

FaxMind Desktop Client for Windows Manual

(Version 1.8.8, build 5/24/2013)

Website: <http://www.faxmind.com>

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1. Introduction

FaxMind Desktop Client for Windows is an application that allows users to connect to a FaxMind Server, for sending fax from every workplace. Fax job can also be appended to an email client (e.g. MS Outlook, Thunderbird, etc.), and sent as a normal email.

Features:

- User-friendly Interface.
- TWAIN scanner supported.
- FaxMind Printer drivers enable you to print directly from any Windows application and have the resulting document faxed to anyone anywhere.
- Public address book.
- Integrated with all popular Email Clients, including Microsoft Outlook, Outlook Express, Windows Mail, Live Mail, Thunderbird, IncrediMail and Foxmail, etc.

1.1 System Requirements

- Microsoft Windows 2000 or above, both 32-bit and 64-bit editions.
- 1.0GHz or higher processor.
- 512M of memory.
- Disk space: 10MB for application and at least 500MB for working space.
- Video display capable of 16-bit color and 800 x 600 resolution.
- Ethernet Network Card, TCP/IP network protocol installed.
- Internet or Intranet communication capabilities.

2. Login to FaxMind Server


When you launch the program, the **Login to FaxMind Server** dialog box appears on the screen:



The dialog box contains the following items:

- **Service Provider URL:** Enter the domain name or IP address and Port of the Fax Server to connect with. i.e.: FaxServerPC, 192.168.1.60
- **Search:** Click to search for FaxMind Server automatically.
- **E-mail address:** Enter your account for logging in FaxMind Server.
- **Password:** Enter your password here. *Leave it blank if you didn't set any password.*
- **Save password:** Save password so you do not need to enter it next time.
- **Auto-Login:** Automatic login to FaxMind Server when the Desktop Client starting up.
- **HTTPS:** Check to use the HTTPS protocol to connect FaxMind Server.
- **Work Offline:** Preview all the features of the desktop client
- **Login:** Sign in to your account.

3. Menus

As soon as you are logged in, the desktop client will be minimized to the Notification Area (System Tray) rather than taskbar, right-click on the icon  to open the popup menu:



- **New Fax...:** Open the New Fax dialog box which can be used to compose a new fax.
- **Fax History...:** Open the Fax History dialog box.
- **User Profile:** Update user personal information which could be used in cover page.
- **Change Password:** Change user's password.
- **Options:** Configure the Desktop Client settings.
- **Exit:** Quit the Desktop Client.
- **About FaxMind:** Display the about dialog box.

4. Send fax

- [Fax Recipients](#)(See 4.1)
- [Compose a new Fax](#) (See 4.2)
- [Send a cover page only fax](#)(See 4.3)
- [Send a fax from FaxMind Printer Driver](#)(See 4.4)
- [Send a scheduled fax](#)(See 4.5)
- [Use an email address as the fax number to send fax to](#)(See 4.6)

4.1 Fax Recipients

Once you create a fax, a fax number of the person who is receiving the fax must be specified. FaxMind allow you to send a fax to multiple recipients, each recipient is split by the ;

(semicolon) character. In general, you do not have to enter the recipient fax number one by one, since most of Email Clients(Including FaxMind Desktop Client) has the ability to choose Contacts while composing a new email. However, you can also enter fax number manually. Here is the list of the formats of fax number that FaxMind supports:

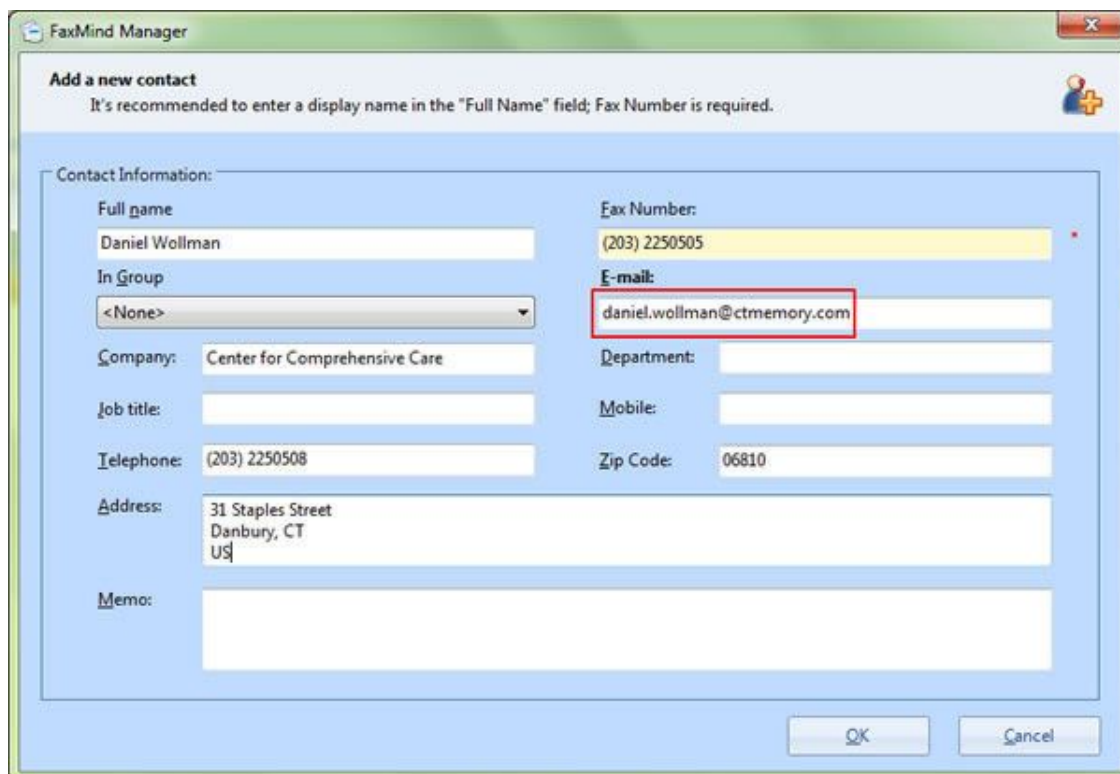
1. **Local Phone Number:** *934-1234, 934 1234 or 9341234.*
This is the format for making local calls, i.e. within the same area.
2. **Long Distance Number:** *(865)934-1234, 865-934-1234, 865-9341234 or **865 934 1234** (separated by space).*
This is the format for making long distance calls within the same country.
3. **International Phone Number:** *+1(865)346-3654, +1-865-8463654, +1 865 8463654 and +1 865 846 3654.*
In international usage, telephone numbers should always be quoted with the country code preceded by a "+";
4. **Extension Phone Number:** *934-1234,,,,,802 or +44-20-654-5678**X**802*
The comma causes a 2 seconds pause in dialing, you can add several commas if you want a longer soft pause. I.e. for the PBX (SPC exchanges) response.
The **x** character is used to split the fax number and extension number, and will cause a 6 seconds pause in dialing.

The above formats follow the rules of the Microsoft [Canonical address format for phone numbers](#) which are easily understood around the world.

The main difference with other Email to Fax software is, that you can simply add/choose an email address as a recipient fax number in your email client (Microsoft Outlook, Windows Live Mail) and never need to remember the recipient's fax number. In this way, it is necessary for you to add the recipient into the Public Contact in FaxMind Server:

1. On the server computer, double-click the **FaxMind Manager** icon on **Desktop**.
2. Enter the Administrator's email address and password, click **Login** button.

3. Click **Contacts** tab, in **Public Contacts** group, click **Add Contacts...**



The screenshot shows the 'Add a new contact' dialog box in FaxMind Manager. The dialog has a title bar 'FaxMind Manager' and a subtitle 'Add a new contact'. Below the subtitle is a note: 'It's recommended to enter a display name in the "Full Name" field; Fax Number is required.' The main area is titled 'Contact Information:' and contains several fields:

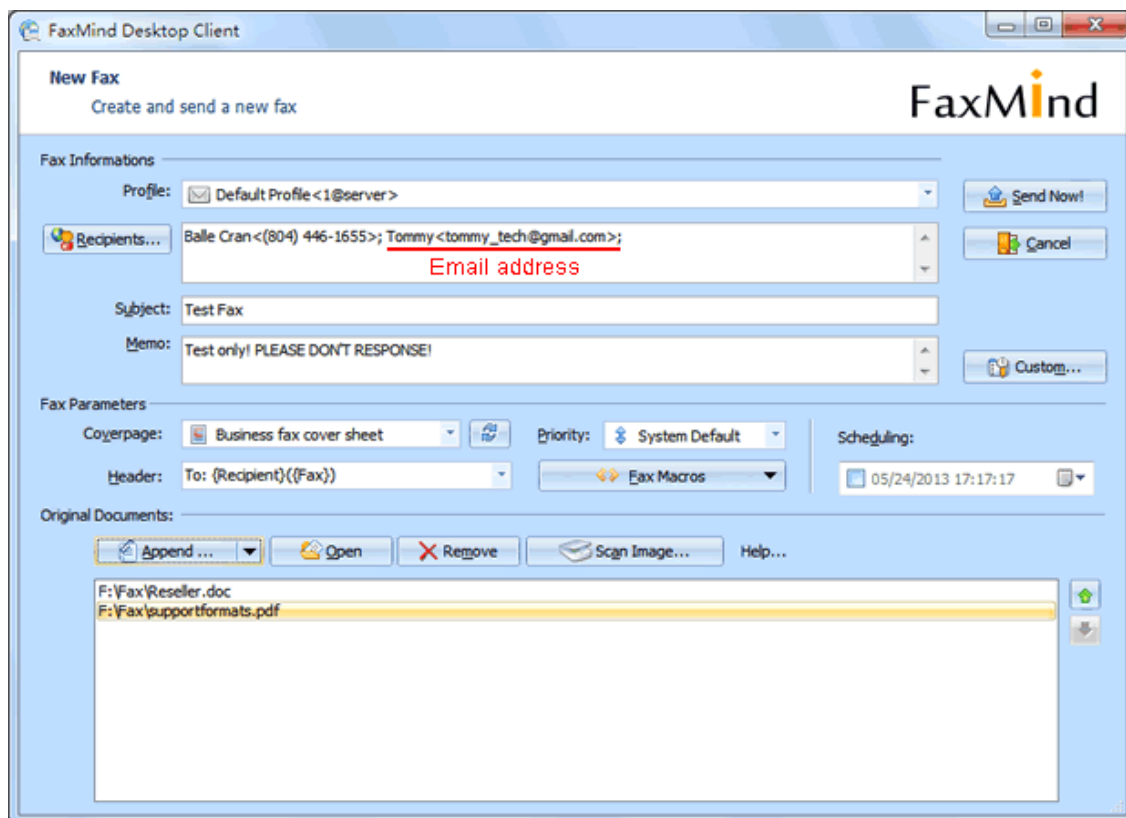
- Full name:** Daniel Wollman
- In Group:** <None>
- Company:** Center for Comprehensive Care
- Job title:** (empty)
- Telephone:** (203) 2250508
- Address:** 31 Staples Street, Danbury, CT, US
- Memo:** (empty)
- Fax Number:** (203) 2250505
- E-mail:** daniel.wollman@ctmemory.com (highlighted with a red box)
- Department:** (empty)
- Mobile:** (empty)
- Zip Code:** 06810

At the bottom right, there are 'OK' and 'Cancel' buttons.


4. Enter the full name, fax number, email address and other information for the new contact.
5. Click **OK** to save.


4.2 Compose a new Fax

1. Double-click the desktop client icon  in the Notification Area (System Tray) or right-click the icon, and click **New Fax...** in the popup menu.




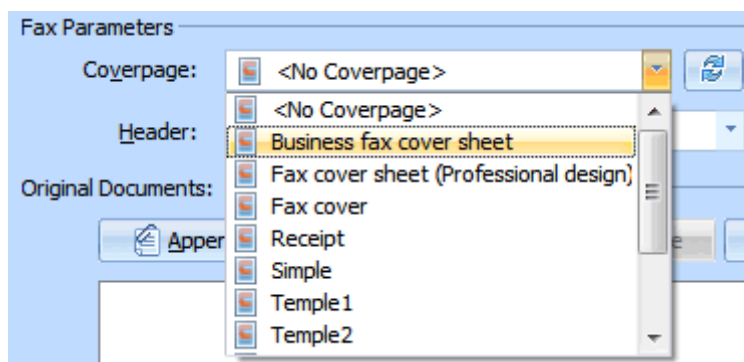
The New Fax dialog box contains the following items & buttons:


- **Send Now:** Submit the current fax job to FaxMind Server, or append the fax job to your email client.
- **Cancel:** Close the New Fax dialog box.
- **Custom:** Display **Custom sender & recipient information** dialog box for you to customize the displaying information in cover page.
- **Profile:** Choose a configuration profile you would like to send fax with.
- **Recipients:** The person to whom the fax is being sent.
- **Subject:** Specify a subject line to be displayed in cover page.
- **Memo:** Specify comment/memo which will be displayed in cover page.
- **Cover Page:** Specify a cover page for current fax.
 Refresh cover page list.
- **Priority:** Set the priority for current fax.
- **Header:** Use [Fax Macros](#) (See 9.) to customize the fax's header string.
- **Scheduling:** Check if you would like to send a scheduled fax.
- **Append:** Add files (Word, Excel, PowerPoint documents) that you want to fax. See [Supported File Format List](#).

- **Open:** Launches the currently selected document.
 - **Remove:** Removes the selected files from list.
 - **Scan Image:** Allows you to scan a document to add to the list.
 - : Use to arrange the order of the added documents.
2. Click **Recipients** button to choose whom the fax is being sent, or type the fax number directly. Recipients are split with a ";" (Semicolon).
 3. Click the **Append...** button, then locate the files you want to fax;
 4. Select a **Header** template if you want to add headers to fax page.
 5. If you wish to customize your personal and recipient information displaying in cover page, click **Custom** button to change it.
 6. Click **Send Now** button, the fax job will be submitted to FaxMind Server by default. If you have chosen to send fax via an email client, FaxMind desktop client will open its composing email dialog box, and automatically fill in the data fields for you.

4.3 Send a cover page only fax

1. Double-click the desktop client icon  in the Notification Area (System Tray) or right-click the icon, and click **New Fax...** in the popup menu.
2. Click **Recipients** button to choose whom the fax is being sent, or type the fax number directly.
3. In the **Cover page** combo box, select a cover page:



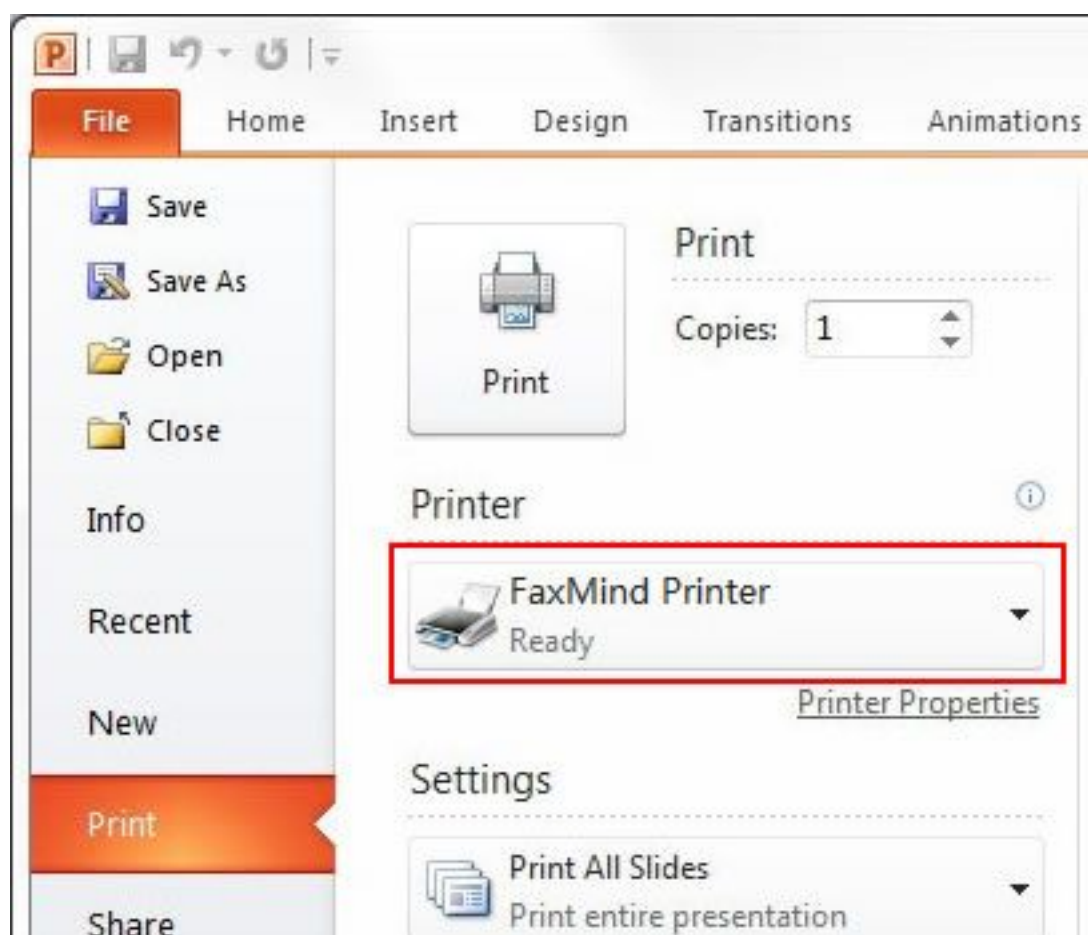
- Click the  button to refresh cover page list from server.
4. Click **Send Now** button.

4.4 Send a fax from FaxMind Printer Driver

With the FaxMind Printer Driver, you can fax documents directly from any applications (e.g. AutoCAD, ERP). You can do this by printing the documents to the FaxMind Printer Driver instead of to your usual printer.

From within your application:

1. Click **Print** on the **File** menu, or the appropriate command for printing;
2. On the **Print** dialog box, change the printer to **FaxMind Printer**;




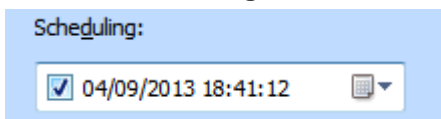
If you would like to change the **Resolution** of fax: Click **Printer Properties**, click **Graphic** or **Advanced** tab, choose **204 x 196 dots per inch** in **Resolution** combo box, click **OK**, click **OK**.

3. Click **OK**.
The FaxMind Desktop Client will be launched automatically.
4. If you are not logged in to FaxMind Server, you will be asked to enter your User's **Email address** and **Password**, click **OK** to login to the FaxMind Server.

5. In the **Recipients** field, type the phone number of the fax machine you would like to send the fax to.
6. In the **Header** field, you can customize the header of the outgoing fax.
7. To send a scheduled fax, check the **Scheduling** box and specify what time the fax will be sent out.
If necessary, modify other fields in the window.
8. Click **Send Now** button.

4.5 Send a scheduled fax

1. Double-click the desktop client icon  in the Notification Area (System Tray) or right-click the icon, and click **New Fax...** in the popup menu.
2. Click **Recipients** button to choose whom the fax is being sent, or type the fax number directly.
3. Click the **Scheduling** check box, and specify a date time when the fax will be sent.



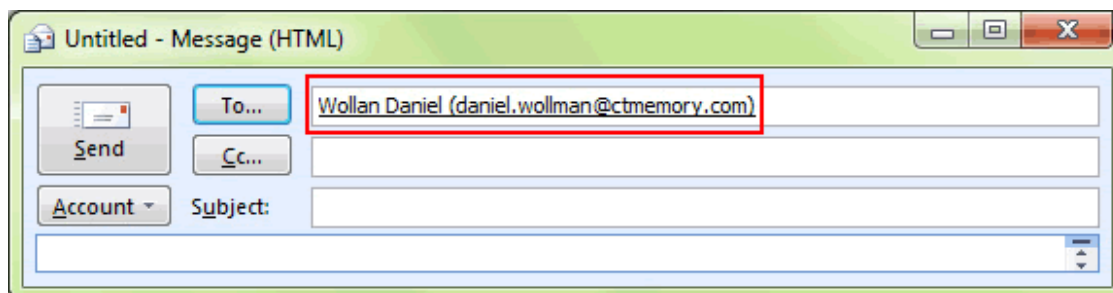
4. Click the **Append...** button, then locate the files you want to fax;
5. Click **Send Now** button.

4.6 Use an email address as the fax number to send fax to (Outlook)

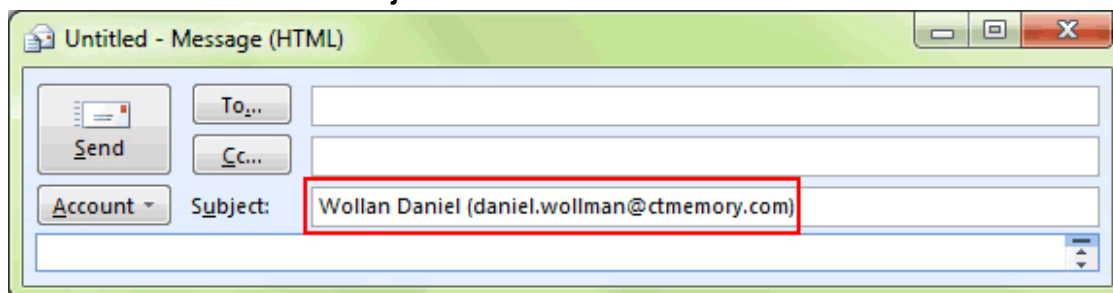
If you have already added the recipient: *Full name: Daniel Wollman, Email: daniel.wollman@ctmemory.com, Fax Number: (203) 225-0505* in FaxMind Server (See [Fax Recipients](#) (See 4.1)) and Microsoft Outlook. We can simply use the contact email address as recipient's phone number to send the fax to:

1. In Microsoft Outlook, click **New Mail Message** button on toolbar to compose a new email.
2. Click **To...** button.
3. In **Select Names: Contacts** dialog box, double-click to choose the contact you would like to send fax to.

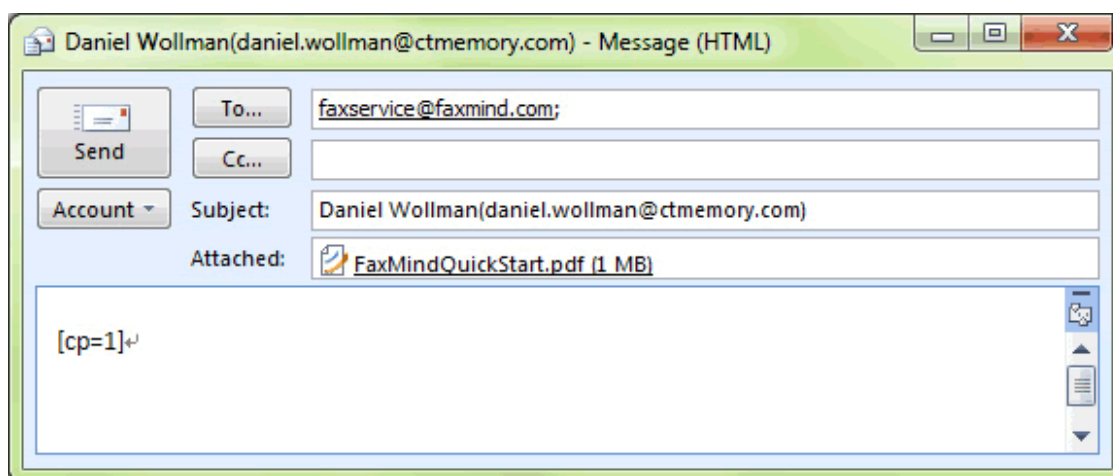
Click **OK**. The selected contact will be added in **To** line:



4. Move the all contacts to the **Subject** line.




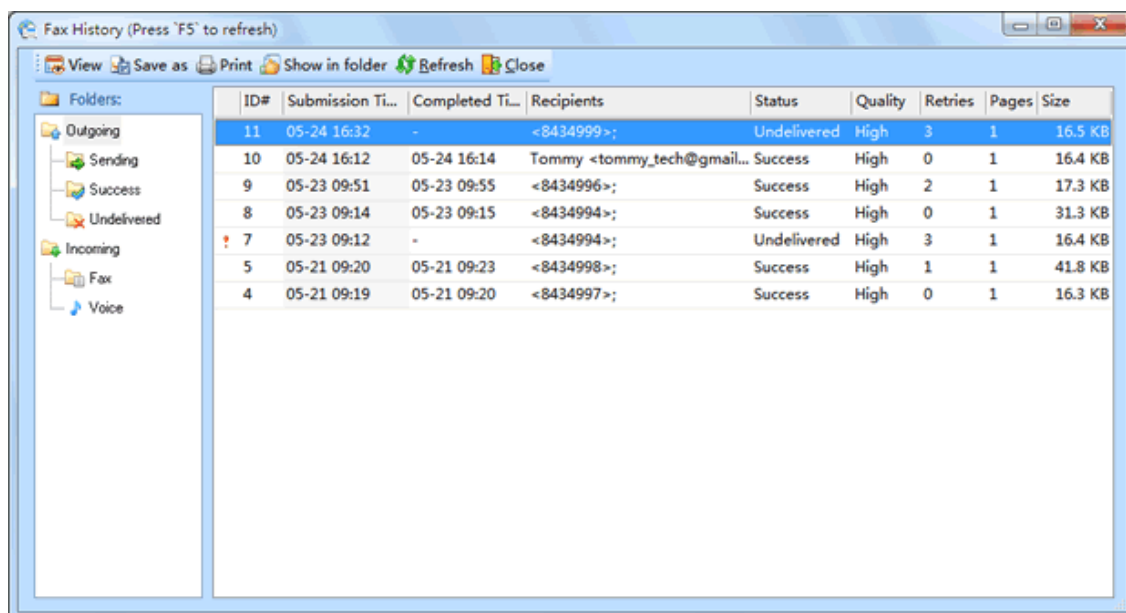
5. In **To...** line, enter the email account that you know FaxMind Server is monitoring, i.e. ***faxservice@faxmind.com***.
6. Attach a file you would like to fax by dragging & dropping a file on the compose email dialog box.



7. Click **Send** to send out the fax.

5. View fax history

1. Double-click the desktop client icon  in the Notification Area (System Tray), and click **Fax History...** in the popup menu, the **Fax History** dialog box will be displayed:




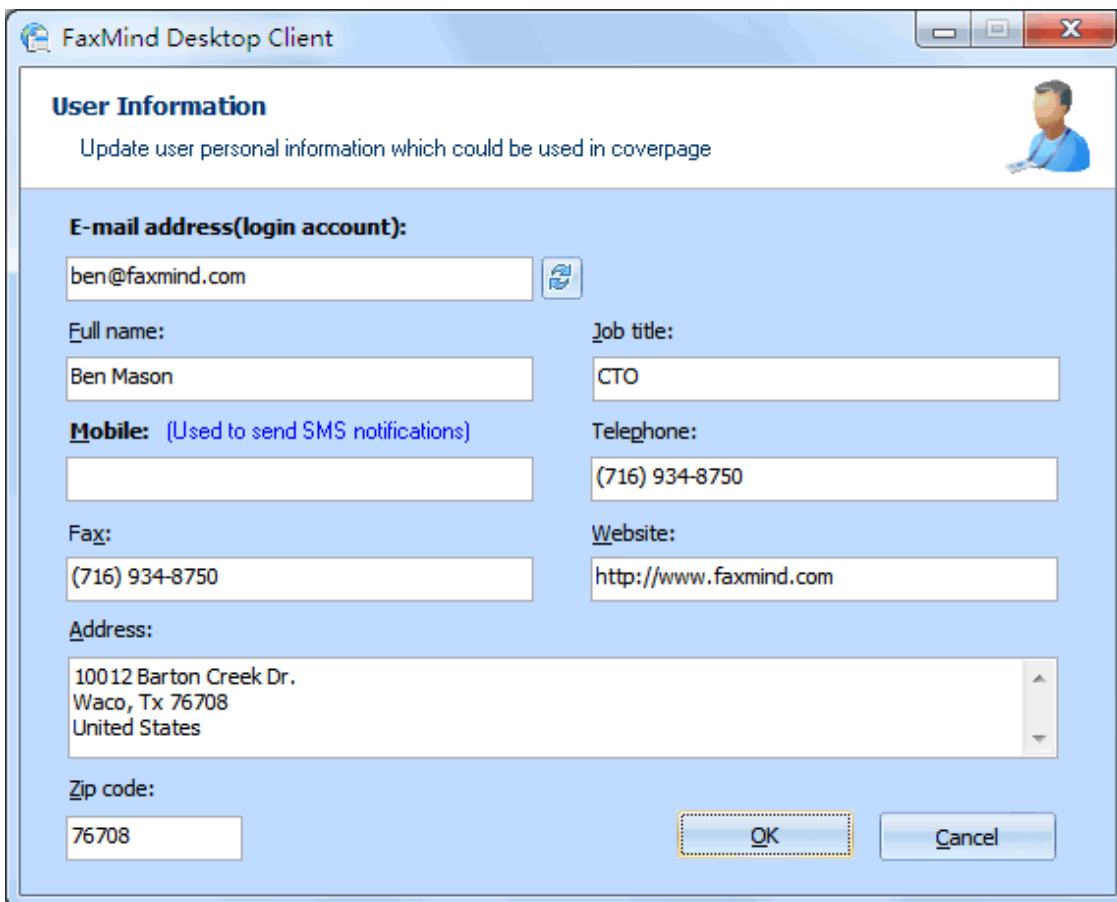
The Fax History dialog box contains the following buttons:

- **View/Play:** Open the fax editor to view the selected fax message or play the selected incoming voice message.
 - **Save as:** Save the selected fax to your local computer in TIFF or PDF format.
 - **Print:** Print the selected fax message.
 - **Show in folder:** Explorer to the fax file.
 - **Refresh:** Press F5 to refresh fax list.
 - **Close:** Close the fax history dialog box.
2. In Folder section, select a sub-folder under the **Outgoing** to view your own outgoing faxes which sent from desktop clients or email clients (Outlook, Gmail); To receive incoming fax & voice message, click the **Incoming** folder.

6. Update User Information

Users can update their personal information (including the login email address) at anytime from a desktop client. To update user's information:

1. Right-click the desktop client icon , and click **User Profile...** in the popup menu, the **User Information** dialog box will be displayed:




2. Make the modification and click **OK** to save.


Caution:

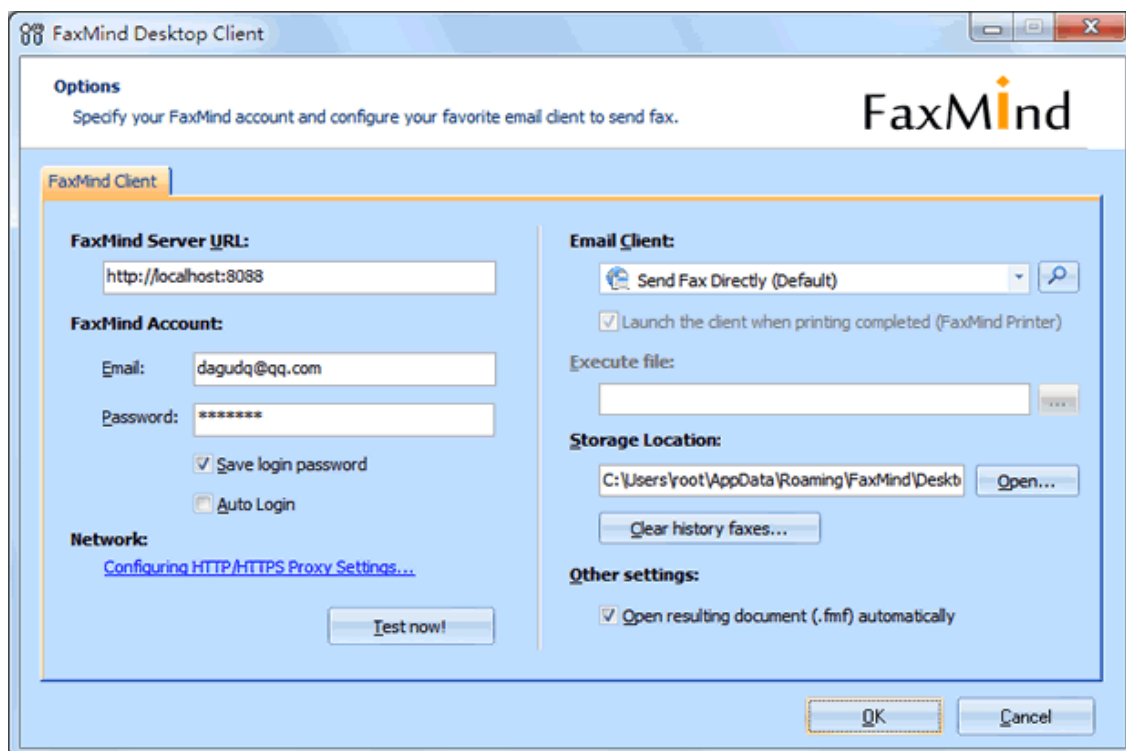
- You cannot update the Administrator's information in a desktop client.

7. Change User Password

1. Right-click the desktop client icon , and click **Change Password...** in the popup menu.
2. In the popup Change Password dialog box, enter your original or new password.
3. Click **OK** to save.


8. Desktop Client Options

1. Right-click the desktop client icon , and click **Options...** in the popup menu, the **Options** dialog box will be displayed:



The **Options** dialog box contains the following items & buttons:

- **FaxMind Server URL:**
Enter the domain name or IP address and Port of the Fax Server to connect with. i.e.: FaxServerPC, 192.168.1.60
- **E-mail address:**
Enter your account for logging in FaxMind Server.
- **Password:**
Enter your password here. *Leave it blank if you didn't set any password.*
- **Save password:**
Save password so you do not need to enter it next time.
- **Auto-Login:**
Automatic login to FaxMind Server when the Desktop Client starting up.
- **Configuring HTTP/HTTPS Proxy Settings:**
Desktop client uses the System Proxy Settings to connect to FaxMind Server. Click to change proxy server settings.
- **Email Client:**
By default, desktop client will submit fax jobs to a FaxMind Server directly. However, fax job can also be appended to an email client, and sent as a normal email. FaxMind Desktop Client supports the following email clients: Microsoft Outlook 2003/2007/2010, Microsoft Outlook Express (Windows 2000/2003/XP), Microsoft Live Mail, Windows Mail (Windows Vista above), Mozilla Thunderbird, IncrediMail and FoxMail 6/7.

Click the  button to auto-detect the default mail client software installed in the your machine.

- **Launch the client when printing completed (FaxMind Printer):**
As soon as you print a document to the FaxMind Printer Driver, the desktop client will launch the corresponding email client, and automatically open the **Compose/New Email** dialog box and attach the resulting document, if this option is selected.
- **Execute file:**
The execute file of the email client.
- **Storage Location:**
The storage location is where the history faxes are stored.
- **Clear History Faxes:**
Delete all local saved faxes.
- **Open resulting document (.fmf) automatically:**
Automatically open the printed resulting document with Fax Editor if this option is selected.

2. Make changes if necessary and click **OK** to save.

9. Fax Macros

The following macros are used in Coverpages, Fax Header string, Notification Emails and SMS messages to display useful fax information.

Macros are case-insensitive and must start with a "{" and end with a "}".

Recipient's details

Macros	Description
{Recipient}	Recipient's full name
{Fax}	Recipient's fax number
{Phone}	Recipient's voice phone number
{Email}	Recipient's email address
{Mobile}	Recipient's mobile phone number
{Company}	Recipient's company name
{Address}	Recipient's mail address
{Zip}	Recipient's zip code

Sender's details

Macros	Description
{TSID}	Device's transmitting subscriber identification
{FrFullName}	Sender's full name
{FrJobTitle}	Sender's job title
{FrFax}	Sender's fax number
{FrPhone}	Sender's voice phone number
{FrEmail}	Sender's email address
{FrWebsite}	Sender's home page
{FrMobile}	Sender's mobile phone number
{FrCompany}	Sender's company name
{FrAddress}	Sender's mail address
{FrZip}	Sender's zip code

Fax's details

Macros	Description
	Show the memo or the email body text.
	NOTE 1: Ensure enough space is allocated to fit in the email body.
{Memo}	NOTE 2: Emails normally include plain text and HTML formats for backward compatibility. FaxMind shows the HTML version in plain text format. If the text length is more than 600 bytes, HTML message will be inserted into a new fax page and leave the memo field blank.
{Subject}	Shows the subject.
{Totalpages}	Total number of fax pages, including the coverpage.
{DateTime}	Fax transmission date and time.
{Date}	Fax transmission date.
{Time}	Fax transmission time.

Additional Fax's details for Notification Emails and SMS messages

Macros	Description
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{FaxID}	Fax/Voice message ID.
{CallerID}	Caller's fax number (Calling Number Display).
{CSID}	Caller's called subscriber identification.
{Duration}	Total length in seconds of the sending/receiving time.
{Submission}	Fax submission date and time.
{StartTime}	Starting date and time for sending/receiving fax.
{EndTime}	Ending date and time for sending/receiving fax.
{Attempts}	How many times FaxMind will try to send out the fax.
{Resolution}	Fax resolution.
{FaxName}	Fax file name.
{FileSize}	Fax file size.
{PhoneType}	Local, Long-distance, International or Direct-dial calls.
{Status}	Brief description of fax result.
{LastError}	Last error message.