eComFax SOHO

User Guide

Versions Control

Version	Author	Reason for Change	Date
1.0	DSI	Preliminary Version	May 17, 2018
1.1	SVJ	Advanced Messaging	August 20, 2019
1.2	DSI	Revised Version	June 31, 2019
1.3	DSI	Revised Version	January 14, 2020
2.0	DSI	Version 02	November 02, 2020

RIGHTS OF USE:

FORMAL STATUS:

Prepared by:	Revised by:	Approved by:
NAME: DSI DATE: May 17, 2018	NAME: DSI DATE: November 02, 2020	NAME: DATE:

Table of Contents

1. Introduction

This document presents the eComFax® SOHO service User Guide.

It explains how to use the service for sending and receiving faxes and also elaborates on other advanced capabilities that can be used to communicate in a better and more efficient way.

2. What is eComFax®?

eComFax® is a Virtual Fax and Advanced Messaging service that allows users to effortlessly send and receive faxes to and from anyone in the World and by using any device that has Internet access (smart phone, tablet, laptop/PC) without the need to have any phone lines, cables, toner, paper, fax machines or other expensive and complex terminal aparters. At the same time eComFax® entails the latest technologies to ensure compliance with the highest security standards and regulation.

eComFax® is entirely virtual so customers do not need to invest in any local or on premise deployment (no hardware or software needed).

3. How Does eComFax® Work?

Users may send faxes, SMSes and other Advanced Messaging options by using their existing email or through an intuitive and extremely easy-to-use and user-friendly web interface.

Users are simply provided with brand new local/domestic fax numbers (DIDs) or they can port their existing DIDs into the eComFax® platform.

Any fax a user sends can be securely archived and (re)viewed at a later time. Users may retain the content and keep it securely archived for as long as they need to (few months to several years).

4. eComFax® Platform

4.1 Access to the eComFax® application

The eComFax® interface can be accessed through the marketplace platform in the following way:

1. Log into your Cloud Marketplace account;
2. (after successfully purchasing eComFax® subscription) click on "My Apps";

3. (once on "My Apps" section) click on the "eComFax" logo. This will take you directly to eComFax® Interface through SingleSignOn (SSO) without requiring additional logins.
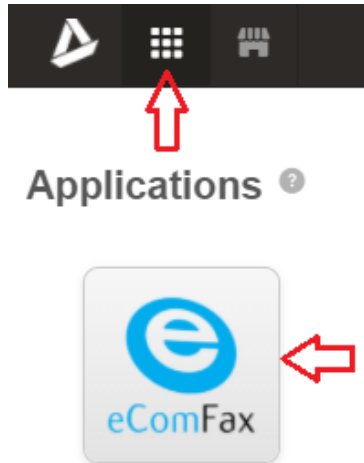

Figure 1 Accessing eComFax App through the Cloud Marketplace

4.2 **First-time access and setup**

When users access the platform for first time, a dialog will ask them to select a number from their area. This number will be used to receive faxes.

Figure 2 New Inbound Fax Number Window

Another option is for the customer to click on "Use your current fax number". This implies the customer has an existing fax number they wish to keep. By clicking on this option the user will be presented with a number porting form.

Figure 3 Number Porting Form

User will need to answers questions noted in the the porting form and provide necessary information around the porting request. Once last month's invoice (from current carrier) is attached / uploaded, the form can be electronically signed and submitted. This will then initiate a porting process.

4.3   **Home menu**

Once logged in the user will access the "Home" menu where user can see four sections:

Figure 4 Home Menu

In the upper-left corner (**Shortcuts**) user may access some quick options such as Sending a new fax or SMS, Accessing the message list or Configuration section.

In the upper-right corner (**eComFax Service**) user may access and read the End-User License Agreement (EULA), privacy policy note, and eComFax® User Guide.

(once user choosen a fax number) In the bottom-left corner (**Fax Number**) user will see eComFax® Account information.

Figure 5 Account Information and Inbound Fax Delivery

<u>Fax Number</u> is the fax number associated with user's own eComFax® account. Very much like the fax number, an email address is also associated with user's eComFax® account. This means that any fax sent to the associated fax number will be received by user's associated email address (Delivery Email).

<u>Delivery Email</u> is the email destination where the notifications for inbound faxes are delivered to. The default Delivery Email the system sets is the same one used to purchase the eComFax® SMB subscription with; however, you may change it with a different one. What is more, you may add more than just one email address as your delivery email address/es – as shown in Figure 5 (email addresses must be separated by a semicolon [without space] and there is a 1,024 character limit); eg:

'john.doe@abc.com;mary.doe@abc.com'.

Apart from Email Delivery method the system also supports other methods such as Web Service, PCI Fax, Secure Fax, and Email+Faxback. In this section user can also change the inbound fax document format (eg. PDF, TIFF, or searchable PDF) as well as define the language for Optical Character Recognition (OCR) feature in case 'searchable PDF' has been set as a default inbound fax document format, as shown in Figure 5. This means that eComFax® will convert any received fax image into a searchable .pdf file allowing search by content and indexing. User is also able to enable SMS notifications when a fax is received by clicking on an empty box next to SMS Notification.

As with Inbound Delivery faxing, it is also possible to add additional email addresses that can be used for Outbound faxing. In other words, email addresses added under <Configuration_Delivery> will receive email notifications for outbound faxing. You may add / remove by clicking on the "+" / "-" icon.
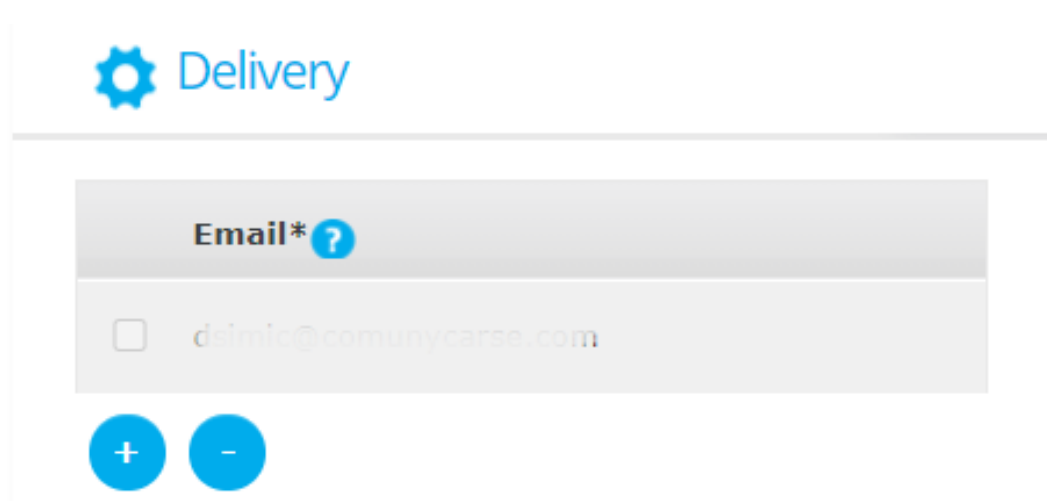

Figure 6 Alternative Email Addresses

Please note that a maximum of 3 additional email addresses can be added within the same account. Those email addresses may also be used to send documents from.

Continuing with Home Page, in the bottom-right corner (**Balances**) information on user's account "Balance" status is available. This section shows the available number of credits in the user's account at any given time. Credits are aggregated and can be used for both, sending and receiving. Users may also use credits for document processing or to use special features such as OCR, CertiFax®, SecureFax® or PCI Fax®. Users may also use credits to increase the archive/storage period.

Figure 7 Balance Status

Please mind that the base subscription credits are allocated/renewed each month (very much like with a wireless plan). These credits are also always the first to be consumed at any given moment. That is, only after the base subscription credits available are fully consumed, the system starts consuming the credits purchased via the "Recharge" option – this option allows to purchase a bulk of credits in packs of 100, 500 and 1,000 and have 1-year validity from the date of the purchase. For more information on pricing please visit the eComFax® Cloud marketplace listing page.

5. Sending Faxes

There are two ways to send faxes and other documents with eComFax® solution:

- Using the eComFax® interface; or
- Directly from your email.

5.1 Sending via eComFax® web interface

To send a fax from the eComFax® interface, the user should access the "New Fax" tab.

Figure 8 Sending a New Fax via the web interface

When sending a normal fax, user should specify the following three fields: (1) Recipients, (2) Fax Data, and (3) Attachments.

1.- Recipient/s:

There are other fax types but when sending a normal fax, user should indicate recipient's fax number and name. The same fax can also be sent to multiple recipients. Click on the "+" symbol to add more fax destinations.

For more information on how to send other fax types please see section 'Other Advanced Messaging Options').

Figure 9 Fax Type Selection

Figure 10 Sending a normal fax via the Web interface

2.- Fax Data:

It is possible to send a fax with or without the cover sheet. Simply check the box "Use Cover" if you wish to send with, or leave unchecked if you wish to send without, a cover sheet. If cover page is checked, simply add any relevant information.

3.- Uploading Files:

One or more document/s can be attached at a time by 'drag & drop' or 'browse & upload' (max size 10Mb). Over 60 types of formats are supported.

Once a recipient has been added, the fax type and fax data specified, and file/s attached, click "Send Fax".

Figure 11 Sending a fax with a cover page via the web interface

5.2   Sending via email

5.2.1   Without a cover page

To send a fax without a cover page, follow the next steps:

1. In the <To> field indicate the fax number you wish to send a fax to followed by syntax "@fax.ecomfax.com". (ie. <faxnumber@fax.ecomfax.com>)

    Example: Sending a fax to a local fax number (eg. US '+1212444333') would look like this → +1212444333@fax.ecomfax.com or 212444333@fax.ecomfax.com (that is, if you have configured the US prefix as default in the Configuration_Delivery section).
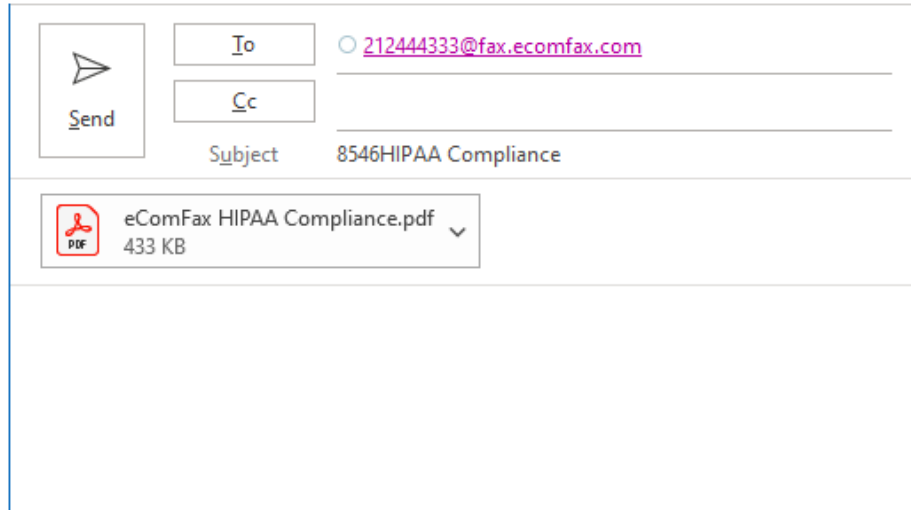
2. In the <Subject> field first enter user's PIN code, followed by the SUBJECT content. **Do not leave** a space between the PIN and the SUBJECT content. A PIN code is a 4-digit number used for security purposes. The PIN code can be accessed from eComFax® web interface under 'Configuration' tab, section "Delivery".

Figure 12 PIN Code

Note: In case DomainKeys Identified Mail (DKIM) validation technique is used, PIN entry is not needed. DKIM is an email authentication method designed to detect forged sender addresses in emails (email spoofing), a technique often used in phishing and email spam. It is specific to email provider whether DKIM is available or not (eg. Microsoft 365 has DKIM built-in).

3. Attach the document that should be sent via fax;

    Please note that only the attachment(s) will be sent. The body of the email will be ignored.
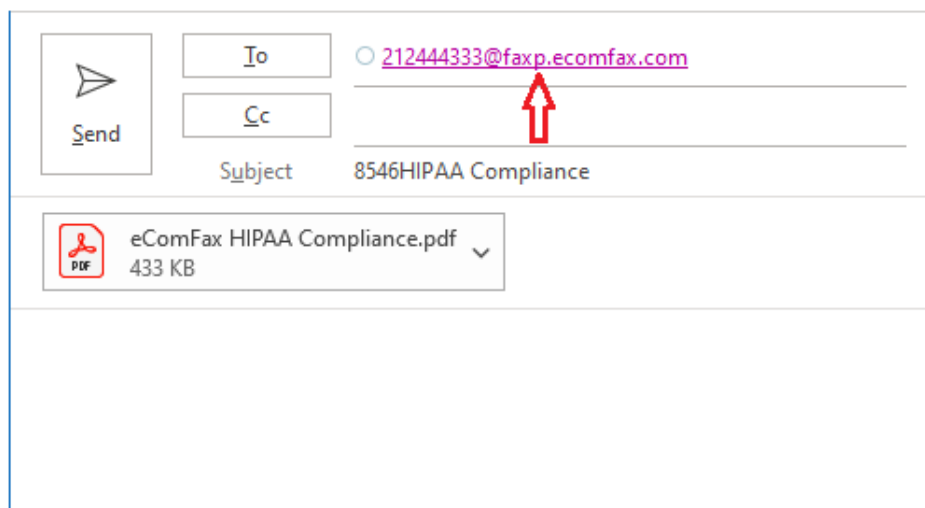
4. Click on "Send" button.

Figure 13 Sending a fax without a cover page via email

5.2.2   With a cover page

In order to send a fax with a cover page, follow the same steps as when sending a fax without a cover page (see section '5.2.1 Without a cover page') but with following adjustments and considerations:

- In the <To> field letter 'p' should be added with syntax <@faxp.ecomfax.com>. (ie. <faxnumber@faxp.ecomfax.com>).

- The content of the SUBJECT field will be used as NOTES in the cover page.

Figure 14 Sending a fax with a cover page via email

5.3 Confirmation message on the transmission status

Once the fax has been sent (or the number of attempts to send has been exceeded), the user will receive an email notification informing them of the transmission status of that fax. Status "OK" means that the fax has been delivered successfully. Relevant metadata and sent fax image are also attached.

Test Cover Notes - OK

eComFax Pro <ecomfaxpro@ecomfax.com>

(F)2E3996484C65449B9402F395B7D33742.tif
17 KB

Result:
Fax successfully sent

Status:
OK

Details:

Job Id: (F)2E3996484C65449B9402F395B7D33742

Date: 10/9/2020 4:04:53 PM (GMT+0200)

Job Type: Fax

Recipient:

Owner:

Remote Id: eComFax

Pages: 1

Duration: 31 seconds

Remaining credits: 325.00

Tip: *Some attachments cannot be converted to fax image (i.e. password-protected documents, those containing macros, etc.).*

Figure 15 Example of an email notification on transmission status of a sent fax

6. Receiving Faxes

Faxes are received by email as a PDF attachment (default) or in a searchable PDF format (optional). Available methods to receive a fax are as follows:

- Web or Email (Default);
- SECURE FAX;
- PCI FAX;
- Email + Faxback;

The available formats for fax reception are as follows:

- PDF;
- PDF/A;
- searchable PDF (uses credits);
- searchable PDF/A (uses credits);
- TIFF.

6.1   Receiving faxes by web interface

To check for received faxes in the web interface, access the "Message List".

Select "Field Name:" = "Type" and "Field Value" = "Received Fax".

Figure 16 List of fax jobs

6.2   Receiving faxes by email

Every time the user receives a new fax, an email will be received (with the fax as an attachment). The email address is the one/default assigned by the user when the service and subscription was purchased and activated. Please note that up to 3 different email addresses may be added/defined as additional delivery points.

Figure 17 Example of a received fax via email

Please also note that fax reception file format may be configured in a PDF searchable format. This feature will enable searching of the content inside the user's email client (for instance: by contract number "C0102930" or SSN). This will work as long as the received fax is not hand-written.

In the event a user does not receive a fax in their email inbox, make sure you also check your spam folder along with the web interface to double check whether the fax has been received properly or not and consequently exclude the spam filter issue.

7. Other Advanced Messaging Options

Apart from regular faxing, eComFax® also offers other messaging options (such as certified faxing, secure faxing, or SMS messaging). The following section expands in more details on all of the available options.

7.1   SecureFax®

SecureFax® can be useful for both, sending and receiving.

There are several reasons for which SecureFax® may be used. One is to protect the information and make it available only for the intended recipients. SecureFax® allows you to send information securely and track the receipt of financial, HR, legal, and medical records. SecureFax® was built by security experts with an intention to keep important data safe from cybercriminals, eavesdroppers and other threats in the modern digital forum.

Another reason to use SecureFax® is for proof of delivery and audit trail purposes. Email administrators can sometimes disable delivery slips to avoid email spamming (also case for specific email clients, such as Outlook), so it is impossible to have a proof that the document reached the destination or has been viewed by the recipient on his/her computer screen. With SecureFax® user has the guarantee the recipient has received the document and also viewed its content.

A common use case for SecureFax® is sending invoices to ensure they have been received by their customers which can help to reduce DSO.

When sending a document with this method, the system ensures that a message with a secure link was delivered to the destination through a secure TLS channel/connection (TLS email server must be enabled). The recipient then has to open the secure link and authenticate to view the document. If the customer is not registered on the platform, they will have to validate access for the first time using two-factor authentication procedure (2FA; an SMS code will be sent to their mobile phone). When the message is viewed on the recipients screen, a message notification is sent back to the sender with information that the message has been opened and viewed by the recipient. Messages sent with SecureFax® cannot be intercepted or sniffed by anyone else.

eComFax® server will only accept jobs coming from domains that have enabled TLS secure transmission in order to maintain security standards. A SecureFax® can be sent to any destination email address (vs destination fax number as with regular fax).

The platform also allows the recall of a document sent by mistake. In this case, the system will delete the document that was sent as long as it has not yet been viewed by the recipient.
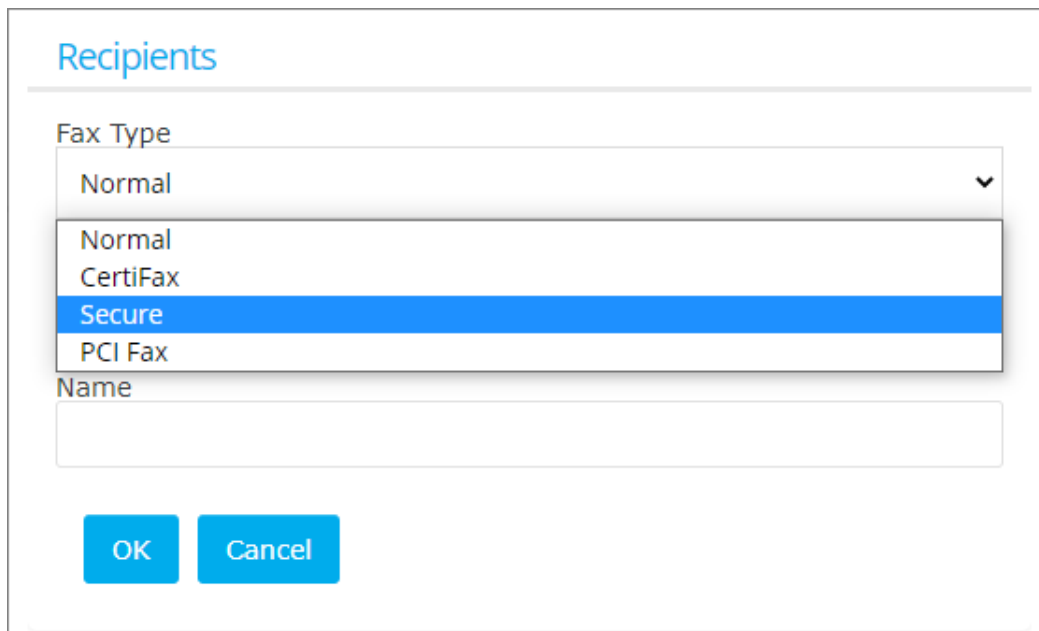
Even if the recipient has no MS Excel, the sender may send an invoice spreadsheet and get a confirmation that the fax was viewed on the destination screen.

7.1.1   Sending a SecureFax®

As with a regular fax, there are two ways to send a SecureFax®: (1) via web interface or (2) via email.

Sending via the Web Interface

Once logged in and on the 'Home' screen, click on the "New Fax" icon/tab and under '1.- Recipient_Fax Type' choose "Secure".

Figure 18 Choosing a SecureFax as a Fax Type via the Web interface

Unlike with a normal fax where you specify the destination fax number, when sending a SecureFax® you specify a destination email address instead. If you wish to send to more destinations at once, add other destinations by clicking on the "+" symbol.

After this, as with normal fax, specify the Fax Data (check/uncheck the box whether or not a cover page is needed) and attach any documents you wish to send as a SecureFax®.

Figure 19 Sending a SecureFax via the Web interface

Sending via eMail

In order to send a SecureFax® via email, please follow the next steps:

In the <To> field indicate the destination email address but replace the "@" for a "+" symbol followed by syntax "@securefax.ecomfax.com".

Example: Sending a SecureFax® to 'john.doe@abc.com' would look like this →

<john.doe+abc.com@securefax.ecomfax.com> (to send without a cover page); or

<john.doe+abc.com@securefaxp.ecomfax.com> (to send with a cover page).

After this, as with normal fax, populate the <Subject> field with PIN code (please note PIN is not needed in case of DKIM validation), followed by the SUBJECT content (included on the cover notes in case of a cover page), and attach the document/s you wish to send as a SecureFax®. If a SecureFax® is sent without any attachment/s or a cover page, the user will receive an error message. If a SecureFax® has been sent successfully, the user will also receive a notification. In case the message was sent by mistake, recipient's access to the document may also be disabled.
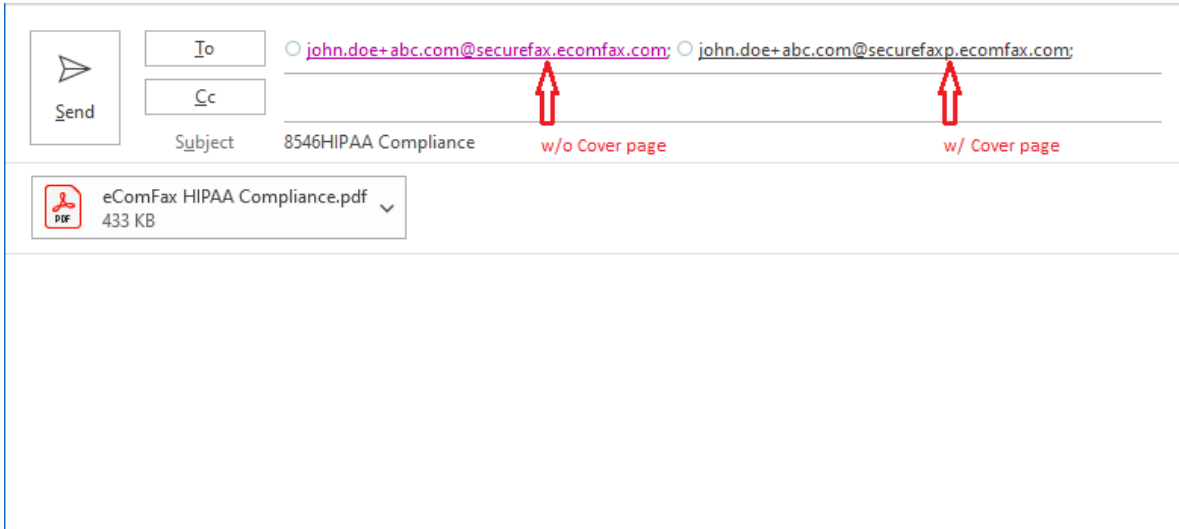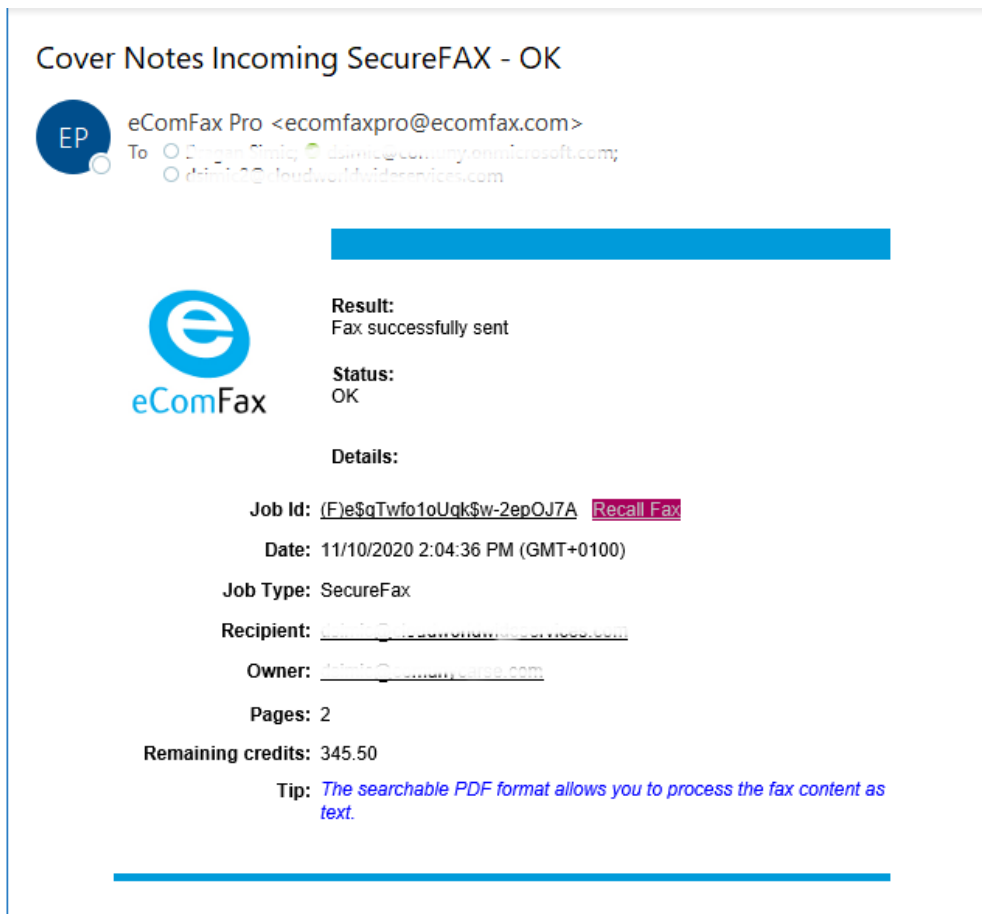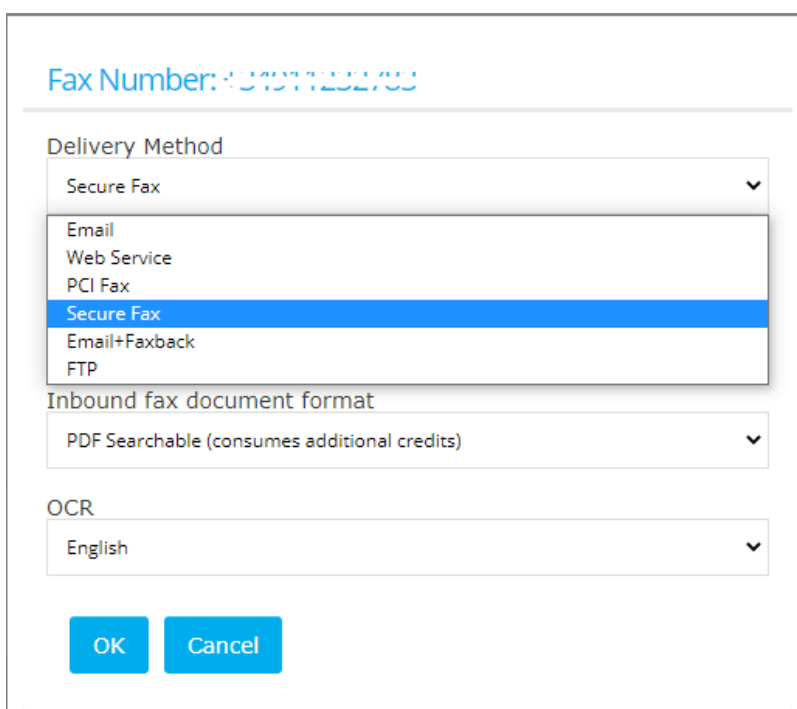
Figure 20 Sending a SecureFax via email

Figure 21 Outgoing SecureFax email notification

7.1.2   Receiving a SecureFax® or using a SecureFax® delivery method

SecureFax® can also be assigned to an incoming DID (ie. Fax number) and used as more secure delivery method ensuring delivery only to a specific person inside the organization. To set the SecureFax® as a default delivery method, follow the next steps:

1. Log in to your eComFax® Web portal;
2. When on 'Home' page scroll down to 'Fax Number' section and click "Edit";
3. Under 'Delivery Method' choose "Secure Fax" and click "OK".

Figure 22 Setting SecureFax as a Delivery Method

By delivering incoming faxes through SecureFax®, the email of an incoming fax only contains information on whom the fax is from and a link to access the fax content (but not the attachment itself). In order to access the document, the user has to be logged in to the eComFax® webpage and once logged in, they may view the content using a secure HTTPs connection.

As a result, documents cannot be intercepted by anyone else (not even email administrators). Inbound SecureFax® functionality is very popular in environments with high-levels of security and confidentiality, such as military or government.
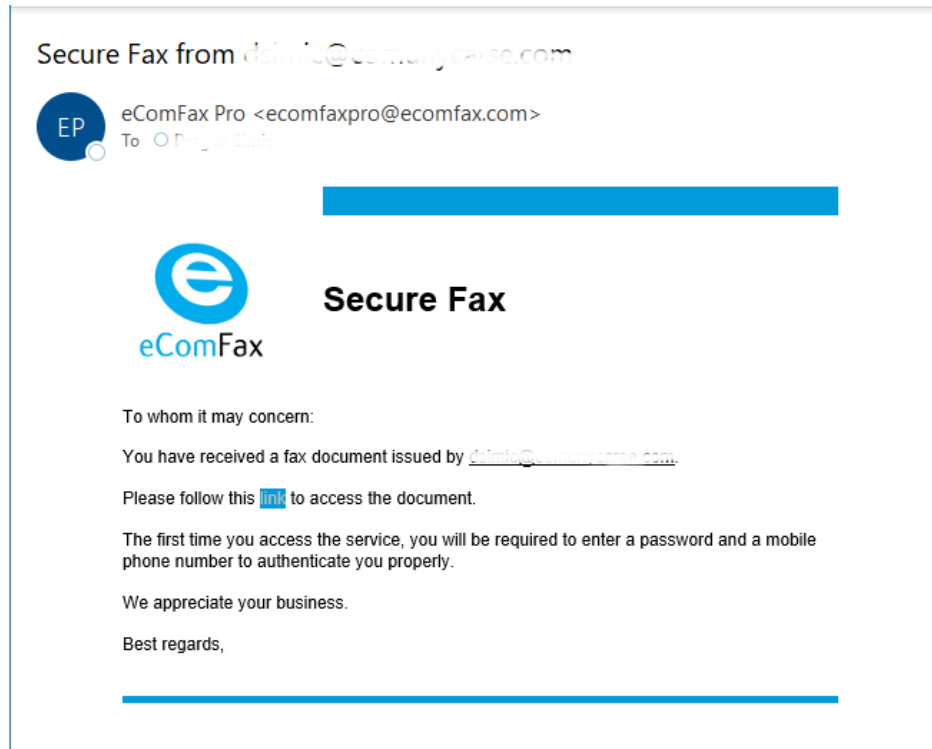
Figure 23 Incoming SecureFax email notification

When a SecureFax® is sent to an individual who has never used the eComFax® service, this recipient should register to the application as an External user using 2FA protocol (an SMS with a secure activation code will be sent to the specified mobile phone number). These users will then be able to access the eComFax® application free of charge with very limited functionality in order to view the received fax content.

Upon successful login, the External user/s (ie. the recipient/s) will be able to see the document/s, their contents, and entire message history under "Message List". If any of the documents are downloaded, eComFax® provides full traceability for audit trail purposes.

In case the recipient has not opened the document in the pre-determined time frame, the sender will receive a notification message about the expiration date and option to extend the expiration date by resending the message with the link to the recipient once again.

Conversely, if the recipient does access the document, the sender will receive a notification message with the date and time when the document was accessed. This email may be kept as a proof that the document was viewed by the addressee/recipient with 100% certainty.

7.2   **PCIFax®**

This method is used to send or receive documents with sensitive content; for instance, containing private credit card information. Using this method, a sender sends document/s in a similar way as with SecureFax® but in order to comply with PCI DSS (Payment Card Industry Data Security Standard), the following restrictions are implied:

- Documents can not be printed;

- Documents can not be forwarded;
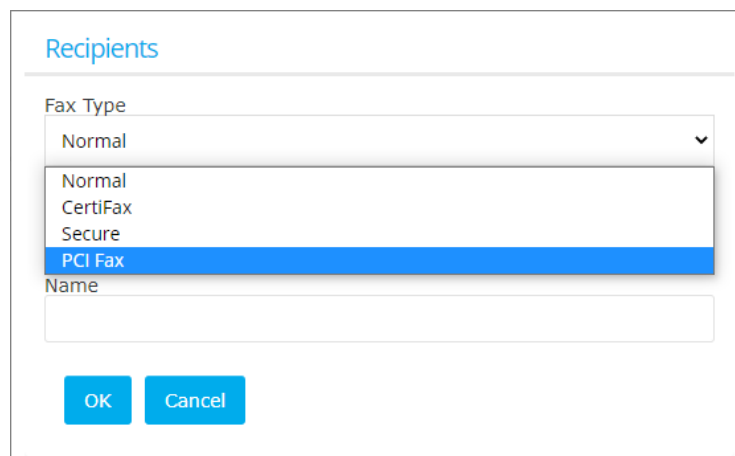
- Documents can not be downloaded;

- Documents can not be intercepted.

An incoming DID can be assigned to a PCIFax® fax delivery method ensuring protection of sensitive incoming credit card information and disabling access to the content by any other interception method.

7.2.1   **Sending a PCIFax®**

As with other eComFax® messaging options, there are two ways to send a PCIFax®: (1) via web interface or (2) via email.

Sending via the Web Interface

Once logged in and on the 'Home' screen, click on the "New Fax" icon/tab and under '1.- Recipient_Fax Type' choose "PCI Fax".

Figure 24 Choosing a PCIFax as a Fax Type via the Web interface

As with SecureFax®, you must specify the destination email address (information on how to proceed with sending a PCIFax® please follow the instructions under section 7.1.1 Sending a SecureFax®).

Sending via eMail

In order to send a PCIFax® via email, follow the same logic (and instructions) as with SecureFax® but replace the "@securefax..." with "@pcifax…"

Example: Sending a PCIFax® to 'john.doe@abc.com' would look like this →

<john.doe+abc.com@pcifax.ecomfax.com> (to send without a cover page); or

<john.doe+abc.com@pcifaxp.ecomfax.com> (to send with a cover page).
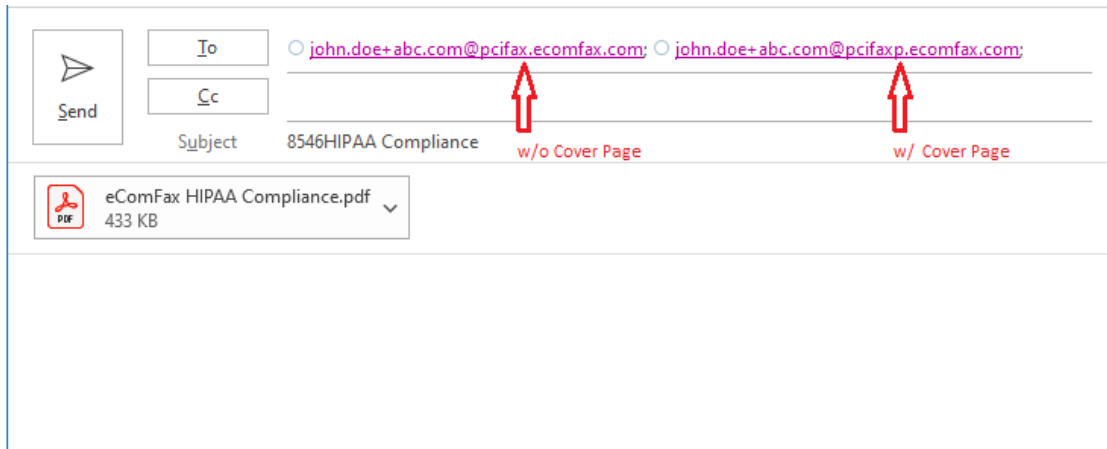
Figure 25 Sending a PCIFax via email

As with SecureFax®, the <Subject> field needs to be inputted with a PIN code (not needed in case of DKIM validation), followed by the SUBJECT content (included on the cover notes in case of a cover page), and the attachment/s. Platform behaviour is as with SecureFax® (for more information please refer back to section 7.1.1 Sending a SecureFax®).

7.2.2   Receiving a PCIFax® or using a PCIFax® delivery method

As with SecureFax®, PCIFax® may also be used as a delivery method for incoming fax documents (for more information on how to set PCIFax® as a delivery method please refer back to section 7.1.2 Receiving a SecureFax® or using a SecureFax® delivery method and opt for PCI Fax instead).

By delivering incoming faxes through PCIFax®, the email of an incoming fax only contains a link and not the attachment itself and so user has to be logged in to the eComFax® web portal to be able to access the document/s.

On top of what receiving with SecureFax® has to offer, in order to comply with PCI DSS standards, document/s sent/received using PCIFax® cannot be printed, forwarded, downloaded, and/or intercepted.

7.3   CertiFax®

Companies may need to use CertiFax® as they may need a proof that a fax document has been sent without any doubt. Consequently, they may need to use that proof in a legal proceeding.

The value of CertiFax® is that it certifies a particular communication/transmission with regards to its authenticity, it digitally signs that communication and puts a time stamp on it proving with a legal paper that a specific communication occurred at a specific date and time, and certifying that it occurred between two parties.

When a fax is sent using this method, the information about the sender, recipient/s, content, and fax metadata are all digitally signed (using a certificate issued by a Certification Authority) and with applied Digital Time Stamp (issued by a legal TSA). Upon successful sending, an official Certificate is issued and sent to the sender, capturing all – above-noted – information.

The Certificate is issued by Cloud Worldwide Services S.L. (CWS) as a 3rd party trust processor and all Delivery Certificates are kept securely on the platform for a period of 5 years.

7.3.1   Sending a CertiFax®

Similar as to a normal fax, there are two ways for sending a CertiFax®: (1) via the web interface or (2) via email.

Sending via the Web Interface

Once logged in and on the 'Home' screen, click on the "New Fax" icon/tab and under '1.- Recipient_Fax Type' choose "CertiFax".

Please note that, as with normal fax, CertiFax® requires a destination fax number (and not a destination email address as with SecureFax® and PCIFax®). Use the "+" symbol to add more recipient/s.

Figure 26 Sending a CertiFax via Web interface

The Fax Data and Cover page cannot be unchecked. CertiFax® by default checks the box and uses a Cover page when sending a certified fax document.
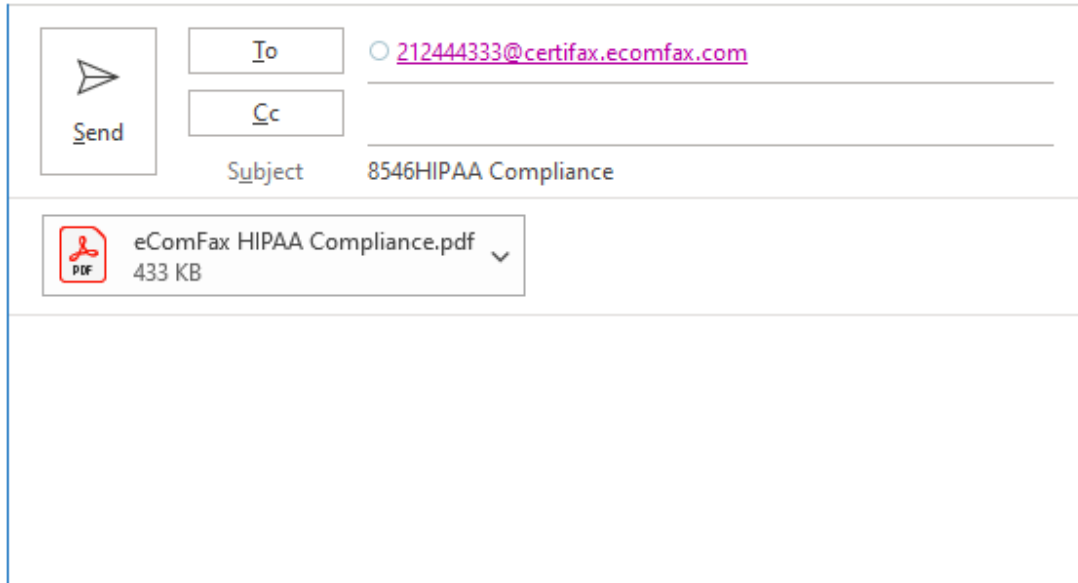
Finally, attach the file/s you wish to send and click "Send Fax".

Sending via eMail

In order to send a CertiFax® via email, follow the same logic (and instructions) as with normal fax but replace the "@fax.ecomfax.com" with "@certifax.ecomfax.com".

Example: Sending a CertiFax® to a local fax number (eg. US '+1212444333') would look like this → +1212444333@certifax.ecomfax.com or 212444333@certifax.ecomfax.com (that is, if you have configured the US prefix as a default in the Configuration_Delivery section).

As already noted, all CertiFaxes are sent with Cover page included.

Figure 27 Sending CertiFax via email

7.3.2 Operation of CertiFax® and the Certificate

Once a CertiFax® is successfully sent (and received by the receipient) the process is end-to-end certified, digitally signed, and sent back to the sender as a certified legal proof of delivery.

The certified fax includes a locator in the top area of the cover page. This locator allows review of the fax information and its content. The sender can also access the operations' history by indicating the locator code on the client's CertiFax® website. This is also accessible through the QR code that appears on the cover page.

Cover Page   **Certification Report**

Figure 28 CertiFax and Certification Report

The first page of the certified fax includes a QR code in the top, right-hand area. The delivery certification report includes this same QR code on the first page in the bottom, right-hand area which can be scanned using any mobile device. This QR code contains the same information as shown in the previously mentioned locator.

The user may download the certificate/s at any time by accessing the CertiFax® website and using the QR Code. User may check all status of all certified faxes under the "Message List" section.

Furthermore, by accessing the certified fax's history user may see if a download has been requested by the recipient and if/when they accessed the certified fax. The remote, masked IP address is also registered; which is a requirement for Data Protection Regulations.

CertiFax® fully tracks access to the CertiFax® website for audit trail purposes and also has several mechanism to ban unauthorized access.

Figure 29 CertiFax Message List
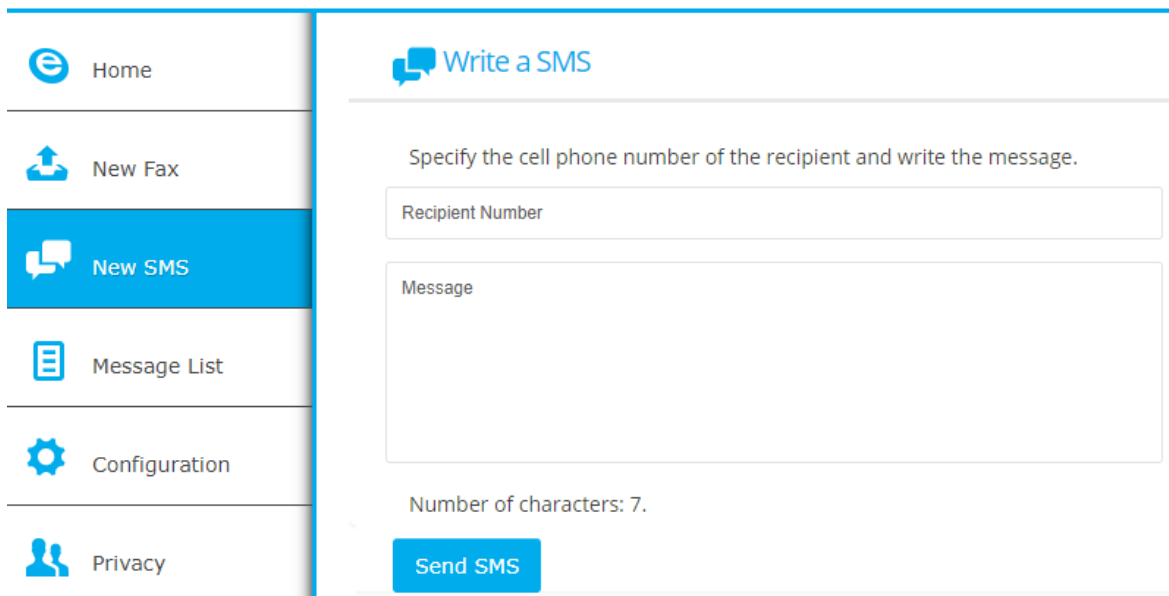

Figure 30 CertiFax Access History

7.4 **eComFax SMS**

eComFax® is a communications platform in which the fax is the main sending method but not the only one. User can also use eComFax® to send SMS messages.

As with other eComFax® messaging options, users are able to send SMSes in two ways: (1) via web interface or (2) via email.

Sending via the Web Interface

Once logged in and on the 'Home' screen, click on the "New SMS" icon/tab and enter 'recipient's number', the SMS message, and click "Send SMS".

Figure 31 Sending an SMS via Web interface

Please note that if the message is over 160 characters, the system will send the excess characters in a separate message.
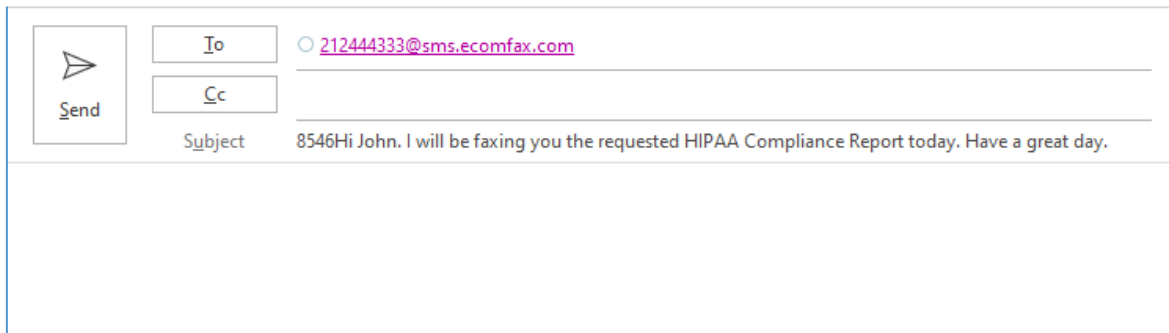
Sending via eMail

In order to send an SMS using eComFax® solution via email, please follow the next steps:

In the <To> field indicate the destination telephone number followed by syntax "@sms.ecomfax.com".

Example: Sending an SMS to '+1212444333' would look like this →

+1212444333@sms.ecomfax.com or or 212444333@sms.ecomfax.com (that is, if you have configured the US prefix as a default in the Configuration_Delivery section).

In the <Subject> field indicate own secure PIN code (not needed in case of DKIM validation) followed by the text you wish to send (no spacing). The body of the message will be ignored.

Figure 32 Sending an SMS vie email

7.5 **eComFax CertiSMS®**

As with Fax, some companies may need a proof that an SMS message has been sent without any doubt. Consequently, they may use that proof in a legal process.

The value of CertiSMS® is that it certifies a particular communication/transmission with regards to its authenticity, it digitally signs that communication and puts a time stamp on it proving with a legal paper that a specific communication occurred at a specific date and time, and certifying that it occurred between two parties.

When an SMS is sent using this method, the information about the sender, recipient/s, content, and SMS-associated metadata are all digitally signed (using a certificate issued by a Certification Authority) and with applied Digital Time Stamp (issued by a legal TSA). Upon successful sending, an official Certificate is issued and sent to the sender, capturing all – above-noted – information.

The Certificate is issued by Cloud Worldwide Services S.L. (CWS) as a 3rd party trust processor and all Delivery Certificates are kept securely on the platform for a period of 5 years.
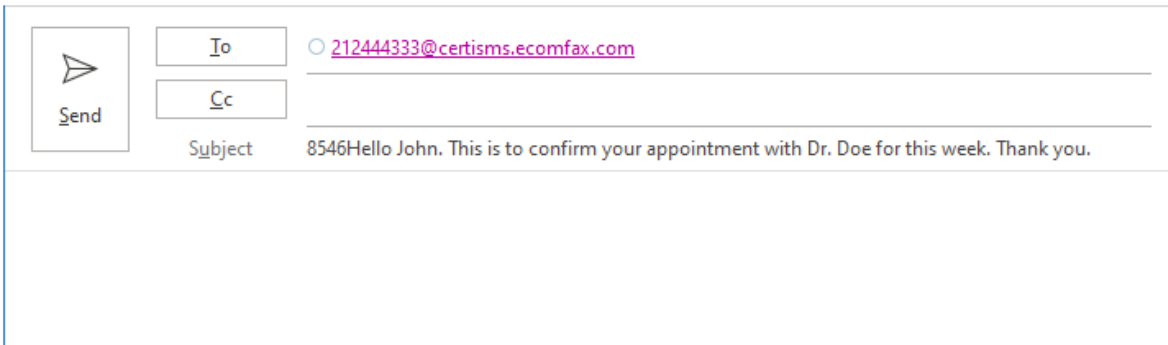
7.5.1 Sending a CertiSMS®

The CertiSMS® module can be used from any email client in a similar way other messaging options are sent as well.

In the <To> field indicate the destination telephone number followed by syntax "@certisms.ecomfax.com".

Example: Sending a CertiSMS® to '+1212444333' would look like this →

+1212444333@certisms.ecomfax.com or 212444333@certisms.ecomfax.com (that is, if you have configured the US prefix as a default in the Configuration_Delivery section).

In the <Subject> field indicate own secure PIN code (not needed in case of DKIM validation) followed by the text you wish to send (no spacing). The body of the message will be ignored.

Figure 33 Sending a CertiSMS via email
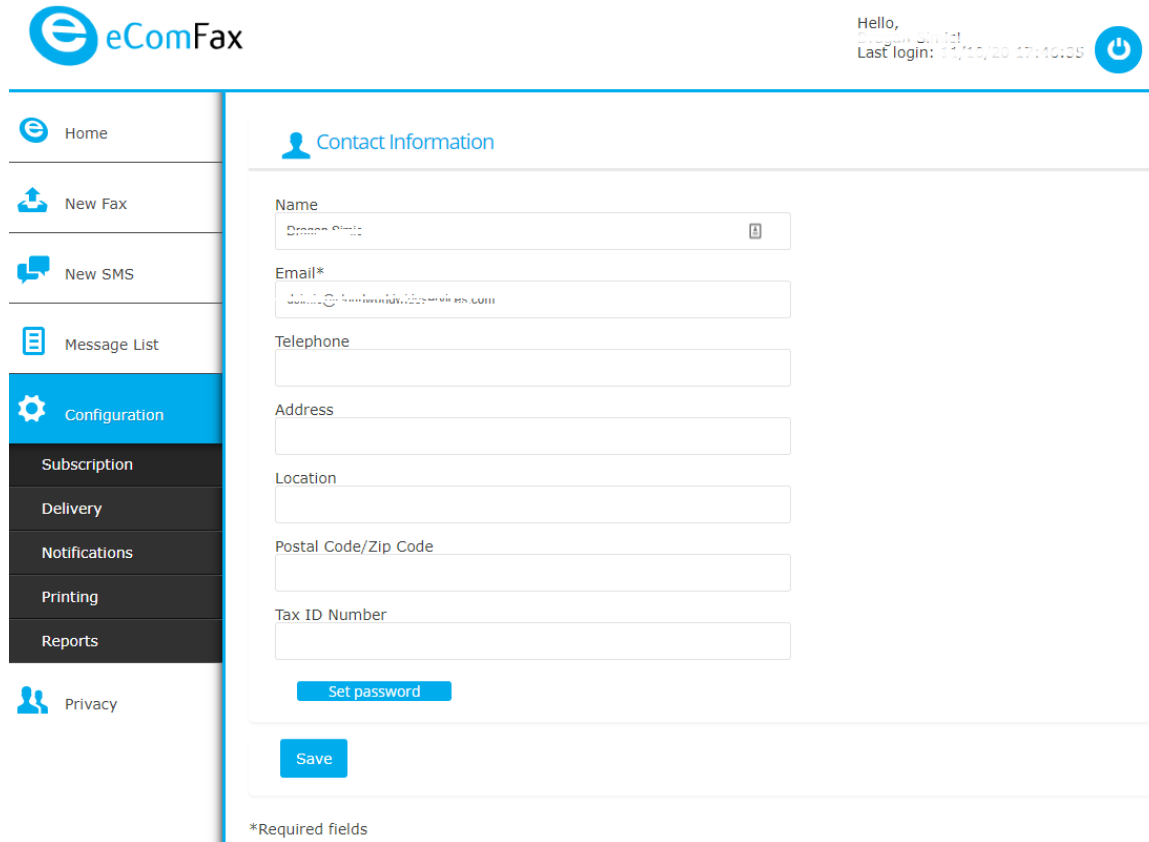
8. Configuration

User may change any available user account settings inside the "Configuration" section of the Web portal. For this, user must access the eComFax® Web interface via the Cloud marketplace (information on how to access Web portal is available in section 4.1 Access to the eComFax® Application).

"Configuration" section has following subsections.

8.1 Subscription

In this subsection user may find main company's contact information. After doing any changes, click on "Save".

Figure 34 Configuration_Subscription_Contact Information

Clicking on "Save" at the bottom of the page will save any changes made in the "Configuration" menu.

8.2 Delivery

In this subsection user may find the following:

Figure 35 Configuration_Delivery

Delivery: User can add (by clicking on the "+" symbol) up to three different email addresses for sending via email client (ie. the default address used to activate eComFax® service plus two more). To remove click on the "-" symbol.

PIN: A 4-digit security code used when sending messages via email. PIN code is placed at the very beginning of the <Subject> field followed by the SUBJECT content (please do not leave a blank space). Please note that in case DomainKeys Identified Mail (DKIM) validation technique is used, PIN entry is not needed. DKIM is an email authentication method designed to detect forged sender addresses in emails (email spoofing), a technique often used in phishing and email spam. It is specific to email provider whether DKIM is available or not (eg. Microsoft 365 has DKIM built-in).

Customized fax number: A unique number that will appear on the cover page of all sent faxes.

Language: Specify the language used for the notification messages.

Time Zone: Specify user's date/time format and zone.

Dialing code: When sending a fax to a local / national number it is unusual to include the country code as part of the destination fax number, so when the dialing codes are correctly set, only the local number (without the country code) can be added when sending a fax.

Example:

	International Prefix	Country Code	National Trunk Prefix
US Dialing codes	001	1	/
ES Dialing codes	00	34	/

Custody period: Specify the retention period and for how long documents should be archived. 30 days comes free of charge in any subscription; however, user may want to increase this period to any other range. Note that healthcare or financial industry regulations may require companies to keep documents stored for at least 5 years.

Custody type: Specify what type of document should be archived (only inbound, only outbound, or all).

Secure access period: Specify (in days) what time recipient/s have to access the sent SecureFaxes and PCIFaxes. If document/s have not been viewed within the secure access period, the recipient/s no longer have access to them.

Auto Refill Pack: If credits (in a given month) are running low, system may automatically top-up / charge the credit balance so it does not go into negative. Here you may specify which credit pack should be automatically added in such a case (for eComFax® SOHO available packs are 100, 500, and / or 1,000). If auto-refill function is enabled and executed, the charge for the pack/s will be automatically added to your next month's bill. For more information on credit packs pricing please visit the eComFax® product listing page on the Cloud marketplace.

After making any changes, click on "Save".

8.3　**Notifications**

In this subsection user may configure what information should be available inside the notification subject note.

There are various placeholders available for outbound as well as inbound faxing.

Example: Fax Subject for Inbound Faxes with "Incoming faxes from **%4**" (%4 = DID) would look like this (eg. received from '+1212444333') →

<Incoming fax from +1212444333>.

Figure 36 Configuration_Notifications_Outbound Fax notification
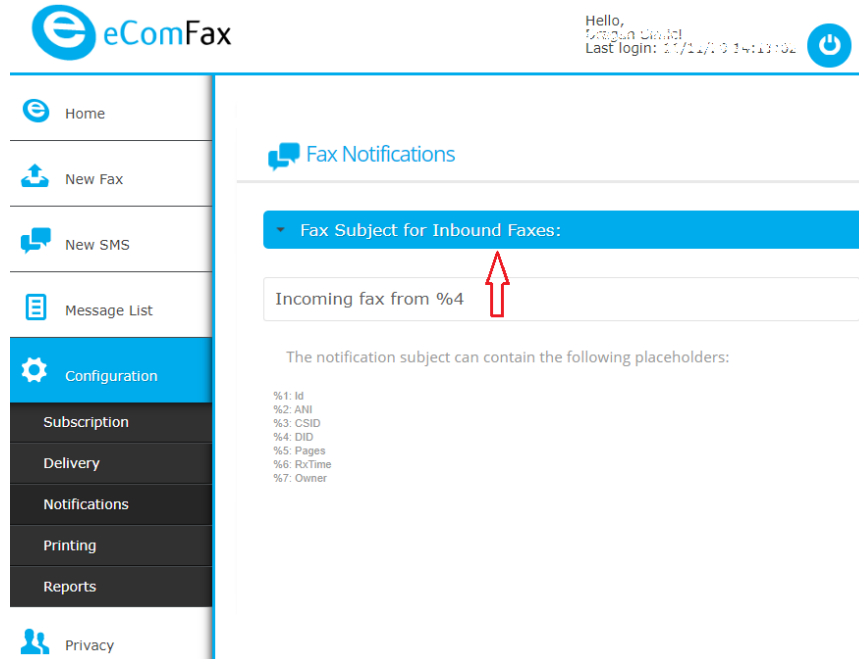
Figure 37 Configuration_Notifications_Inbound Fax notification

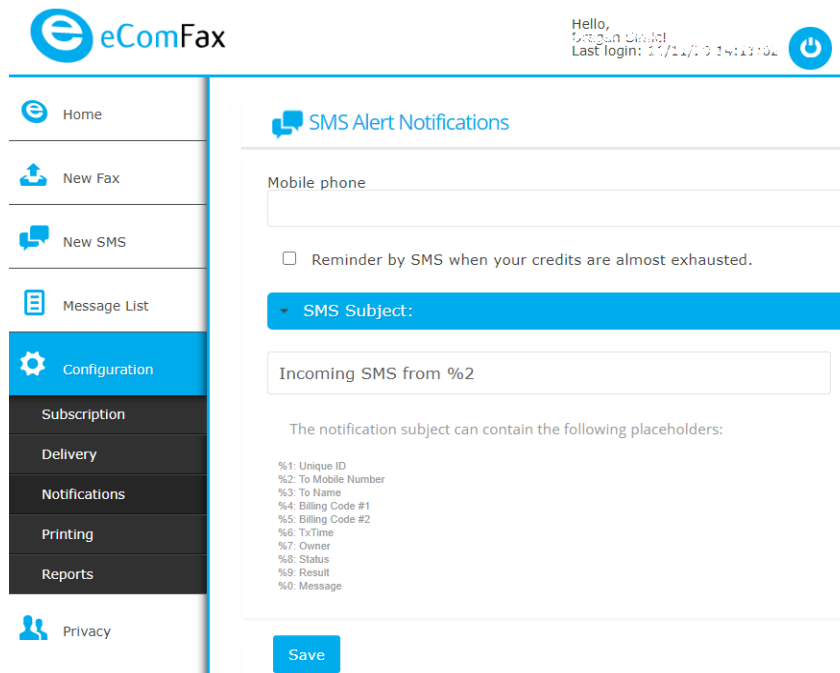As with fax, the SMS notification subject can also be configured.

Figure 38 Configuration_Notification_SMS Alert notification

What is more, eComFax® permits SMS notification reporting. By entering a mobile phone number into the system user receives updates/messages to their mobile device from the platform reporting the current balance of their credit availability.

Additionally, an email reminder can be sent to a user when only 20% of credits are still available/left, reminding the user to beware or up the credit balance. There is also a possibility of receiving an SMS notification for this same purpose. Please beware that sending these SMS notifications will consume credits (1.5 credits per notification).
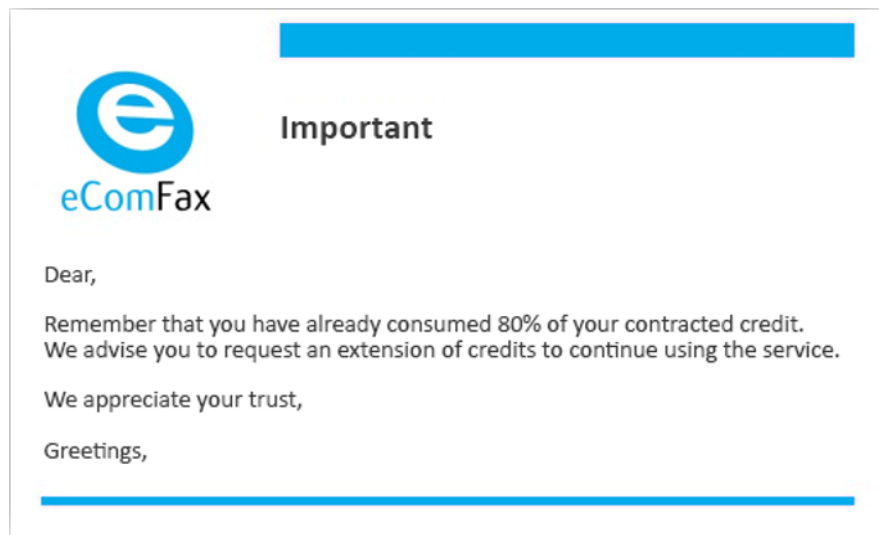
Figure 39 Email notification when credits reach 80% capacity

If a user sends a fax but does not have sufficient amount of credits, the eComFax® service will cover the full transmission cost; however, the credits due will be paid when the user re-enters into positive credit balance (either with next month's credit allotment or by purchasing additional credit packs).

This means that if a user is being sent a fax while with a negative credit balance, the platform will not resend the image of the fax via email to the user. Instead a notification message will be sent informing the user about an incoming fax document. eComFax® platform will retain the document for a maximum period of 30 days or when user regains positive credit balance (either with next month's credit allotment or by purchasing additional credit packs).
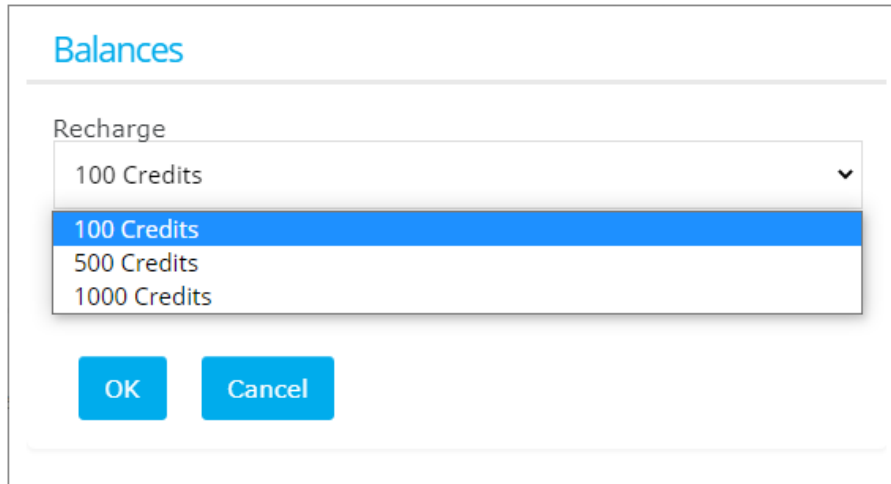
Figure 40 Recharging credit balance with credit packs

Credit packs are available in 100, 500, and 1,000 credit. For more information on pricing please visit the eComFax® Cloud marketplace listing page.

8.4   Reports

Under the "Report" section, user is able to create (by clicking on "Add") and generate reports that can be automatically sent to user's email address. These reports include relevant information about outgoing and incoming faxes. User is also able to specify the frequency and format of the reports, who receives them, and in what language.

Figure 41 Configuration_Reports

Figure 42 Creating an automatic report

Table of Figures