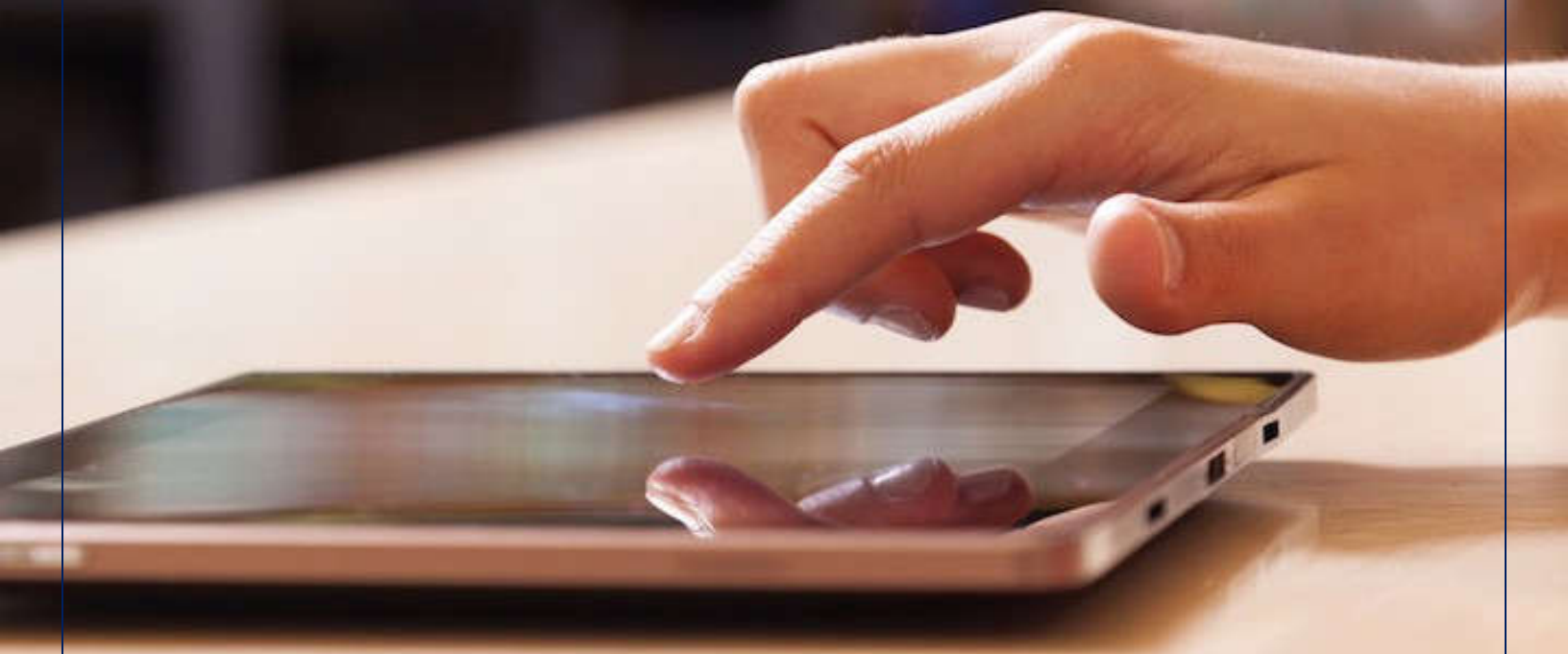


PRINT2FAX

USER GUIDE



Publication Notice

The contents of this publication and the specifications of this application are subject to change without notice.

The fax service who provided the software reserves the right to make changes without notice to this publication. The fax service provider and software, shall not be responsible for any damages, consequential or otherwise, caused by reliance on the materials presented herein, including typographical errors.

Version

This guide describes the Print2Fax installation and instruction manual.

Version 2.7.5.0, revised July 19th, 2016

Contents

Publication Notice	1
About Print2Fax	3
Installing Print2Fax.....	3
Minimum System Requirements for Print2Fax.....	3
Step-By-Step Installation Guide	3
Step-By-Step Upgrading Print2Fax.....	3
Configure your Print2Fax from <i>Preferences</i> :	4
Print2Fax Options	5
Display Fax Dialog:.....	5
Display Transmission Status:	5
Always Send Fax Cover Page:.....	5
Validate Fax Number:.....	5
Server Side Cover Page:.....	5
Export:	5
Import:	5
Print2Fax Preferences transport options	6
Print2Fax Extended Email Transport	6
Print2Fax Simple Email transport.....	7
Direct Submission Transport	8
Using Print2Fax.....	10
Adding and Removing Recipients Manually.....	11
Adding and Removing Recipients through Address Book	12
Adding and Removing Documents.....	13
Print2Fax Cover Pages	15
Print2Fax Address Book	16
Basic Address Book	16
Shared Address Book	17
Gaining access to your fax logs	18
Appendix A – FAQ	19

About Print2Fax

Print2Fax is a utility that will allow you to convert any printable Windows document to a fax.

Print2Fax installs as a printer driver and will appear as an option in your “Printers” folder. Using Print2Fax is as easy as printing a document, and requires just a few simple steps.


Installing Print2Fax

Minimum System Requirements for Print2Fax


- To use Print2Fax, you must have a fax provider service account.
- Supported operating systems: *Windows 2008 (x86 / x64), Windows 7 (x86 / x64), Windows 8 (x86 / x64), Windows 8.1 (x86 / x64), Windows 2012 (x64), or Windows 10 (x86 / x64)*
- Print2Fax requires at least 128 megabytes (MB) of RAM (256 MB is recommended).
- Print2Fax requires at least 20 megabytes (MB) of available space on the hard disk.
- The application also requires a Microsoft Mouse or compatible pointing device.

Step-By-Step Installation Guide


NOTE: Disable any anti-virus software before installing Print2Fax

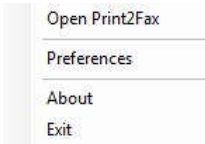
- Double-click on “Print2FaxInstall.exe” file.
- Accept the default “Destination Folder”, click “Next >”, and click “Install”.
- A progress bar will display your installation progress.
- After the progress bar completes you will get the “successfully installed” notification.
- In your Start menu go to Start | Programs | Fax Tools | Print2Fax.
- This will add the  Print2Fax icon to the system tray and from here you will be able to access Print2Fax Preferences to configure the application. You will also see a new printer installed with the name “Print2Fax”.



Step-By-Step Upgrading Print2Fax

- Go to Control Panel / Add Remove programs and Click on Print2Fax.
- Click on the Change / Remove button and you will see an alert that will ask you to confirm removing the application. Click “Yes” and this will remove the current version of Print2Fax.
- Then check if the  Print2Fax icon is in the system tray. If it is, right-click and choose exit to remove the existing Print2Fax from memory.
- Then follow the step-by-step instructions in the installation guide above.

Print2Fax Configuration and Preferences:

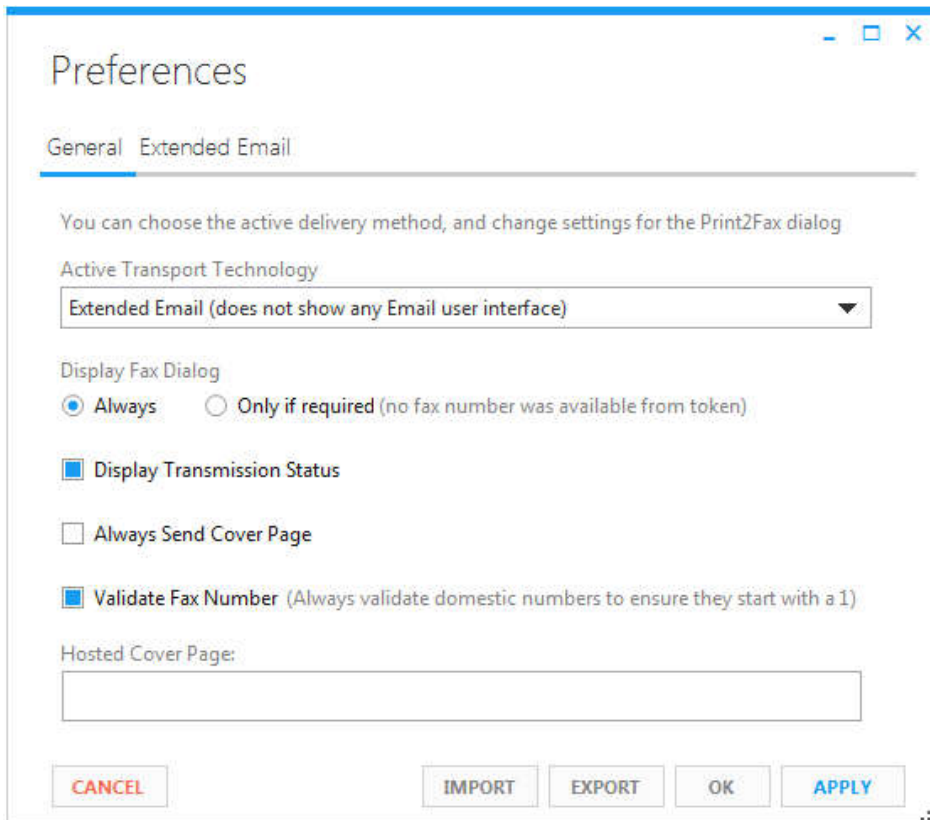
There are several options available to customize the behavior and transmission method in Print2Fax. The Preferences can be accessed by ensuring that Print2Fax is active and then right-clicking the  Print2Fax icon in the system tray and selecting **Preferences** from this menu:



The **Preferences** can also be accessed by double-clicking the  Print2Fax icon and clicking the  **SETTINGS** button in the upper-right:



This will open the **Preferences** menu:



Print2Fax Preferences

Active Transport Technology: This menu provides various different options for transmitting your fax jobs to Concord. The available options are *Simple Email*, *Extended Email*, or *Direct Submission*, with the default method being *Extended Email*. These options give you different transport mechanisms, allowing greater functionality when faxing with the Print2Fax application. They are explained in more detail later in this document.

Display Fax Dialog: This is an option to disable the Send Fax dialog box for use when Print2Fax is in an automated environment. For end-user use this should be set to Always.

Display Transmission Status: This will show a dialog window confirming the fax transmission status.

Always Send Fax Cover Page: This forces the automatic use of a server-side cover page for each fax.

Validate Fax Number: This option will cause the fax number to be validated prior to sending the fax. This helps to prevent an incorrectly formatted number from being misinterpreted.

Hosted Cover Page: This specifies the server-side cover page to be used when sending the fax.

Export/Import: This feature allows a user to save the Print2Fax configuration and preferences to a file on a local or network directory, or to import a set of preferences from a previously exported file or from another workstation or server.

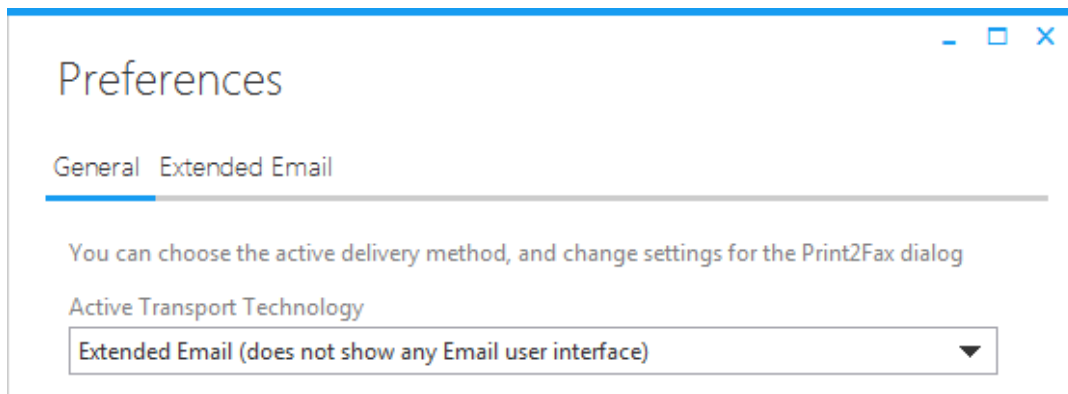
Print2Fax Preferences - Transport Options

There are three transmission options available for delivering your fax job to your fax provider: **Extended Email**, **Simple Email**, and **Direct Submission**.

Print2Fax Extended Email Transport

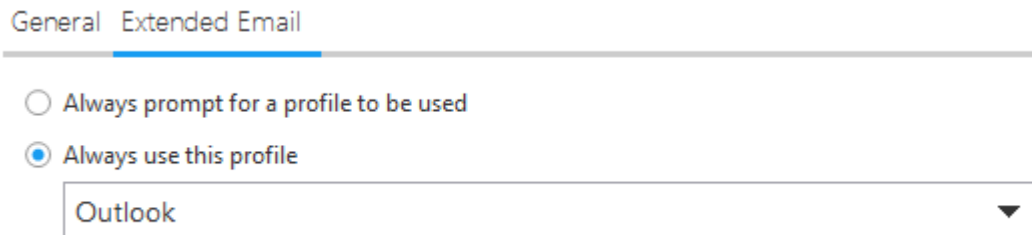
NOTE: This Transport type requires a 32 bit version of Microsoft Outlook.

The Extended Email option leverages your locally installed Microsoft Outlook application to transmit your fax job using SMTP.



This option makes use of the ESMTP protocol and **will not** display a New Mail window. The fax will be sent using background processes, so no further interaction is necessary once you click Send Fax.

The fax will be sent using the Microsoft Outlook profile configured in the **Extended Email** tab. The user may select **Always prompt for a profile to be used** to choose a specific Outlook profile, or can select a default profile under **Always use this profile**



Print2Fax Simple Email transport

The Simple Email option also leverages a locally installed instance of Microsoft Outlook to transmit the fax using SMTP.

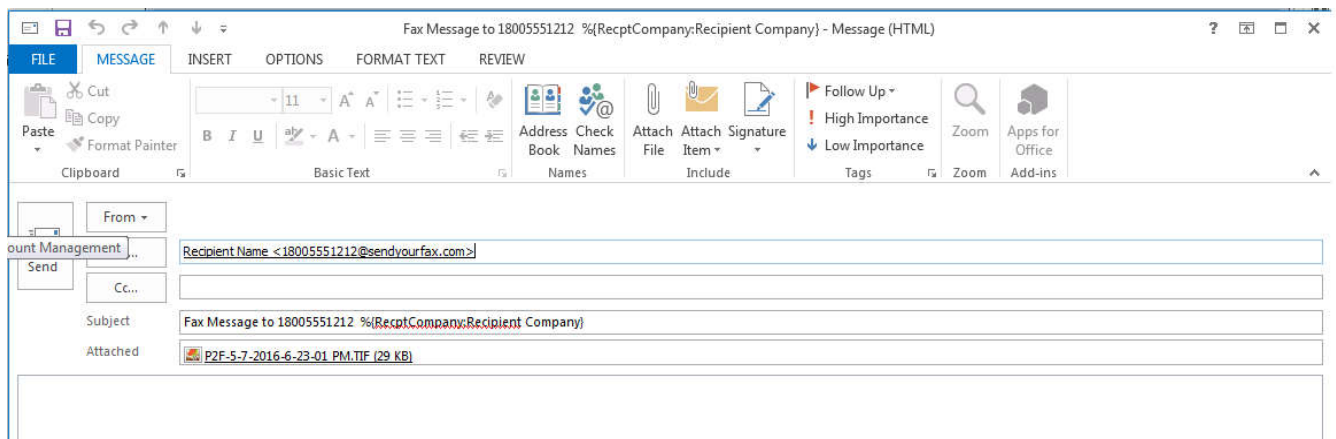
General

You can choose the active delivery method, and change settings for the Print2Fax dialog

Active Transport Technology

Simple Email (displays Email user interface for editing messages) ▼

This option will produce a New Mail window that is pre-populated with the recipient and cover page information entered in the Send Mail Dialog:



Simple Email offers the ability to CC the attached fax document to additional email addresses for archiving, record keeping, or communication purposes.

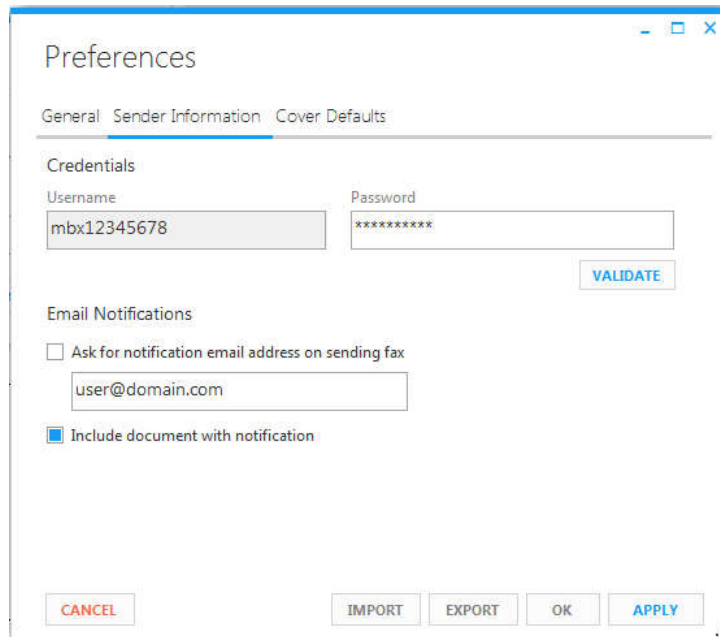
NOTE: Both **Extended Email** and **Simple Email** require that the sending Email address is registered with your fax provider to authorize sending faxes.

If the email application **Outlook** is not actively running, the fax will not be sent until **Outlook** is opened. The Print2Fax print job for **Extended Email** and **Simple Email** is linked to the email application. If the application is closed, the job will not print until it is open.

Print2Fax Direct Submission Transport

Direct Submission (secure) allows the transmission of a fax directly to the fax service provider server via the HTTPS protocol. This method does not require a local installation of Microsoft Outlook or other email clients.

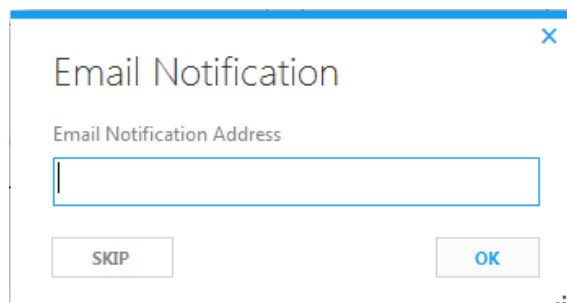
Sender Information: The fields in this tab must be completed to allow for Direct Submission to the fax provider.



The screenshot shows a 'Preferences' dialog box with the 'Sender Information' tab selected. The 'Credentials' section has a 'Username' field containing 'mbx12345678' and a 'Password' field with masked characters. A 'VALIDATE' button is to the right. The 'Email Notifications' section has an unchecked checkbox for 'Ask for notification email address on sending fax' and a text field containing 'user@domain.com'. There is also a checked checkbox for 'Include document with notification'. At the bottom are buttons for 'CANCEL', 'IMPORT', 'EXPORT', 'OK', and 'APPLY'.

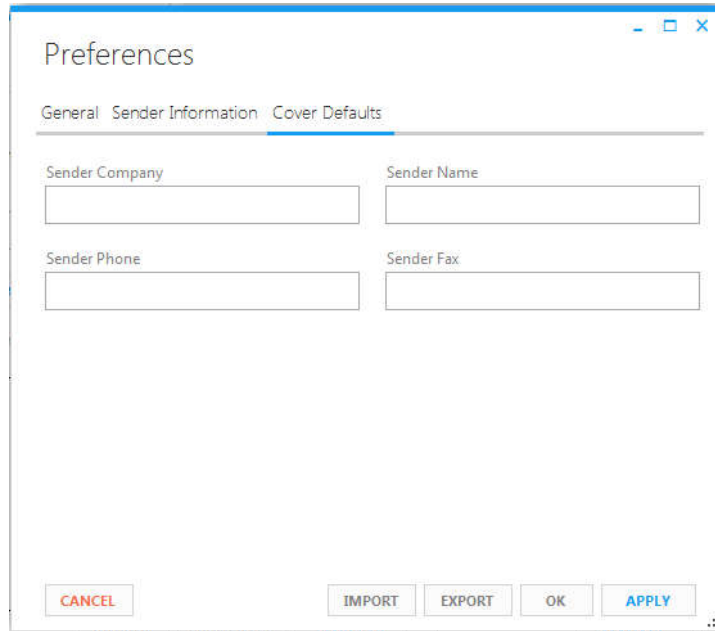
Credentials: The Credentials fields must be populated with the User ID and Password provided by the fax provider to authenticate with the HTTPS server and allow for transmission.

Email Notifications: The Email Notifications fields indicate the email address to which Delivery Confirmations should be sent upon fax completion. Entering an email address in the field will provide a Default address to which all notifications will be sent. Checking the 'Ask for Notification email address on sending fax' option will present the user with a dialog window in which they enter an email address for the specific fax submission



The screenshot shows an 'Email Notification' dialog box with a single text field for 'Email Notification Address'. Below the field are 'SKIP' and 'OK' buttons.

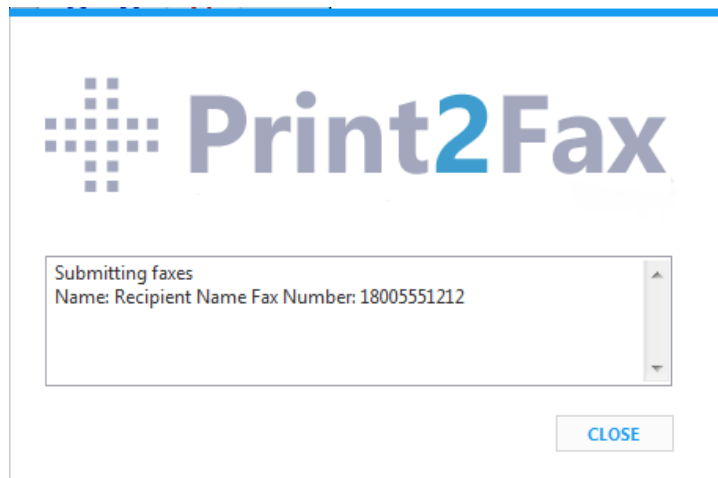
Cover Default: This tab allows for default values to be entered which will automatically populate on any Cover Page included with the fax job.



The screenshot shows a window titled "Preferences" with three tabs: "General", "Sender Information", and "Cover Defaults". The "Cover Defaults" tab is selected. It contains four text input fields: "Sender Company", "Sender Name", "Sender Phone", and "Sender Fax". At the bottom of the window, there are five buttons: "CANCEL", "IMPORT", "EXPORT", "OK", and "APPLY".

Note that these values may be altered as needed through the Cover Page button on the main Send Fax dialog window.

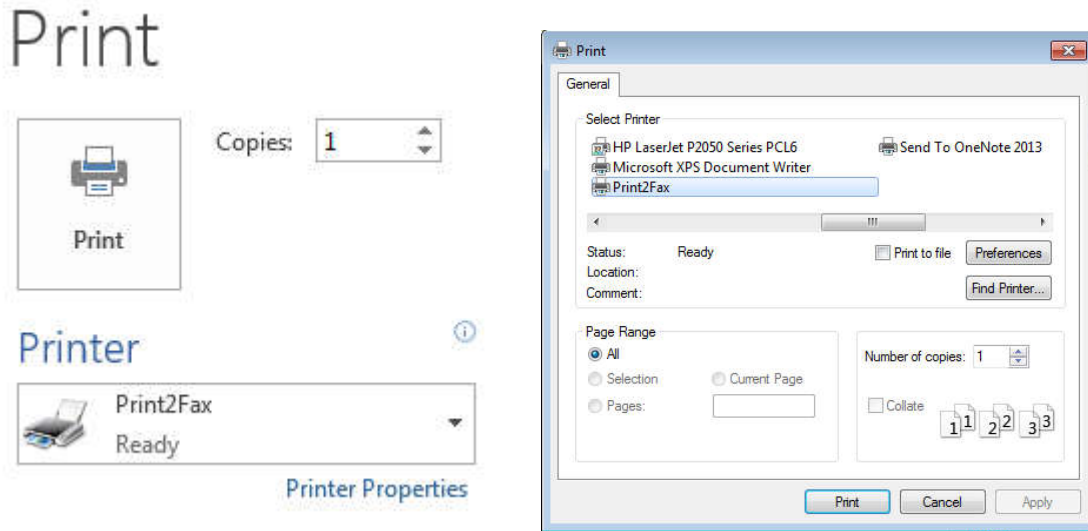
Display Transmission Status: When this option is selected on the main *Preferences* screen, a dialog box will appear confirming the successful transmission of your fax job to the fax provider:



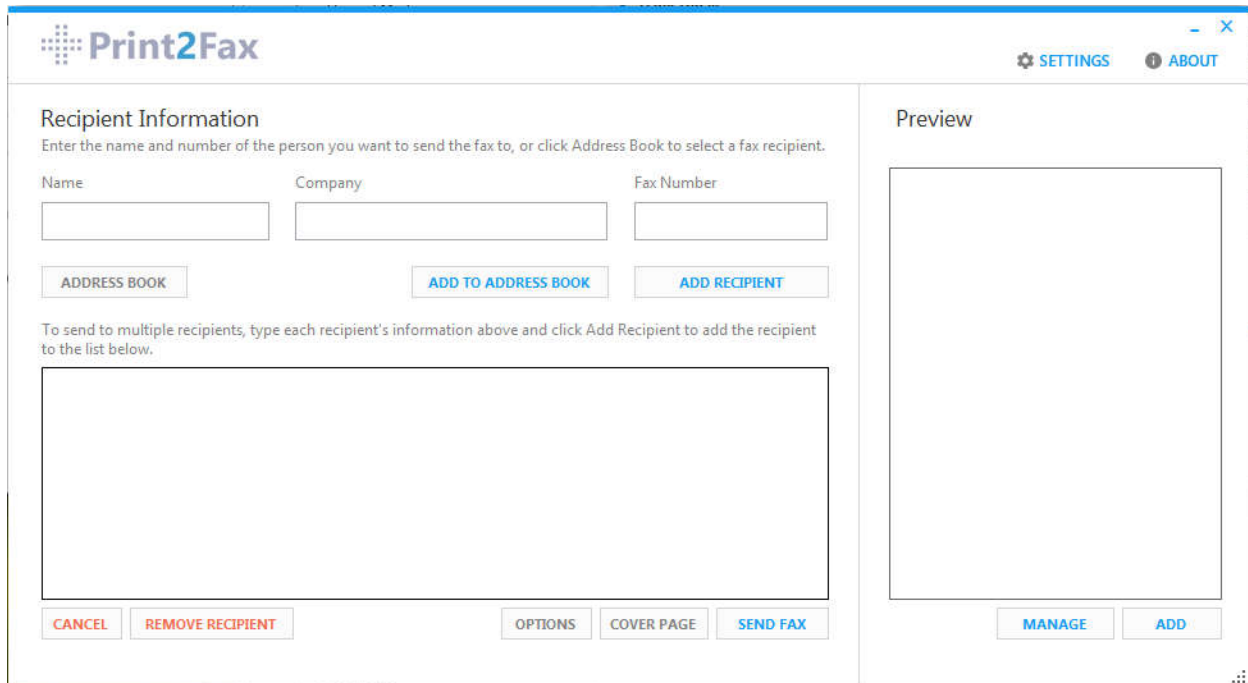
The screenshot shows a dialog box with the "Print2Fax" logo at the top. Below the logo is a text area containing the text "Submitting faxes" and "Name: Recipient Name Fax Number: 18005551212". At the bottom right of the dialog box is a "CLOSE" button.

Using Print2Fax

Once Print2Fax has been installed and configured, sending a fax is as simple as clicking the Print button or selecting File > Print from within the document you wish to fax, and then selecting the Print2Fax option:



Upon printing the document, the main Print2Fax interface will be launched:



Adding and Removing Recipients to a Fax

The fax recipient information can be entered either by manually completing the **Recipient Information** fields or by adding recipients from the **Address Book**.

Adding Recipients Manually

To manually add a recipient, populate the *Name*, *Company*, and *Fax Number* fields and then click the **ADD RECIPIENT** button:

Recipient Information

Enter the name and number of the person you want to send the fax to, or click **Address Book** to select a fax recipient.

Name	Company	Fax Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
ADDRESS BOOK	ADD TO ADDRESS BOOK	ADD RECIPIENT

NOTE: The fax number format may vary based on the fax provider, but the default format should include the country code and full fax number (including area code) with no spaces or punctuation.

Multiple recipients can be added to the same fax job by populating the fields then clicking the **ADD RECIPIENT** button:

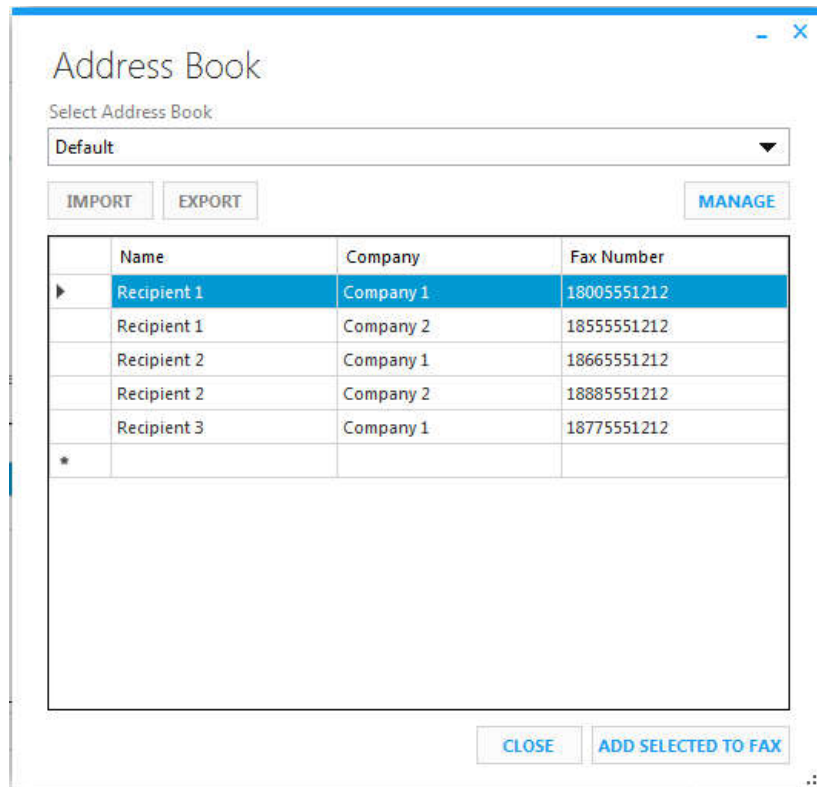
To send to multiple recipients, type each recipient's information above and click **Add Recipient** to add the recipient to the list below.

	Name	Company	Fax Number
▶	Recipient 1	Client 1	18005551212
	Recipient 2	Client 2	18665551212

Recipients can be removed from the current fax job by highlighting the recipient and clicking the **REMOVE RECIPIENT** button.

Adding Recipients using the Address Book

Recipients can also be added to a fax job from the Address Book by clicking the **ADDRESS BOOK** button:

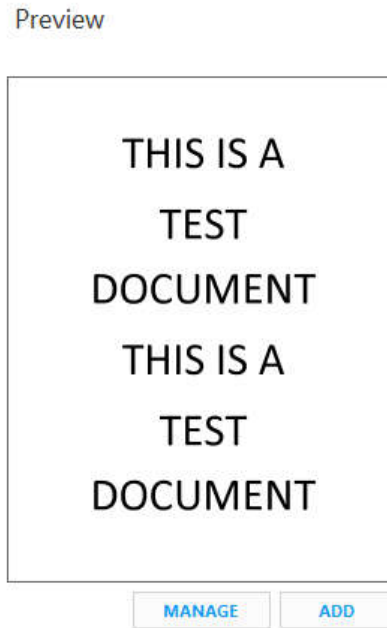


Click on the recipient that should be added and then click the **ADD SELECTED TO FAX** button.

NOTE: The fax service provider or email host may limit the number of recipients that can be added to a single fax job. Print2Fax will return an error in the event that this limit has been exceeded.

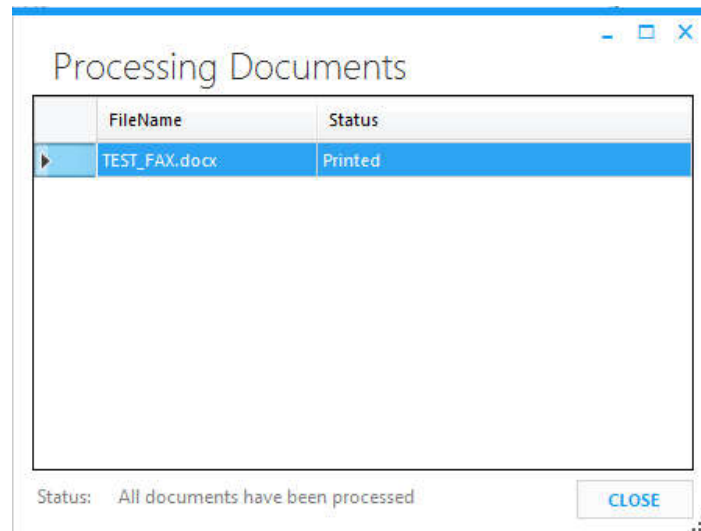
Adding and Managing Fax Documents

Print2Fax allows for the addition, removal, and reorganization of multiple documents in a fax job. A preview of the first page of the original fax document printed is shown in the pane on the right:

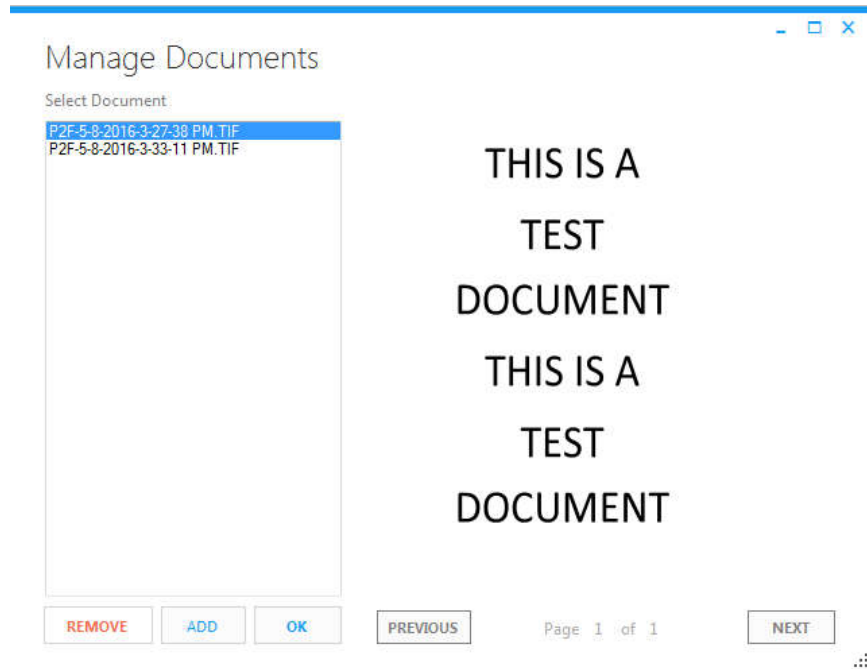


Clicking the **ADD** button will launch a Windows Explorer menu which can be used to find and add further documents to the current fax job.

Locate the file that should be added to the fax and then press the Open button. Print2Fax will process the document then add it to the fax job:



Documents can be previewed, added, or removed from the fax job by clicking the **MANAGE** button:

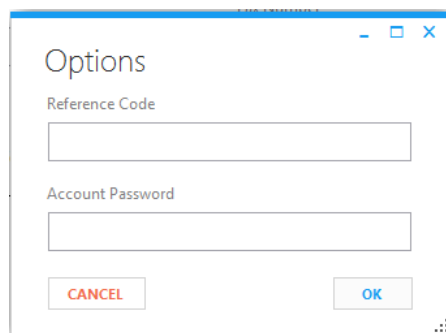


Similar to the option in the Send Fax window, further documents can be added via the **ADD** button or removed via the **REMOVE** button.

NOTE: The fax service provider or email host may limit the total file size and/or total page count that can be sent in a single fax job. Print2Fax will return an error in the event that these limits have been exceeded.

Additional Options

By clicking on the **OPTIONS** button Recipient Information, a Reference ID can be added. This information is customizable up to 32 characters in length. It will be included in the metadata stored by the fax provider, and can also be populated on the Cover Page:



Print2Fax Cover Page Options:

Provided your account with your fax provider is set to allow the use of a cover page, you can select and customize it by clicking the **COVER PAGE** button. Then within screen that follows, you may enter the information required to include your custom cover page.

The screenshot shows a window titled "Add Cover Page" with a close button in the top right corner. The window contains the following fields and controls:

- Cover Page Name:** A single-line text input field.
- Sender Company:** A single-line text input field.
- Sender Name:** A single-line text input field.
- Sender Phone:** A single-line text input field.
- Sender Fax:** A single-line text input field.
- Subject:** A single-line text input field.
- Rich Text Editor:** A large text area with a toolbar above it. The toolbar includes icons for cut, copy, paste, undo, redo, bold (B), underline (U), italic (I), font color (ABC), background color (ABC), bulleted list, numbered list, indent, outdent, and link.
- Include Cover Page:** A checkbox located at the bottom left of the dialog.
- CANCEL and OK:** Two buttons located at the bottom right of the dialog.

Cover Page Name: The name of the cover page to be used as stored on the fax provider servers.

NOTE: This field is case and space sensitive and requires the exact cover page name be entered. If using a standard or default cover page this field should be left blank.


Sender Information Fields: These fields can be populated as preferred based on the cover page assigned to the user.

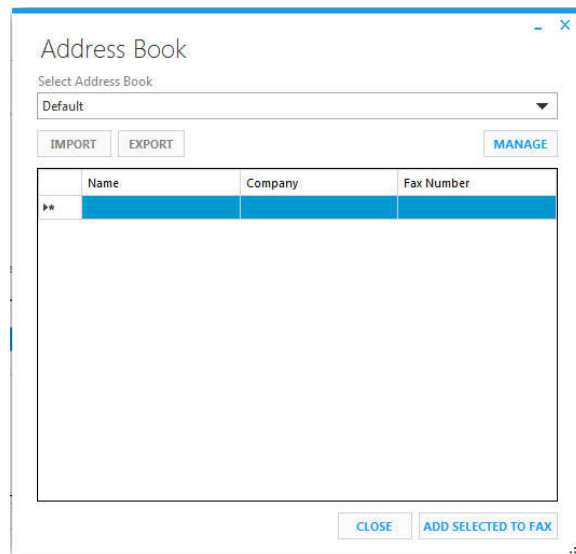
NOTE: None of these fields are required.

Include Cover Page: This option must be checked if the sender wants to include the cover page.

Print2Fax Address Book

The Print2Fax address book allows you to access a stored list of contacts that can be added as recipients to any fax job.

Click the  button from within the primary Print2Fax interface to launch the Address Book manager:



Basic Address Book Management

Select Address Book: Print2Fax allows for access and management of multiple discrete address books. This allows a user to select a specific address book file.

Adding a Contact: To add a contact enter the Name, Company and Fax Number in the field next to the star (*).

Edit a Contact: Click the field to be changed and enter the new value.

Remove a Contact: To remove a contact select the row that should be removed and press the backspace or delete key.


Add Selected to Fax: Click this to add a contact to a fax job. The highlighted contact(s) will be added to the fax. Multiple contacts may be selected by holding down the shift or control key.


Import: This will allow you to import an address book from a back-up file or from another computer or server. If any contacts are found which are identical to an existing entry they will be skipped to prevent duplication.

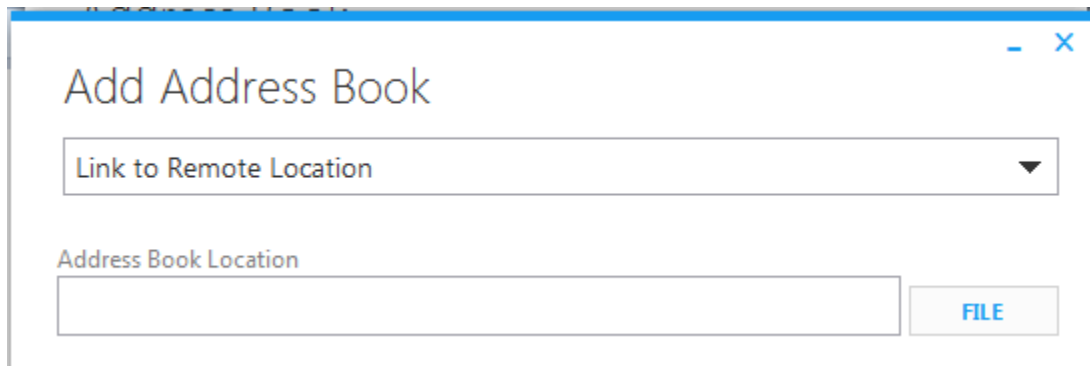
Export: This will allow you save the address book to a back-up file, or transfer the address book to another computer or server.


Advanced Address Book Management

In addition to importing and exporting Address Book files from a local workstation or server, Print2Fax has the ability to actively sync with a Shared Address Book. This allows for a single Address Book file to be maintained which can be accessed by multiple users without requiring an Import each time the Address Book has been updated.

To select an existing Shared Address Book, open the Address Book and then click the  button:

Click the  button and then select Link to Remote Location from the drop-down menu:



Click the  button and use Windows Explorer to navigate to the directory of the Shared Address book.

NOTE: If the Shared Address book is stored on a remote server, the user must have the appropriate directory Mapped to a Drive Letter on their Windows Profile.

Accessing Print2Fax Logs

Print2Fax will create log files for all user interactions, and any potential errors that may occur. If a user experiences any problems when using Print2Fax, the fax vendor will require these log files to troubleshoot any problems.

The Print2Fax log files are located in the following directory:



C:\Users\\AppData\Roaming\Print2Fax\Logs

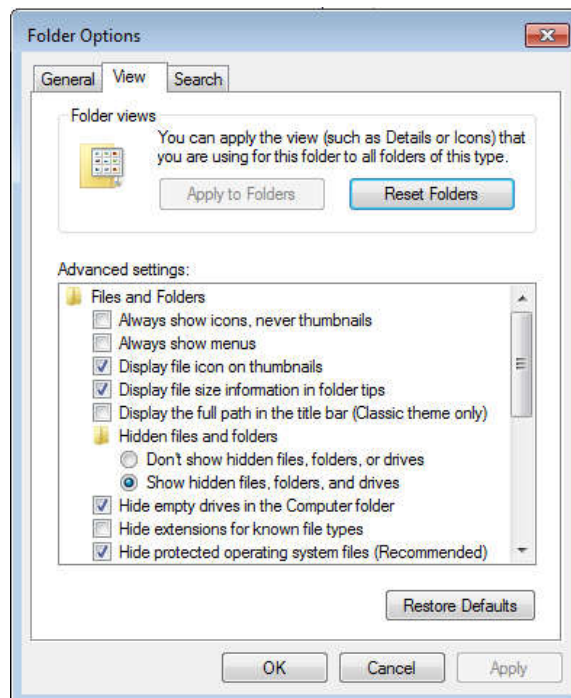
The filenames in this directory will reflect the date that the log was created and are stored with a **.log** extension. The files can be opened in any standard text editor, such as Notepad or Microsoft Word.

The log files for the current day will not be prepended with a date, they will simply be named **Print2Fax.log** or **Print2Fax-Errors.log**. In most cases the fax provider will ask for these most recent files for troubleshooting purposes.

NOTE: The **AppData** folder is a Hidden folder in Windows. In order to view or access this directory the Windows user must be able to view hidden files and folders.

To enable this ability perform the following steps.

1. Click the **Start** button  then **Control Panel**.
2. Select the **Folder Options**  **Folder Options** menu.
3. Click the View tab then select the radio button next to **Show hidden files, folders, and drives**.



Appendix A – FAQ

Q Does Outlook have to be running for Print2Fax to send a fax?

An active instance of Outlook is required if using a Simple or Extended Mail Transport configuration. The faxes will be stored in the Outbox until Outlook has been launched and will then be sent. If the using Direct Submission Transport option, then Outlook is not required.

Q When sending a fax an “Error opening Outbox” occurs.

This most likely indicates that Print2Fax is configured for Extended Email Transport and the primary Outlook Profile is not configured correctly. Check the email login credentials for the account that is set as the default in the Extended Email option and ensure that a standard email can be sent using this account.



The screenshot shows the 'Extended Email' tab selected in a configuration window. Below the tab are two radio button options: 'Always prompt for a profile to be used' (unselected) and 'Always use this profile' (selected). Below these options is a dropdown menu with 'Outlook' selected and a downward arrow on the right.

Q When sending a fax an “EMAPI -1” error occurs.

This indicates that Print2Fax is configured to use the Extended Email Transport option and there is a 64-bit version of Outlook installed. This version of Outlook is incompatible with Print2Fax. The Simple Email Transport or Direct Submission methods must be used instead.

Q When opening Print2Fax a “devmode” error occurs.

This indicates that there was a problem with the installation of Print2Fax. It is likely that an Anti-Virus application was running during the install. Uninstall the Print2Fax application through the Programs and Features menu in the Control Panel. Reboot the workstation, disable any Anti-Virus, then reinstall Print2Fax.