

WinFax™ PRO^{10.0}

RightFAX Client User's Guide

WinFax PRO Client for RightFAX Servers

User's Guide

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WinFax PRO Client for RightFAX Servers

WinFax™ PRO client is a program you can use to send and receive faxes. This document describes how to use WinFax as a fax client to your RightFAX Server. Topics in this document include:

- information about using this document and the WinFax online help
- understanding how WinFax works with your RightFAX Server
- installing WinFax PRO for RightFAX Servers (*administrators only*)
- sending faxes
- receiving faxes
- checking for new faxes
- viewing faxes
- troubleshooting faxing problems

About this Guide

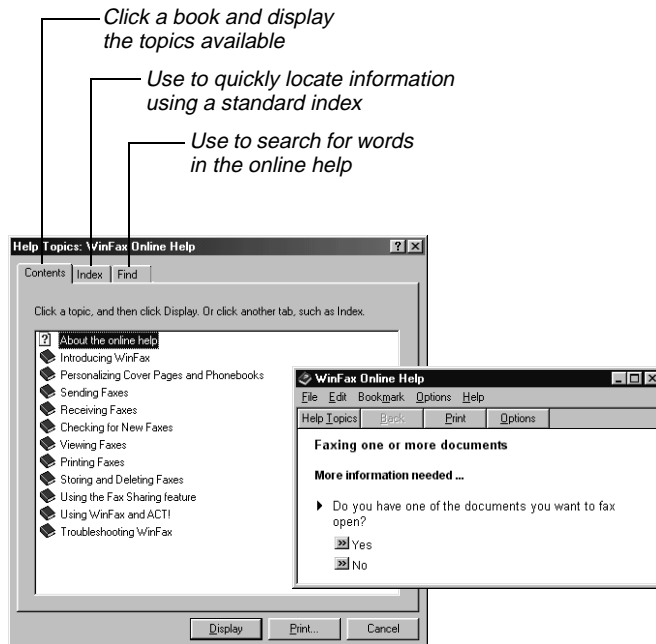
While this guide contains instructions for the most basic WinFax tasks, the online help covers *all* features. Additional information on using WinFax with a modem is provided in the *WinFax PRO User's Guide*, available in Adobe Acrobat format on your WinFax installation CD. Using WinFax as a client to the RightFAX Server is similar to using WinFax with a modem.

Using the Online Help

The Help Topics dialog is the main entry into the WinFax online help and contains links to both feature overviews and instructions for the most commonly used features.

To open the Help Topics dialog:

- 1 In Message Manager, click WinFax Help Topics on the Help menu. The Help Topics dialog appears.



- 2 Select the help options you want to use.

Getting Help in a Dialog

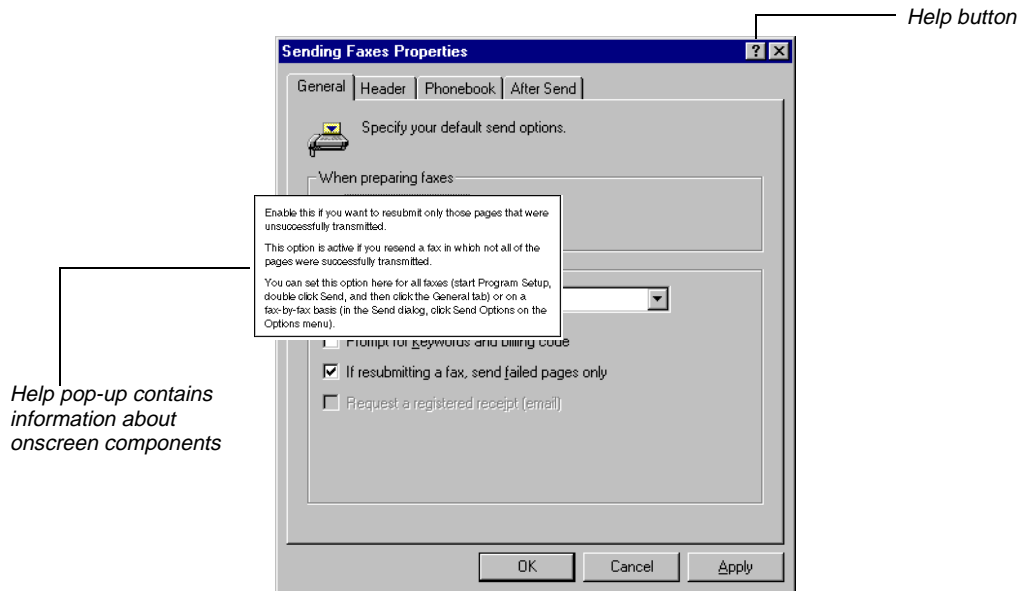


*Help button
in upper right
corner of most
WinFax dialog
and window*

Most WinFax dialogs and windows contain a help button (in the upper right corner) that you can use to display information about onscreen components, such as commands and individual fields in dialogs.

To view the pop-up help for an onscreen component:

In a dialog, click the What's This? button in the upper right corner, then click any screen element. A pop-up appears over the element.



Documentation Feedback

Symantec is interested in your suggestions for improving both the print and the online documentation for WinFax. We are interested in knowing what works and what needs improvement. Did you find errors, omissions, or confusing information? Tell us if you found information too difficult to find. Tell us where you looked for information, and where you looked first. Your feedback will help shape future versions of the documentation for WinFax.

To forward your feedback, use one of the following methods:

- **Fax** – Fax your comments to 1-416-441-0333 to the attention of the Technical Publications Department.
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Introducing WinFax PRO Client for RightFAX Servers

WinFax turns your computer into a personal fax machine that sends and receives faxes. Using WinFax, you can fax documents from your computer to any fax number in the world, anytime.






WinFax sends and receives faxes using a modem. For most WinFax users, the modem is installed locally on their computer. If you do not have a modem installed on your computer, you can send and receive faxes by setting up WinFax as a client to your RightFAX Server.

The RightFAX Server is the faxing center for all WinFax clients on your network. The only difference between a fax machine and the RightFAX Server is that the RightFAX Server can accept fax documents electronically over the network. You no longer need to print out the documents you want to fax, assemble them in the order you want to fax them, and then feed them into a fax machine. Using WinFax client, you can select the documents you want to fax on your computer, assemble your fax in the WinFax PRO Send dialog, and then transfer them over the network to a RightFAX Server to be faxed—all with a single click.

Similarly, the RightFAX Server receives all incoming faxes for your company. When new faxes arrive, the RightFAX administrator determines who the fax is for and then forwards that fax to you over the network. Your faxes arrive in your WinFax inbox.

Included Programs

When you install WinFax, the Setup program creates the WinFax PRO program group and adds the following items to it and to the Windows Start menu.

Program Icon	Details
	WinFax PRO Message Manager – The main program you use for all your faxing activities—preparing faxes, sending and receiving faxes, using phonebooks, and so on. From Message Manager, you can access Fax Viewer, the tool you use to view and print faxes you receive, and Cover Page Designer, the tool you use to modify cover pages or to create your own cover pages from scratch. You can also install macros from Message Manager that add faxing commands to the following programs: Microsoft Excel (versions 2000, 97, 7.0, and 5.0), Microsoft Word (versions 2000, 97, 7.0, and 6.0) and Corel WordPerfect (versions 7, 8 and later). For more information about macros, see the WFXMACRO.TXT file in the Macros folder in your WinFax installation directory.
	Controller – The tool that appears automatically on the Windows taskbar when you start Windows and allows you to automatically receive faxes at all times, even when Message Manager is not running. When the Controller is running, you can send faxes, receive faxes, and check for new faxes without having to start Message Manager.
	Program Setup – The program you use to change your WinFax setup and to set your preferences for sending, receiving, managing messages, and so on.
	Send New Fax – Starts the WinFax PRO Send dialog so you can send faxes without starting Message Manager.
	Install Directory – A shortcut to the WinFax installation directory.

Starting and Exiting WinFax Programs

You can start WinFax programs in the same way you start any other Windows program.

To start Message Manager:

Click the Windows Start button, point to Programs, point to Symantec WinFax PRO, and then click WinFax PRO Message Manager. Message Manager starts.

To exit Message Manager:

On the File menu, click Exit.

To start Program Setup:

Click the Windows Start button, point to Programs, point to Symantec WinFax PRO, and then click Program Setup. Program Setup starts.

To exit Program Setup:

On the WinFax PRO Program Setup dialog, click Close.

Saving Time With the Controller



The Controller is a tool that starts automatically with Windows and appears as an icon on the Windows taskbar. Because it is always running (unless you close it), the Controller gives you quick, *shortcut* access to the most commonly used WinFax features. These features include the following:

- **Receive faxes at all times** – You can receive faxes even when Message Manager is not running. When the Controller detects an incoming fax, it receives the message in the background, letting you continue with your work. (You must enable automatic reception.)
- **Send faxes** – Start preparing a new fax without starting Message Manager. When you start a new fax, the Controller starts only the Send dialog, not Message Manager.
- **Turn automatic reception on or off** – Using the Controller, you can enable or disable automatic reception without starting Message Manager.
- **Check for new faxes** – Recently received faxes appear on the Controller menu. To view a fax, simply click that item on the menu.
- **Quickly start WinFax programs** – With one click, you can start Message Manager or Program Setup.
- **Monitor current WinFax activities** – The Controller icon changes accordingly when messages are being sent or received and when you have received new messages.

Because most of the components started from the Controller do not start Message Manager, using the Controller may reduce the amount of system memory your computer uses.

About the Controller Icon

The Controller icon changes to represent the action that WinFax is currently performing. For example, when Auto Receive is on, a light panel appears next to the Controller icon. The following icons represent the Controller:



Ready to receive, automatic receive on – WinFax is ready to receive faxes at any time.



Busy outgoing and incoming – You are sending and receiving a fax at the same time. (Appears only when you have WinFax set up to use two fax devices simultaneously.)



Not ready to receive, automatic receive off – To receive faxes when WinFax detects an incoming call, click Manual Receive Now on the Controller menu.



Failed send – WinFax was unable to send a fax successfully. This icon appears until you close the Controller or you view the Send Log.



Busy outgoing – You are sending a fax.



New fax – You have new faxes.



Busy incoming – You are receiving a fax.

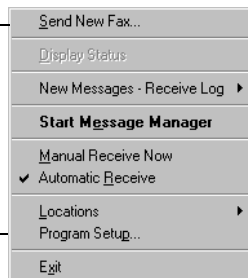
To use the Controller menu options:



- 1 Right click the Controller icon in the Windows system tray. The Controller menu appears.

Start a fax without starting Message Manager (may use less memory)

Start Program Setup



View a list of your most recently received messages. Click any fax or message to view it.

Start Message Manager

Icon in Windows system tray

- 2 Click the appropriate option.

To close the Controller:

- 1 Right click the Controller icon. The Controller menu appears.
- 2 Click Exit.

Installing WinFax (Administrators Only)

In most cases, your administrator should install WinFax for you. If you are an administrator, use the instructions provided in the Scripted Installation Guide (SCRIPT.PDF file) in the DOCs folder on the WinFax installation CD.

To install WinFax, you will need to know the machine name of the RightFAX Server, the communications protocol you want to use, and the account information for each user.

When creating the installation script, specify the following RightFAX options:

- In the [GENERAL] section, specify the appropriate installation directory and type.
- In the [STANDALONE] section, set STDALONE=0.
- In the [WFXIFSETUP] section, set WFXIFID=RFX.
- In the [MODEMS] section, set USEHAL=1 and HAL=3.
- Fill in the [RFX] section using the instructions in the sample script file.

Setting Up Phonebooks

Using phonebooks, addressing a fax is quick and easy. Instead of typing the information every time you send a fax, you can select recipients from a phonebook.

You can use four types of phonebooks with WinFax:

- **RightFAX phonebooks** – You can use any existing RightFAX phonebook.
- **WinFax phonebooks** – Create and manage *personal phonebooks* directly in WinFax. You can also create *shared phonebooks* on a network. For more information about shared phonebooks, look up “shared phonebooks” in the online help index. When you create WinFax phonebooks, you can import records from other phonebooks. For more information, look up “importing phonebooks” in the online help index.
- **ACT! phonebooks** – You can use your ACT! phonebooks with WinFax. For more information, look up “ACT!” in the online help index.
- **Other phonebooks** – You can use phonebooks created in other *Personal Information Manager* programs (PIMs), such as Lotus Organizer, GoldMine, and ECCO. For more information, look up “PIM” in the online help index.

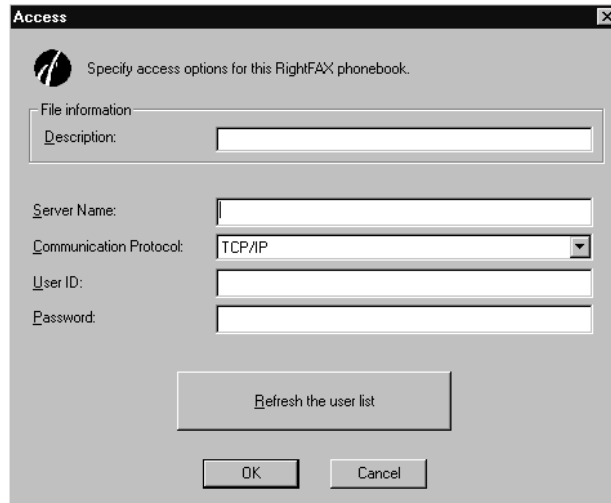
Linking to Existing RightFAX Phonebooks

If your administrator or other users maintain public phonebooks on the RightFAX Server, you can set up WinFax to use those phonebooks.

To link to the RightFAX Server phonebook:

- 1 Start Message Manager (see page 9).
- 2 On the Go menu, click Phonebooks. The Phonebooks window opens.
- 3 On the File menu, point to New, and click Phonebook. The New Phonebook wizard starts.
- 4 Click Link To An Existing Phonebook From Another Program and then click Next.
- 5 In the Name field, type the name of the existing RightFAX phonebook and then click Next.

- 6 Click Other, click RightFAX Phonebook, and click Next.
- 7 Click Set Information. The Access dialog appears.



The 'Access' dialog box is titled 'Specify access options for this RightFAX phonebook.' It contains the following fields and controls:

- File information:**
 - Description:** A text input field.
- Server Name:** A text input field.
- Communication Protocol:** A dropdown menu with 'TCP/IP' selected.
- User ID:** A text input field.
- Password:** A text input field.
- Refresh the user list:** A button.
- OK** and **Cancel** buttons at the bottom.

- 8 In the Description field, type a description of the phonebook.
- 9 In the Server Name field, type the name of the RightFAX Server on which the phonebook resides.
- 10 In the Communications Protocol drop-down list, click TCP/IP.
- 11 In the User ID field, type the user ID of the individual who created the phonebook.
- 12 Click Refresh The User List to ensure you get the most up-to-date version of the phonebook and click OK.
- 13 On the last screen, click Finish. WinFax creates a link to the RightFAX phonebook.

Creating WinFax Phonebooks

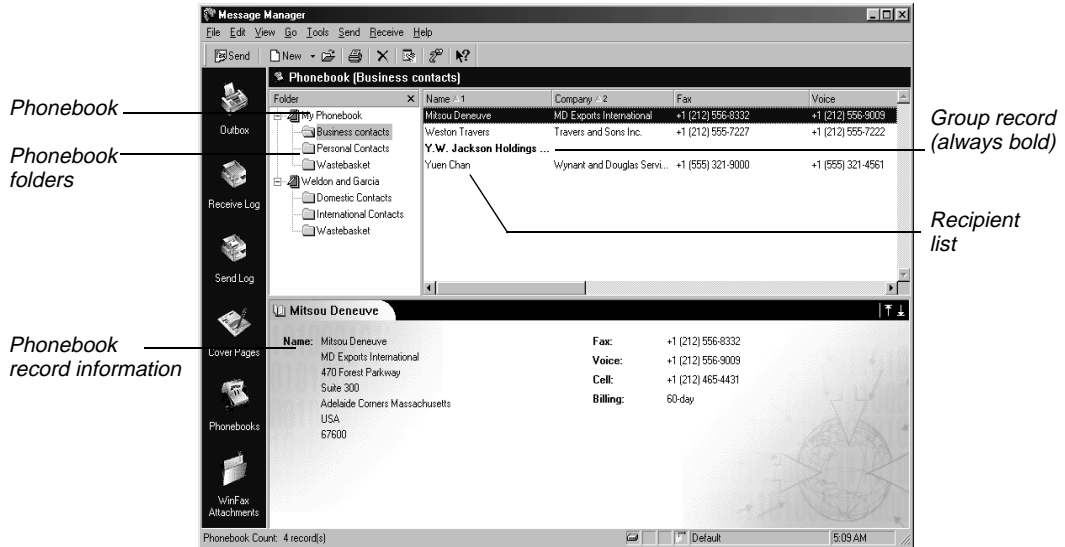
WinFax phonebooks can contain two types of *phonebook records*, or entries: recipient records and group records. *Recipient records* contain addressing information and fax settings for one person. *Group records* contain a list of recipient records. Use group records to automatically address a fax to a group of people. To modify the fax settings for a group, you must modify each recipient record individually.

To organize your phonebook records, you can create multiple phonebooks, or create folders within each phonebook.



To create a WinFax phonebook:

- 1 Start Message Manager (see page 9).
- 2 On the Go menu, click Phonebooks. The Phonebooks window opens.



- 3 On the File menu, point to New, and then click Phonebook. The New Phonebook wizard starts.
- 4 Follow the instructions on the screen. Click Next to continue.
- 5 On the last panel of the wizard, click Finish to create the phonebook.

Creating Recipient Records in Phonebooks

Recipient records contain information that you would normally expect to find in any standard directory. When you address a fax using a phonebook, WinFax uses the basic recipient information (that is, the name and fax number). Additional information you specify in the recipient record is used for advanced WinFax features, such as scheduling, special dialing instructions, and so on.

To create a recipient record:

- 1 Start Message Manager (see page 9).
- 2 On the Go menu, click Phonebooks. The Phonebooks window opens.
- 3 In the phonebook list, click the appropriate phonebook.
- 4 On the File menu, point to New and click Recipient. The New Recipient dialog appears.

Click to specify a mailing address

Click to specify keywords, billing codes, and notes

	Country:	Area:	Local number:	Extension:
Primary fax:	1	212	556-8332	
Alternate fax:				
Voice:	1	212	556-9009	45
Cellular:	1	212	465-4431	

- 5 Click the Name And Number tab.
- 6 In the First Name and Last Name fields, type the recipient's first and last names.
- 7 In the Primary Fax row, type the recipient's fax number. For examples of domestic and international dial sequences, look up "dial sequences" in the online help index.
- 8 Click the other tabs and fill in the appropriate information.

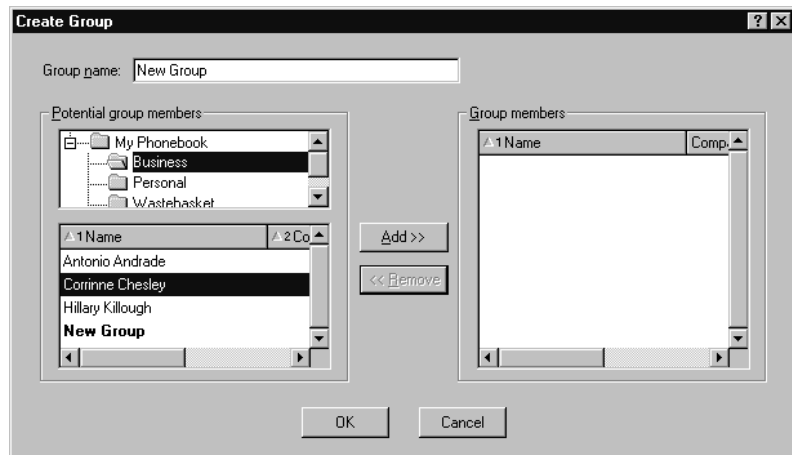
Tips: If you want to add another recipient to the phonebook without closing the New Recipient dialog, click Add instead of OK. To use the current record as a template for the next new record, enable Last Values.

Creating Group Records in Phonebooks

If you frequently send faxes to the same group of people, you can create a group record, which functions as a distribution list. This saves you the time of repeatedly sending the same fax to different people. When you send a fax to a group, WinFax automatically distributes it to each member of the group, but you send the fax only once.

To create a group record:

- 1 Start Message Manager (see page 9).
- 2 On the Go menu, click Phonebooks. The Phonebooks window opens.
- 3 In the phonebook list, click the appropriate phonebook.
- 4 On the File menu, point to New and click Group. The Create Group dialog appears.



- 5 In the Group Name field, type a name for the new phonebook group.
- 6 In the Potential Group Members list, click the first recipient you want to include in the group.
- 7 Click Add. The recipient appears in the Group Members list.
- 8 Repeat steps 6 and 7 until you have added all the members of the group.

Personalizing Cover Pages

You can include a cover page with any fax. A *cover page* is a page that WinFax adds to the front of your fax. It typically includes information such as your name and fax number, the recipient's name and fax number, the total number of fax pages, and so on.

There are two types of cover pages:

- **Pre-designed cover pages** – WinFax includes dozens of ready-to-use cover pages in the *Cover Your Fax* collection.
- **Cover pages you create or customize** – WinFax includes the *Quick Cover Page*, a basic cover page without graphics that automatically includes details such as the recipient's name and fax number, the date and time, and the number of pages in the fax. You can customize the Quick Cover Page by adding text and a graphic to it (for example, your logo). If you want to create a cover page from scratch, you can do so using the *Cover Page Designer* tool included with WinFax or the *Cover Page Design wizard*.

Getting Your Signature into WinFax

You can create an electronic version of your signature so you can quickly add it to faxes or cover pages. This feature is useful, for example, when you receive a fax and you are required to “sign” it before faxing it back to the sender or before forwarding it to someone else.

Once you have created an electronic version of your signature in WinFax, you can add it quickly and easily to any WinFax fax or cover page using the Add Signature button on the WinFax Send dialog.

Note: If you want to use your signature on the Quick Cover Page, *export* the image and save it as an .FXS file. For more information, look up “exporting faxes” in the online help index.

To create an electronic version of your signature in WinFax:

- 1 Prepare a sheet of paper that has your signature on it. Write it at normal size, using dark ink.

Tips: You can use your letterhead or an envelope, or tape your business card to a blank sheet of paper. If you have an electronic writing tablet, such as Palm Pen, you can use it to capture your signature and import it into WinFax. If you have a scanner, you can scan your signature or any other image to create a signature stamp (look up “scanning” in the online help index).



- 2 Have someone fax it to your computer at high (fine) resolution, at normal size, using dark ink.
- 3 Open the fax in Viewer.
- 4 On the View menu, disable Annotation.
- 5 On the toolbar, click the Select Area button.
- 6 Position the cursor at the desired start point and hold the left mouse button down.
- 7 Drag the mouse to outline your signature. This is the area you will use as your signature stamp.
- 8 Release the mouse button. A dotted line outlines the selected area.
- 9 On the Edit menu, click Create Stamp. The Select Graphic dialog appears.
- 10 In the File Name field, type a file name for the signature stamp.
- 11 In the Description field, type a name or description to help you identify the stamp in the future. Click Save. The signature stamp is added to the list of available stamps.
- 12 On the View menu, enable Annotation.
- 13 On the Insert menu, click Stamp. The Insert Stamp dialog appears.
- 14 In the list of available stamps, click on the signature stamp you just created.
- 15 Click to check the Use This Stamp As My Signature checkbox. Click OK.
- 16 Position the stamp at the desired insertion point and click to test your signature.
- 17 On the File menu, click Save. Exit from the Viewer. The signature stamp is now ready for use.

Notes: The signature stamp remains permanently available for future use. You can now add it to any outgoing fax by clicking the Add Signature button on the Send dialog.

You can also scan your signature directly into WinFax format or TIFF format.

You can also add your signature to WinFax using an electronic writing tablet, such as the PalmPad.

Adding your signature to a fax

You can use the Add Signature button on the WinFax Send dialog to quickly and easily add your signature to any outgoing fax. The first time you click the Add Signature button, WinFax instructs you on how to add your signature to the program. After you add your signature, when you click the Add Signature button WinFax automatically displays your signature stamp, which you can place anywhere on your fax.

To add your signature to a fax:

- 1 Prepare your signature and add it to WinFax.
- 2 Prepare a fax to send, as usual. Enter recipient information, add fax documents, and select the cover page you want to use, as desired.
- 3 On the WinFax Send dialog fax preview toolbar, click the Add Signature button. Viewer opens and displays the pages of the fax. The signature stamp cursor is active.
- 4 Use your mouse to move the signature stamp over the fax pages to the position where you want your signature to appear.
- 5 Click at the desired insertion point. Your signature appears.
- 6 On the file menu, click Save. Exit the Viewer.
- 7 Complete the outgoing fax as desired, and send.



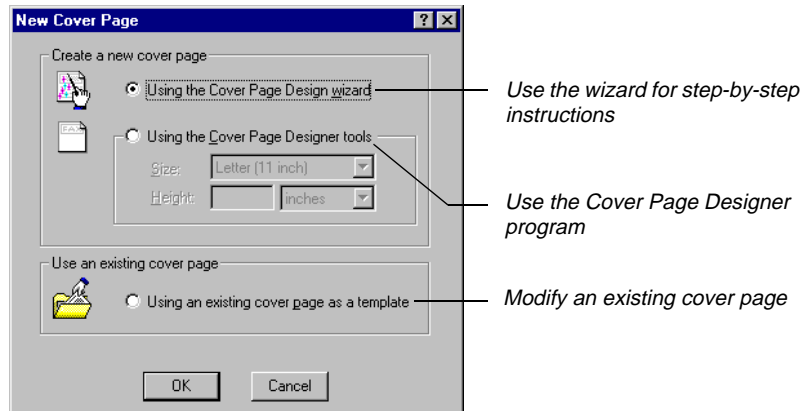
Creating Custom Cover Pages

When you create a new cover page, you can use two methods:

- **Cover Page Design wizard** – Use the Cover Page Design wizard to create a cover page by following step-by-step instructions.
- **Cover Page Designer tools** – Use the tools in Cover Page Designer to create a custom cover page from scratch or to customize one of the WinFax cover pages.

To create a custom cover page using the Cover Page Design wizard:

- 1 Start Message Manager (see page 9).
- 2 On the Tools menu, click Cover Page Designer. Cover Page Designer starts and the New Cover Page dialog appears.



- 3 Click Using The Cover Page Design Wizard and then click OK. The Cover Page Design wizard starts.
- 4 Follow the instructions on the screen. Click Next to continue.
- 5 On the last panel of the wizard, click Finish to create the cover page.

To create a cover page in Cover Page Designer:

- 1 Start Message Manager (see page 9).
- 2 On the Tools menu, click Cover Page Designer. Cover Page Designer starts and the New Cover Page dialog appears.
- 3 Click Using The Cover Page Designer Tools.

- 4 Using the Size and Height fields, specify the appropriate page size and then click OK. A new cover page appears in Cover Page Designer.

- 5 OPTIONAL – Add your company logo. Do the following:

- a Convert your logo to a WinFax graphic (see “Creating Custom Cover Pages” on page 21).
- b On the toolbar, click the Stamp button. The Insert Stamp dialog appears.
- c In the Description list, click the logo you prepared and then click OK. The cursor changes.
- d Drag the cursor to the location where you want to insert your logo and click the left mouse button. Your logo appears.
- e Resize the logo, if required.



- 6 OPTIONAL – Insert the appropriate text. Do the following:

- a On the toolbar, click the Text button. The cursor changes.
- b Click at the desired start point and hold the left mouse button down.
- c Drag the pointer to outline where you want to add the text. A dashed line outlines the size of the text object you are creating.
- d Release the mouse button. A text box appears with the cursor positioned inside if it.
- e Type the appropriate text.
- f Spell check your text. On the Tools menu, click Spelling. Follow the instructions on screen to correct any spelling errors.
- g Format the text using the tools on the Cover Page Designer toolbar. For more information, look up “formatting text” in the online help index.



- 7 OPTIONAL – Add variables such as the sender’s name, recipient’s name, number of pages, and so on. Do the following:

- a On the Insert menu, point to Recipient, Sender, or Details and click the appropriate variable. The variable appears.
- b Drag the variable to the desired location.
- c Resize the variable, if required.

- 8 OPTIONAL – Add other graphics or text using the tools on the Cover Page Designer toolbar. For more information, look up “toolbar buttons” in the online help index.

- 9 When you are finished, click Save on the File menu. The Save Current Page As dialog appears.
- 10 In the File Name field, type a name for the cover page file.
- 11 In the Description field, type a description for the cover page. This is the name that appears in the Cover Page library.

Note: *Do not* overlap elements (such as text, graphics, or variable fields) on cover pages, as this may cause problems when you send faxes.

Customizing the Quick Cover Page

The Quick Cover Page transmits more quickly than other types of cover pages because it is already converted to the fax image format (.FXS) and does not need to be converted at send time. You can modify the Quick Cover Page at any time.

To add text or a logo to the Quick Cover Page:

- 1 Prepare your logo by saving it as a WinFax stamp. For instructions, see “Creating Custom Cover Pages” on page 21.
- 2 Start Message Manager (see page 9).
- 3 On the Go menu, click Cover Pages. The Cover Pages window opens.
- 4 In the cover page list, click Quick Cover Page.
- 5 On the File menu, click Properties. The Quick Cover Page Properties dialog appears.
- 6 In the Logo section, click Select, locate the .FXS version of your logo file, and then click Open. The Quick Cover Page Properties dialog reappears and displays your logo.
- 7 In the Text section, do one of the following:
 - *Reference an ASCII file* – Click File Name, then type the path and file name, or click Select and browse for the file.
 - *Add your own text* – Click User-Defined, then type text in the box provided.
 - *Import a file* – Click User-Defined, select the file you want to import, and then click Open.

Note: If text is automatically inserted in this field, you can replace the text at any time by typing over it.

Specifying a Default Cover Page

Once you create a cover page or customize one to suit your needs, you can set up WinFax to use that design as the default cover page, so you do not need to select it each time you send a fax. Selecting a default cover page can save you the time of searching for and selecting a cover page each time you send a fax. When you select a default cover page, the Send dialog links that cover page to your faxes.

If you want to select another cover page at send time or send a fax without a cover page, you can do so without having to change the default cover page setting. For example, this feature allows you to use a business cover page as the default and to select other cover pages (such as a humorous design) at send time without changing the default setting.

To specify a default cover page:

- 1 Start Message Manager (see page 9).
- 2 On the Go menu, click Cover Pages. The Cover Pages window opens.
- 3 In the cover page list, locate the cover page you want to use as your default, and then click that cover page.
- 4 On the File menu, click Set As Default.

Sending Faxes

Faxes typically consist of one or more documents. For example, you might fax a letter, a price list, and a cover page. When you use a fax machine, you would print each document you want to fax, assemble the printed pages in the appropriate order, and then feed them into a fax machine. Using WinFax, you can select the documents you want to fax, and then fax them from your computer with a single click—without printing a paper copy.

To send a fax with WinFax, you need a minimum of two things:

- at least one page for faxing (for example, a document you created in Excel or a WinFax cover page)
- a destination fax number

The two most commonly used methods for sending a fax are faxing one or more documents from your computer and faxing a one-page note, using a cover page as the entire fax.

Note: For more information, look up “sending faxes” in the online help index.

When you click the Send button in the Send dialog, WinFax converts your documents to fax image format and then delivers them over the network to the RightFAX Server. The RightFAX Server then adds the fax to the queue and when a modem becomes available, it sends your fax.

The illustration below depicts how WinFax and RightFAX Server send your fax.



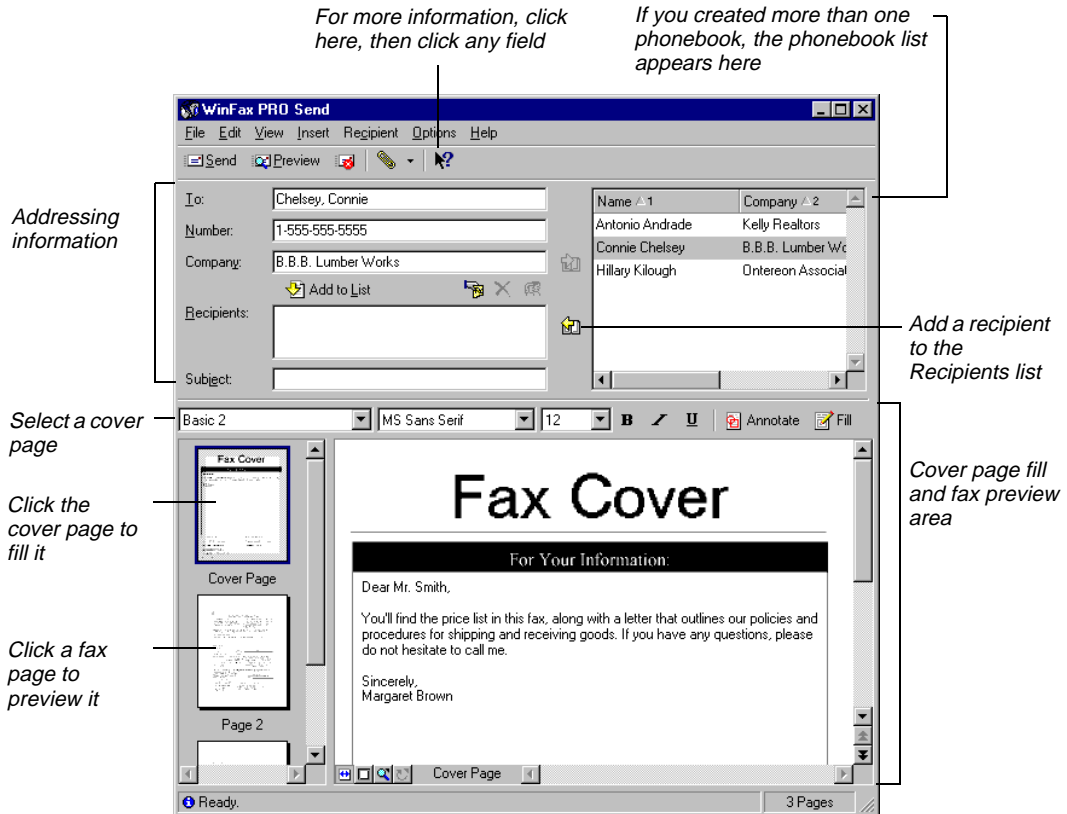
Faxing One or More Documents

When you fax a document, there are two ways you can *start* a fax and open the Send dialog. The procedure in this section describes both methods of starting a fax:

- **Opening the document in its native program** – Open your document in the program you used to create it and then print it to the WinFax printer. Use this method if you want to view or modify the document you want to fax.
- **Start WinFax** – Use this method if the document you want to fax is ready to fax and you do not need to view it.

Whenever you send a fax, you can always combine multiple documents together in the same fax. For example, you could fax a letter you created in Word and a price list you created in Excel. Whether you start a fax by

printing to WinFax from another program or by starting WinFax, the Send dialog appears at the appropriate time. Use the Send dialog to address the fax and select any other options you want to use. The following illustration highlights features available in the Send dialog.



Note: If you start your fax by printing to WinFax from another program, some formatting changes may occur in your document when you select a WinFax printer. Setting your printer to a WinFax printer before creating documents minimizes formatting changes, but it may also limit your selection of available fonts.

To fax one or more documents stored on your computer:

- 1 Start the fax by doing one of the following:
 - **Open the document you want to fax, then print it to a WinFax printer:**

- a Start the appropriate Windows program and open the document you want to fax. (For example, start Word and open your letter.)
- b On the program's File menu, click Print. Select the WinFax printer you want to use (High Quality or Photo Quality), then print the document. WinFax converts the file to fax format and opens the Send dialog with the document you printed displayed in the fax preview area.

Each thumbnail represents a page in the document.

▪ **Start Message Manager, then select the document you want to fax:**

- a Start Message Manager (see page 9).
- b On the Send menu, click Send New Fax. The Send dialog appears.
- c On the Insert menu, click Files. The Insert Files dialog appears. Locate and then click the appropriate file. Click OK. WinFax converts the file to fax format and displays the fax in the preview area of the Send dialog.

Each thumbnail represents a page in the document.

2 OPTIONAL – Add any additional documents to the fax:

- a On the Insert menu, click Files. The Insert Files dialog appears.
- b Select the *next* document you want to appear in the fax, then click OK. WinFax converts the file to fax format and displays the fax in the preview area of the Send dialog, after the previous document you added.
- c Continue adding documents until all documents appear in the fax preview area.

3 Address the fax by doing one of the following:

- *Type the appropriate information* – Type the recipient's name, fax number, and company name in the appropriate fields. (If you are unsure of how to fill in the Number field, use the What's This (?) button at the top right of the dialog. To determine what you need to include in a dial sequence, try dialing the number as if the call were a voice call, refer to your local phonebook, or contact a telephone operator.)
- *Select a recipient from a phonebook* – Locate and then click the recipient or group you want to send the fax to.

Note: If you want to send the fax to more than one person, click Add To List and continue adding recipients. For more information on faxing to groups, see “Faxing to a Group” on page 30.

- 4 OPTIONAL – Add a subject line to the fax. In the Subject field, type the appropriate text (for example, “Price List” or “Sales Report”).
- 5 OPTIONAL – Add a cover page by doing the following:
 - a In the Cover Page drop-down list, click the cover page you want to use. The cover page appears as the first thumbnail in the preview area.
 - b Type a note in the text area of the cover page, in the preview area beside the fax thumbnails. If there is more than one text field, press Tab to move from field to field, or click WinFax Filler on the View menu, and then fill in the appropriate fields in Filler.
- 6 OPTIONAL – Select any other options on the Options menu of the Send dialog.
- 7 Click Send. WinFax begins processing your fax. If you included a cover page and *did not* fill in the text area, Filler starts. Fill in the cover page text and click Send.

WinFax processes the fax. Until the fax is sent successfully, it appears in the Outbox in the Logs window.

Note: If you click Preview And Send instead of Send, the Preview window opens and displays the fax. Preview the fax, annotate the fax (optional), and then click Send Fax. For more information about annotating a fax while you preview it, see “Previewing Faxes” on page 31.

Faxing a Cover Page with a Note

If you want to send only a one-page fax with a quick note on it, you can fax a cover page instead of creating a one-page document from scratch. As a minimum requirement for a fax, WinFax needs only one page and a destination fax number.

To fax a cover page with a note on it:

- 1 Start Message Manager (see page 9).

- 2 On the Send menu, click Send New Fax. The Send dialog appears.
- 3 Address the fax by doing one of the following:
 - *Type the appropriate information* – Type the recipient's name, fax number, and company name in the appropriate fields. (If you are unsure of how to fill in the Number field, use the What's This (?) button at the top right of the dialog. To determine what you need to include in a dial sequence, try dialing the number as if the call were a voice call, refer to your local phonebook, or contact a telephone operator.)
 - *Select a recipient from a phonebook* – Locate and then click the recipient or group you want to send the fax to.

Note: If you want to send the fax to more than one person, click Add To List and continue adding recipients. For more information on faxing to groups, see “Faxing to a Group” on page 30.

- 4 Select the cover page you want to use by doing the following:
 - a In the Cover Page drop-down list, click the cover page you want to use. The cover page appears as the first thumbnail in the preview area.
 - b Type a note in the text area of the cover page, in the preview area beside the fax thumbnails. If there is more than one text field, press Tab to move from field to field, or click WinFax Filler on the View menu, and then fill in the appropriate fields in Filler.
- 5 OPTIONAL – Add a subject line to the fax. In the Subject field, type the appropriate text (for example, “Price List” or “Sales Report”).
- 6 OPTIONAL – Select any other options in the Send dialog.
- 7 Click Send. WinFax begins processing your fax. If you *did not* fill in the cover page text area, Filler starts. Fill in the cover page text and click Send.

WinFax processes the fax. Until the fax is sent successfully, it appears in the Outbox in the Logs window.

Note: If you click Preview And Send instead of Send, the Preview window opens and displays the fax. Preview the fax, annotate the fax (optional), and then click Send Fax. For more information about annotating a fax while you preview it, see “Previewing Faxes” on page 31.

Faxing to a Group

You can send faxes to a group so you do not need to prepare a separate fax for each recipient. For example, you can prepare a price list and print it to WinFax, add all the appropriate recipients to the Recipients list, and then click the Send button once. WinFax does the rest, sending the fax to each recipient's fax number.

When you send a fax to a group, you can address your fax using two methods. If you use a phonebook to address the fax, you can either select the recipients you want to send the fax to, or create a group record for those individuals (this is useful if you want to send faxes to the same group in the future). When you use any of the following methods, you can use them alone or in combination with one another. For example, you could type a number *and* select a group from a phonebook.

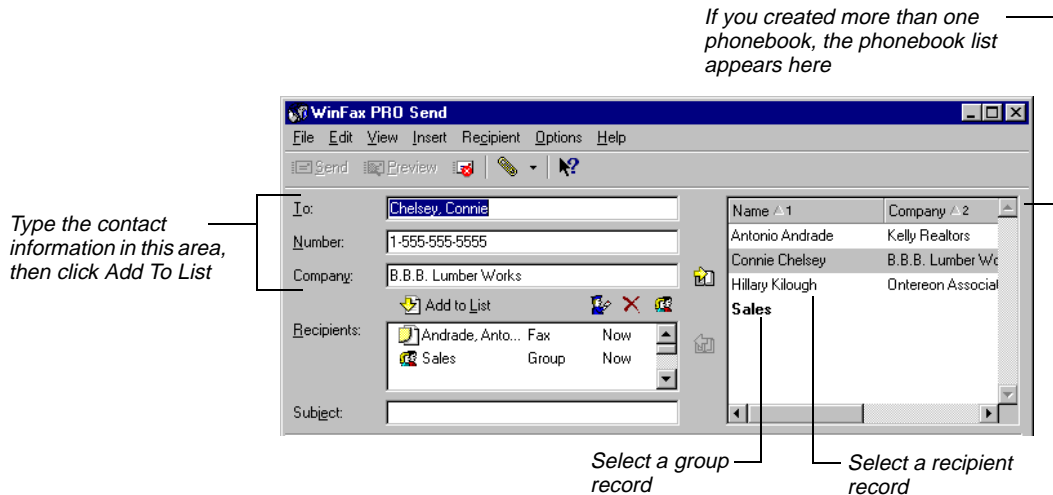
When you address a fax to a group, you can use any of the following methods:

- **Type the numbers individually** – If you are sending a fax to a group and you do not want to add the contact information for those people to your phonebook, type the phone numbers in the Send dialog and create a list of recipients.
- **Select recipients from a phonebook** – If you are sending a fax to a group of recipients that are recorded in your phonebook, you can select those names from the phonebook to build the Recipients list. For information about creating recipient records in WinFax phonebooks, see page 15.
- **Select a group from a phonebook** – You can address a fax by selecting a group from a WinFax phonebook. For information about creating group records in WinFax phonebooks, see page 17.

To address a fax to a group:

- 1 Prepare your fax.
- 2 Address the fax to the group in the Send dialog. Do one of the following:
 - *Type the first name and number in the address section* – In the To, Number, and Company fields, type the first recipient's name, fax number, and company name.
 - *Select a recipient from a phonebook* – Locate and then click the appropriate recipient record.

- *Select a group from a phonebook* – Locate and then click the appropriate group record.



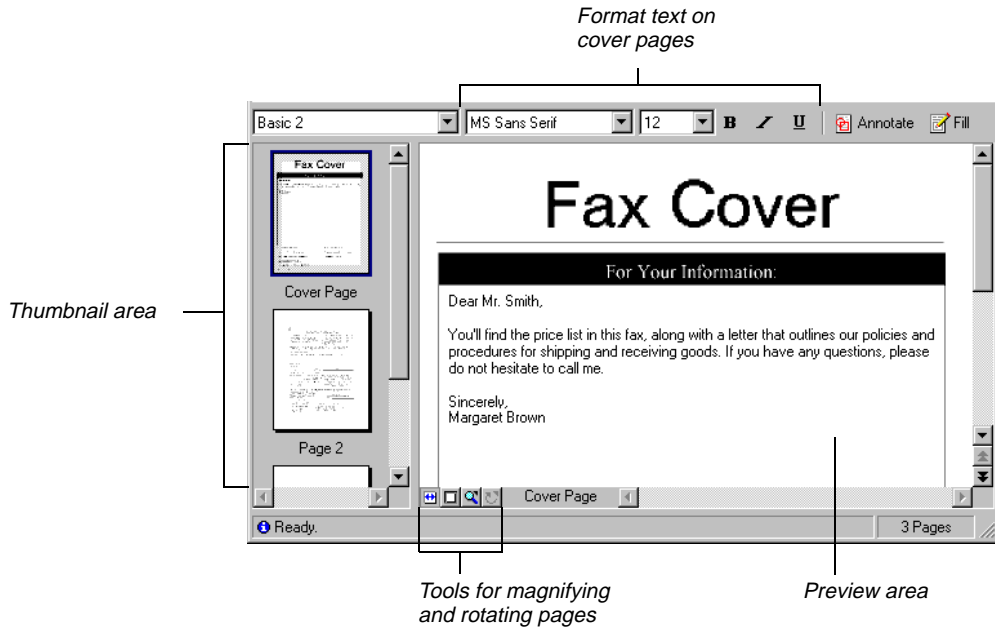
- 3 Click Add To List. The recipient or group appears in the Recipients list.
- 4 Repeat steps 2 and 3 until the Recipients list is complete.

Previewing Faxes

Before you send a fax, you can preview it in the preview area at the bottom of the Send dialog. The preview area displays thumbnails of your fax pages.

In the preview area, you can do the following:

- Click the Cover Page thumbnail and type text directly on the enlarged view of the cover page, pressing the Tab key to move from field to field. Format the text if the cover page you selected is not the Quick Cover Page.
- Click a thumbnail to display an enlarged view of a fax page. When you click the Cover Page, you can fill it in the enlarged view area.
- Drag and drop thumbnails to rearrange fax pages before sending.
- Delete pages you do not want to include in the fax.
- Use the tools at the bottom of the preview area to magnify and rotate the pages before sending.



You can also preview your fax in Viewer to verify the contents and page order, or you can mark up the pages using the Annotation tools. For example, you can use the Annotation tools to circle something or type a note. For more information, look up “annotating” in the online help index.

To preview a fax in Viewer:

- 1 Prepare and address your fax.
- 2 In the Send dialog, click Preview And Send on the File menu. WinFax Preview starts and displays the first page of the fax.
- 3 After viewing the fax, do any of the following:
 - *Annotate the fax* – Enable Annotation and use the Annotation toolbars. Look up “annotating” in the online help index.
 - *Return to the Send dialog* – Click Return.
 - *Send the fax* – Click Send.

Note: If you added a cover page and did not fill in the text area, Filler starts. Fill in the cover page text and click Send. The Preview window appears and displays the fax.

Confirming Successful Transmission

Depending on the options you select in the Send dialog or in the wizard, the following may occur immediately when you send a fax:

If you did this ...	This happens ...
Sent a fax to one recipient.	WinFax processes the fax immediately.
Sent a fax to multiple recipients or a phonebook group.	WinFax prepares to send the fax to all recipients.
Sent a fax that includes a cover page with fillable text fields but you did not fill them.	Filler starts. Type the appropriate text in the fillable fields of the cover page, then click Send Fax.
Sent a fax using the Preview And Send command.	Preview starts. Preview or annotate the fax before sending it and click Send Fax.

You can monitor the status of faxes you send in any of the following ways:

- **From the RightFAX Server** – If you enable the Display “At Server” Status option in the RightFAX Properties dialog (see page 37), the RightFAX Server displays status information immediately after you send a fax. The status information appears in a regular Windows message box on your computer.
- **From the Controller** – The Controller icon in the Windows system tray (opposite the Start button) changes to reflect the status of the current faxing activity. If a fax fails, a failed transmission icon appears next to the Controller.

- **From the Send Log** – The details about sent faxes, including those canceled, appear in the record list of the Send Log folder (on the Go menu in Message Manager, click Send Log). WinFax uses icons to identify the status of faxes in the Logs record list.



Successful – Entire message was sent or received and can be viewed.



Recurring – Message is scheduled to be sent at regular intervals.



Unsuccessful – Message was not sent or received, or was only partially transmitted.



Held – Message is “on hold” until you instruct WinFax to send it.



Scheduled or pending – Message is scheduled, or WinFax is waiting to retry the send.



Collapsed group – Message is being sent to a recipient group.

Sometimes faxes are not sent successfully due to communication problems such as busy or no-answer signals. In those situations, WinFax stores the faxes in the Outbox until either they are successfully delivered or the number of retries is exceeded.

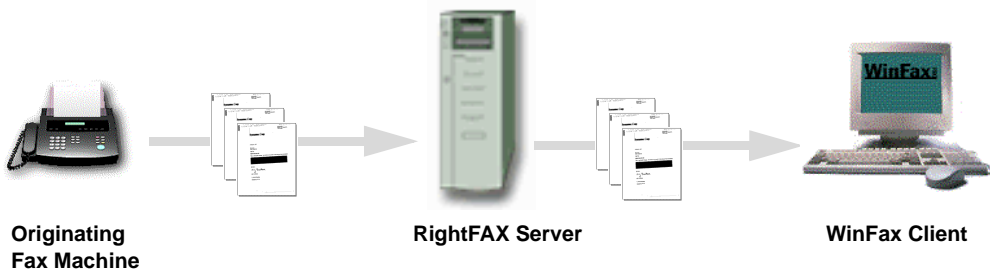
Note: If the number of retries is exceeded, WinFax places the fax in the Send Log and marks it as an “unsuccessful” event. For more information, look up “retrying” and “resending” in the online help index.

Receiving Faxes

The RightFAX Server receives all faxes for your company in a centralized inbox. Your RightFAX administrator regularly checks the RightFAX Server for new faxes. When new faxes arrive, the administrator checks to see who the fax is addressed to and then forwards the fax to the appropriate recipient over the network. You receive your faxes in your WinFax Receive Log.

In order to receive faxes on your computer, you must enable the receive option in the RightFAX Properties dialog *and* you must have either Message Manager or Controller running in automatic receive mode.

The flowchart below illustrates how this works.



To receive faxes:

- 1 Start Program Setup (see page 10).
- 2 Click the General tab.
- 3 Double click Modems And Communications Devices. The Modems And Communications Devices Properties dialog appears.
- 4 In the Possible Devices list, click RightFAX Server Interface.
- 5 Click Properties. The RightFAX Properties dialog appears.



- 6 Enable Receive Faxes and click OK.
- 7 Click OK to return to Program Setup.
- 8 Enable automatic reception in WinFax. Do one of the following:
 - *Using the Controller* – Right click the Controller icon in the Windows system tray and enable Automatic Receive on the menu that appears.
 - *Using Message Manager* – On the Receive menu, enable Automatic Receive.

Checking for New Faxes

You can check for new faxes in the Message Manager or from the Controller.

To check for new faxes:

Do one of the following:

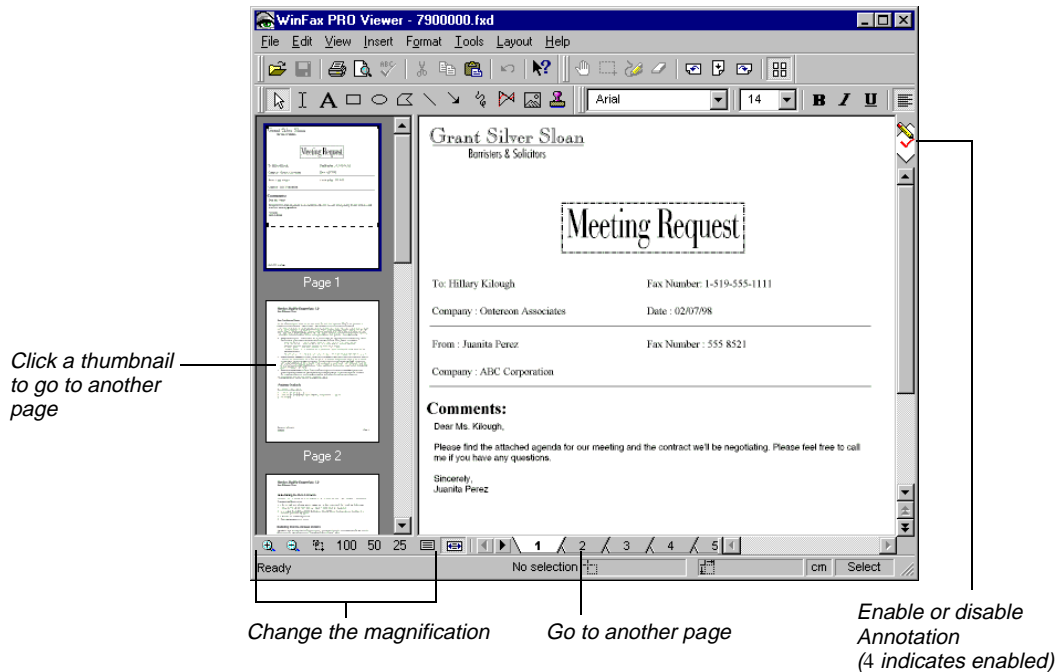
- *From Message Manager* – On the Go menu, click Receive Log. The Logs window opens to display the contents of the Receive Log folder. All new messages appear bolded.
- *From the Controller* – Look for a “flashing” new message icon.

Viewing Faxes

You can open and view faxes directly from Message Manager. This is the most common method of viewing faxes. For other methods of viewing faxes, look up “viewing faxes” in the online help index.

To view a fax:

- 1 Start Message Manager (see page 9).
- 2 On the Go menu, click Receive Log. The Logs window opens and displays the contents of the Receive Log folder.
- 3 In the record list, click the fax you want to view.
- 4 On the File menu, click Open. Viewer starts and displays the first page of the fax.



- 5 On the View menu, point to Zoom, then click 100%, 50%, 25%, Whole Page, Page Width, or Zoom In. Viewer displays the fax at the appropriate magnification.

Setting Up RightFAX Server Options

Your installation of WinFax uses the RightFAX Server information supplied by your administrator. You can view this information in Program Setup at any time.

To view RightFAX Server options:

- 1 Start Program Setup (see page 10).
- 2 Click the General tab.
- 3 Double click Modems And Communications Devices. The Modems And Communications Devices Properties dialog appears.
- 4 In the Possible Devices list, click RightFAX Server Interface.

- 5 Click Properties. The RightFAX Properties dialog appears.



- 6 Make any necessary changes and click OK
- 7 Click OK to return to Program Setup.

Using WinFax With a Modem

WinFax can also send and receive faxes using a modem and a telephone line. This feature is useful when you are travelling with a laptop and need to send and receive faxes. To use WinFax with a modem, you must set up your modem in WinFax and then switch from the RightFAX Server device to the modem.

Note: Using WinFax with a modem is similar to using WinFax with the RightFAX Server. When you switch to a modem, the WinFax user interface disables some RightFAX options and enables other modem-related options. For example, you will see additional dialing options in Program Setup. For more information about using WinFax with a modem, see the online help.

To set up WinFax to work with your modem:

- 1 Install your modem and turn it on.
- 2 Start Program Setup.
- 3 Double click Modems And Communications Devices. The Modems And Communications Devices Properties dialog appears.
- 4 Click Add. The Install New Modem Type panel appears.
- 5 Click Regular Modem and click Next.
- 6 Follow the instructions on screen.
- 7 On the last panel, click Finish. The Modems And Communications Devices Properties dialog appears displaying your modem.

To switch WinFax to use the modem:

- 1 Start Program Setup (see page 10).
- 2 Click the General tab.
- 3 Double click Modems And Communications Devices. The Modems And Communications Devices Properties dialog appears.
- 4 In the Possible Devices list, disable the Active check box for the RightFAX Server Interface.
- 5 In the Possible Devices list, enable the Active check box for your modem and click OK.
- 6 Click OK to return to Program Setup.

Troubleshooting

If you encounter problems while using WinFax, there are a number of things you can do before calling technical support. Taking the time to troubleshoot your situation may help you identify the problem and fix it. In many cases, this can save you time and money.

Make note of any changes you have made to your computer and to your Windows setup. Determine when you started experiencing the problem. If you can reproduce the problem, make note of the steps required to do so. Also, record any messages that appear on the screen when the problem occurs. When you have done this, check the following sources for troubleshooting information:

- **WinFax PRO User's Guide** – Contains detailed troubleshooting information for the most common problems encountered by WinFax users. The *WinFax PRO User's Guide* is included on the WinFax installation CD in Adobe Acrobat format.
- **WinFax PRO Online Help** – Contains detailed troubleshooting information for WinFax. To view the troubleshooting section in the online help, click WinFax Help Topics on the Help menu, and then double click the “Troubleshooting” book in the Help Topics dialog.
- **WinFax PRO Read Me file** – Contains hardware-specific information and information not available when this user's guide was printed. To view the Read Me file, click the Windows Start button, point to Programs, then to WinFax PRO, and then click Install Directory. Double click README.TXT in the WinFax install directory.
- **Symantec Service And Support Web site** – For 24-hour access to technical product information (Knowledge Base), discussion groups, FAQs, the automated Symantec Support Genie, and the Symantec FTP site, connect to <http://service.symantec.com>. For more information, look up “support” in the online help index.
- **Online forums** – Provide question-and-answer support on CompuServe and America Online (AOL). Symantec Technical Support representatives monitor these forums. For more information, look up “support” in the online help index.
- **Other documentation** – In addition to the above sources of information, the documentation provided with your hardware, your operating system, and any other programs you use with WinFax may be a good source of information.
- **Telephone support** – Contact your RightFAX Server administrator to obtain the technical support telephone number.