11") Legal (8.5" x 14") A4 (8.25" x 11.75")

The full list of options includes the following:

- Email addresses used for sending faxes
- Manage cover pages
- Default paper size
- Default country code
- Email address and settings for receiving confirmation of sent faxes
- Saved documents
- Fax header and caller ID settings
- Sent fax storage
- Password use in emails
- Microsoft Office Integration
- MyFax Print-to-Fax Assistant

Perform the following steps to access the Send Preferences:

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Locate the user in the User Accounts list. Click on the **User ID** for the desired user.
3. Click on the **Send Preferences** link near the top of the page.

Once in the Send Preferences view, you can click on any of the links near the top of the page to switch to any of the other views: User Profile, Receive Preferences, User Settings, or User Inbox.

The following instructions assume that you are already viewing the Send Preferences of the desired user.

Email Addresses used for Sending Faxes

Email Addresses Used for Sending Faxes

You can send faxes from up to 5 different email addresses

Send faxes from (max 5):

- *jane@company.com
- jane@home.com

* Default address, cannot remove

Add new email address to list:

Perform the following steps to alter email addresses for sending faxes:

Remove Email Addresses used for Sending Faxes

The first email address listed is always the same as the user's primary email address. This email address can never be deleted. If it needs to be changed, this is done in the User Profile view.

1. Select the email address to be removed in the **Send faxes from** list.
2. Click the **Remove** button.
3. On the confirmation pop-up window, click **OK** to remove the email address, or **Cancel** to cancel with no changes.

Add Email Addresses used for Sending Faxes

A user can have up to a maximum of five email addresses listed, from which he or she can send faxes. Perform the following steps to add an email address:


1. Enter the email address to be added in the **Add email address to list** field.
2. Click the **Add** button.
3. The email address has now been added.

Manage Cover Page

As an administrator, you can choose to add a cover page from any of the cover page templates shown on the cover page list for that user. This cover page is applied when a fax is sent using this MyFax account. Cover page templates can be shared by other users in the account.

Manage Cover Pages

Select your default cover page and press Update.

Default Cover Page: 
Default Cover Page: * None

* Indicates that it cannot be removed.

Add a New Cover Page

File to Upload:

Cover Page Name:

Share cover page with all users.

Set the Default Cover Page

Users who typically want to attach a cover page to faxes that they send can set a default cover page. Once set, all faxes being sent through this MyFax account will use the default cover page, unless specifically indicated otherwise. Setting the default cover page to “None” causes faxes to be sent without a cover page, unless otherwise specified.

Perform the following steps to establish a default cover page:

1. Click on the name of the desired cover page on the **Cover Page List**.
2. Click the **Set Default** button.

Preview a Cover Page

You can preview any of the cover pages on the list to help you decide which one to use as the default.

1. Click on the name of the desired cover page on the **Cover Page List**.
2. Click the **View Style** button next to the **Cover Page List**.
3. **Close** the pop-up window containing the cover page preview to return to the Send Preferences page.

Download a Cover Page Template

Cover page templates are stored as Microsoft Word documents. You can download any of the cover page templates that are preloaded in the MyFax system. You can also make any editing changes to these templates that you desire, such as adding a company logo, and then upload your newly created template under a new name.

Perform the following steps to download a cover page template:

1. Click on the name of the desired cover page on the **Cover Page List**.
2. Click on the **Download** button next to the **Cover Page List**.

3. From the File Download window, click **Open** to open the cover page template directly in Microsoft Word, or click **Save** to save the template for later use. Click **Cancel** to cancel downloading without opening or saving the template.

Remove a Cover Page Template

You can remove any cover page template that has been uploaded by a user or an administrator. Cover page templates that are preloaded by MyFax (indicated by “*”) cannot be removed.

Perform the following steps to remove an uploaded cover page template:

1. Click on the name of the desired cover page on the **Cover Page List**.
2. Click on the **Remove** button next to the **Cover Page List**.
3. A confirmation will be provided that this cover page has been removed.

Add a New Cover Page

You can add a new cover page to the list of cover pages available to the user. The filename of a new cover page must be different from the filename of any existing cover page on the user’s cover page list.

Note: The easiest way to create a new cover page is to download an existing system cover page and make your edits (ie. moving existing merge fields, adding/removing text and images), rename and upload the file. This will ensure there will be no formatting errors with the available merge fields in your newly created cover page.

Perform the following steps to add a new cover page to the existing stored cover pages:

1. Click on the **Browse** button next to the **File to Upload** field.
2. Select the file containing the cover page template and click **Open**.
3. Enter a name for the new cover page template in the **Cover Page Name** field.
4. Check or uncheck the **Share cover page with all users** checkbox as desired.
5. Click **Add Cover Page**.

Default Paper Size

This setting allows the administrator to define the paper size which is used by default when a fax is sent by the user. It can be changed at the time of sending by the user, if desired.

Default Paper Size

Select your default paper size for sending a Fax.

Letter (8.5" x 11") Legal (8.5" x 14") A4 (8.25" x 11.75")

To adjust the default paper size, perform the following:

1. Select the desired paper size
2. Click the **Update** button at the very bottom of the page.

Set Default Destination Country Code

Because MyFax is capable of delivering faxes anywhere in the world, MyFax must be provided with a fully specified fax number which includes the country code of the destination, even if the number is local to your location.

If you usually send faxes to destinations within the same country, you can save the country code for that country by selecting it from the drop-down list, and clicking **Update**. Once you have saved a default country code, you no longer need to type the country code when entering a fax number for that country.

If you have saved a default country code, you can also check the box to independently select whether that default country code should be used when sending faxes by email. For more information on using country codes see the “MyFax User Guide – Appendix: A”.

Set Default Destination Country Code

Specify the default destination country code to use when sending faxes. If no default is specified, you need to include the country code with each destination fax number.

Default Country Code:

Also use the default country code when sending faxes by email.

To adjust the default country code, perform the following:

1. Select the desired country code from the drop-down list.
2. Choose to use this country code by default when sending faxes via email.
3. Click the **Update** button at the very bottom of the page.

Fax Confirmations

Change Email Address used for Receiving Fax Confirmations

Confirmation emails indicating that a fax was delivered successfully or otherwise are sent to the email address specified here. It can be the same as the email address used for sending or receiving faxes or it can be a different address. More than one user can have their confirmations going to the same email address if desired.

Fax Confirmations

Fax Confirmations

Send fax confirmations to this email address:

Attach fax to confirmation email.

Send Fax Delivery Confirmations by email: Success Failure Both Off

Send Fax Delivery Confirmations by SMS: Success Failure Both Off

You can also choose whether to receive confirmations of successful faxes, failed faxes, both (and optionally attach the fax to the confirmation email), or no confirmations at all.

If you have set up a mobile device to receive SMS notifications on (see **User Profile**), this is where you can select whether to receive fax delivery confirmations via SMS.

To adjust the confirmation email address and other settings, perform the following:

1. Type the new fax confirmation email address in the field provided.
2. Choose to attached the fax (as it was delivered in TIF format) to the confirmation email if you would like a copy of the fax which has been delivered included with the confirmation.
3. Select the desired confirmation method.
4. Click the **Update** button at the very bottom of the page to have the changes take effect.

Saved Documents

MyFax allows you upload and store documents for you users which can then be faxed to desired destinations without requiring access to a local computer. These documents are kept private and only accessibly to those with access to the MyFaxCentral account. This may be very useful for those users who have a form or template which often gets faxed, such as a terms and conditions sheet or order form.

Saved Documents

Save documents that you send frequently.

Browse for a document Enter short name for drop-down list

Description

Adding a Document

To add a saved document:

1. Select an open position in the drop down list (Add document...) to add a new document.
2. Select **Browse** to locate the file which you would like to upload from your local computer.
3. Enter a short name (50 characters or less) for this file which will be added, this will be used to identify the document within MyFaxCentral from a drop-down list when you are sending a fax.
4. Add a detailed description if desired to provide additional information about the file which has been added, to help with the ongoing management of the files.
5. Select **Add** to upload the file to your online MyFax document storage.

Removing a Document

To remove a saved document:

1. Select the position in the drop down list which contains the document name.
2. Select **Remove** to have this document removed from the online saved documents.

Fax Header Fields

Every fax sent by a MyFax user contains a header line at the top of a page that includes a space to indicate from whom the fax was sent. Use this field to enter text that you want to appear to identify yourself to your recipient, such as your company name. When the user account is created, this field contains the user's name by default.

You can also change the time zone used by the date and time stamp on the fax header. Select the time zone you wish to use from the drop-down list. The GMT (Greenwich Mean Time) offset in the time zone drop-down list is always shown in Standard Time, but will automatically be adjusted for Daylight Savings Time if necessary when it is displayed.

For example, suppose that the time zone selected in Send Preferences is:

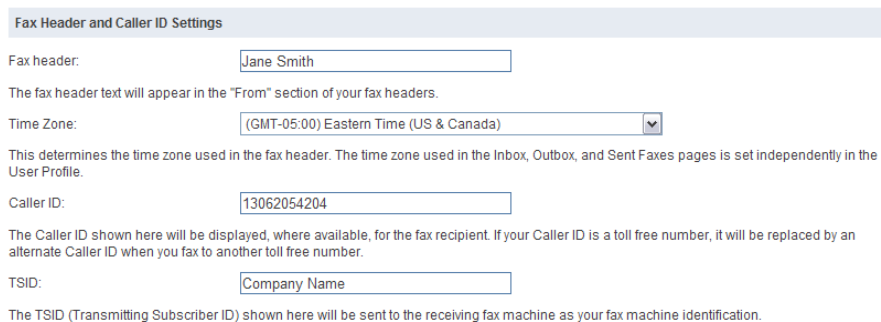
(GMT-05:00) Eastern Time (US & Canada)

If a fax is sent at 3:00PM Eastern Time (during Standard Time), then the time displayed in the fax header will be shown as 15:00 GMT-5:00. If a fax is sent at 3:00PM Eastern Time (during Daylight Savings Time), then the time displayed in the fax header will be shown as 15:00 GMT-4:00

Note: This has no impact on the time zone used by the MyFaxCentral Inbox, Outbox, Sent Faxes, or fax confirmations sent by email. To change the time zone for those, refer to Online Time Zone Setting in **User Preferences**.

The Caller ID should be set to the fax number which it is desirable to reference the fax as being delivered from. This may be required in environments where you are required to deliver a fax from a known number. For example, the remote location is expecting that fax to be delivered from a specific fax number, you would provide them the value which is populated in this field. Generally, it is best practice to populate this with the MyFax account's fax number, or leave the field blank.

TSID is the Transmitting Subscriber ID which is used to identify the fax machine. By default the field is populated with "FAX". The information shown here will be sent to the receiving fax machine as your fax machine identification. This information is interpreted by the receiving machine as your CSID, meaning this information may be displayed on receiving fax machine or fax logs.



The screenshot shows a form titled "Fax Header and Caller ID Settings". It contains four main sections:

- Fax header:** A text input field containing "Jane Smith". Below it, a note states: "The fax header text will appear in the 'From' section of your fax headers."
- Time Zone:** A dropdown menu currently set to "(GMT-05:00) Eastern Time (US & Canada)". Below it, a note states: "This determines the time zone used in the fax header. The time zone used in the Inbox, Outbox, and Sent Faxes pages is set independently in the User Profile."
- Caller ID:** A text input field containing "13062054204". Below it, a note states: "The Caller ID shown here will be displayed, where available, for the fax recipient. If your Caller ID is a toll free number, it will be replaced by an alternate Caller ID when you fax to another toll free number."
- TSID:** A text input field containing "Company Name". Below it, a note states: "The TSID (Transmitting Subscriber ID) shown here will be sent to the receiving fax machine as your fax machine identification."

Change the Fax Header "From" Field

Perform the following steps to change the Fax Header information fields:

1. Type the new text to appear in the **Fax Header "From" Field**.
2. Select your local **Time Zone**.
3. Enter your **Caller ID** information (generally your MyFax account fax number)
4. Enter your **TSID** information (the information to identify yourself to the remote fax machine)
5. Click the **Update** button at the bottom of the page for your changes to take effect.

Online Sent Fax Storage

MyFax has the capability to save faxes that your users send for up to 366 days. You can change this setting if you wish to save faxes for less time. Setting this to 0 will stop saving sent faxes.

Online Sent Fax Storage

You can store faxes online for up to 366 days:

Store faxes for: Days *

* Storage period applies to all fax numbers in your account.

Note: An unlimited number of faxes of any size will be stored for the period defined here.

Perform the following steps to change the online sent storage period:

1. Type the new value in days to which you wish to **Store faxes for**.
2. Click the **Update** button at the bottom of the page for your changes to take effect.

Password Protection (Email Faxing Only)

This legacy feature is used when sending faxes from email, you enforce the requirement that the user's password is included in the email, in the first line of the email body. If this option is selected, faxes sent by email are refused by the system if the password is not included or is not correct. The password does not appear on the fax.

Password Protection (Email Faxing Only)

When checked, your MyFax account password will be required on all faxes sent by email (does not apply to faxes sent from MyFax Central). Passwords must appear as the first line in the email body.

Enable Password Protection:

Important: If this option is not selected, DO NOT include the password in the email or the password will appear on the fax, since the system is not expecting it to be there.

Perform the following steps to enable or disable password protection:

Enable or Disable Password Protection

1. Check or uncheck the **Enable Password Protection** checkbox, as desired.
2. Click the **Update** button at the bottom of the page.

Microsoft Office Internet Fax Integration

MyFax can integrate natively with Microsoft Office 2003 and Microsoft Office 2007 applications. When this integration is completed, clicking on "File, Send To, Recipient using Internet Fax Service..." within any compatible Microsoft Office application causes that application to open Microsoft's Office's built-in faxing capability, and sends the document as a fax automatically using your MyFax account. Full integration with Microsoft Outlook contact books is provided.

The Microsoft Integration option is located at the bottom of the Send Preferences page as shown below:

Microsoft® Office Internet Fax Activation

[Click here to enable Microsoft® Office to send faxes using MyFax.](#) This feature is supported for both Microsoft® Office 2003 and Microsoft® Office 2007. When prompted, click the "Run" button. This will set your faxing options. No software will be installed on your computer.

[Click here to disable Microsoft® Office from sending faxes using MyFax.](#)

The cover pages available by means of Microsoft Office Integration are not the same as the cover pages selected in MyFaxCentral.

Note: Enabling or disabling Microsoft Office Integration must be done while logged into MyFaxCentral as the user, on the computer where the integration is to be used. More than one computer can be set up to integrate by the same user.

Perform the following steps to enable Microsoft Office Integration:

Enable Microsoft Office Integration

1. Click on the designated link to **enable Microsoft Office integration**. This causes a registration file script to be opened.
2. Click on **Run** to activate the registration script. No software is installed on the computer, only a registry key is added.
3. Click **Yes** to enable Microsoft Office MyFax Integration or **No** to cancel with no changes.
4. Perform the following steps to disable Microsoft Office Integration:

Disable Microsoft Office Integration

1. Click on the designated link to **disable Microsoft Office integration**. This causes a registration file script to be opened.
2. Click on **Run** to activate the registration script. No software is installed on the computer.
3. Click **Yes** to disable Microsoft Office MyFax Integration or **No** to cancel with no changes.

MyFax Print-to-Fax Assistant

If you want to your users to use MyFax to fax directly from Windows-based applications that support standardized print drivers you can download and install the MyFax Print-to-Fax Assistant. This application is installed on the user PC and provides an interface which allows users to "Print" documents to their MyFax account, having them delivered as a fax to the desired recipient

MyFax Print-to-Fax Assistant

[Click here](#) to download the MyFax Print-to-Fax Assistant. This software will add print driver functionality for easy faxing from any application. Just download and Install.

Note: Enabling the Print-to-Fax Assistant must be done while logged into MyFaxCentral as the user who's account will be using the service. To bulk-enable the MyFax Print-to-Fax assistant for multiple users contact your Account Executive. A distributable .msi file is available to be pushed to users by your network administrator, with the end user being prompted to enter their MyFax user information on first use.

Receive Preferences

The Receive Preferences are where the user's preferences pertaining to receiving faxes is maintained, including email addresses delivering received faxes, file formats, and online storage options, as shown in the image below:

Receive Preferences

Fax Delivery Email Addresses

Faxes and notifications can be delivered to a maximum of 5 email addresses:

Deliver my faxes to (max 5):

Remove

You must list at least one email address

Add new email address to list:

Add

Fax Delivery and Notification Options

Receive faxes as: PDF TIFF

Deliver by email: Fax Notification Only Neither

Display first page of fax in email body: Yes No

Send Fax Received notifications by SMS: Yes No

Online Fax Storage

You can store faxes online for up to 366 days

Store faxes for: Days*

* Storage period applies to all fax numbers in your account.

Junk Fax Options

Automatically identify a fax as a junk when:

- Caller ID matches Caller ID of a previously marked junk fax
- Sender matches the Sender of a previously marked junk fax
- No Caller ID is available
- No Sender is available

Faxes identified as junk will be sent to:

- Inbox
- Junk folder

Update

Cancel

Perform the following steps to access the Receive Preferences:

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Locate the user in the User Accounts list. Click on the **User ID** for the desired user.
3. Click on the **Receive Preferences** link near the top of the page.

Once in the Receive Preferences view, you can click on any of the links near the top of the page to switch to any of the other views: User Profile, Send Preferences, User Settings, or User Inbox.

A user's receive preferences are maintained individually for each fax number assigned to the user. For users with more than one fax number, select the fax number from the fax number drop-down list at the top of the page before you change any of the preferences.

The following instructions assume that you are already viewing the Receive Preferences of the desired user.

Fax Delivery Email Addresses

Fax Delivery Email Addresses

Faxes and notifications can be delivered to a maximum of 5 email addresses:

Deliver my faxes to (max 5): [Remove](#)

You must list at least one email address

Add new email address to list: [Add](#)

Remove Email Addresses used for Delivering Received Faxes

The first email address listed is initially the same as the user's primary email address. One email address must always be included in a user's profile, regardless of the fax delivery options that are set. If only one address is listed, it cannot be deleted.

To change the address, add a new one, and then delete the old one.

Perform the following steps to remove an email address:

Select the email address to be removed in the **Deliver My Faxes to** list.

1. Click the **Remove** button.
2. On the confirmation pop-up window, click **OK** to remove the email address, or **Cancel** to cancel with no changes.

Add Email Addresses used for Delivering Received Faxes

A user can have up to a maximum of five email addresses listed, to which received faxes can be delivered.

Perform the following steps to add an email address:

1. Enter the email address to be added in the **Add email address to list** field.
2. Click the **Add** button.

Fax Delivery Options

A user can choose to receive fax content in different methods depending on the security requirements of the organization or interfaces which users have access to:

- Faxes by email (actual fax content is included within the email)
- Faxes as PDF or TIFF file attachments
- Only a notification of the received fax (email is received without fax content, fax content is accessed securely via MyFaxCentral by following the included link)
- No email at all, relying entirely on MyFaxCentral

Fax Delivery and Notification Options

Receive faxes as: PDF TIFF

Deliver by email: Fax Notification Only Neither

Display first page of fax in email body: Yes No

Send Fax Received notifications by SMS: Yes No

Set Fax Attachment Format

Select if faxes are to be received as PDF or TIFF file attachments.

Perform the following steps:

1. Click on the **PDF** or **TIFF** radio button.
2. Click the **Update** button at the very bottom of the page.

Set Fax Delivery Preference

Select if an email is to be sent with the fax attached, if a notification with a link to MyFaxCentral is to be sent, or if no email is to be sent at all.

1. Click on the **Fax**, **Fax Notification**, or **Neither** radio button.
2. Click the **Update** button at the bottom of the page.

Set First Page Display Option

Select if the first page of a fax should appear in the email body as an embedded GIF image. This functionality is beneficial for quickly viewing the subject or desired recipient of a fax without having to open the complete fax attachment.

Note: This option is unavailable when Fax Notification Only or Neither has been selected as the email delivery preference.

1. Click on **Yes** to Display first page of fax in email body, or **No** not to display.
2. Click the **Update** button at the bottom of the page.

SMS Notification Option

Select if the delivery of faxes should provide a notification to the mobile phone specified for this account

1. Click on **Yes** to deliver a notification via SMS, or **No** to provide no notification.
2. Click the **Update** button at the bottom of the page.

Online Fax Storage

All received faxes can be stored online for up to 366 days (unlimited number of faxes, with unlimited file size), after which time the fax is removed from the system and is no longer accessible. Each user can set their personal preference to any number of days up to that maximum. If the number of days is set to 0 (zero), then faxes are not retained online.

Online Fax Storage

You can store faxes online for up to 366 days

Store faxes for: Days*

* Storage period applies to all fax numbers in your account.

Note: Unlike the other receive preferences, this setting applies to all the user's fax numbers. An administrator can also lock this value so that the user cannot change it. See **User Settings** for more information.

Set Online Storage Limit

Perform the following steps to set the online storage limit:

1. Enter the number of days you wish to **Store faxes for**.
2. Click the **Update** button at the bottom of the page.

Junk Fax Options

MyFax provides the means to help users identify new inbound faxes as Junk, based on what faxes you have previously identified as Junk. There are four ways to tell MyFax to consider a new fax as Junk:

1. When the Caller ID of the new fax is the same as the Caller ID of a fax you had earlier marked as Junk.
2. When the Sender (Fax Machine ID) is the same as the Sender of a fax you had earlier marked as Junk.
3. When the Caller ID is not provided.
4. When the Sender (Fax Machine ID) is not provided.

Junk Fax Options

Automatically identify a fax as a junk when:

- Caller ID matches Caller ID of a previously marked junk fax
- Sender matches the Sender of a previously marked junk fax
- No Caller ID is available
- No Sender is available

Faxes identified as junk will be sent to:

- Inbox
- Junk folder

You can choose any combination of the above options. Also, you can select to use a separate Junk Fax folder, into which all of your Junk faxes will be placed, so that you don't have to see them in your Inbox.

Note: MyFax never deletes a Junk fax for you, so that in case a Junk Fax is incorrectly identified, you can still look through your Junk faxes to find it, and unmark it as Junk if you need to.

Warning: You should be aware that not all telephone carriers properly transmit Caller ID, so it is possible that you will receive faxes from different sources that appear to have the same Caller ID. **Use these settings with caution, and periodically check your Junk faxes, to ensure that you never accidentally miss an important fax.**

User Settings

The user settings are where settings are maintained that the user administrator controls. The users themselves cannot alter these settings.

The User Setting page is shown below:

User Settings

Sending Faxes

Billing Code:

Billing Code Use: Default Required Fixed

Must Use Corporate Cover Page:

Receiving Faxes

Lock Online Storage Period:

Billing

Include Cost:

Usage Limit: \$

Web Access Permissions

The user is permitted to:

Log in to MyFaxCentral Access Sent Faxes
 Use Send a Fax Access Outbox
 Access Inbox Access My Preferences
 Contact Books

Perform the following steps to access the user settings:

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Locate the user in the User Accounts list. Click on the **User ID** for the desired user.
3. Click on the **User Settings** link near the top of the page.

Once in the User Settings view, you can click on any of the links near the top of the page to switch to any of the other views: User Profile, Send Preferences, Receive Preferences, or User Inbox.

The following instructions assume that you are already viewing the User Settings of the desired user.

Sending Faxes

The settings described below impact the way in which faxes are sent by the user.

Sending Faxes

Billing Code:

Billing Code Use: Default Required Fixed

Must Use Corporate Cover Page:

Set Default Billing Code

When the user account is first created, the default billing code is set to the User ID. The default billing code can be set to any text string of up to 128 characters, including letters, numbers, and punctuation. The user can change the billing code for each sent fax unless the Fixed option described below is selected.

Perform the following steps to set the default billing code:

1. Enter the desired default billing code in the **Billing Code** field.
2. Click the **Update** button at the bottom of the page.

Set Billing Code Use

The billing code can be used by each user as a private identifier to track the reason a fax was sent, or as a means of keeping track of clients to whom you want to bill-back the charge the fax (hence the name billing code). It can also be used by the administrator as a means of organizing users by departments or some other structure, for internal account purposes. The controls here provide some flexibility in controlling how billing codes are used. There are three options:

- **Default** – When this is set, the default billing code is just that, a default that is used when a fax is sent by the user, unless the user changes it to something else at the time the fax is sent.
- **Required** – When this is set, the user must always enter the billing code for each fax sent. There is no default, and the user is unable to send a fax without entering a billing code. If a fax is sent by email without a billing code, it fails for reason “Missing Billing Code”.
- **Fixed** – When this is set, the billing code entered by the administrator is always used and the user cannot change it, as long as this setting is enabled. This is the option to use if you wish to group users by: cost-center, organization, department, group, location, etc..

Perform the following steps:

1. Click on the **Default**, **Required** or **Fixed** radio button as desired.
2. Click the **Update** button at the bottom of the page.

Set Corporate Cover Page Use

If desired, an administrator can enforce the use of a “Corporate” cover page, to maintain consistency throughout the corporation. When this option is selected for a user, the cover page is chosen as the default cover page for the master user is used as the cover page for that user. The user has no control over cover page selection in this case, and is always forced to use the corporate cover page. If the master user’s default cover page is set to “None” and the corporate cover page option is chosen, then the user cannot add a cover page.

Perform the following steps:

1. Check or uncheck the **Must Use Corporate Cover Page** checkbox.
2. Click the **Update** button at the bottom of the page.

Receiving Faxes

The settings described here impact the way in which faxes are received by the user.

Receiving Faxes

Lock Online Storage Period:

Lock Online Storage Period

If this setting is selected, then the user’s online storage period, as set in Receive Preferences, cannot be changed by the user.

Perform the following steps:

1. Check or uncheck the **Lock Online Storage Period** checkbox.
2. Click the **Update** button at the bottom of the page.

Billing

Include Cost

If checked, the user can see the costs incurred by his or her fax receiving and sending, in online reports and in confirmation emails.

Billing

Include Cost:

Usage Limit: \$ Per Month

Perform the following steps:

1. Check or uncheck the **Include Cost** checkbox.
2. Click the **Update** button at the bottom of the page.

Set Usage Limit

An administrator can limit the activity incurred by a user by setting a dollar amount limit for that user. The limit can be either a one-time total or a monthly limit. In either case, the user can neither receive nor send faxes once the limit is exceeded. A dollar amount of 0 (zero) means that the user is not limited.

Perform the following steps:

1. Set the desired dollar amount in the **Usage Limit** field.
2. Select either **Per Month** or **One Time** from the drop-down list.
3. Click the **Update** button at the bottom of the page.

Web Access Permissions

The administrator can control if a user is permitted to log in to MyFaxCentral, and once there, what areas of MyFax Central the user can access. The options that can be changed are shown below:

Web Access Permissions

The user is permitted to:

- Log in to MyFaxCentral
- Access Sent Faxes
- Use Send a Fax
- Access Outbox
- Access Inbox
- Access My Preferences
- Contact Books

Perform the following steps:

1. Check or uncheck the access permission checkboxes as desired.
2. Click the **Update** button at the bottom of the page.

User Inbox

In order to allow for situations where a user is unavailable or needs an administrator's assistance in retrieving faxes, the administrator can access the user's inbox directly, without needing to log in as the user. You then see the user's inbox, as shown below:

[User Profile](#) | [Send Preferences](#) | [Receive Preferences](#) | [User Settings](#) | **User Inbox**

Inbox

[Download Fax](#) [Delete Fax](#) [Forward](#) [Junk](#) [Export Report](#)


Display faxes from: To: List faxes for all fax numbers:

Sender	Received	Pages	View	<input type="checkbox"/>
Fax	5/14/2010 11:20:14 AM	2	View	<input type="checkbox"/>
Fax	5/14/2010 11:09:21 AM	2	View	<input type="checkbox"/>
Fax	5/14/2010 11:08:57 AM	2	View	<input type="checkbox"/>
Fax	5/14/2010 11:08:50 AM	2	View	<input type="checkbox"/>

Faxes 1-4 of 4 Display per page

Page of 1 >> [First](#) | [Previous](#) | [Next](#) | [Last](#)

Customize Your Inbox View

SHOW OPTIONS 

Perform the following steps:

1. Click on **User Administration** in the **My Account** sidebar menu.
2. Locate the user in the User Accounts list. Click on the **User ID** for the desired user.
3. Click on the **User Inbox** link near the top of the page.

The inbox view presented is the standard inbox view, with the same sets of controls as provided in the user's own inbox. **Refer to the "MyFax User Guide" for specific instructions pertaining to using the Inbox.**

About MyFax

MyFax is the fastest growing Internet fax service used by individuals, small, medium, and large businesses to send and receive faxes using existing email accounts or the web. MyFax offers services in North America and Europe, including the United Kingdom, to industries recognized among the fastest growing adopters of internet fax including finance, insurance, real estate, healthcare, transportation and government. More than 20,000 new customers subscribe to MyFax each month. Additional information is available at www.myfax.com and www.myfax.uk.com.

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