

**Captaris RightFax**

# Quick Reference Guide



**Client for Microsoft Outlook**


# Using RightFax Forms in Outlook

RightFax forms simplify creating, addressing, and formatting fax messages in Microsoft Outlook. Your administrator may have installed either a “standard” or “advanced” RightFax form. Contact the RightFax administrator for information on which form you should use.

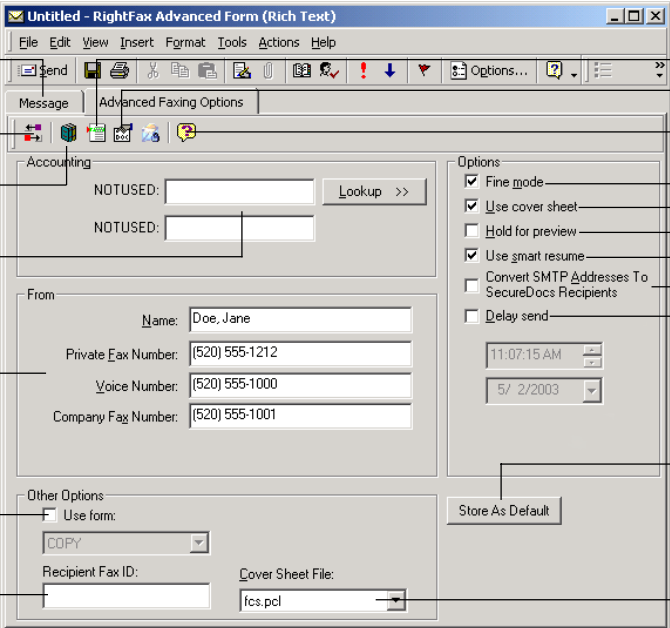
## To Open the Standard RightFax Form

- 1 From your Outlook Inbox, select **Tools > Forms > Choose Form**.
- 2 Highlight the form **RightFax** in the Organization Forms Library, and click **Open**.  
The Standard form is similar to the Advanced form (described below) but does not include some of the Advanced form features. For help with sending documents using the Standard form, click the **Help** tab.

## To Open the Advanced RightFax Form

- 1 Click the **New Fax to Contact** button  in the Outlook toolbar.
- 2 If you are sending your document to one or more recipients, complete the **Quick Fax Address** dialog box. The recipient’s name and fax number are required. Click **Add Another** to add additional fax recipients.
- 3 When you have added the addressing information for all the fax recipients you want, click **Done**. After the Advanced RightFax form opens, you can choose to add e-mail addresses to your recipient list in addition to fax addresses.

If you select one or more contacts in your Contacts folder before clicking the **New Fax to Contact** button, the Advanced RightFax form will automatically use the fax addresses of the selected contacts.



Address and compose message

Configure server information

List library documents

Enter billing codes

Enter your contact information to display on the cover sheet

Select overlay form

ID of receiving fax machine

List billing codes

Set document conversion options

View online help

Select fax resolution

Use a cover sheet

View before sending

Use Smart-Resume

Send via Certified Delivery

Send at specified time/date

Save current settings as default

Select cover sheet

## To Send a Document Using the RightFax Forms

- 1 On the **Message** tab, add one or more additional fax or e-mail addresses in the **To:** and **CC:** fields (For information on creating fax addresses in Outlook, see *Addressing Documents to Fax Numbers* below.)
- 2 Complete the **Subject** line, the message body, and add any desired file attachments. Text in the **Subject** line will be placed in the **Notes** section of the fax cover sheet. File attachments will be converted to graphic images and automatically appended to the end of the document in the order they appear in the message.
- 3 Click the **Advanced Faxing Options** tab. Add any desired library documents, billing codes, or overlay forms, and select any transmission options you want.
- 4 When the address and all desired options have been completed, click the **Send** button.

## Addressing Documents to Fax Numbers

RightFax forms support two different address formats for addressing faxes: the FAX format, and the RFAX format. For information on which of these formats you should use, contact your RightFax administrator.

### To Send a Document to a Fax Number Using the FAX Addressing Format

- 1 Specify a destination name and fax number in the **To:** or **Cc:** box of a new message using this format:  
[FAX:*Name@FaxNumber*]  
(You must include both the *Name* and *FaxNumber* as well as the enclosing square brackets.)
- 2 Separate multiple FAX addresses with semicolons.

**Example:**

[FAX:Jane Doe@555-1212];[FAX:John Smith@(520)555-1000]

### To Send a Document to a Fax Number Using the RFAX Addressing Format

- 1 Specify a destination name and fax number in the **To:** or **Cc:** box of a new message using this format:  
[RFAX:*Name@/FN=FaxNum*]  
(You must include the opening and closing square brackets.)
- 2 The name and fax number are required. You can also add these parameters for display on the cover sheet:

SMS Number	/SMS= <i>Number</i> (replaces /FN for a fax number)
Billing code 1	/AN= <i>Code</i>
Billing code 2	/MN= <i>Code</i>
City and state	/CI= <i>City, State</i>
Company	/CO= <i>Company</i>
Voice phone number	/VN= <i>Number</i>


- 3 Separate multiple RFAX addresses with semicolons.

**Example:**

[RFAX:Jane Doe@/FN=555-1212/VN=555-2345/CO=Acme, Inc.]

### To Send a Document to a Contact in Your Outlook Contacts List

- 1 Click the **To:** button to open the **Select Names** dialog box and show the names in your Contacts list.
- 2 Select one or more Business Fax or Home Fax entries.

Alternatively, you can select one or more contacts from your Contacts folder and click the **New Fax to Contact** button  in the Outlook toolbar (if it has been installed.)

## Adding Cover Sheets

### To Include a Cover Sheet with Your Document

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Select the **Use cover sheet** option.
- 3 In the **Cover Sheet File** box, type the file name of the cover sheet to use (including the .PCL or .DOC file extension), or select a cover sheet file from the list.
- 4 In the **From** group box, enter your name, fax number, voice number, and your organization's fax number.

## Attaching Library Documents

Library documents are frequently used documents that your fax administrator has stored on the server for easy access. Marketing materials, price lists, and product specifications are commonly stored as library documents.

### To Attach Library Documents

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 On the Advanced form, click the **Show the Select Library Document Dialog** button. This opens a list of the library documents on your network.
- 3 Double-click each library document that you want to attach. Each selected attachment is displayed in the **Selected Attachments** list. Library documents will be added to the end of the document in the order they appear in the **Selected Attachments** list.

On the Standard form, type the document ID of each library document to attach in the **Library Document IDs** field. Separate each document ID with a semicolon.

## Adding Overlay Forms

Overlay forms are image files that combine with your document so the two images appear together. Company letterhead is a commonly used overlay form. You can add one overlay form per document.

### To Add an Overlay Form to Your Document

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Select the **Use Form** option, and then select the overlay form you want from the list.  
On the Standard form, type the ID of the overlay form to use in the **Form Overlay Code** box.

## Assigning Billing Codes

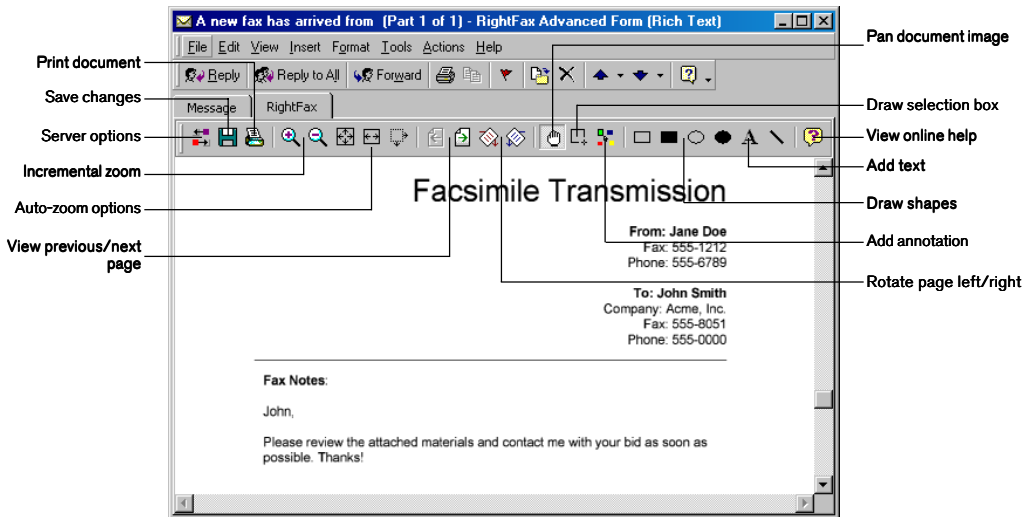
Billing codes may be used by the RightFax administrator to identify the sender, the recipient, or the content of documents. Billing codes do not normally appear in your documents but are stored with each document on the server.

### To Assign Billing Codes to Your Document

- 1 On the RightFax form, click the **Advanced Faxing Options** tab.
- 2 Under **Accounting**, enter one or two billing codes.  
If you are using the Advanced form, you can click **Lookup** to select from a list of available billing codes.

# Viewing Fax Documents

When the Advanced RightFax form is installed, Outlook messages containing received fax documents are automatically displayed in the RightFax fax viewer.



If you have the Standard form installed, no built-in fax viewer is available for received fax documents. The fax image will be included as a file attachment to e-mail messages. To view the fax image, double-click the attachment to open your computer's default TIFF file image viewer.

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## For More Information

Captaris is a leading provider of Business Information Delivery solutions that integrate, process and automate the flow of messages, data and documents. Captaris produces a suite of proven products and services, in partnership with leading enterprise technology companies, delivered through a global distribution network. Captaris has installed over 80,000 systems in 44 countries, with 93 of the Fortune 100 using the company's award-winning products and services to reduce costs and increase the performance of critical business information investments. For more information please contact us at [www.captaris.com](http://www.captaris.com) or call +1.520.320.7000.