


Captaris RightFax

Quick Reference Guide



Client for Lotus Notes

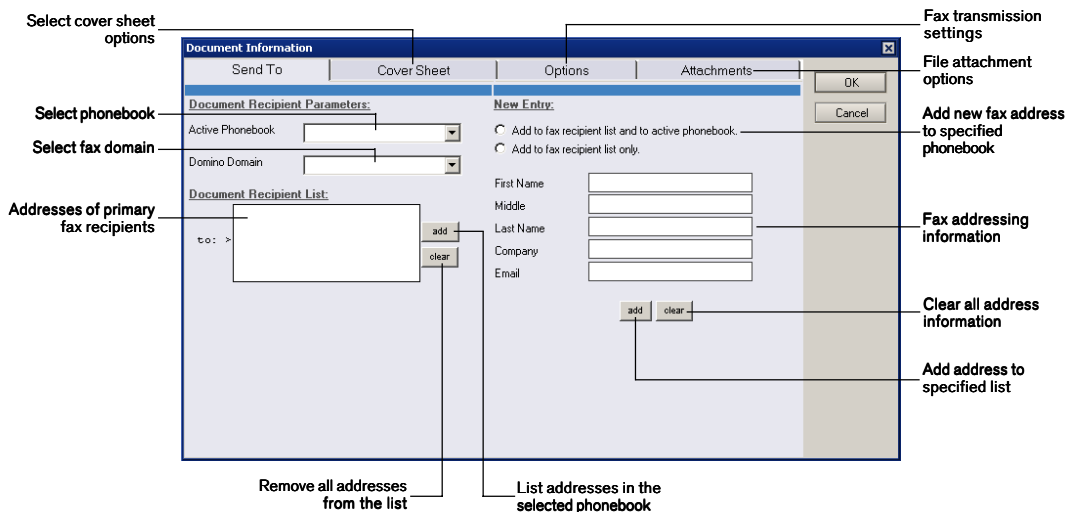
Faxing from Notes

- 1 Open your mail database and display your RightFax Faxing folder.
- 2 Click the **New RightFax Fax** button  in the Action bar, or on the Actions menu, click **Fax Tools**, and then **New RightFax Fax**. This opens a new memo and displays the **Fax Information** dialog box.
- 3 In the **Document Information** dialog box, add one or more fax recipients and specify your cover sheet options, library document attachments, and other sending preferences. Click **OK** to address the message. If you want to make changes to the fax address or sending options, click the **RightFax Fax** button in the **New Memo** Action bar to open the **Document Information** dialog box.

If you want to send a fax message to an e-mail destination, click the **New RightFax Document** button in the **New Memo** Action bar and enter the e-mail address you want. Faxes are sent to e-mail addresses as file attachments.

- 4 Complete the **Subject** line and type the body of the message. File attachments in the message will be converted to fax format and added to the end of the fax in the order they are listed.
- 5 When the message is ready to send, click the **Send** button.

When you create a new fax (described above), Notes opens the **Document Information** dialog box. This dialog box lets you select one or more fax addresses from your address books or manually enter fax address information. You can also specify your cover sheet options, add library document attachments, and customize several other sending preferences.



To Address a Fax to a Contact in Your Phonebook

- 1 In the **Document Information** dialog box, click the **Send To** tab.
- 2 Select the phonebook or address book you want from the **Active Phonebook** list and a fax domain from the **Domino Domain** list.
- 3 Click the **Add** button next to either the **to:** or **cc:** fields. This opens a list of all addresses in the selected phonebook.
- 4 Place a check next to each of the addresses you want, click **Add**, and then click **OK** to enter them in the specified address box. You can select entries from different address books.

To Address a Fax to a New Contact

- 1 In the **Document Information** dialog box, click the **Send To** tab.
- 2 Under **New Entry**, select either **Add to Fax Recipient List Only** or **Add to Fax Recipient List and to Active Phonebook** depending on whether or not you want the new address to be added to the selected phonebook.
- 3 Type the name, fax number, and other addressing information in the boxes provided, and specify a fax domain in the **Domino Domain** box.
- 4 Click the **to:** or **cc:** button depending on how you want the address added to the fax.

Adding Cover Sheets

A fax cover sheet can be automatically generated and added to the beginning of each of your faxes. The cover sheet typically identifies the fax sender, the intended fax recipient, and contact information for the sender and sender's organization. Your fax administrator can restrict your ability to change cover sheet styles or settings, so you may not have access to change some or all of the cover sheet options.

The screenshot shows the **Document Information** dialog box with the **Cover Sheet** tab selected. The dialog has four tabs: **Send To**, **Cover Sheet**, **Options**, and **Attachments**. On the right side, there are **OK** and **Cancel** buttons.

On the left side, there are two labels with arrows pointing to specific fields:

- Select a cover sheet** points to the **Select a cover sheet** dropdown menu, which has the text "(use my user default)" below it.
- Specify a resolution for the cover sheet** points to the **Resolution** dropdown menu, which is currently set to "Fine".

The main area of the dialog is divided into two sections:

- Cover Sheet:** This section contains the **Select a cover sheet** and **Resolution** dropdowns.
- From Info:** This section contains fields for **Name** (Rolando Ramos/Captaris), **Company**, **Voice**, **Fax**, and **General Fax** (425-555-1212). There is an **edit** button next to the **Name** field.

At the bottom, there is a **Cover Sheet Text:** section with a large text area. On the right side, there are two labels with arrows pointing to the **From Info** section and the **Cover Sheet Text** area:

- Your name and other contact information** points to the **From Info** section.
- Cover sheet notes (same text as the message "Subject" line)** points to the **Cover Sheet Text** area.

To Customize the Fax Cover Sheet

- 1 In the **Document Information** dialog box, click the **Cover Sheet** tab.
- 2 In the **Select a Cover Sheet** list, select the file name of the cover sheet.
- 3 Set the cover sheet resolution in the **Resolution** box. Higher resolution cover sheets are easier to read but take longer to transmit.
- 4 Under **From info**, type your name, voice number, fax number, and your company's fax number as you want them to appear on the cover sheet.

Sending Library Documents

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

To Add Library Documents to a Fax

- 1 In the **Document Information** dialog box, click the **Options** tab.
- 2 Click the **Add** button on the right side of the **Library Docs** box.
- 3 Place a check mark next to each library document to attach, and then click **OK**. The library documents you select will be added to the end of your fax in the order they are listed.

Specifying 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 the document.

To Add Billing Codes to a Fax

- 1 In the **Document Information** dialog box, click the **Options** tab.
- 2 Under **Billing Codes**, type one or two billing codes in the boxes provided, or click the **Edit** button to select from a list of available billing codes.

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 a Fax

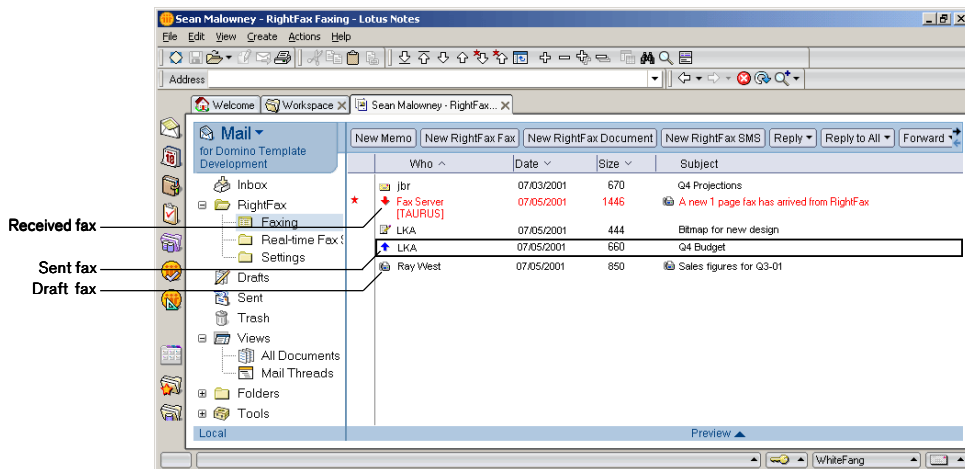
- 1 In the **Document Information** dialog box, click the **Options** tab.
- 2 Select the overlay form you want from the **Overlay Form** list.

Receiving Faxes in Notes

When incoming faxes are routed to your Notes mailbox, they are delivered as e-mail messages with file attachments. This file attachment is your fax.

To Identify Fax Messages

Sent and received fax messages are marked with special icons.



To View a Received Fax in Notes

- 1 In your mailbox, open the mail message containing the fax file attachment.
- 2 Double-click the attachment icon to open the **Attachment Properties** dialog box. Click **Launch**, and the fax will appear in the fax viewing application that your computer has associated with TIFF files.

Previewing Faxes

You can preview faxes before they are sent. This lets you check the appearance of your faxes before sending them.

To Mark a Fax for Preview

- 1 In the **Document Information** dialog box, click the **Options** tab.
- 2 In the **Hold for Preview** box, select **Yes**.

To Preview a Sent Fax

- 1 In your mail database, select **RightFax Real-Time Fax Status**, and then click the **View Real-Time Status** button in the Action bar. This opens a view of your sent documents that are stored on the RightFax server.
- 2 In the **Held for Preview** list, select the fax, and then click the **Release** button.

Monitoring Faxes

You can monitor the status of your sent faxes as they are processed on the RightFax server.

To View the Status of Faxes

In your mail database, select **RightFax Real-Time Fax Status**. Click the **View Real-Time Status** button in the Action bar. This opens a snapshot of your sent documents on the RightFax server, which lists faxes that have been sent and the status of faxes that are in process. Each fax includes a message that describes its status on the server.

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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 or call +1.520.320.7000.