

New to the Application?

If you are new to the application, then to familiarize yourself with the information, functions and settings that you must enter/perform in your eFax account—and where in the UI to do so: See “Appendix A: Keyword Index for eFax Administrators” in the *eFax Administrator's Guide*. Clicking a keyword navigates you to a list of its related procedures and where in the UI to perform them.

Set Up Your Users

Corporate administrator: After the account is created, the next best thing to do is to add fax numbers to the account (see “Add Fax Numbers to the Account” in the *eFax Administrator's Guide*). Then, set up the account based on your situation (as stated below).

IF...	THEN...
<p>You have a small group of users with relatively the same functions</p>	<ol style="list-style-type: none"> 1. First, set corporate-account settings for all users. (See “Set Default User Settings” in the <i>eFax Administrator's Guide</i>.) 2. Then, add users to the account. (See “Add a User or Administrator”.) <div data-bbox="542 856 1370 947" style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>✓ NOTE: If any user needs settings different from those you just set for all users, you can do so when adding that user to the account.</p> </div> <ol style="list-style-type: none"> 3. Assign fax numbers to the users. (See “Assign or Unassign Fax Numbers to/from Users”.) 4. Then—after all users are created, you may create groups (see “Create a Group”) and add users to them (via “Add a User or Administrator”).
<p>You have a large group of users with different functions</p>	<ol style="list-style-type: none"> 1. First, create groups for those users whose functions are similar. (See “Create a Group”. You will also set the default settings for the group.) 2. Then, add the users to the groups. (See “Add a User or Administrator”.) <div data-bbox="542 1205 1370 1295" style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>✓ NOTE: If any user needs settings different from the defaults you just set for a group, you can do so when adding that user to the group.</p> </div>

Set Up the Account So Your Users Can Send and Receive Faxes

Corporate administrator:

- See “Appendix B – Corporate Administrators: How to Set Up the System So Your Users Can Receive and/or Send Faxes” in the *eFax Administrator's Guide*.

✓ **NOTE:** if you want a particular user to only send faxes, call Customer Service to configure that option for that user.

- verizonbuss@j2.com
- USA Toll-Free: 1 (833) 753 2563

- If you're going to permit your users to receive outbound-fax delivery notifications (i.e., send-receipts), then to set up your printers to send the notifications, see “Appendix F, Setting Up for the Send-Receipt Feature” in the *eFax Administrator's Guide*.

Create Extra Corporate Administrators

You may want to add one or two people (you trust) as corporate administrators (see “Add a User or Administrator” in the *eFax Administrator's Guide*). They will have the same rights as you, unless you give them **Read-Only Admin** permission.

However, if you don't want them to be read-only, but do want to prevent them from accidentally deleting you (because they can if they're not read-only), then:

- Place them in a new group with a new name (see “Create a Group”).
- Then: Give this new group the same default settings as the **My Account** group. Because this new group will be a sub-group of the **My Account** group (to which you, the main corporate administrator, belong), the corporate administrators in this group will not be able to delete you. (That is: If given permission to delete users [including administrators], an administrator can only delete users in his or her own home group and sub-groups—not above.)

The Home Page

The **Home** page displays your dashboard of “widgets” (quick-glance data reports about users and their fax usage).

The screenshot shows the eFax Corporate Home page dashboard. The navigation bar includes 'HOME', 'SETTINGS', 'USERS', 'GROUPS', 'NUMBERS', and 'USAGE'. The dashboard contains the following widgets:

- Recent Activity:** Shows a table for 'Group: new group' with columns for 'User Name', 'Last Activity', and 'Logs'.
- User Summary:** For 'Group: My Account', showing 'Summary: Groups: 73, Admins: 56, Users: 184' and buttons for 'Add User' and 'Add Group'.
- Fax Number Summary:** For 'Group: 14', showing 'Numbers: Assigned: 0, Unassigned: 0, Total Numbers: 0, Numbers Assigned to Account: 0/500'.
- Fax Number Summary:** For 'Group: My Account', showing 'Numbers: Assigned: 192, Unassigned: 218, Total Numbers: 410, Numbers Assigned to Account: 410/500' and a pie chart.

An 'ADD WIDGETS' button is located at the bottom of the dashboard.

The **Home** page (your dashboard)

The Home Page (Cont.)

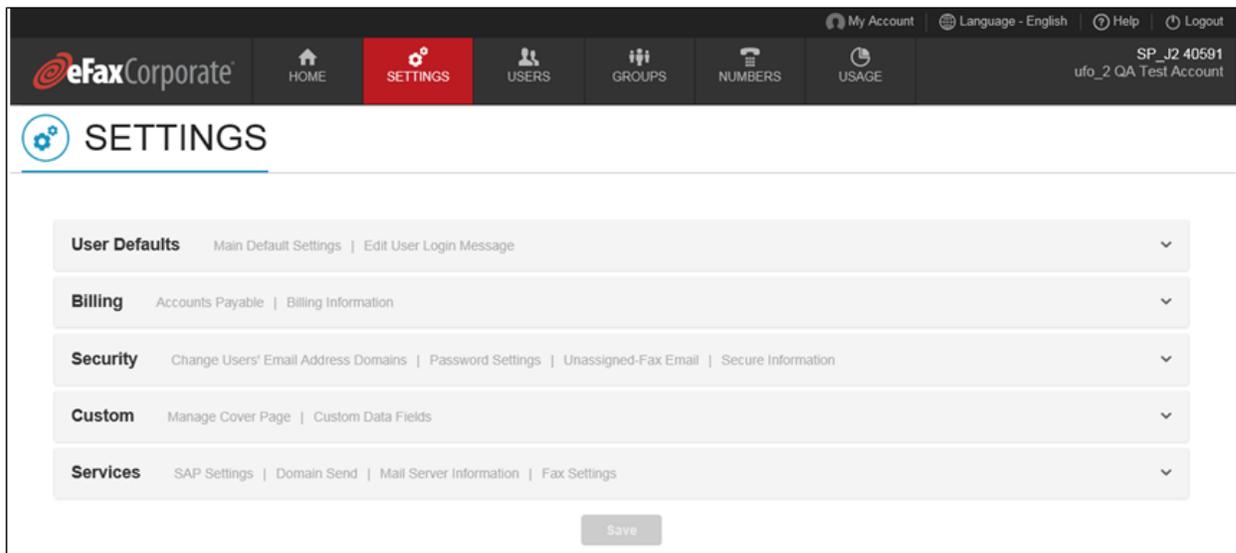
You can:

- Add a widget
- Remove a widget
- Display a particular group's information on a widget

See the *eFax Administrator's Guide*—or the online help—for instructions.

The Settings Page

On the **Settings** page, the corporate administrator sets up the information and settings needed for the corporate account and its users.



The Settings page

SETTINGS	
USER DEFAULTS	<p>You can:</p> <ul style="list-style-type: none"> • Set—or reset—default settings for all users. • Enable or disable the <i>Messenger</i> download. • Create or edit the user-login message
BILLING	<p>You can See/edit the accounts-payable contact/billing information, current method of payment, credit limit, and/or purchase-order (PO) number.</p>

Continued on next page

The Settings Page (Cont.)

SETTINGS (CONT.)	
SERVICES	<p>You can:</p> <ul style="list-style-type: none"> • Enter or edit the email address for sending delivery notifications of faxes sent directly from SAP, if the account is integrated with the <i>eFax Corporate SAP Connector</i>. • Enable or disable the <i>Domain Send</i> service
SECURITY	<p>You can:</p> <ul style="list-style-type: none"> • Add/remove domains that can be used in the account. • Change users' email-address domains. • Set password limits. • Add or edit the email address for faxes sent to unassigned fax numbers • View secure-fax information.
CUSTOM	<p>You can:</p> <ul style="list-style-type: none"> • Manage cover pages [usage, restriction, removal]. • Add/edit email-address domains for users' outbound-fax delivery notifications [i.e., Send-receipts]. • Create/edit custom-data fields

See the *eFax Administrator's Guide*—or the online help—for instructions.

The Users Page

On the **Users** page, users are added to the account—and managed.

The screenshot shows the eFax Corporate interface. At the top, there's a navigation bar with 'Home', 'Settings', 'Users' (highlighted), 'Groups', 'Numbers', and 'Usage'. The 'Users' page title is displayed, along with a search bar and a 'Page Actions' dropdown. Below this is a table of users with the following columns: First Name, Last Name, Email Address, Number, Group, Billing Code, Account ID, and Usage. The table contains several rows of user data, including administrative users and standard users.

<input type="checkbox"/>	First Name	Last Name	Email Address	Number	Group	Billing Code	Account ID	Usage
<input type="checkbox"/>	000spimportuser001	000spimportuser001	sp_a1@cygnet-infotech.com	61261477012	A1	BC_1	-	RECEIVE
<input type="checkbox"/>	000spimportuser002	000spimportuser002	sp_a2@cygnet-infotech.com	61261477025	A1	BC_1	-	RECEIVE
<input type="checkbox"/>	000spimportuser003	000spimportuser003	sp_a3@cygnet-infotech.com	61261477035	A1	BC_1	-	RECEIVE
<input type="checkbox"/>	000spimportuser004	000spimportuser004	sp_a4@cygnet-infotech.com	61261477046	A1	BC_1	-	RECEIVE
<input type="checkbox"/>	000spimportuser005	000spimportuser005	sp_a11@cygnet-infotech.com	61240275086	A4_number 2	1234	-	SEND RECEIVE
<input type="checkbox"/>	000TG_AdminFR (ADMIN)	000TG_AdminFR	tom.gray@j2.com	-	My Account	BC_1	-	-
<input type="checkbox"/>	000TGAdminDE001 (ADMIN)	000TGAdminDE001	tom.gray@j2.com	-	My Account	BC_1	-	-

The Users page

The Users Page (Cont.)

✓ NOTES:

- The corporate administrator can manage all users (including group administrators).
- A group administrator can only manage his or her home-/sub-group users—and only within the limits permitted by the corporate administrator.

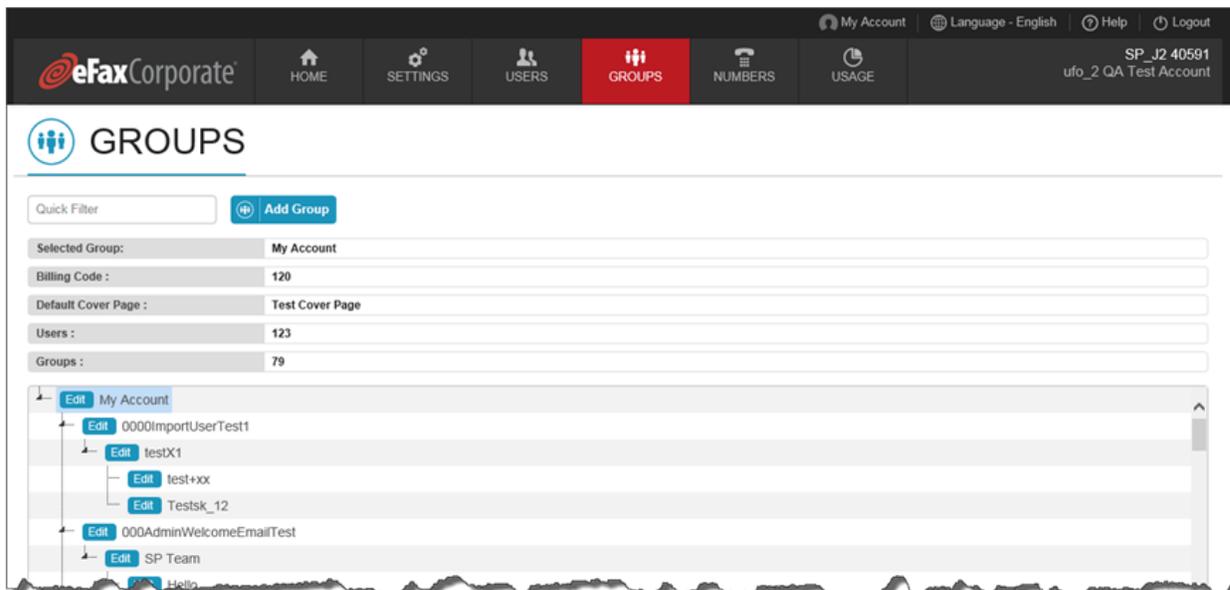
You can:

- Import or export a user list.
- See a list of all users or a particular group's users.
- Add a user or an administrator.
- Search for a user
- Resend the *Welcome* email
- See which users can send and/or receive faxes.
- Edit a user's or administrator's information/settings.
- Enter or change the user's inbound-/outbound-fax CSIDs.
- Add or remove a user's inbound-/outbound-fax email addresses.
- Move users to another group
- Remove one or more users from the account.

See the *eFax Administrator's Guide*—or the online help—for instructions.

The Groups Page

The **Groups** page displays all the group names (in tree-navigation view). Selecting a group displays its name, billing code (if any), cover page, number of users, and any sub-groups, at the top of the page. On this page, users can be placed into unique groups—and managed.



The Groups page

The Groups Page (Cont.)

✓ **NOTES:**

- A corporate administrator may organize users into a group and assign one or more group administrators to manage that group.
- A group administrator, if permitted, may create sub-groups under his or her home group, assign fax numbers to those groups' users, and assign administrators to manage those groups.

You can:

- Search for a group.
- Create a group.
- Add a user or administrator to a group.
- Edit a group's information/settings.
- See all of a group's administrators.
- Reset one or more settings for a group's users.
- Move a user from one group to another.
- Remove a group administrator.
- Move or remove a group.

See the *eFax Administrator's Guide*—or the online help—for instructions.

The Numbers Page

The **Numbers** page displays all the fax numbers added to the corporate account. You can see which numbers are assigned or unassigned—and for those that are assigned, to whom and at which locations.

The screenshot shows the eFax Corporate interface. The top navigation bar includes 'Home', 'Settings', 'Users', 'Groups', 'Numbers' (highlighted), and 'Usage'. The main header area displays 'NUMBERS' with a search bar. Below this, there are three filter buttons: 'All' (181), 'Unassigned' (153), and 'Assigned' (28). A 'Page Actions' dropdown is visible on the left. The table below lists the following data:

Phone Number	Location	Group	User Name
12024033453	DC: Washington (+1 202)	My Account	Test_User_1 Test_User_1
12052786937	AL: Birmingham (+1 205)	My Account	Test_User_1 Test_User_1
12052786973	AL: Birmingham (+1 205)	My Account	Test_User_1 Test_User_1
12076698349	ME: Ellsworth (+1 207)	My Account	Test_User_1 Test_User_1
12097294050	CA: Angels Camp (+1 209)	A4_number 2	(Unassigned)
12246334135	IL: Antioch (+1 224)	My Account	(Unassigned)

The Numbers page

The Numbers Page (Cont.)

You can:

- Add numbers to the account.
- See assigned, unassigned, or all fax numbers.
- Search for a number.
- Assign or unassign numbers to/from users.
- See all of a user's numbers.
- Move a number to another user.
- Move fax numbers from one group to another.
- Remove a specific location's unassigned fax numbers.

See the *eFax Administrator's Guide*—or the online help—for instructions.

The Usage Page

The **Usage** page gives access to reports on users' fax usage.

Start Date	End Date	Billable Pages	CSV	Excel
Sep 28, 2015	Sep 28, 2015	0	⬇	⬇
Sep 27, 2015	Sep 27, 2015	0	⬇	⬇
Sep 27, 2015	Sep 27, 2015	0	⬇	⬇
Sep 26, 2015	Sep 26, 2015	0	⬇	⬇
Sep 26, 2015	Sep 26, 2015	0	⬇	⬇
Sep 25, 2015	Sep 25, 2015	0	⬇	⬇
Sep 25, 2015	Sep 25, 2015	0	⬇	⬇

The Usage page

You can:

- Run a log of a user's inbound/ outbound faxes.
- Download a fax-usage report.
- View recent user-setting updates to the account.
- Download results of user-list imports or exports.

See the *eFax Administrator's Guide*—or the online help—for instructions.