

# **Fax Router Manual**

Revised 10-10-2008

## ***Purpose***

Fax Router is designed to productively distribute facsimiles throughout an organization. The distribution can be via an eMail attachment, an eMail with a link to the document, moving the facsimile to a Specified File Folder, and Printing on one or more printers on the network.

## ***How it Works***

Fax Router cycles through facsimiles in a folder on the network. As it cycles through the files, Fax Router prompts the user for a Shortcut Key Combination and Command. For instance, the shortcut “jj” could be for John Jones. If this shortcut is entered and the e-Mail button pressed, John Jones would receive an email with the facsimile attached as a tiff image or a PDF. With the Folder button pressed the facsimile would be moved to a John Jones file and if the Print button was pressed the facsimile would print on his local printer. Fax Router can also be setup to use rules which gives it the capability of processing all shortcuts with the same name. So, jj could email John Jones, move the file onto his desktop and print a copy all by pressing the rules key. If there are rules that allow a facsimile to be eMailed and saved to a file folder the eMail will contain a link to the file saving bandwidth and over coming email attachment size limits.

Shortcuts can be stacked. So if a user enters two lines one with kp=c:\faxes\Keith and the other one with kp=c:\faxes\sales the file will placed in each folder. If two rules with the same name appear in the Printer list it will be printed on multiple machines.

With emails the process is different. If a rule has an eMail Address and there is a matching rule under “Folders” a link to the document will be sent. Therefore by entering jp with an email address “jp=john@edocfile.com” and under “Folders” “jp=C:\faxes\John” the email will contain a link to the document. However if multiple folders are specified with jp and multiple email addresses the fax will be delivered as an attachment.

If entering multiple email addresses on one line such as sales=bob@edocfile.com; sam@edocfile.com; henry@edocfile.com each email address will receive the file as an attachment. Even if there are lines in the Folder Section “sales=c:\faxes\sales” “sales=c:\faxes\sam” and “Sales=c:\faxes\henry”.

In other words, if a shortcut has one folder and one email address it will always arrive as a link. In every other case it will arrive as an attachment.

An example:

A law firm has multiple attorneys working on case number 123.

If under email the shortcuts are  
123=bob@law.com

123=henry@law.com

And under folders

123=C:\Samson Law Suit

And under Printers

123=OKI 7200

When the user enters 123, clicks on Rules the file will be saved in the case folder “C:\Samson Law Suit” an email with the file attached will be sent to Henry and Bob and it will be printed on the OKI 7200 in Fred’s Office. Because of this the user could also enter under email 123= bob@law.com; henry@law.com in the email rule as the output would be the same, provided that the rules were the same for Printers and Folders

Advanced options are also available allowing one document to be e-Mailed to one group, Printed for another Group, and moved into a file folder for another.

As most users will not need all of these functions, Fax Router can be configured to only offer the functions the user needs. This saves time when tabbing through the options and when training a new user. One option always available is “Advanced” which allows for multiple actions to be carried out on one document.

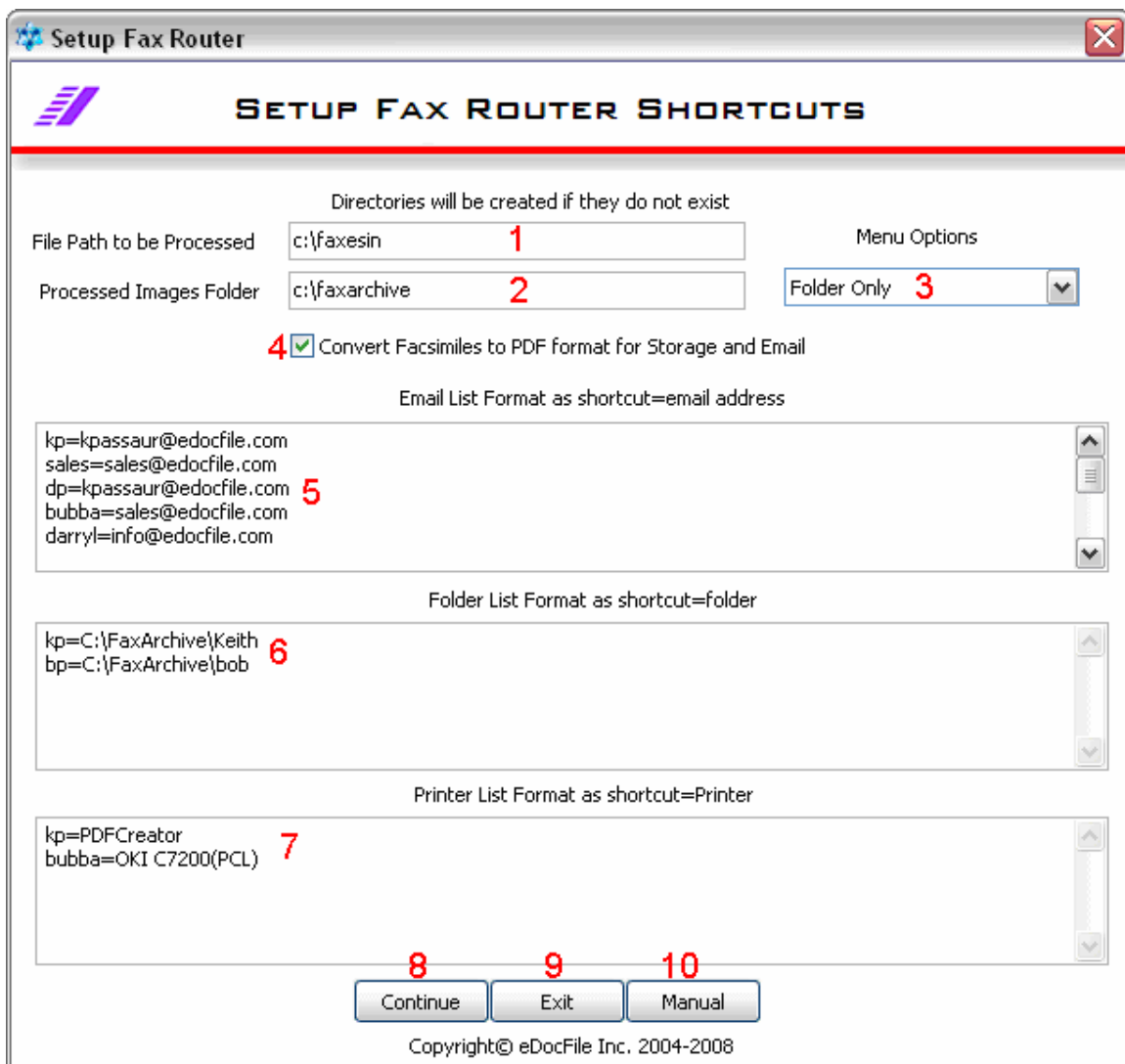
Shortcuts can be entered through the setup menu and when one document rule is to be created. For instance if the uses wants to eMail Mike Myers and there is no short cut for him the user will be prompted for one and it will be automatically saved. However, this does not apply when processing rules. When the user selects Rules it looks for an eMail address, a printer and a file folder and only processes the ones previously setup.

## Setup

**Important – Once setup is run the user needs read write permissions to the Folder C:\FaxRouter and all subfolders**

Begin setup by clicking on Start / All Programs / Fax Router / Setup Fax Router

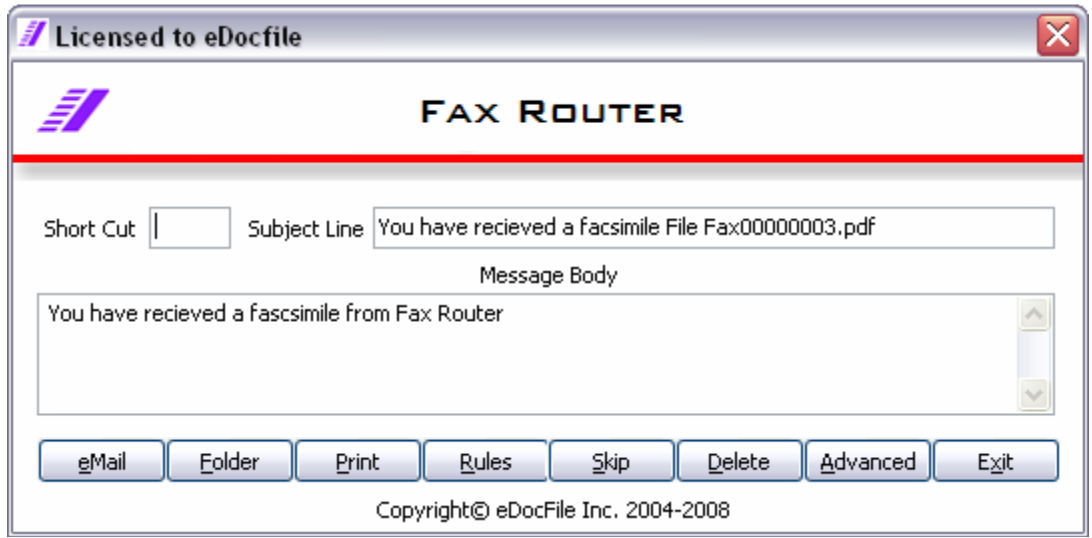




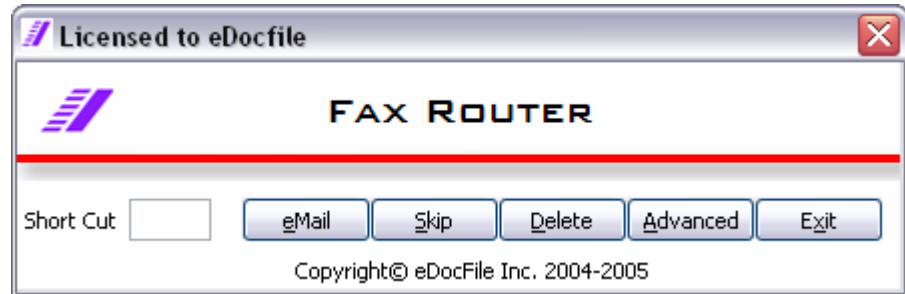
1. Enter the path of where the tiff images (facsimiles) are stored if this folder is not presently available it will be created
2. Enter an archive path for the facsimiles – all faxes are first saved to this folder as a tif image or a PDF before any delivery has been carried out.
3. Check this box to convert the facsimile to a PDF
4. Select the Menu to be displayed – See Available Menus Below

5. Enter the shortcut to the email address. Format this as the shortcut an equals sign “=” then the email address.
6. Enter the shortcut for routing to a Folder. Follow this with an equals sign “=” sign then the folder.
7. Enter the shortcut for routing to a Printer. Follow this with an equals sign “=” sign then the Printer
8. Continue saves and Exits the Setup

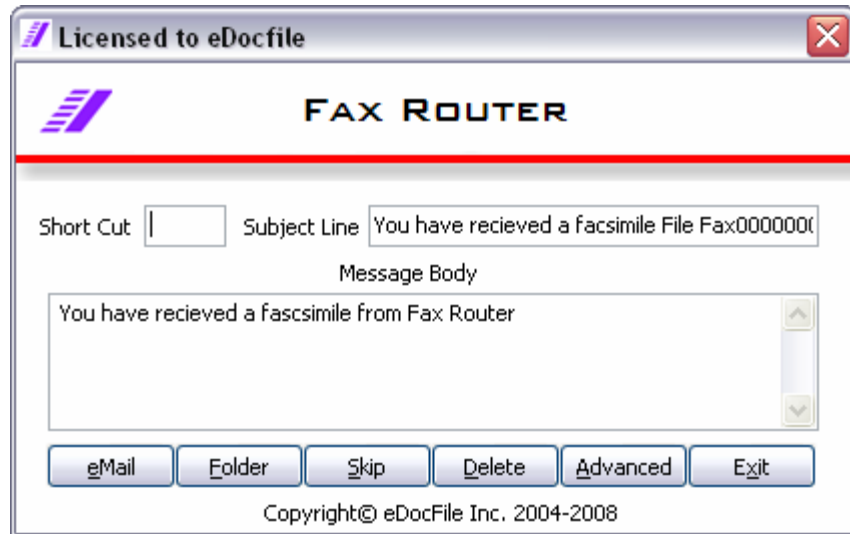
Show All  
Options



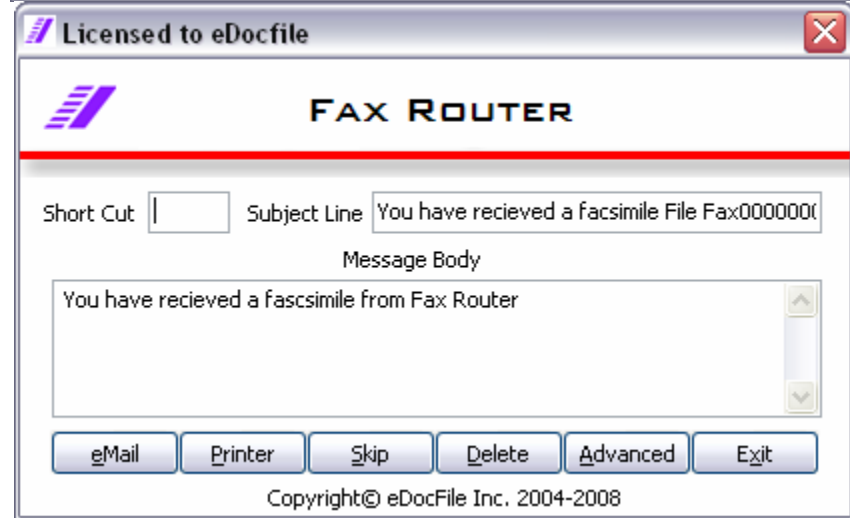
Use eMail  
Defaults



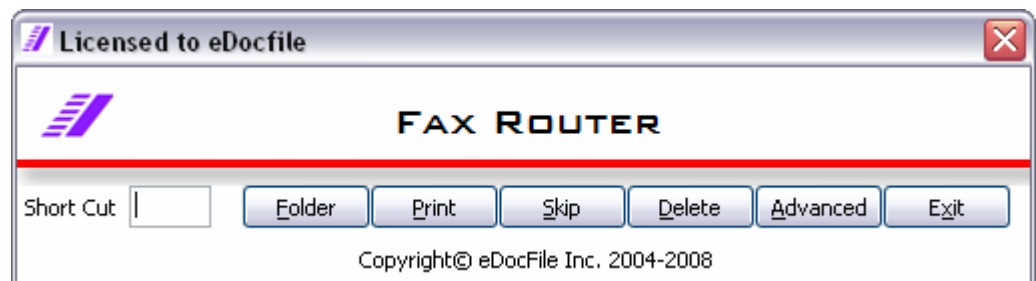
eMail and Folder



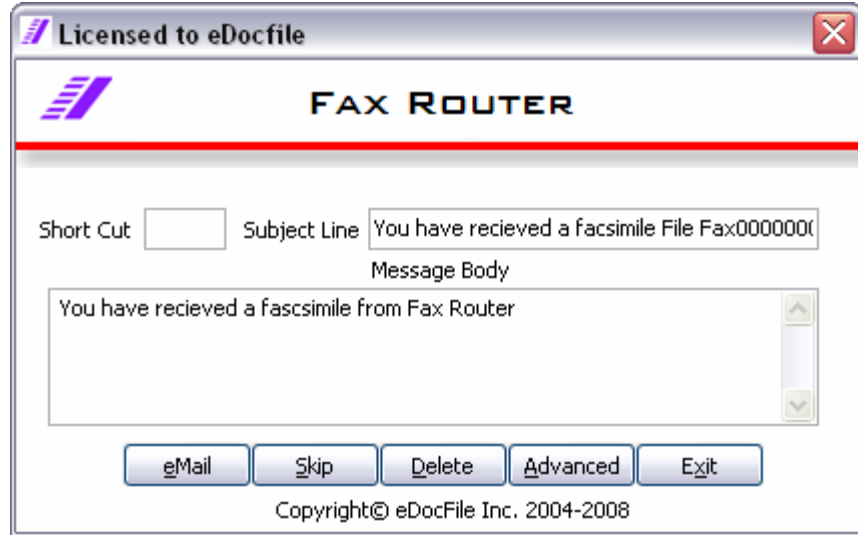
eMail and Printer



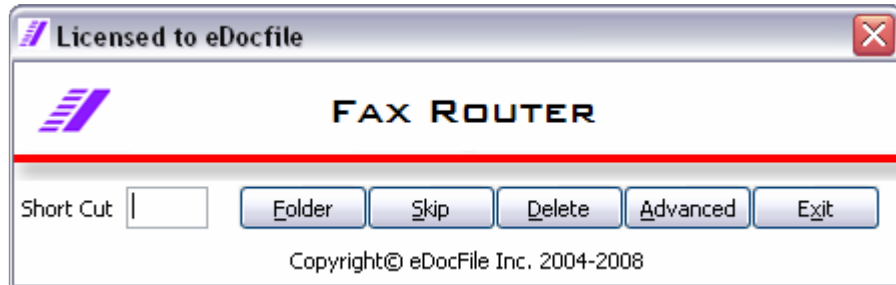
Folder and Printer



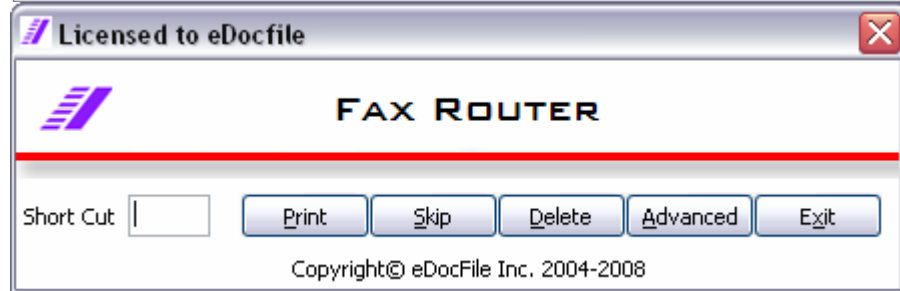
eMail Only



Folder Only



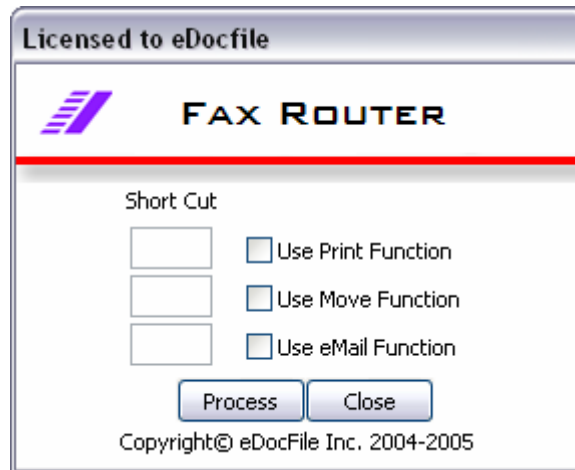
Print Only



Rules



## Advanced Menu



When deciding on the menu to use the user should select the one with the least options that meet their needs. This allows the user to cycle through the faxes quicker as fewer keystrokes are needed to process the document. If using rules the user will not be prompted if an option does not exist as the software is designed to only process existing rules.

Enter the desired shortcuts in the appropriate boxes and click on Continue



Select Yes to Enter Mail Setup

**e-Mail Notification Setup**

**SETUP FAX ROUTER EMAIL**

From Address  1      From Name  2

Mail Server  3      SMTP Password  4      SMTP User ID  5

Default Subject Line  You have recieved a facsimile 6

Default eMail Message

You have recieved a fasscimile from Fax Router 7

8  Show Send Status Window - Text eMail    9  SMTP Authentication Required    10  25 Port

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1. Enter the email address of the sender
2. Enter the From Name of the Sender
3. Enter the Mail Server
4. Enter the SMTP Password
5. Enter the SMTP User ID
6. Enter a Default Subject Line, the subject line will always use this if it is not manually changed in the menu prompts
7. Enter a default eMail Message this message will always be sent if it is not manually changed when the user is entering the shortcuts. By default if a link is being sent it will be appended to the end of this message
8. Place a check mark here to see a status window when testing the mail settings. The window will not appear when sending the mail
9. Place a check mark here if SMTP Authentication is required
10. Enter the Mail Port – usually 25
11. Click to Test the settings
12. Save and Exit – the last tested settings will always be saved so it is necessary to always check the settings before exiting.

Enter the required settings for sending mail and check them before exiting. If settings are entered and not tested before exiting they will not be saved.

## ***Running the Program***

Begin setup by clicking on Start / All Programs / Fax Router / Fax Router



An Icon will appear in the Sys Tray showing the user the program is running



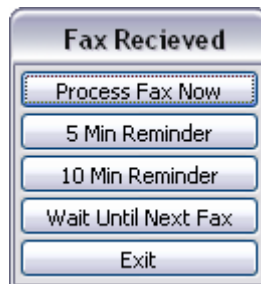
By Right clicking on it the user can start and stop the program or exit it.



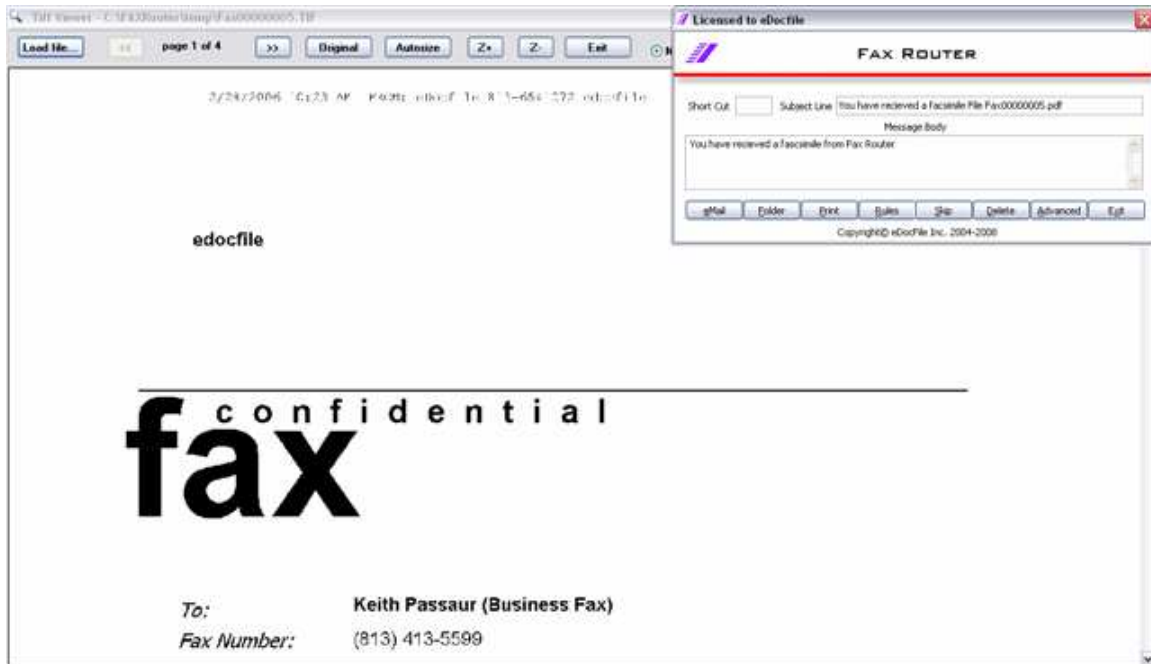
If the program is stopped the Icon will appear with at “X” on it



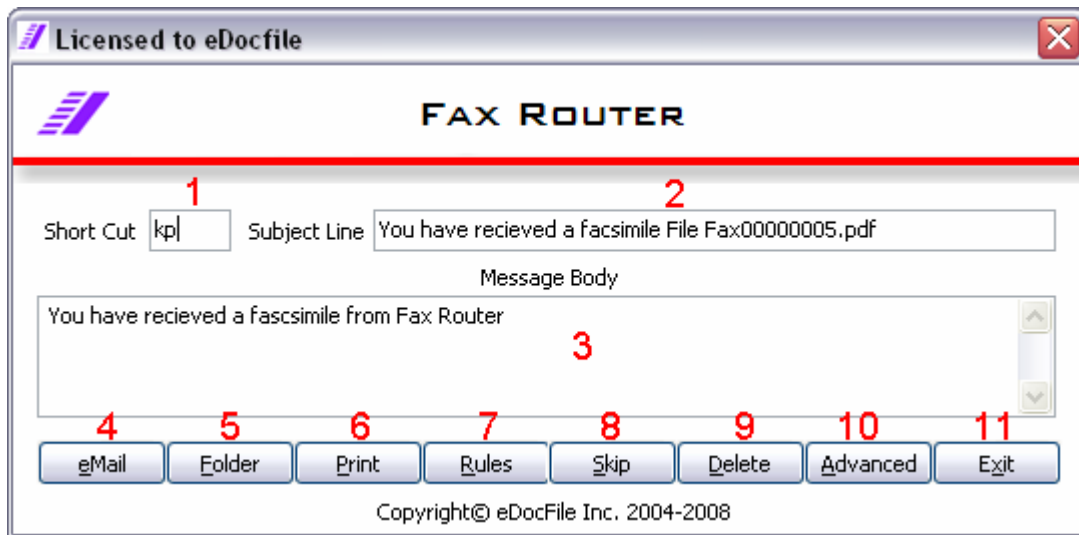
When the program is running a Fax arrives the following menu will appear



The user can select to process the facsimile now or be reminded later. When the user presses “Process Fax Now”



The facsimile will open expanded to the top of the facsimile with the Router Menu Placed on top of it. (Shown below displaying all options)



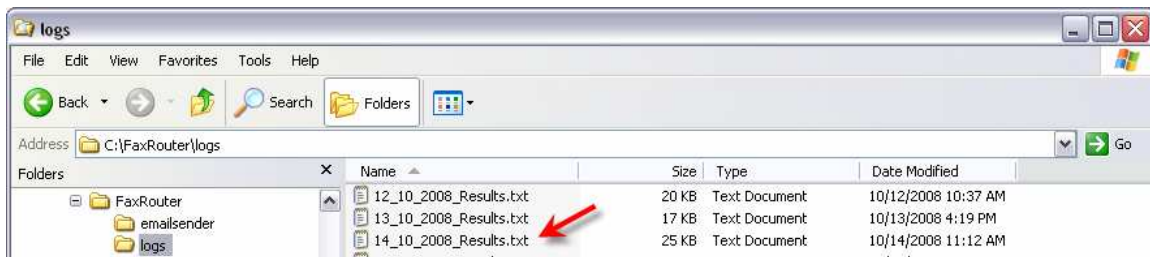
The user enters a Shortcut and clicks on the desired option.

1. The short cut key that is to be processed
2. The subject line for the email this comes from the default setup in the mail section – this can be edited before sending
3. The message body comes from the default setup in the mail section– this can be edited before sending

4. eMail if pressed will send an eMail to the address or addresses that match the shortcut or shortcuts with the facsimile attached.
5. Folder if pressed will place a copy of the facsimile in the folder or folders that match the shortcut or shortcuts
6. Print if pressed will Print the facsimile on all Printers that match the shortcut
7. Rules if pressed will check the rule for a match in eMail, Folder, and Printer and process all of them. If more than one eMail is matched the eMail will have the facsimile attached. If one eMail address is matched and one folder is matched the eMail will contain a link to the facsimile
8. Skip if pressed will close the facsimile and put it back in the input folder for processing later
9. Delete if Pressed will delete the eMail
10. Advanced if pressed will bring up the advanced menu allowing the user to specify a rule for emailing, Printing and which folders to place it in.
11. Exit if pressed exits the program

## Log Files

A log file of all processes is recorded and saved in the folder C:\FaxRouter\logs



A file is created for each day's processing.

## Support

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