



USERGUIDE | FAXSOLUTIONS



**MASERGY**

Masergy Fax Solutions  
Virtual Fax and Fax Line  
User Guide

Document Version 1.8  
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## Getting Started

Once your purchase of the Masergy Fax Solution has been processed, you will receive an e-mail that contains login information. Be sure to log this information below for future reference.

User Name: \_\_\_\_\_ Password: \_\_\_\_\_ Fax #: \_\_\_\_\_

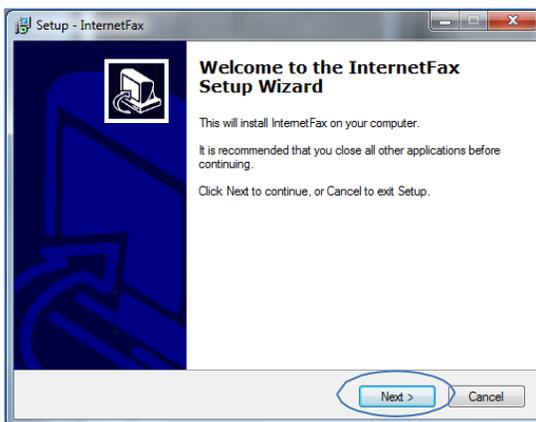
## Installation

*\*IMPORTANT NOTE\* this information is to install the PRINT DRIVER onto your computer, NOT TO ACCESS YOUR Masergy Fax Service web portal. The Masergy Fax Solutions web portal link is provided with the login information you received via e-mail at the time of purchase.*

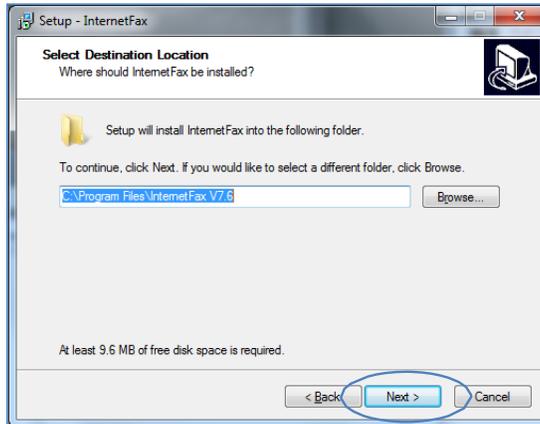
Please visit: [Masergy Fax Portal](#) for access.

## Fax Print Driver Instructions (Optional)

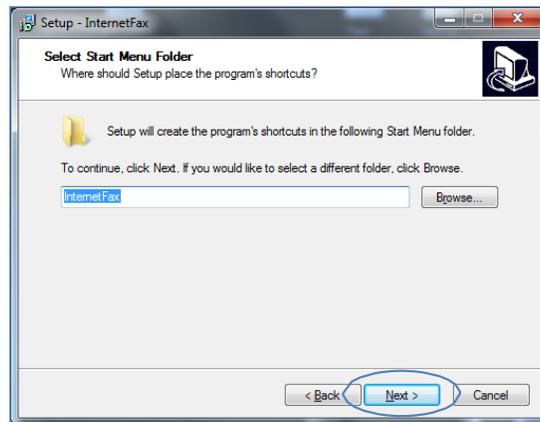
1. Go to this web site to download the “32-Bit” or “64-Bit” Internet Fax Print Driver version of MS Windows. [Masergy Software and Downloads](#)
2. Click on the appropriate version and then save to your desktop.
3. If you do not know which version of MS Windows you have please try the following:
  - a. Click on start
  - b. Right click “My Computer” and then click “Properties”.
  - c. In the “System” section, you will see an item called “System Type”. It will be either 32-Bit or 64-Bit.
4. Now find the file you saved to your desktop, extract to a folder or open with WinZip. Click on the “setup.exe” to run the install program.
5. If you get an Open File-Security Warning Click Run.
6. In the “Select Setup Language” window, select the language you and click “OK”.
7. In the new window that pops up click “Next”



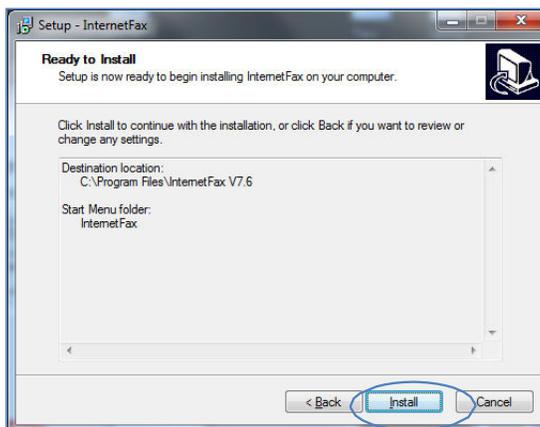
8. In the next window, keep the default folder location and click “Next”.



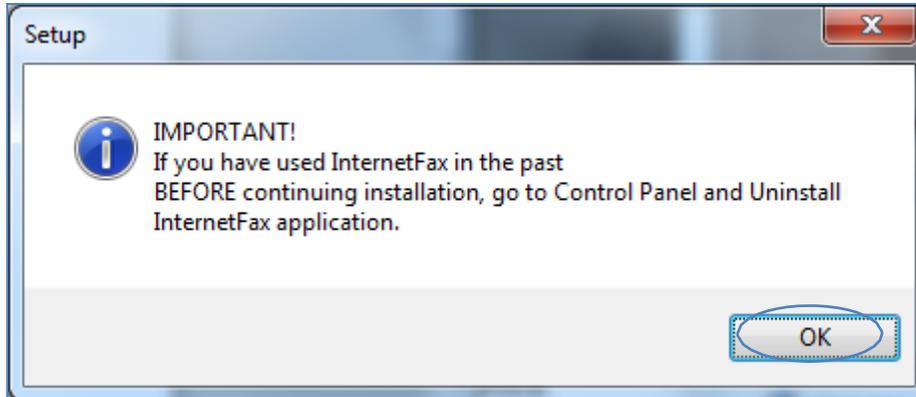
9. In the next window, keep the default folder name and click “Next”.



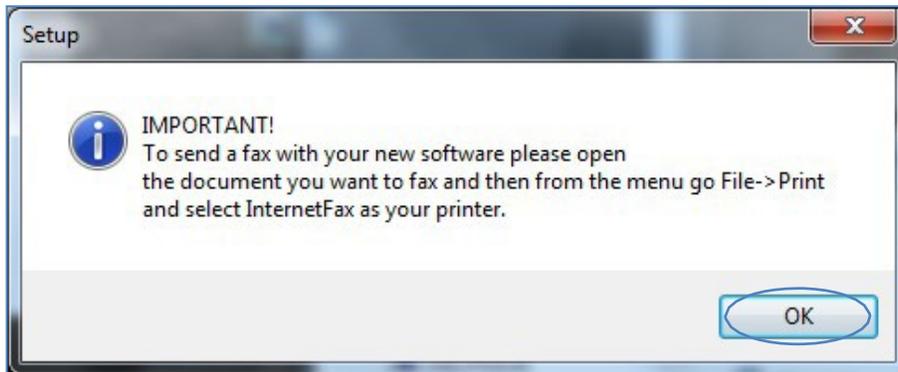
10. In the next window, click “Install”.



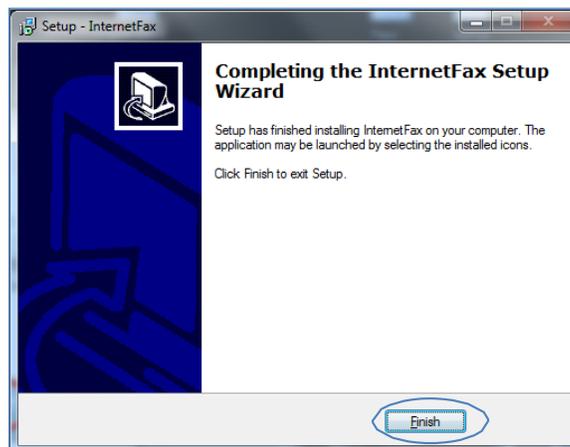
11. Click OK in the second pop up that appears (or follow instructions on message if they apply).



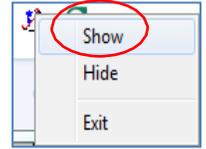
12. Click OK on next pop up that appears



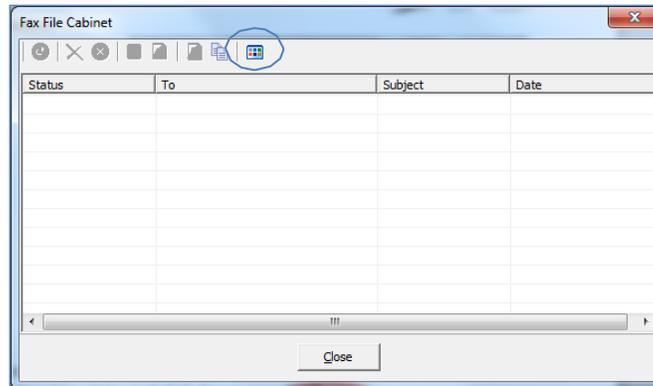
13. Click "Finish" in the install window.



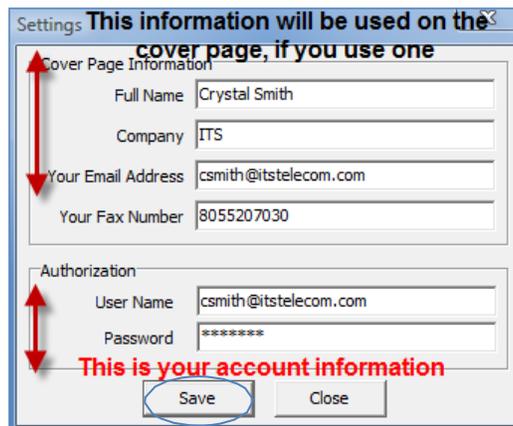
14. Now you will find the little white globe in the system tray. The system tray is the area with icons next to the clock in the lower right corner, usually of your start menu. "Right Click" on the white globe and click show.



15. In the Fax File Cabinet window, click the settings button.



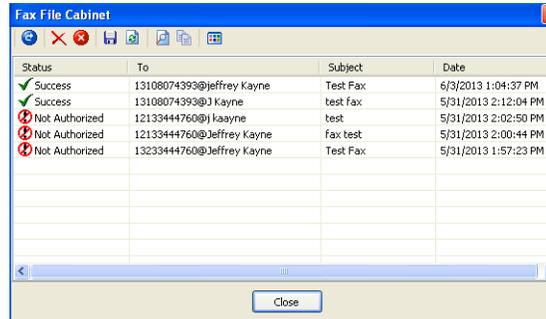
16. Fill out the new window.
  - a. Populate the top section with your Name, Company, Email Address and Fax number. This information will be displayed on any cover page if you choose to add one to an outgoing fax.
  - b. In the Authorization section, enter your account information that was given to you when you signed up for the Masergy Fax service. (Username and Password in email from Masergy) Then click the save button.



17. Now close the Fax File Cabinet window
18. If you had to disable an Anti-virus or Anti-malware application in order to get the Internet Fax drivers installed, please make sure to re-enable these applications.



The Fax File Cabinet window will also display all your fax status.

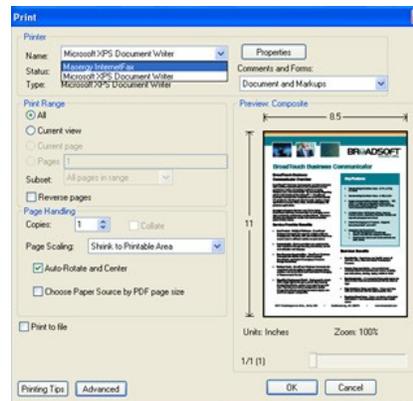


Status	To	Subject	Date
✓ Success	13108074399@jeffrey kayne	Test Fax	6/3/2013 1:04:37 PM
✓ Success	13108074399@J Kayne	test Fax	5/31/2013 2:12:04 PM
✗ Not Authorized	12133444760@j kaayne	test	5/31/2013 2:02:50 PM
✗ Not Authorized	12133444760@Jeffrey Kayne	fax test	5/31/2013 2:00:44 PM
✗ Not Authorized	13233444760@Jeffrey Kayne	Test Fax	5/31/2013 1:57:23 PM

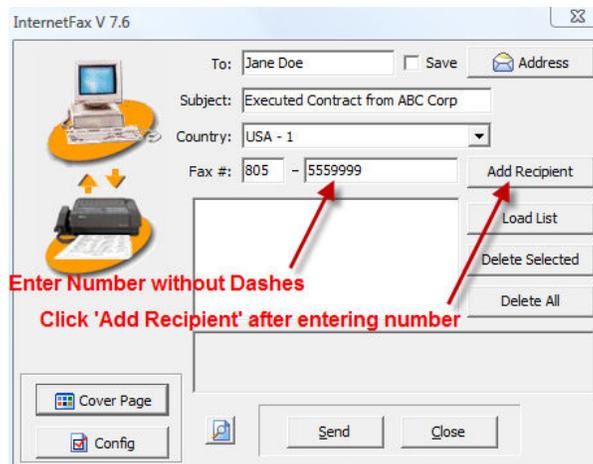
### Print to Fax

*\*IMPORTANT NOTE\* The Masergy Internet Fax is not compatible with Mac computers, only Window PCs.*

1. From the application that you've created the document that you want to fax, select File-> Print.
2. Then select the Masergy InternetFax printer from the list of printers.



3. Select OK to print the document.
4. Enter in the recipient information and "Click Add Recipient".



InternetFax V 7.6

To: Jane Doe  Save

Subject: Executed Contract from ABC Corp

Country: USA - 1

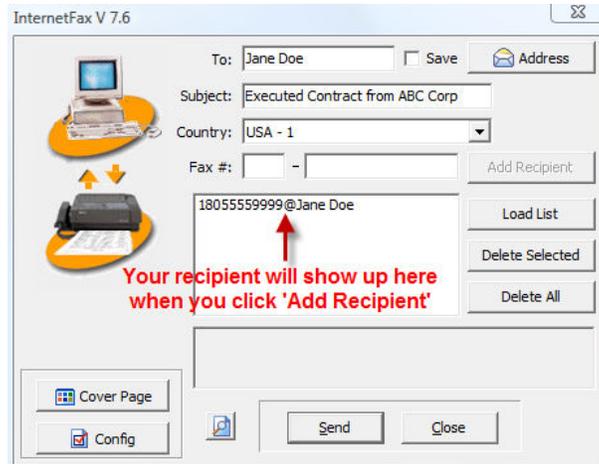
Fax #: 805 - 5559999

Enter Number without Dashes

Click 'Add Recipient' after entering number



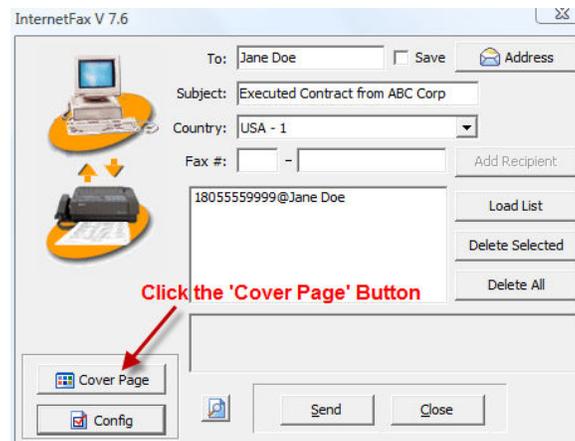
5. After you click “Add Recipient,” your recipient will be added to the list. (The “1” will automatically be added to the phone number after adding recipient to the list.)



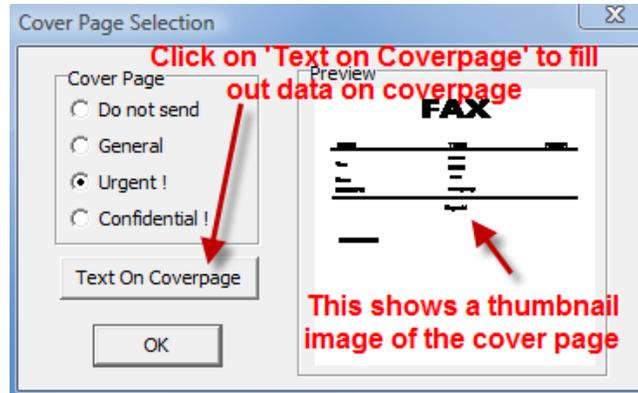
6. Add another recipient if you want by entering the information and clicking “Add Recipient”.



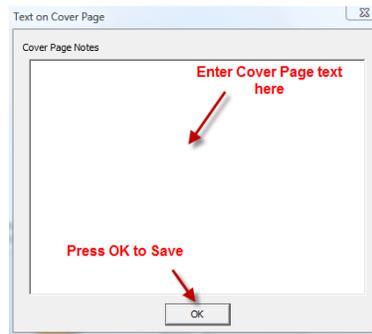
7. Add a cover page by clicking the “Cover Page” button.



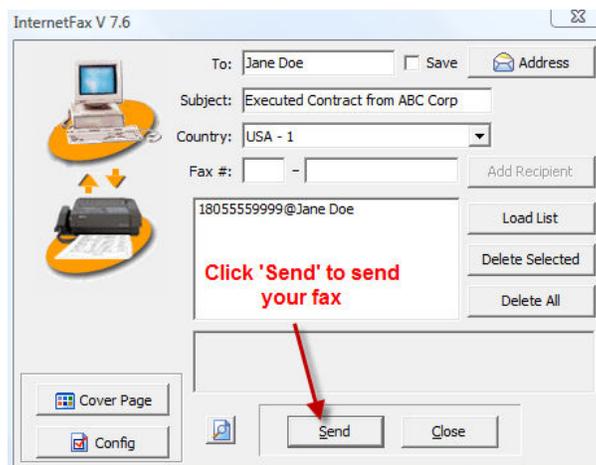
8. Select one of 3 cover page types.



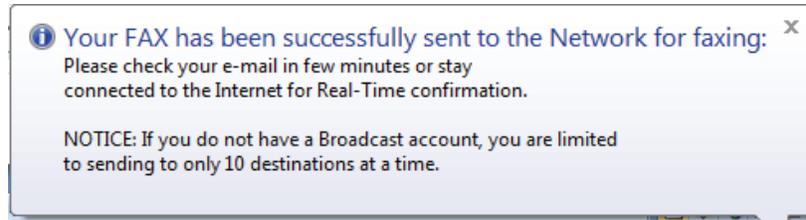
- a. Click on “Text Coverage” to fill out the data for cover page.



9. Input the information that you want to be put on the cover page and click OK to save.
10. To send your fax, click “Send”.



- Note this screen which confirms that the system has received your fax and is attempting to send.

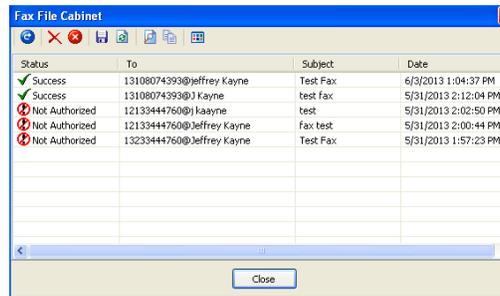


- To see your fax file cabinet (queue of faxes), click on the world icon on your computer's tool bar (lower right side).



Click on this icon to see your see your fax file cabinet

- This shows your fax waiting to be sent. You can keep this open to see when your fax is successfully sent by the system, or you can close it and wait for an e-mail confirmation.

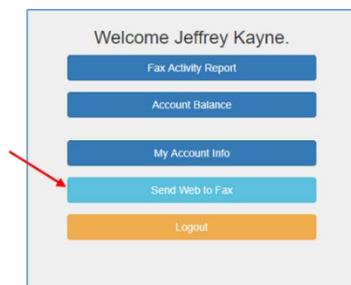


- This screen can show both your pending, successful and unsuccessful faxes as well.

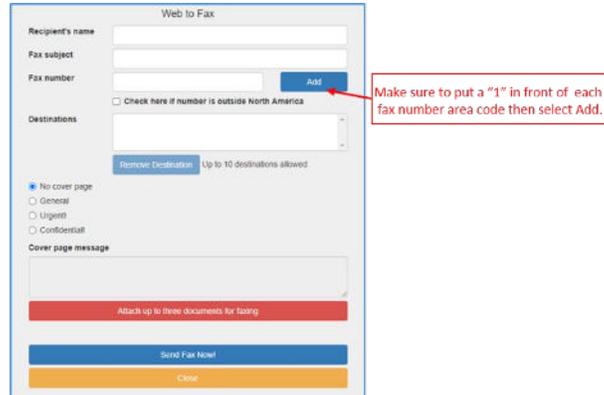
## Web to Fax

When registering for Masergy Fax Services, you will receive an e-mail with your login information. Save this e-mail/information in a safe place. Note: If you misplace your login information, please contact [ucsupport@masergy.com](mailto:ucsupport@masergy.com) or call (800) 942-4700.

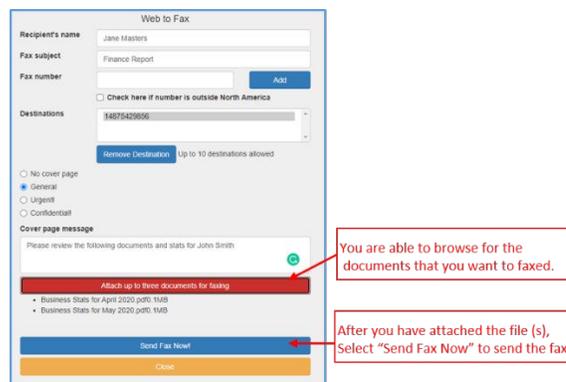
- Go to the user login page for Masergy Fax Solutions and enter your login and password at: <https://secure.ipfax.net>
- Once logged in, to send an outbound fax from the web, select “Send Web to Fax” button.



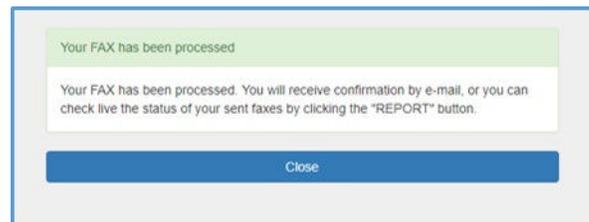
3. From this screen, you can send an outbound fax. Think of this as the cover page to your fax.
4. You must complete the following required fields: To, Fax Subject, Fax Number(s), and Message.



5. Once you have completed the required fields, attach the file you want to send by clicking the browse button and selecting the appropriate file.



6. Once the fax has been sent, you will receive a confirmation message letting you know that your outbound fax has been processed.



7. In order to determine whether or not your fax was successful, you can check the automatically generated e-mail or pull a report from the secure portal.
8. An e-mail will automatically be sent indicating to you whether or not the fax was successful.



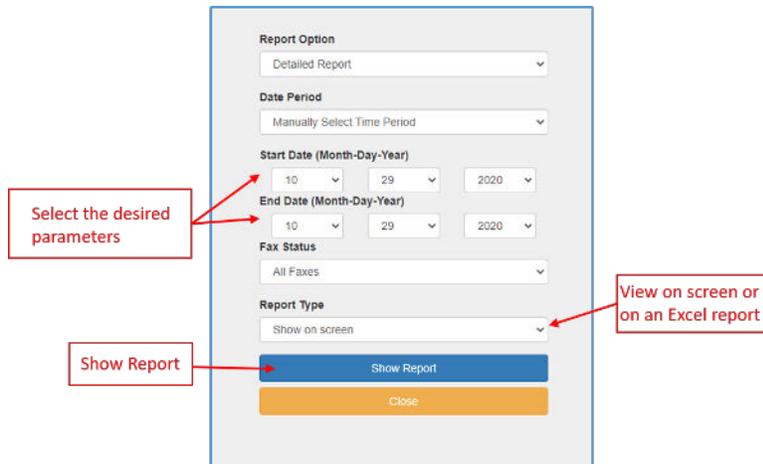
9. If the fax was not successfully transmitted, the automatically generated e-mail may indicate why the fax was unsuccessful in the fax field.



10. You may also view the status of all your sent faxes by returning to the main screen and clicking on Fax Activity Report.



11. The Report screen allows you to do a search of your fax statuses. You may either view them on screen or download them as an Excel file. After selecting your options, click on Show Report to view your results.



12. The Results page shows your fax transactions, based on criteria you selected. In the Status field, you can determine whether or not your fax was successfully sent or not.



Close Reports

<< Prev Page Next Page >> Rows: 60 Refresh Now 3/1/2012 3:05:03 PM

Total cost = 0.03 Total pages = 6 Total minutes = 2

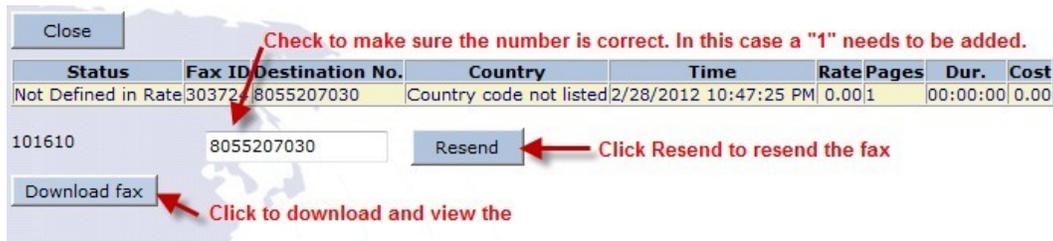
Status of Fax. "Not Defined in Rate" means unsuccessful

Status	Fax ID	Destination No.	Country	Time	Rate	Pages	Dur.	Cost
Not Defined in Rate	303724	8055207030	Country code not listed	2/28/2012 10:47:25 PM	0.00	1	00:00:00	0.00
Not Defined in Rate	303723	8055207020	Country code not listed	2/28/2012 10:47:25 PM	0.00	1	00:00:00	0.00
SUCCESS	303722	18055207030	USA	2/28/2012 10:47:16 PM	0.03	1	00:00:18	0.03
Fax to Email	303691	*2536666310	Fax to Email	2/28/2012 4:40:44 PM	0.00	1	00:00:30	0.00
Fax to Email	303153	*2536666310	Fax to Email	2/28/2012 9:38:34 AM	0.00	4	00:01:54	0.00

5 found.

13. All faxes can be resent by clicking on the Fax ID number. (Without the need to re-attach the document).

14. Make sure that you placed a "1" before the area code and that your fax does not exceed 2 MB.



Close

Check to make sure the number is correct. In this case a "1" needs to be added.

Status	Fax ID	Destination No.	Country	Time	Rate	Pages	Dur.	Cost
Not Defined in Rate	303724	8055207030	Country code not listed	2/28/2012 10:47:25 PM	0.00	1	00:00:00	0.00

101610      8055207030      Resend      Click Resend to resend the fax

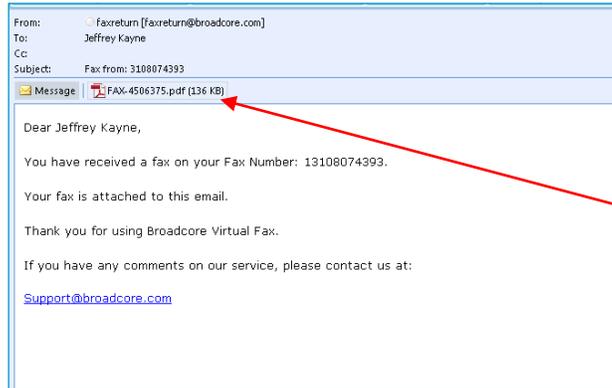
Download fax      Click to download and view the

15. View the faxes that were not sent in the reporting function, as well as, follow these steps to RESEND the faxes missed.
- Go to <https://secure.ipfax.net>
  - Log in to your account.
  - Click on REPORT.
  - Pick a date range that starts with the day faxes were no longer being received.
  - Click on the Fax ID for the fax you wish to have resent.
  - Click on the Resend button.



## Receiving Fax

1. Faxes will be delivered to your inbox as an attachment to an e-mail.



2. Click on attachment to open fax.
3. NOTE: DO NOT REPLY to e-mail, the fax sender will not receive your response.
4. Receiving faxes to e-mail allows for:
  - a. Greater privacy
  - b. Improved method of storing and tracking faxes.

*Please Note: All faxes sent and received on Fax cloud server are stored for 7 days.*

## E-mail to Fax

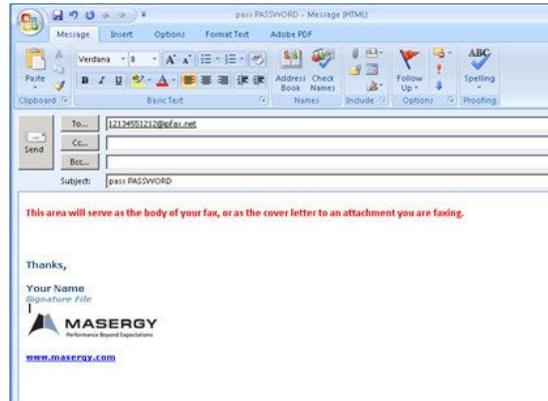
**IMPORTANT NOTE** E-mail to Fax is only available for use by the original email address (login name) that the Masergy Fax Solution was registered with. The Fax user login name must be the “email address” and not the fax number.

Steps to follow:

1. Open a new email
2. Send to “Destination number”@ipfax.net (Destination number should be 11 digit number that includes a “1” and area code. (Example - 14243064668@ipfax.net)
3. In the Subject field enter the word “pass” a space and then the Fax Portal Password (i.e. r433721)
4. Body of email will act like the cover page to an attachment, or will serve as the fax if no attachment is added.
5. Press send to send fax

*Please note: E-mail to Fax supports up to 3 attachments per e-mail in any format.*



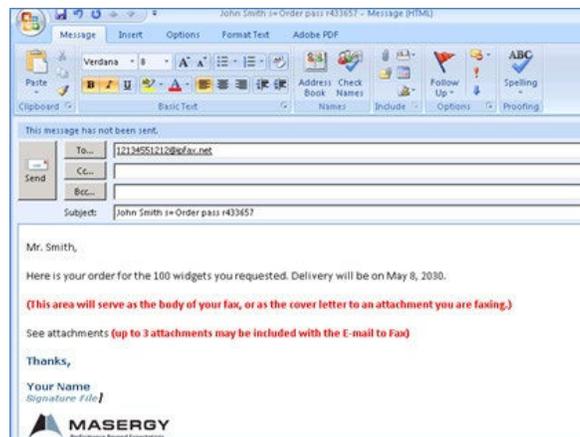


Example of E-mail to Fax Generic Format

A Fax Confirmation will be sent to your e-mail address.

### Custom Subject Line

On the following page is an example of a more personalized subject line. The formatting must match what is shown in the example. You may place the name of the recipient, followed by “s=XXXX” (without quotation marks), followed by pass with a space and then the Fax Portal Password (r433657)



Example of E-mail to Fax with Custom Subject Line

Example of what can be in the Subject: John Smith s=Order pass r433657

The Masergy Fax Solution services validates the outgoing e-mail with the user’s credentials in the Fax Portal. The user name needs to be the user’s e-mail address and Fax Portal password.

For training on Masergy Fax Solutions please send an email to Masergy Training at [uctraining@masergy.com](mailto:uctraining@masergy.com) to schedule an on-line session.