



Fax Broadcast

User Guide

Supports

WinFax PRO 10.0

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Concord Technologies

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Introduction

This User Guide explains how to install and use the features of Fax Broadcast.

- Signing up for Fax Broadcast
- Setting up Fax Broadcast
- Creating a Fax Broadcast document
- Broadcasting a fax
- Resubmitting a fax broadcast
- Canceling a fax broadcast
- Getting broadcast activity reports
- Getting help

Signing Up for Fax Broadcast

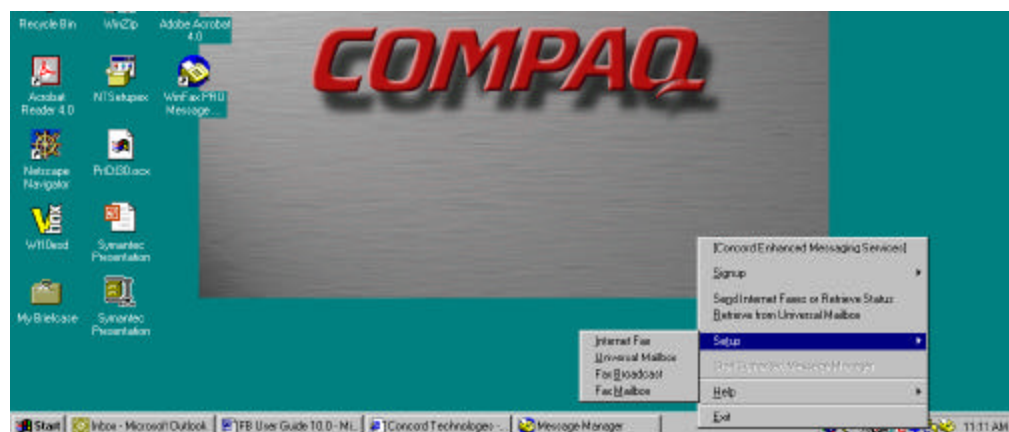
Before you can begin to use the Fax Broadcast service, you need to contact Concord and sign up for an account. There are several easy ways that this can be done. They include:

- Calling 1-800-670-8777 or 1-206-441-3346 and speaking to a representative.
- Using the signup wizard built into WinFax PRO. From the main menu, select **Tools, Program Setup, Concord Services** and **Fax Broadcast**. Select **"Sign Up Now!"**. This will take you to the concordfax.com Web site where you will be able to complete an on-line registration. A customer service representative will call you back to provide you with your account details.
- Using your Web browser to go to **www.concordfax.com**. From the main page, select the **Services** section, select **Fax Broadcast** and click the **Sign Up Now!** graphic at the bottom right of the page. Complete the registration and submit your information. A customer service representative will call you back to provide you with your account details.

Setting Up Fax Broadcast

Once the software is installed, the next step is to configure your Fax Broadcast service. Follow these steps:

1. Right click on the Concord tray icon on the lower right corner of your screen.
2. Select **Setup, Fax Broadcast** from the menu.



Enter your specific information on the following tabs.

Access

User ID

Enter the User ID provided to you by customer service. This ID will have eight (8) characters and begin with "C0" (the first character is the letter 'C' and the second character is the number 0 – zero).

Connecting by

Select the method you wish to use to submit your fax jobs to the service. You can either dial directly into the service or go through the Internet.

- Internet using Local Area Network (LAN)—To use your corporate LAN connection to the Internet.
- Host Name – enter **cfg.concord.net** unless instructed otherwise by a Concord representative.
- Use Secured Access (SSL) – place a check mark here if you wish to use SSL encryption for secure connectivity to the Concord Fax Broadcast platform.

Time Zone

Make sure the time zone displayed matches your location. This is especially important when sending fax broadcasts that will be sent at a scheduled time.

Notification

Upon completion of your Fax Broadcast event, you can have the service send an Exception Report to you. Unsuccessful fax numbers are sent to you in an Exception Reports list. The report can be delivered either by fax or by e-mail.

Tip: If you are traveling or are at a remote location, change these settings so you can have the report sent to your current location. The report is sent only once; you must contact customer service should you require an additional copy.

Deliver via fax transmission

If you want your fax broadcast Exception Report to be sent to a specific fax number, enter the number. Make sure all fax numbers include the area code (e.g. 1-212-321-1432). This option is only available in the U.S. and Canada. For notification outside this region, use email notification (see below).

Deliver via Internet E-mail

If you want your fax broadcast Exception Report to be sent to an e-mail address, complete this field with the full Internet e-mail address.

User

This information will be used to fill in portions of the fax header and quick cover page (if one was sent) for your broadcast faxes. Verify that your Name, Company, Voice and Fax numbers are correct.

CSID

Completing the CSID field is extremely important, as it will be included in the header of all of your fax broadcast messages.

Calling Station Identifier: This information is used to identify the sending fax device to the receiving fax device. Concord recommends using your name or company name as the CSID. You can also enter your email address; the field is limited to 20 characters.

Address

As with the user section, the address information will be used to fill in portions of the cover page (if one was sent) for your broadcast faxes.

Cover Page

There are several types of cover pages that can be sent with your Fax Broadcasts. They are divided into two categories: quick cover pages and standard cover pages. This tab allows you to set the default cover page for each category. This will be used when selecting the type of cover page to use on the WinFax Send screen.

Update Cover Page list from Server

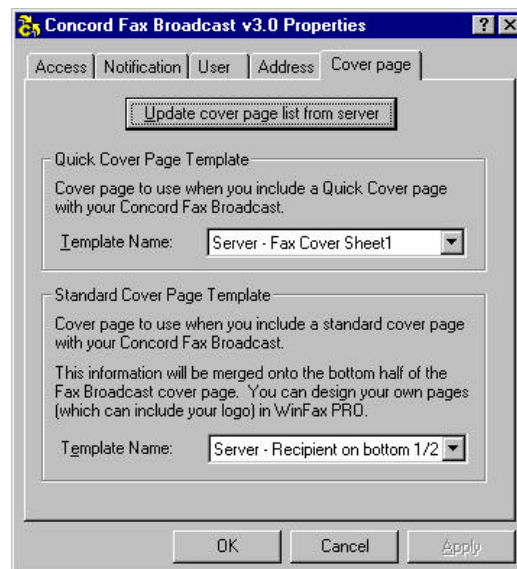
Click to connect to the Concord service and receive a list of available cover pages.

Quick Cover Page Template

These cover pages are generated by the fax service. They can be either a full page or a small 'additional header,' which is merged onto the first page of your fax. This section of the dialog selects which specific "Quick" cover page to use when you select quick cover on the WinFax PRO send screen.

Standard Cover Page Template

The standard cover pages are cover pages where the top half is generated from a WinFax cover page template and the bottom half has recipient info generated by the service. This section selects which template to use for the bottom half of the cover page. When you have selected your options click the Apply button. You are now ready to begin using the Fax Broadcast service.



Broadcasting Faxes

WinFax PRO makes it easy to convert your documents into crisp and clean faxes, ready for distribution to your broadcast recipients.

You can broadcast your document directly from any Windows program. For example, you can create a document in an application and deliver it to WinFax PRO via the Print command for broadcasting. You can broadcast the document later from WinFax, simply by saving it as an attachment. See “Attachments” in the WinFax PRO on-line Help.

Using the Symantec WinFax PRO Send dialog, you bring together all the pieces of your fax broadcast. Additionally, you can specify information about the fax you want to broadcast. Fax broadcasting is a 5-step process:

1. Create fax pages to send.
2. Select your fax broadcast recipients.
3. Choose any desired broadcast options.
4. Select a cover page (if applicable).
5. Schedule the delivery of the fax broadcast or send immediately.

Create Fax Pages to Send

Printing from an Application

If the document you want to fax resides in another application (Word Processor, Spreadsheet, Contact Manager or other application), creating your fax pages is as simple as printing to the WinFax printer. In addition, if you would like to broadcast a fax that is in your WinFax receive log, you can do so by printing to WinFax PRO.

Note: You should not use WinFax’s forward function to generate a Fax Broadcast.

When you print to WinFax, the Send screen will be displayed. If you would like to add extra pages to your document, continue below; otherwise skip to “Select your fax recipients.”

Adding Attachments

If some or all of the fax images you would like to send are already attachments in WinFax, you can easily add them to your broadcast.

To add an attachment to your broadcast, follow these steps.

1. Select **Insert, WinFax Attachments** from the menu. The Add Attachments dialog appears.
2. Use the dialog to specify which attachments to include in your broadcast.

To include predefined attachments, select the attachments in the **Add Attachment** dialog box and click **OK**.

For more details on adding, removing, viewing, moving, modifying and searching attachments, look up Attachments in the WinFax PRO on-line help index.

Select Your Fax Broadcast Recipients

You can send a fax broadcast to up to 5,000 recipients within your WinFax phonebook.

Note: Make sure all fax numbers include the area code and for overseas calls, the country code. For example, in North America 716-555-4567 • to overseas 99-555-987654.

The long distance access code (1) for broadcasting faxes anywhere in North America is optional.

Fax Broadcast does not deliver broadcasts to fax numbers starting with 1-900 or 1-976.

Please insure all telephone numbers are parsed correctly from within the WinFax Recipient properties box. The area code must be separated from the telephone prefix and number. To verify your contacts fax number format, from the WinFax PRO phonebook, double-click on the contact.

Specifying your Fax Broadcast Recipients

1. Type the recipient's name in the To: field and the fax number in the Number: field, or click a recipient within a phonebook or an entire phonebook.
2. For details on specifying fax recipients or searching your phonebooks for fax numbers, see Chapter 5, Sending Faxes, in the Symantec WinFax PRO User's Guide.
3. To place the name in the Recipient List, click Add to List. Each recipient or phonebook you add to the list that is a Broadcast type in your phonebook automatically displays as Broadcast.

For details on specifying recipient groups on the fly, see Chapter 5, Sending Faxes, in the Symantec WinFax PRO User's Guide.

Choose Broadcast Send and Preview Options

The Send Options dialog box is where you tell WinFax to use your Fax Broadcast Service for sending the current fax. You also can set the option to preview and annotate your faxes before the fax is transmitted.

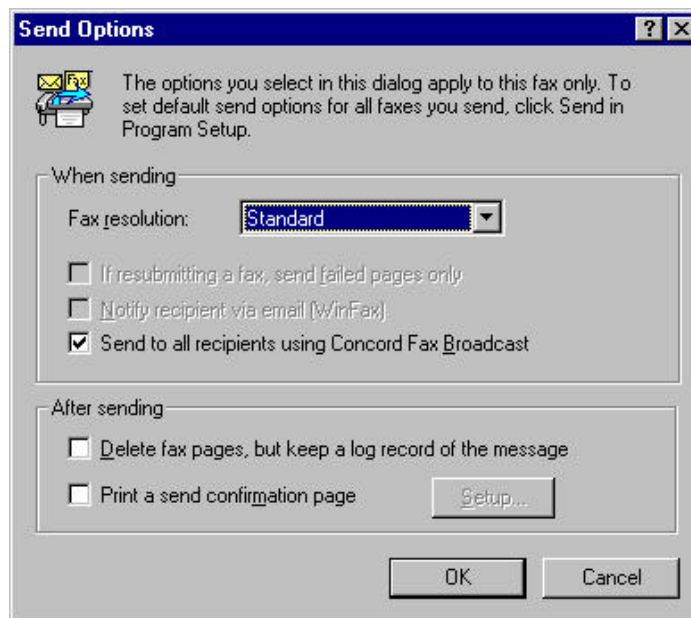
Selecting the "Allow me to preview and annotate faxes" lets you view your document and check for errors before sending.

To select your Send Options, select "Send Options" from the Options Menu.

Select **"Send to all recipients using Concord Fax Broadcast"** to enable WinFax to send the fax using the Fax Broadcast service.

Optionally, you can set the fax resolution. Standard resolution is the default; selecting Fine resolution may increase the transmission time of your faxes and thus the cost of your broadcast.

Click OK.



Note: Do NOT select the option **"Delete fax pages, but keep a log record of the message"** as you will lose valuable information useful in technical and billing support.

Select a Cover Page

If you would like to include a cover page with your Fax Broadcast, simply select the Cover page in the Send dialog.

Next, select which type of cover page to use:

Quick Cover Page:

There are two types of quick cover pages.

1. A full-page with the standard information on it including sender and recipient information.
2. An 'extended fax header' which is merged onto the first page of the fax to send. The 'extended fax header' is a single line that is placed just below the normal fax header at the top of the page. This allows you to not have to send an extra page just for the cover. If you use this cover page, you must leave a top margin of at least 3/4" on your first page. To use one of these cover pages, click on the 'Cover' button on the Send screen and choose 'Quick Cover Page.' Which type of cover page used is based on the selection you choose in the Cover pages properties earlier in this guide.

Note: you cannot include any memo text on these cover pages as they are generated by the server.

Standard Broadcast Cover Page:

To select which standard cover page to use, click on 'Cover' and select the 'Fax Broadcast' folder in the 'Select Cover Page' dialog. If you would like to preview any of the cover pages, just select the entry and a preview will be shown. Click 'OK' once you have decided which to use.

These cover pages are fully customizable and can be edited to include your company logo as an example. Note, Make sure to keep your customized cover page free of recipient variables and limit its length to no more than 5" (roughly 1/2 a page in height). To design and add your own cover page see the WinFax PRO User Guide, Chapter 4.

Schedule the Delivery of the Fax Broadcast

WinFax assumes you want to broadcast your fax as soon as possible. **You can delay your broadcast until a specific time or until an off-peak time within 48 hours.** In addition, you can add descriptions about your broadcast to aid searching later.

You might delay broadcasts to accommodate international time differences or to take advantage of Concord's off-peak rates. Concord's Fax Broadcast peak hours are Monday to Friday from 7:00 a.m. to 7:59 p.m. (Eastern Time).

Whether you choose to broadcast your fax immediately or to delay it, WinFax delivers your broadcast information to the Fax Broadcast host. When the specified time is reached, your fax is

Delivery Options

General

Choose how you want this fax delivered to the selected recipients.

To: Jane Doe

Number: +1 (555) 5551212

Send by: Fax Broadcast - Concord Fax Broadcast

Priority: Normal

Deliver: As soon as possible

☐ Cancel by: Time: 11:59:00 PM Date: 7/ 2/01

Billing code:

Keywords:

☐ Send secure:

OK Cancel Apply

broadcast automatically. To cancel a broadcast, see “Canceling a Fax Broadcast” on page 11.

To view or change your delivery options, click “Recipient, Advanced” from the menu, or click the Delivery Options icon.

To select your delivery, click the arrow in the **Deliver:** drop down box.

- To send your broadcast immediately, click **As Soon As Possible**.
- To specify a time for your broadcast, click **At a Date and Time I Specify**. Set the time and date you want to by clicking the up and down arrows specifying a new time and date within the next **48 hours** to broadcast your fax.
- To broadcast your fax during the Concord off-peak period click **Off-peak**. The off-peak period that is displayed is for use by WinFax and is not applicable for your Fax Broadcast service. The Fax Broadcast off-peak hours are stated above.
- To select a time to terminate your fax broadcast, enable **Cancel by**. Set the time by which you want your broadcast to be terminated. The default time is 11:59 p.m. of the day you initiate the broadcast.
- Select billing information and keywords in the Other section if desired. Billing information added here can help you locate Fax Broadcast events in the future.

Delivering your Fax Broadcast

You are now ready to send your fax broadcast to the service.

1. In the Send dialog, click **Send**. The Password dialog box appears.
2. Enter your PIN#, click **OK**.

If you click **Preview**, WinFax displays a preview of your broadcast. This preview does not include the cover page or fax broadcast header. To continue, click **Send**.

WinFax delivers your attachment and user, account, recipient, scheduling and subject information to the Fax Broadcast host. During delivery, the Fax Broadcast Status box appears displaying status information.

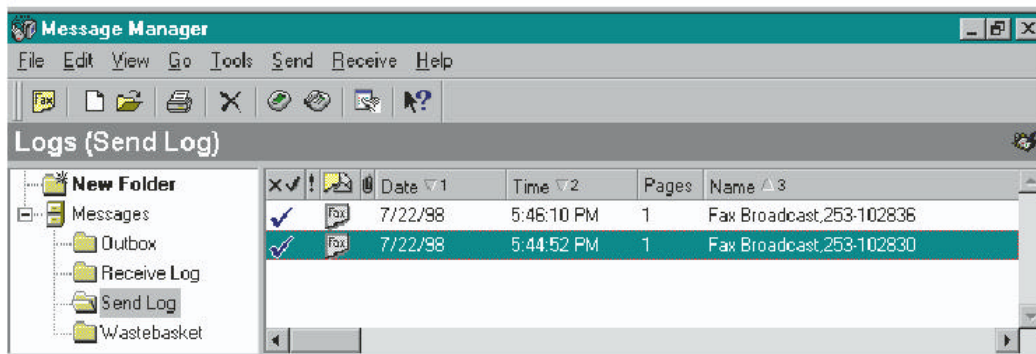


Note: All Fax Broadcast recipients must share the same delivery scheduling information. If you need to send two documents at different times to your recipients, you must create two separate fax broadcast events.

What Happens After you Send your Fax Broadcast

When the Fax Broadcast host receives a valid broadcast from WinFax, the host assigns an identification number (ASN) for your reference and future tracking. This ASN is returned to WinFax and appears as the Name in the WinFax PRO Send Log folder as part of a standard fax event.





Once a Fax Broadcast event appears in the Send Log folder, you can treat it as any other WinFax fax event, except you cannot view the broadcast cover page. The broadcast cover page, if you select this option, is added by the Fax Broadcast host when the broadcast occurs and is not part of the WinFax event. For more details on managing event records, see Chapter 8, Logging, Storing and Organizing Faxes in the Symantec WinFax PRO User's Guide.

Note: To see information about a particular Fax Broadcast event, **select the event**, click **View** from the main menu bar and then click **Info**. The Fax Broadcast Event dialog appears. You can also **highlight the Fax Broadcast event**, **right click** and select **Info** for the same screen.

This dialog displays information about your broadcast, including the ASN; options selected; date and time the broadcast was sent, deferred to or canceled; a list of the recipient names/companies; and the total number of recipients in the broadcast.

If you set up the notification feature of the Fax Broadcast service, an exception report will be sent to you at the completion of the broadcast. Possible reasons why a fax could not be delivered include: because a voice answered the call, there is no answer, the line is busy, or you have an incorrect number or area code.

Resubmitting a Fax Broadcast

You can send a successful broadcast again, or try to deliver an unsuccessful broadcast a second time, by resubmitting it. Resubmitting a fax is similar to the way you resubmit any other send event, from the WinFax Send Log.

To resubmit a Fax Broadcast.

1. In the Send Log folder of the Logs window, select the broadcast event you want to resubmit, click **Send, Resubmit** on the Send menu. The Send dialog appears and displays the original send information for the selected broadcast.
2. Re-select the Fax broadcast option, cover page, and re-schedule.
3. To change the information in the Send dialog, click **Send**. The Password dialog appears.

Note: You can only resubmit a job once.

For details on resubmitting a send event, see Chapter 5, Sending Faxes in the Symantec WinFax PRO User Guide.

When resubmitting a broadcast, individual recipients appear in the Recipient List of the Send dialog as originally submitted. However, any recipients that were members of a phonebook group in the original

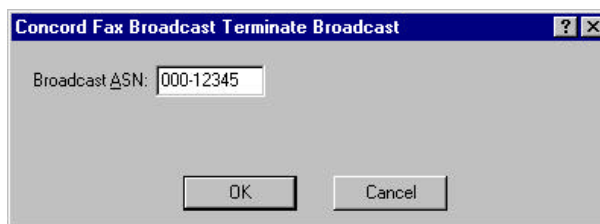
broadcast appear for resubmitting as individual recipients. You can change your recipients or select other send options before resubmitting.

Canceling a Fax Broadcast

Once your broadcast has been sent to the Fax Broadcast host and is logged in your WinFax Send Log with an ASN, your fax is ready for broadcasting to the selected recipients immediately or at the scheduled time.

You can cancel all of an unsent broadcast, or any unsent faxes of a broadcast that is in progress.

To cancel an entire broadcast, select **Tools, Services, Concord Fax Broadcast, Terminate Broadcast** on the main WinFax PRO menu. The Terminate Fax Broadcast dialog appears. In the Broadcast ASN field, type the Fax Broadcast ASN (from your WinFax Send Log), click **OK**. Enter your password and click **OK**. You will connect to the service via the default connection method you established in the Fax Broadcast Properties.



Note: You can cancel only broadcasts that are still in queue to be sent by the host. Any broadcast that is canceled cannot be reactivated and can only be broadcast again by resubmitting the job. Check with customer service if you are unsure of the status of broadcast.

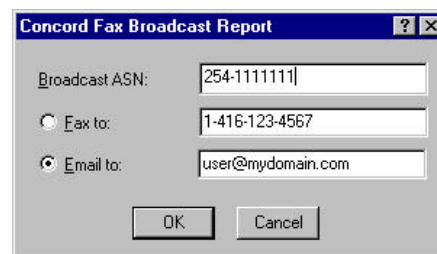
Fax Broadcast Activity Reports

An activity report provides a complete activity log showing how many faxes were successful as well as any errors that occurred. You can request an activity report for a specific ASN number.

Note: You must request an activity report within 24 hours from the time the broadcast was first submitted. All faxed reports will cost \$5.00; all email reports are free of charge.

Requesting a Report

1. On the Tools menu, select **Services, Fax Broadcast Report**. The Fax Broadcast Report dialog appears.
2. Enter the **ASN number** of the fax broadcast on which you wish to receive a report. The ASN number is located in the name field of your WinFax PRO send log. Each Fax Broadcast will have a separate ASN number.
3. If you want the report sent to a different fax number then you have set in your Fax Broadcast properties, you may enter the number here and click **OK**. (All faxed reports will cost \$5.00; all email reports are free of charge.)
4. You will then be prompted for your Fax Broadcast password.
5. Fax Broadcast will connect to the fax server based upon your default method of connection specified in the Access tab of the Fax Broadcast setup dialog.



A Fax Broadcast activity report for the ASN number you entered is sent to the fax number you specified.

Getting Help

This section explains how you can contact Concord Technologies' Customer Service, for questions regarding your account or general questions on Concord services.

For technical support with your WinFax PRO software, please see the WinFax PRO on-line Help file or the User's Guide.

Contacting Concord Technologies Customer Service

Normal service hours are Monday–Friday, 7 a.m.–5 p.m. (Pacific Time).

Telephone: +1 (206) 441-3346 or 1-800-792-0329

For written support, please either fax or e-mail your question to the number or address below and a representative will respond within one business day:

Fax: +1 (206) 441-7965 or 1-800-301-0329

E-mail: service@concordfax.com.

You can contact Concord Technologies Customer Service to:

- Get the status of a broadcast
- Subscribe to additional services.
 - Universal Mailbox
 - Fax Mailbox
 - Internet Fax
- Inquire about billing and charges.
- Change your current account information. For example, if you want to switch your current credit card billing to another credit card, contact Customer Service. All account changes are subject to the appropriate credit approval.

We recommend that you visit our Web site at **www.concordfax.com** for frequently asked questions regarding our services.