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GENESYS™

Interaction Fax

Printed Help

Abstract

This document contains the application help for Interaction Fax.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

Installing the Interaction Fax Print Driver

Prior to faxing documents, you must install the Interaction Fax print driver on your workstation.

To determine if the Interaction Fax Print Driver is already installed:

1. From the **File** menu of any Windows-based application on the machine where Interaction Desktop is installed, click **Print**.
2. On the **Print** dialog box, click the **Printer Name** list to display a list of installed print devices.

   Note: If the Interaction Fax print driver is installed, you should see a printer entry named "Interaction Fax."

To install the Interaction Fax print driver:

Run the CIC User Application again to install the Interaction Fax components.

How to Use Interaction Fax

This section contains information on using Interaction Fax, which provides the following functionality:

- Viewing Faxes
- Saving and Printing Faxes
- Sending Faxes
- Removing Pages
- Assigning Account Codes to Faxes
- Working with Annotations

Viewing Faxes

This section contains information about viewing faxes and includes the following topics:

- Opening a Fax from Your Inbox
- Displaying a New Fax
- Viewing a Fax
- Viewing a Stored Fax
- Zooming In or Out
- Rotating a Fax Image
- Inverting a Fax Image
- Re-ordering Fax Pages

Opening a Fax From Your Inbox

You can open a fax from your e-mail Inbox. You can forward the fax to another person, just as you would any other e-mail message. You can also set alerts for new fax messages. Faxes can be managed in one of two ways, depending on whether or not Interaction Fax is installed on your workstation.

To Open a Fax From Your Inbox:

1. Open your e-mail Inbox.
2. Open the e-mail containing the fax message.
3. Double-click the attached fax.

   Result:
- If Interaction Fax is installed on your workstation, it opens and displays the fax.
- If Interaction Fax is not installed on your workstation, the default application in windows set up for *tif files displays the fax.

> **Note:** The CIC administrator must configure your User rights in Interaction Administrator to enable you to receive faxes as *.tif files. Contact your CIC administrator if you do not have Interaction Fax installed or if your faxes are not being attached to your e-mail as *.tif files.

Displaying a New Fax

CIC distributes new faxes as attachments to e-mail (e.g., Microsoft Outlook, Microsoft Outlook Express, Lotus Notes, etc.) messages. This process is an example of unified messaging.

To Display a Fax Document Attached to an E-mail Message:

Do one of the following:
- From within your e-mail viewer (e.g., Microsoft Outlook, Microsoft Outlook Express, Lotus Notes, etc.), double-click the icon for the .i3f file to launch Interaction Fax.
- If you cannot click the Interaction Fax icon in your e-mail tool, save the fax attachment as an .i3f file and open the fax document using the Open command in Interaction Fax.

Related Topics

Forwarding a Fax

Viewing a Stored Fax

Saving a Fax

Viewing a Fax

Interaction Fax displays two primary views of each fax:
- A reduced image in the Thumbnail View pane on the left side
- A normal image in the main Page View pane

For information on manipulating the document image, see the related topics.

Related Topics

Inverting a Fax Image

Rotate Right

Rotate Left

Re-ordering Fax Pages

Zooming In or Out

Viewing a Stored Fax

CIC fax files are stored in files with an **.i3f** extension.

To View a Saved Fax:

1. From the **Main** toolbar, click the Open Fax button.
2. Optionally, click **File** > **Open Fax**.
3. From the Open dialog box, select the **.i3f fax** file you want to view, and then click **Open**.

Related Topics
Forwarding a Fax
Saving a Fax

Zooming In or Out

You can enlarge or reduce the display size of a fax image.

To Zoom In (Enlarge) a Fax Image:

1. From the Main toolbar, click the Open Fax button.

   Optionally, click File > Open Fax.
2. From the Open dialog box, select the .i3f fax file you want to view, and then click Open. The fax image displays.
3. From the Main toolbar, click the Zoom In button. The fax image is enlarged.

   Optionally, click **View** > **Zoom In**.

To Zoom Out (Reduce) a Fax Image:

1. From the Main toolbar, click the Open Fax button.

   Optionally, click File > Open Fax.
2. From the Open dialog box, select the .i3f fax file you want to view, and then click Open. The fax image displays.
3. From the Main toolbar, click the Zoom Out button. The fax image is reduced.

   Optionally, click **View** > **Zoom Out**.

Related Topics
Scale to Gray Command (View Menu)
Inverting a Fax Image

Rotating a Fax Image

Occasionally, you may want to rotate a fax for greater readability. For example, you may want to turn a faxed map or drawing to view it from a different angle. When you select to rotate a fax image in Interaction Fax, the rotated position remains for the next view session if saved.

To Rotate a Fax Page 90 Degrees (Left):

- From the **Main** toolbar, click the Rotate Left button.

  Optionally, click **Page** > **Rotate Left**.

To Rotate a Fax Page 90 Degrees (Right)

- From the **Main** toolbar, click the Rotate Right button.

  Optionally, click **Page** > **Rotate Right**.

Related Topics
Scale to Gray Command (View Menu)
Inverting a Fax Image
Zooming In or Out

Inverting a Fax Image

Fax images are always black and white. If a fax contains more black than white, you may want to reverse the image for greater readability. When you select to reverse, or invert, an image, the white area of the fax image turns black and the black area of the image turns white.

To Reverse a Fax Image:

- From the **Main** toolbar, click the **Invert** button.

  Optionally, click **Page** > **Invert**.

Related Topics
Scale to Gray Command (View Menu)
Rotating a Fax Image
Zooming In or Out

Re-ordering Fax Pages

Occasionally, you might want to re-order the pages of a fax. When you select to re-order a fax in Interaction Fax, the new order remains for the next view session if you save the document.

To Re-order Pages of a Fax:

1. In **Page** view, select the page you want to move.
2. Drag the page to the new location in the fax. Two blue lines indicate the insertion point of the re-ordered page.

Related Topics

Scale to Gray Command (View Menu)

Inverting a Fax Image

Zooming In or Out

Editing Faxes

This section contains information about editing faxes and includes the following topics:
- Importing images into a fax
- Exporting pages from a fax
- Copying and pasting fax pages

Importing Images Into a Fax

If have fax pages stored as image files and you want to include them in an existing fax document, you can import them. Unless they are in a multi-page .tif file, you will need to import them one at a time. If you are importing a multi-page .tiff file, you can select each page to import individually.

To Import an Image Into a Fax:

1. Open the fax document in Interaction Fax.
2. From the Page menu, click Import. The Import dialog box displays.
3. Select a fax image to import and press **Open**. The **Import Page dialog box** displays.

> **Note:** You currently can only import the following file formats: Bitmap Files (*.bmp), JPEG (*.jpg, *.jpeg), GIF (*.gif), TIFF (*.tif, *.tiff), PNG (*.png). To import multi-page faxes, only the TIFF format is supported.

4. Select your options on the **Import Page** dialog box.
5. Click **OK**.

Related Topics

Scale to Gray Command (View Menu)

Inverting a Fax Image

Zooming In or Out

Export Pages From a Fax

If you want to store a fax page as an image file, you can export it. Each page is exported as a separate file.

To Export Pages From a Fax:

1. Open the fax document in Interaction Fax.
2. From the **Page** menu, click **Export**. The **Export As** dialog box displays.
3. Enter a name for the file and select a file type.

   > **Note:** You currently can only export the following file formats: Monochrome Bitmap (*.bmp), JPEG (*.jpg, *.jpeg), GIF (*.gif), TIFF (*.tif, *.tiff), PNG (*.png).

4. Click **Save**. Interaction Fax exports the page.

Related Topics
Scale to Gray Command (View Menu)
Inverting a Fax Image
Zooming In or Out

Copying and Pasting Fax Pages

Occasionally, you might want to move or copy a page of a fax and then paste it within the same fax document or in another open fax document.

To Copy a Fax Page:

- In **Page** view, select the page and press **CTRL + C**.

To Paste a Fax Page:

- In **Page** view, press **CTRL + V**. The copied page displays at the end of the fax.

To Move a Fax Page to a New Location:

- In **Page** view, drag the selected page to the new location. Two blue lines display that indicate the insertion point.

Related Topics
Importing Images Into a Fax
Export Pages From a Fax

Sending Faxes

This section contains information on the following topics:

- Faxing a Document
- Sending a Fax
- Canceling a Fax
- Using the Address Book
- Adding a Cover Page to a Fax
- Addressing a Fax and Cover Page
- Forwarding a Fax
- Using the Interaction Fax Monitor
- Diagnosing Sending Problems

Faxing a Document From a Windows Application

You can send any document as a fax from an CIC client workstation using any Windows application that allows printing. After you compose a fax in your Windows document composition program, perform the following steps.

> **Note:** Your call privileges, not the fax station's call privileges, determine whether or not you have adequate permission to send a fax. For example, if FaxStation 1 has long distance privileges but you do not, you would be unable to send a long distance fax using FaxStation 1. The CIC administrator determines call privileges. If you have questions regarding your call privileges, contact the CIC administrator.

To Fax a Document:

1. From the **File** menu, click **Print**. The **Print** dialog box displays.
2. In the list of printer names, click **Interaction Fax**.

   > **Note:** If the Interaction Fax print driver does not display in the list, run the CIC Client install again to install the driver.

3. Click **OK**.

   Result: Interaction Desktop converts the document to a fax and displays it in Interaction Fax.
4. From the **File** menu, click **Send Fax**.

   > **Note:** You might be prompted to log in to CIC the first time you send a fax during each session. If so, just enter your login ID, password, and CIC server name, and then click **Log on**. Or, if you are using the Windows Authentication option to log on, enter your user ID and CIC server, and then click **Log on**.

5. Enter or select the destination fax number and cover sheet, along with any other recipient information, and then click **Send**.

The CIC server queues the fax and, if you chose to be notified of the fax status, sends an e-mail message to the sender indicating whether the fax was sent successfully or it failed to send.

Related Topics

Diagnosing Sending Problems

Sending a Fax

Using the Address Book

Using the Interaction Fax Monitor

Sending a Fax

You can use Interaction Fax to send a fax document.

> **Note**: You can also assign account codes to outgoing faxes. See the related topics.

To Send a Fax from Interaction Fax:

1. From the **Main** toolbar, click the **Send Fax** button. The **Send Fax** dialog box displays.

   Optionally, click **File** > **Send Fax**.

   > **Note**: You might be prompted to log on to Interaction Fax the first time you send a fax during each session. If so, just enter your **login ID**, **password**, and CIC server, and then click **Log on**. Or, if you are using the Windows Authentication option to log on, enter your user ID and CIC server, and then click **Log on**.

2. In the **Fax Number** field, enter the recipient's fax number.
3. Enter the optional recipient information in the **Name**, **Company,** and **Phone** fields.
4. If an Account Code applies to the fax, select it from the **Account Code** list.

   > **Note**: The Account Code list does not display if you do have not been granted permission to use this feature or if no account codes have been set up. Contact your administrator if you have any questions about account code rights.

5. To add multiple recipients, open the Address Book.
6. To include a cover page, select a cover sheet format from the Cover Page list.

   > **Note**: The Max Cover Page Size server parameter determines the maximum size of the cover page allowed for a fax. The default value of the server parameter is 10,000 KB. If the cover page you select exceeds the maximum size set on the server parameter, the fax does not get sent and an error message appears in the FaxServer.ininlog. For more information, see Optional General Sever Parameters in Interaction Administrator help.

5. Click **Send** to send the fax.

The CIC server queues the fax and, if you select to be notified of fax status, sends an e-mail message to the sender indicating whether the fax was sent successfully or it failed to send. The date and time in the fax header are determined by the CIC server's Windows system locale.

> **Note**: Your administrator can configure the hours during which faxes can be sent. For more information, contact your administrator.

Related Topics

Adding a Cover Page to a Fax

Faxing a Document

Using the Address Book

Using the Interaction Fax Monitor

Canceling a Fax

The **Cancel Fax** option attempts to prevent the transmission of a fax already in progress.

To Cancel a Fax:

1. Right-click the fax transmission displayed in the Interaction Fax Monitor.
2. Click **Cancel Fax**. Interaction Fax Monitor asks you to confirm that you want to cancel the fax.
3. Click **Yes** to cancel the fax transmission.
4. From the **File** menu, click **Exit** to close the Interaction Fax Monitor.

Related Topics

Sending a Fax

Adding a Cover Page to a Fax

Using the Interaction Fax Monitor

Using the Address Book

In Interaction Fax, you can send a fax to multiple recipients on the **Send Fax** dialog box.

Note: The list of contacts comes from the data sources defined in Interaction Administrator.

To use the address book:
1. From the toolbar, click the Send Fax button. The Send Fax dialog box appears. Optionally, click File > Send Fax.
2. Click Click here to add recipients from an address book to expand the address book section of the Send Fax dialog box.
3. Under Show Contacts From, select the directory or contact list to search.
4. In the Search field, specify the criteria for the contact(s) you want to display. The matching contacts automatically appear in the list.
5. Select the recipients from the contact list, and then click Add. To select multiple recipients, hold down the CTRL key while you select the recipients.
6. From the Cover Page list, select the appropriate cover page to use for the fax.
7. Click Fields to modify the sender information on the cover page, and then click OK to return to the Send Fax dialog.
8. Click Send to send the fax.

Related Topics

Adding a Cover Page to a Fax

Addressing a Fax and Cover Page

Adding a Cover Page to a Fax

A cover page contains basic **To** and **From** address information on the first page of a fax. Sometimes the cover page and the fax content are contained on a single page. The CIC administrator uses Interaction Fax Cover Page Editor to design the cover page layout. The default cover page template is specified by the fax configuration in Interaction Administrator.

To Add a Cover Page to a Fax Document:

1. From the **Main** toolbar, click the **Send Fax** button. The **Send Fax** dialog box displays.
2. Optionally, click **File** > **Send Fax**.
3. Select a sample cover letter from the **Cover Page** list.

   > **Note:** CIC includes several generic sample cover pages, which display in the Cover Page list (e.g., Default, FaxCoverLetter1, FaxCoverConfidential, etc.). Your CIC administrator may have replaced these file names or added other file names.

   If no cover page file names display in this list, contact your IC administrator.
3. Click **Fields** to open the **Cover Page Information** dialog box and specify information for the person sending the fax.
4. Click **Send** to send the fax.

   Interaction Fax automatically adds the recipient's name, company, and fax number information to the cover page based on the information you typed under **Recipients** in the **Send Fax** dialog box.

Related Topics

Using the Address Book

Faxing a Document

Addressing a Fax and Cover Page

In Interaction Fax, it is possible to address a fax or attach a cover page prior to sending a fax.

To Address a Fax and Cover Page:

1. From the toolbar, click the **Send Fax** button. The **Send Fax** dialog box appears.

   Optionally, click **File** > **Send Fax**.
2. In the **Send Fax** dialog box, click **Click here to add recipients from an address book**. The **Send Fax** dialog box expands to show an address book section.
3. Under **Show Contacts From**, select the appropriate directory or contact list.
4. In the **Search** field, specify the search criteria for the contact. All matching entries automatically appear in the address book section.
5. Select one or more contacts, and then click **Add** to add those contacts as fax recipients.

   > **Note:** To manually add a fax recipient, type the recipient's name, company, and fax number in the appropriate fields, and then click **Add**.
6. Click **OK** to send the fax.

Related Topics

Using the Address Book

Adding a Cover Page to a Fax

Forwarding a Fax

After you receive a fax via e-mail (e.g., Microsoft Outlook, Microsoft Outlook Express, Lotus Notes, etc.), you can forward the e-mail message containing the Interaction Fax document to another CIC user who also has Interaction Fax. You can also send the document to another fax machine.

To Forward a Fax Document From Interaction Fax:

1. Open the fax document in Interaction Fax.
2. From the **Main** toolbar, click the Send Fax button. The **Send Fax** dialog box displays.

   Optionally, click **File** > **Send Fax**.
3. Under **Recipients**, enter the new recipients' fax number, name, company name, and phone number.
4. Click **OK** to forward the fax.

> **Note:** If you need to change the time the fax is sent, the page header text, or other delivery details, click Options on the Send Fax dialog box to display these options. To include a cover page, select one from the Cover Page list. The time and date in the fax header are determined by the CIC server's Windows system locale.

Related Topics

Sending a Fax

Canceling a Fax

Using the Address Book

Using the Interaction Fax Monitor

Each time you send a fax (or queue a fax to be sent later), you have the option of starting the Interaction Fax Monitor, which monitors the queue and transmission status of each fax. The **Interaction Fax Monitor** window displays as soon as you click **Send** on the **Send Fax** dialog box. The Interaction Fax Monitor icon displays in the notification area of the taskbar or the notification overflow area, just like the Windows print monitor. Double-click the Interaction Fax Monitor icon to display the status of each fax. You can also cancel a transmitting fax, view basic and detailed fax properties, and clear the list of completed faxes.

To Control the Display of the Interaction Fax Monitor:

1. In Interaction Fax, from the **Tools** menu, click **Options**.
2. Select the **Show Monitor When Fax is Sent** check box to display Interaction Fax Monitor. Clear the check box to hide Interaction Fax Monitor.

To Display the Interaction Fax Monitor:

- If the Interaction Fax Monitor window doesn't display, click its icon in the system tray.

To Cancel a Transmitting Fax:

The **Cancel Fax** option attempts to prevent the transmission of a fax already in progress.
1. Right-click the fax transmission. The Interaction Fax window displays the Cancel Fax/Properties menu.
2. Click Cancel Fax. A confirmation message appears.
3. Click Y**es** to confirm that you want to cancel the fax transmission.

To View Fax Properties:

The **Fax Properties** window displays basic information about a fax transmission in progress.
1. Right-click the fax transmission. The **Interaction Fax** window displays the **Cancel Fax/Properties** menu.
2. Click **Properties**. The **Fax Properties** window displays.
3. Click **Close** when finished.

To View Detailed Fax Properties:

The **Fax Detailed Properties** window displays detailed information about a fax transmission in progress.
1. On the **Fax Properties** window, click **View Details**. The **Fax Detailed Properties** window displays.
2. Click **Close** when finished.

To Clear Completed Faxes:

The **Clear completed faxes** option clears the list of faxes in the Interaction Fax Monitor.
1. Right-click any fax transmission in the list.
2. Click **Clear completed faxes**.

Related Topics

Sending a Fax

Canceling a Fax

Using the Address Book

Diagnosing Sending Problems

If Interaction Fax fails to send a fax, you can diagnose the problem.

To Diagnose Sending Problems:

1. Is the client workstation properly connected to the CIC server?

   > **Note:** To verify, double-click on your **My Computer** icon to display the mounted network servers. Make sure the CIC server computer is available in this list.

2. Is the [Interaction Fax print driver](#) properly installed?
3. Does the **Recipients** section of the **Send Fax** dialog box contain a valid fax number?

   If all the conditions have been met, but Interaction Fax still fails to send a fax, contact your CIC administrator for help.

Related Topics

[Sending a Fax](#)

[Canceling a Fax](#)

[Using the Address Book](#)

[Using the Interaction Fax Monitor](#)

Saving and Printing Faxes

This section contains the following topics:
- [Saving a Fax](#)
- [Printing a Fax](#)

Saving a Fax

You can save a fax document using the current file name, or you can save the fax document with a new file name.

To Save a Fax Document:

- From the **Main** toolbar, click the Save Fax button. The Save As dialog box opens.

    Optionally, click **File** > **Save**.

To Rename and Save a Fax Document:

1. From the **File** menu, select **Save As.** The Save As dialog box opens.
2. Enter the new fax document name in the **File Name** field.
3. Click **Save**.

Related Topics

Viewing a Stored Fax

Printing a Fax

You might want a hard copy of a fax you send to file or review. In Interaction Fax, you can print fax documents using either of these methods:

- Print to the default printer using the **Print** button on the main toolbar.
- Print to a selected printer or specify print options using the **Print** command on the **File** menu.

To print a fax to the default printer:

- On the toolbar, click the Print button. The fax prints immediately on the default printer.

To print to a selected printer or specify print options:

1. From the **File** menu, choose **Print**. The Print dialog box appears.
2. In the Print dialog box, specify the printer device and any other print options you want to change.
3. Click **OK** to begin printing the fax.

Assigning Account Codes

This section contains the following topics related to using account codes and assigning them to faxes:

- Understanding account codes
- Setting up a default account code
- Assigning an account code to an outgoing fax

Understanding Account Codes

You can use account codes to organize outgoing faxes by customer. You might want to use this feature for customer billing purposes if you process faxes for more than one customer. You can assign separate account codes to different recipients of the same fax. Your administrator can generate reports to categorize call details by account codes.

> **Note**: If your administrator does not set up Interaction Fax to use account codes, this feature will not be available to you. For information on setting up and enabling account codes, see your CIC administrator.

- You can assign account codes to outgoing faxes from the **Send Fax** dialog box. For information on using account codes when sending a fax, see the related topics.

Related Topics

Assigning an Account Code to an Outgoing Fax

Setting up a Default Account Code

Assigning an Account Code to an Outgoing Fax

In Interaction Fax, you can assign account codes to outgoing faxes on the **Send Fax** dialog box. Also each individual recipient of the fax can have a unique account code.

> **Note**: If your administrator does not set up Interaction Fax to use account codes, this feature will not be available to you. For information on setting up and enabling account codes, see your CIC administrator.

To Address a Fax and Cover Page:

1. From the **Main** toolbar, click the Send Fax button. The **Send Fax** dialog box opens.

   Optionally, click **File** > **Send Fax**.
2. Under **Recipients**, type the recipient's fax number, name, company, and phone number.
3. Click the arrow at the end of the **Account Code** field and highlight the account code you want to assign to this call.
4. Click **Add**.
5. To send the fax to additional recipients, repeat **Step 2** until you add all recipients.
6. To send a cover page, select one from the Cover Page list.
7. Click **Send** to send the fax.

Related Topics

Assigning an Account Code to an Outgoing Fax

Set up a Default Account Code

Setting up a Default Account Code

You can set up a default account code in Interaction Fax. This is the code Interaction Fax assigns to a fax unless you change it on the **Recipient** tab of the **Send Fax** dialog box.

> **Note:** If your administrator has not set up Interaction Fax to use account codes or has not given you permission to use them, this field won't be available to you. For more information on setting up and enabling account codes, see your CIC administrator.

To Set up a Default Account Code:

1. From the **Tools** menu, click **Options**.
2. Click the arrow at the end of the **Account Code** box and select the default account code.

> **Note:** You can change the account code for an individual fax in the **Send Fax** dialog box.

3. Click **OK**.

Related Topics

Understanding Account Codes

Assigning an Account Code to an Outgoing Fax

Working with Annotations

This section includes the following topics:

- Adding Annotations
- Modifying Annotations

Adding Annotations

Use the **Annotations** toolbar to add lines, shapes, text, drawings, and rulers, as well as to highlight information you wish to emphasize in your fax. After you create an annotation, you can modify its properties.

Select from the following options on the **Annotations** toolbar to create an annotation:

Tool	Description
🖑	**Select:** When you click this button, the cursor changes to an arrow and allows you to click an object to move, delete, or modify it.
▢	**Rectangle:** Draws a rectangle where you click and drag in the active document.
╲	**Line:** Draws a straight line where you click and drag in the active document.
✏	**Freehand Line:** Draws freehand where you click and drag in the active document. To end a shape and leave it open, release the mouse button. To close a shape, release the mouse button near its starting point.
📄	**Text:** Displays a dialog box where you can enter the text and specify the font and point size for the text.
🖼	**Stamp:** Adds an image in the area where you click in the active document.
📅	**Date Stamp:** Adds a date stamp in the area where you click in the active document.

Note: Starting in CIC 4.0 SU2, when you add an annotation, Interaction Fax uses the font settings that you used in the last annotation you added.

Modifying Annotations

After you create an annotation, you can modify its properties.
- Right-click the annotation and then click **Properties**.

Note: The properties that you can modify depend on which tool was used to create the annotation. For example, you can modify the border and fill properties for a rectangle annotation, or you can modify the width and color of a line or freehand annotation.

Configuring Interaction Fax

This section includes the following topics:
- Setting Annotation Preferences
- Setting Advanced Options
- Setting Options

Setting Annotation Preferences

Use this dialog to set the preferences of the annotation tools used on a fax document. The settings you select will affect any new annotations you create.

Rectangle

Set the preferences for rectangle annotations. The options include border color, width, fill color and transparency, and whether or not to use a solid color.

Freehand

Set the preferences for freehand annotations. The options include color and width.

Line

Set the preferences for line annotations. The options include color and width.

Image

Set the image for the **Stamp** tool.

Setting Advanced Options

From the **Options** dialog box, click **Advanced Options** to configure the following options:

Page Header

A fax page header is the space in the top ¼ to ½ inch (0.635 to 1.27 cm) margin on each page. It typically contains the sending company's name and/or fax number since anonymous faxes are considered illegal in many places.

Retries

- Select **Attempt to resend failed faxes** to continue to send a fax if it has failed.
- Enter a positive whole number in the **Number of retries** field indicating how many times the server should try to send the fax if it fails to send it on the first attempt (e.g., the line is busy or down). The maximum number of retries is 12.
- Enter a positive number in the **Delay between retries** field to indicate how many seconds between retries. The delay between retries can to 5 to 300 seconds.

Fax Device Configuration

If more than one fax or group of faxes is installed on the Interaction Fax Server, you can select which fax or fax group to use.

1. Select a device group from the **Device Group** list.

   Select a device group, or select the asterisk (*), which uses the first group available.
2. Enter a Station ID.
3. Select a transmission speed from the **Transmission Speed** list.

   Note: If you need help with these settings, check with your CIC or network administrator to find out what settings you should use.

Language Settings

If you have language packs installed, you can select the language for the user interface.

Related Topics

Options (Tools menu)

Setting Options (Tools Menu)

You can configure the following options from the **Options** dialog box. To display the **Options** dialog box, click **Options** on the **Tools** menu.

Show Monitor When Fax is Sent

Select to show the fax monitor when a fax is sent.

Default Cover Page

Select a default cover page from the list and edit the fields by clicking **Fields**.

Notification

Specify an e-mail address for sending notifications, and then select which notifications you want to send.

Annotations

Click **Annotation Preferences** to configure settings such as line type, color, and width.

Advanced

Click **Advanced Options** to select further options such as page header, number of retries, and fax device configuration.

Updating Interaction Fax

This section includes the following topic:

- Updating Interaction Fax

Update Interaction Fax

Interaction Fax software updates will be installed automatically by Interactive Update, based on your Interactive Update configuration settings. For more information, refer to the "Update Interaction Client" topic in the Interaction Desktop Help.

Menu Commands

This section includes the following topics:

- File menu
- View menu
- Page menu
- Tools menu
- Main Toolbar
- Help menu

File Menu Commands

The **File** menu offers the following commands:

New Fax	Creates a new document
Open Fax	Opens an existing document
Close	Closes an open document
Send Fax	Displays the **Send Fax** dialog box, where you specify fax recipients, cover page information, scheduling and notification details, and other transmission options prior to sending a fax
Save Fax	Saves an open document using its current file name
Save As	Saves an open document with the file name you specify
Print	Prints a document
Print Preview	Displays the document on the screen as it would display when printed
Exit	Exits Interaction Fax

View Menu Commands

The **View** menu offers the following commands:

Fit Width	Resizes the width of the current fax page to fit in the view window.
Fit Page	Resizes the current fax page to fit completely within the view window. The proportional spacing of the document is preserved.
Zoom In	Enlarges the view of the current fax page image.
Zoom Out	Reduces the view of the current fax page image.
Scale to Gray	Display the pages using gray scale. This can improve the clarity of graphic images when viewing a fax.

Page Menu Commands

The **Page** menu offers the following commands:

Rotate Left	Rotates the fax image 90 degrees counter-clockwise.
Rotate Right	Rotates the fax image 90 degrees clockwise.
Import	Imports images into a fax.
Export	Exports the selected page from a fax.
Remove	Removes the currently selected page.
Invert	Switches the fax image colors so white becomes black and black becomes white.

Tools Menu Commands

The **Tools** menu includes the following command:

Options	Opens the **Options** dialog box.

Main Toolbar

The **Main** toolbar is displayed across the top of the application window, below the menu bar. The **Main** toolbar provides quick access to many tools used in Interaction Fax.

Button	Description
New Fax	Open a new fax document.
Open Fax	Open an existing fax document. Interaction Fax displays the Open dialog box, in which you can locate and open the desired file.
Save Fax	Save the active fax document or template with its current name. If you have not named the document, Interaction Fax displays the Save As dialog box.
Send Fax	Send a fax document. Interaction Fax .NET Version displays the Send Fax dialog box to prepare to send a fax.
Print	Print the active fax document.
Zoom In	Zoom in on the page.
Zoom Out	Zoom out from the page.
Rotate Left	Rotate the page 90 degrees counter-clockwise.
Rotate Right	Rotate the page 90 degrees clockwise.
Invert	Invert the image colors, turning white space black and black images white.

To Remove Toolbar Labels:

1. Right-click the toolbar, and then click **Customize**.
2. In the **Text Options** list, click **No text labels**.

Help Menu Commands

The **Help** menu offers the following commands, which provide you assistance with this application:

Help Contents	Offers you a table of contents of help topics.
Help Index	Offers you an index to help topics.
Genesys	Provides an opportunity for providing feedback and contacting Genesys.
About Interaction Fax	Displays the version number of the application.

Miscellaneous topics

Open Dialog Box (File Menu)

The following options allow you to specify which file to open:

Look In

Select the drive and/or network location and directory in which Interaction Fax stores the file that you want to open.

File Name

Type or select the file name you want to open. This box lists files with the extension you select in the **Files of type** list box.

Files of Type

Select the type of file you want to open. Interaction Fax uses files with an .i3f extension. When Interaction Fax inserts other graphics files into a fax, it opens any of the following file types:
- Interaction Fax Document (.i3f)
- TIFF (Tag Image File Format)

Save As Dialog Box

The following options allow you to specify the name and location of the file you're about to save:

File Name

Type a new file name to save a document with a different name. A file name can contain up to eight characters and an extension of up to three characters. Interaction Fax adds the extension you specify in the **Save as type** list.

Save In

Select the drive and folder where you want to store the document.

Save as Type

Select the file type. By default, Interaction Fax saves fax files as Interaction Fax Files, with a .i3f extension. You can also save a fax file as a *.tif image.

Print Dialog Box (File Menu)

The following options allow you to specify how the document should be printed:

Printer

This is the active printer and printer connection. Select **Properties** to change the printer and printer connection.

Print Range

Specify the pages you want to print:

All	Prints the entire document.
Pages	Prints the range of pages you specify in the **From** and **To** boxes.
Selection	Prints the currently selected text.

Copies

Specify the number of copies you want to print for the above page range.

Collate Copies

Prints copies in page number order, instead of separated, multiple copies of each page.

Print Progress Dialog Box

The **Printing** dialog box is displays at the same time that Interaction Fax sends output to the printer. The page number indicates the progress of the printing.

To terminate printing, click **Cancel**.

Print Preview Toolbar

The **Print Preview** toolbar offers you the following options:

Print

Display the Print dialog box to start a print job.

Zoom

Set the view level from the drop down list. Auto view scales the view to the window size.

One Page / Two Page / Three Page / Four Page / Six Page

Preview one, two, three, four or six printed pages at a time.

Close

Return from print preview to the editing window.

Page

Enter a page number to see a specific page or use the up and down arrows to navigate to the desired page.

Connecting to Session Manager

Interaction Fax needs to connect to **Session Manager**. This allows Interaction Fax to:
- Send faxes
- Set options
- Check for updates to Interaction Fax

The connection can be authenticated using NT authentication or explicit authentication.

For more information, contact your administrator.

Help Index Command (Help Menu)

Use this command to display online help index.

About Interaction Fax Command (Help Menu)

Use this command to display the copyright notice and version number for Interaction Fax.

Exit Command (File Menu)

Use this command to end your Interaction Fax session. You can also select **Close** on the application Control menu. Interaction Fax prompts you to save documents with unsaved changes.

Shortcuts

Mouse: Double-click the application's Control menu button.

Keys: **Alt + F4**

Close Command (File Menu)

Use this command to close all windows containing the active document. You should save changes to your document before you close it. If you close a document without saving, you lose all changes made since the last time you saved it. Before closing an untitled document, Interaction Fax displays the Save As dialog box and suggests that you name and save the document.

New Fax Command (File Menu)

Use this command to create a new document in Interaction Fax. The new document is initially labeled **Untitled**. Interaction Fax prompts you to rename the document when you close the document or select **Save As**.

> **Note**: To open an existing document, use the **Open** command.

Shortcuts

New Fax button

Open Fax Command (File Menu)

Use this command to open an existing document in a new window. You can open multiple documents at once.

> **Note**: To create new documents, use the **New** command.

Shortcuts

Open Fax button

Keys: **Ctrl + O**

Print Preview Command (File Menu)

Use this command to display the active document, as it would display when printed. When you select this command, the main window is replaced with a print preview window in which one or two pages will be displayed in their printed format.

The Print Preview toolbar offers the following options:
- View either one or two pages at a time
- Move back and forth through the document
- Zoom in and out of pages
- Initiate a print job

Print Command (File Menu)

Use this command to print a document. This command presents a Print dialog box, where you may specify the range of pages to be printed, the number of copies, the destination printer, and other printer setup options.

Shortcuts

Print Fax button

Save Fax Command (File Menu)

Use this command to save the active document to its current name and directory. When you save a document for the first time, Interaction Fax displays the Save As dialog box so you can name your document.

If you want to change the name and directory of an existing document before you save it, select the **Save As** command.

Shortcuts

Save Fax button

Send Fax command (File menu)

Use this command to send the current document as a fax. This command presents the **Send Fax** dialog box, where you prepare to send the current document. Fill in the **Fax Number** and **Name** fields. If you desire, you may also fill in the optional **Company** and **Phone** fields.

When you finish preparing the fax, click **Send** to send it.

Related Topics

Faxing a Document

Sending a Fax

Using the Address Book

Addressing a Fax and Cover Page

Fit Width Command (View Menu)

Use this command to resize the page from its current size to fill the width of the current window.

Fit Page Command (View Menu)

Use this command to resize the page from its current size to fit completely within the current window. If you resize the window, the document image is also resized to fit the window.

Help Topics Command (Help Menu)

Use this command to display the opening screen of Help. From the opening screen, you can jump to step-by-step instructions for using Interaction Fax and various types of reference information.

Invert Command (Page Menu)

Use this command to switch the fax image colors so all black images become white and all white space becomes black.

Shortcuts

Invert button

Main Page View

The main window pane displays one page of a fax at a time. From the main window pane, you can:

- Enlarge or reduce the page display size
- Invert the image
- Rotate the image left or right
- Zoom in on one part of the fax image

Rotate Left Command (Page Menu)

Use this command to rotate the page 90 degrees in a counter-clockwise direction.

> **Note**: This is most useful if you receive a portrait-oriented document (i.e., taller than wide) that was sent wide-edge first and it displays in a landscape position (wider than tall), or if the fax was sent upside down.

Shortcuts

Rotate Left button

Rotate Right Command (Page Menu)

Use this command to rotate the page 90 degrees in a clockwise direction.

> **Note**: This is most useful if you receive a landscape-oriented document (i.e., wider than tall) that was sent narrow-edge first and it displays in an upright portrait position (taller than wide), or if the fax was sent upside down.

Shortcuts

Rotate Right button

Scale to Gray Command (View Menu)

Use this command to display fax images (e.g., imported as black and white or color) using gray scale. This command can improve the clarity of graphic images when viewing a fax. It can also make text portions of a fax display fuzzier if the text if fine or was originally in color.

Thumbnail View

A reduced image of each page of a fax is displayed in the scrolling windowpane on the left side of Interaction Fax. In the thumbnail view, you can:

- Click on a thumbnail page to display it in the main page view window pane.
- Scroll up and down to see an overview of the entire fax.
- Rotate thumbnail images along with the main page by selecting the Rotate Left or Rotate Right buttons on the tool bar, or the **Page** commands.

Cover Page Dialog Box

You can optionally include a cover page with each fax. This dialog box lets you add text to an existing cover page and include the cover page as the first page of your fax document.

From

The name of the person sending the fax. This field defaults to the name set in the Fax configuration in Interaction Administrator. To change the name, click in the field and type a new name.

Fax

The sender's fax number automatically displays in this field, based on the same field in the **Fax Configuration** page in Interaction Administrator. To change the number, click in the field and type a new fax number.

Company

The sender's company name automatically displays in this field, based on the same field in the **Fax Configuration** page in Interaction Administrator. To change the name, click in the field and type a new company name.

Phone

The sender's voice phone number automatically displays in this field, based on the same field in the **Fax Configuration** page in Interaction Administrator. To change the number, click in the field and type a new phone number.

Comments

Type any introductory remarks or instructions that need to display on the cover page.

Related Topics

Adding a Cover Page to a Fax

Import Page Dialog Box

Page Tabs

These tabs indicate how many pages there are to import in a multi-page fax. Each page can have different settings.

Import This Page

Select this check box to import the page into the fax.

Page Size

Select the page size for the imported page. Select between letter, Legal, and A4.

Orientation

Select between portrait or landscape for orientation of the imported page.

Image Quality

Select the quality at which you want to import the page. Select between Standard (204 x 98 pixels) and Fine (204 x 196 pixels).

Stretch Image to Fit Page

Select this check box if you want Interaction Fax to stretch the image to fit the page.

Maintain Aspect Ratio

Select this if you are stretching the image to fit and you want to maintain the aspect ratio of the image. If you select not to stretch the image, this will be disabled.

Info Column of Interaction Fax Monitor

This column contains information pertaining to the fax's status.
- If the status of a fax is **Holding**, this column indicates the date and time of the next attempt to send the fax.
- If the status of a fax is **Transmitting,** this column indicates the remote fax machine identifier number.

Otherwise, this column is blank.

Unified Messaging

The ability of a system to centralize communications of various kinds by using a single repository (for example, Microsoft Exchange Server). CIC uses unified messaging to deliver voice mail, faxes, and other notifications.

Page

If the status of a fax is **Successful** this column is set to **0** which indicates that no pages remain to be transmitted.

Remove Command (Page Menu)

Use this command to remove the selected page.

Save As Command (File Menu)

Use this command to save and name the active document as an Interaction Fax (.I3F) file. Interaction Fax displays the Save As dialog box so you can name the document.

To save a document with its existing name and directory, use the Save command.

Save Fax Command (File Menu)

Use this command to save your fax. If the file was not previously saved, the Save As dialog box opens.

Shortcuts

Save Fax button

Status

The fax status. There are six possible statuses:

Status	Description
Holding	The fax has been sent to the fax server, but has not yet been transmitted. (The recipient's fax number may be busy or you may have specified that the fax be sent at a later time.)
Queued for sending	The fax is ready to be sent and will be transmitted as soon as a fax resource is ready.
Connecting	The fax resource is making a phone call to transmit the fax. A fax is in a connecting state from the time the phone call begins until it is in full communication with the recipient's fax machine.
Transmitting	The fax resource is actually sending the fax.
Successful	The fax was successfully sent.
Failed	The fax transmission failed and all retry attempts have been exhausted.

Copyright and trademark

Submitted

This is the date and time you submitted the fax.

Zoom command (View menu)

Use this command to enlarge or reduce the display size of a fax image.

Shortcuts

Zoom In button

Zoon Out button

Providing Feedback and Accessing Support

Options in the Help menu provide the ability to learn more about PureConnect products, promote and share ideas, access technical support, and submit feedback about bugs and enhancement requests.

To access these features, open the **Help** menu, click **Genesys**, and then select from the following options:

- Home: This menu option takes the user to the Genesys home page, www.genesys.com.
- Support: This menu option takes the user to Genesys Support Services web site. The user must log into the site before accessing technical support.
- Community: This menu option takes the user to Genesys PureConnect Community Forum, a free and public service provided by Genesys to promote an online community devoted to the sharing of ideas and information regarding Genesys software.
- Feedback: This menu option takes you to a feedback form and allows you to report bugs, request enhancements, and submit other product-related information to Genesys.

> **Note**: You must have internet access to use these menu options.

Change log

Date	Changes
15-March-2019	Created this change log.
11-October-2019	Added Fax Formats to Overview of Interaction Fax topic. Fixed miscellaneous formatting issues caused by font style settings.