



Soft Solutions, Inc.

# 4-Sight FAX v7.5 Email Suite Functionality Guide

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# Email Suite Setup

## Introduction

In order to use the full email features of 4-Sight FAX v7.5, such as email-to-fax and email-forwarding, you must first configure and set up Email Suite on 4-Sight FAX.

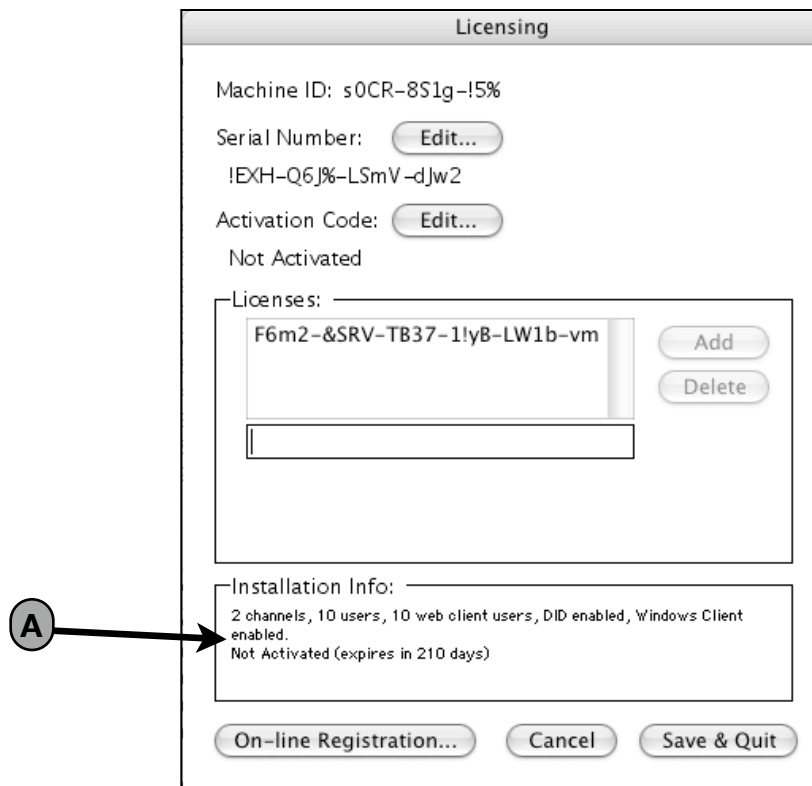
## Install

Follow each step completely in order to correctly configure 4-Sight FAX for Email Suite functionality.

## Check Licensing

In order to enable the Email Suite, you must first have the correct license in order to access the Email Suite. From the 4-Sight FAX Server menu, select Setup → Licensing. From here, you can check to see if you are properly licensed.

The Licensing dialog contains the detailed information at the very bottom of the window, under 'Installation Info':



A marks the activation status of the license. The license must be activated in order to continue.

Note: If you are running 4-Sight Fax v7.0, the Licensing prompt will look a bit different, replacing “10 Web Client Users” with “10 Email Suite Users”.

If this does not appear to be the case, contact support at [support@softsinc.com](mailto:support@softsinc.com).

## Set up Email

Now that we’ve ensured that the licensing portion is set up, now we have to set up the actual configuration of the features. Go to the menu of the 4-Sight FAX Server and select Setup → Email to set up the server information for sending and receiving email.

The screenshot shows the 'Email Setup' dialog box with the following configuration:

- Sending email:**
  - SMTP server: mail.softsinc.com
  - SMTP port: 26
  - SMTP server requires authentication
  - Account ID: fax@softsinc.com
  - Password: [masked]
  - "From" email address: fax@softsinc.com
- Email Forwarding:**
  - Enable
  - Subject line: [Text: New Fax -]
  - Plus fax subject
- Email to Fax:**
  - Enable
  - POP server: mail.softsinc.com
  - POP port: 110
  - Account ID: fax@softsinc.com
  - Password: [masked]

From here, you can set up your SMTP (the outgoing mail) server information, as well as enable Email Forwarding and Email to Fax.

While you can set the “From email address” to be a bogus address, using a non-working email address means that users will have no way to reply to the email.

Email Forwarding specifies the Subject Line of forwarded emails as well as allows enabling/disabling of functionality. The Subject Line (set as “New Fax - “ in the illustration) specifies what text to appear in the Subject of the email. Checking the “Plus fax subject” inserts the text into the Assign dialog for incoming faxes.

Email to Fax specifies the POP (the incoming mail) server information and account information. To enable Email to Fax, check the box by Enable and fill in the server and account information for the email address which you would like to *process* Email to Fax.

Note that an email account must exist on the server to allow receiving and sending of emails from an email address. If you are unfamiliar with ports, mail servers, or account IDs related to this setup, consult your IT professional or email [support@softsinc.com](mailto:support@softsinc.com) for more information.

### Set up Confirmation Emails

Next, you must configure the settings to what users will receive when they receive fax emails. From the 4-Sight FAX Server, select Setup → Receipts.

Receipt Configuration

On  Off

Sent Fax File Creation:

First Page Only  
 All Pages

Broadcast fax - limit to  recipients

Confirmation Stamp:

Off  
 First Page Only  
 All Pages

Printing:

Off  
 First Page Only  
 All Pages

Default Printer  Direct Printing

Printer: hp LaserJet 4300

Email:

Off  
 First Page Only  
 All Pages

Cancel OK

From here, enable receipt configuration by toggling the “On” button at the top and setting the settings to your liking.

### Set Up User Features (Email To Fax, Email Forwarding)

Once you’ve completed the previous steps, your final step involves providing configuration for each user who will be using the email features.

To access the information for each user, go to [Setup](#) → [Security Setup](#) → [User Setup](#) and select a user you wish to change permissions and settings for.

The screenshot shows the 'Edit User' dialog box with the following settings:

- Name: Administrator
- Password: [Redacted]
- Group Membership: [Empty]
- Login and Access:
  - Administrator access to server
  - Full queue access
  - Allow automatic login
  - Allow username alias
  - Enforce group name as public
  - Allow add to Block List
  - Allow delete from Block List
  - Allow web client
- Faxing Privileges:
  - Priority fax
  - Broadcast fax
  - Private fax
- Server Address Book Privileges:
  - Add Address Book Contact
  - Modify Address Book Contact
  - Delete Address Book Contact
- Text Message Notifications:
  - Incoming activity
  - Outgoing activity
  - Phone #: [Empty]
  - Provider: [Empty]
  - Include URL link:
  - File type:  PDF  TIFF
  - Language: English
- Email Suite:
  - Enable email forwarding
  - Email forwarding address: tim@softsinc.com
  - "From" email address for sending email: [Empty]
  - Enable email to fax
  - Permissible email addresses: [Empty]
- Printing:
  - Use General Settings
  - No Printing
  - Direct Printing
  - Printer: [Printer...]
- Dialing and Routing:
  - Enable In-Bound Routing
  - User fax number: [Empty]
  - Specify Outgoing Fax Line: Next Available
  - Allow Client to specify
- Phone Card:
  - Before fax number
  - After fax number
  - Allow Client to specify
- Personal Incoming Fax Archive:
  - On  Off
  - Save As:  PDF  TIFF
  - Save To:  Saved Faxes  Custom

Buttons: Cancel, OK

Notice the center column which has a section entitled "Email Suite".

For each user intending to use the Email Suite, their settings must be changed to reflect the following:

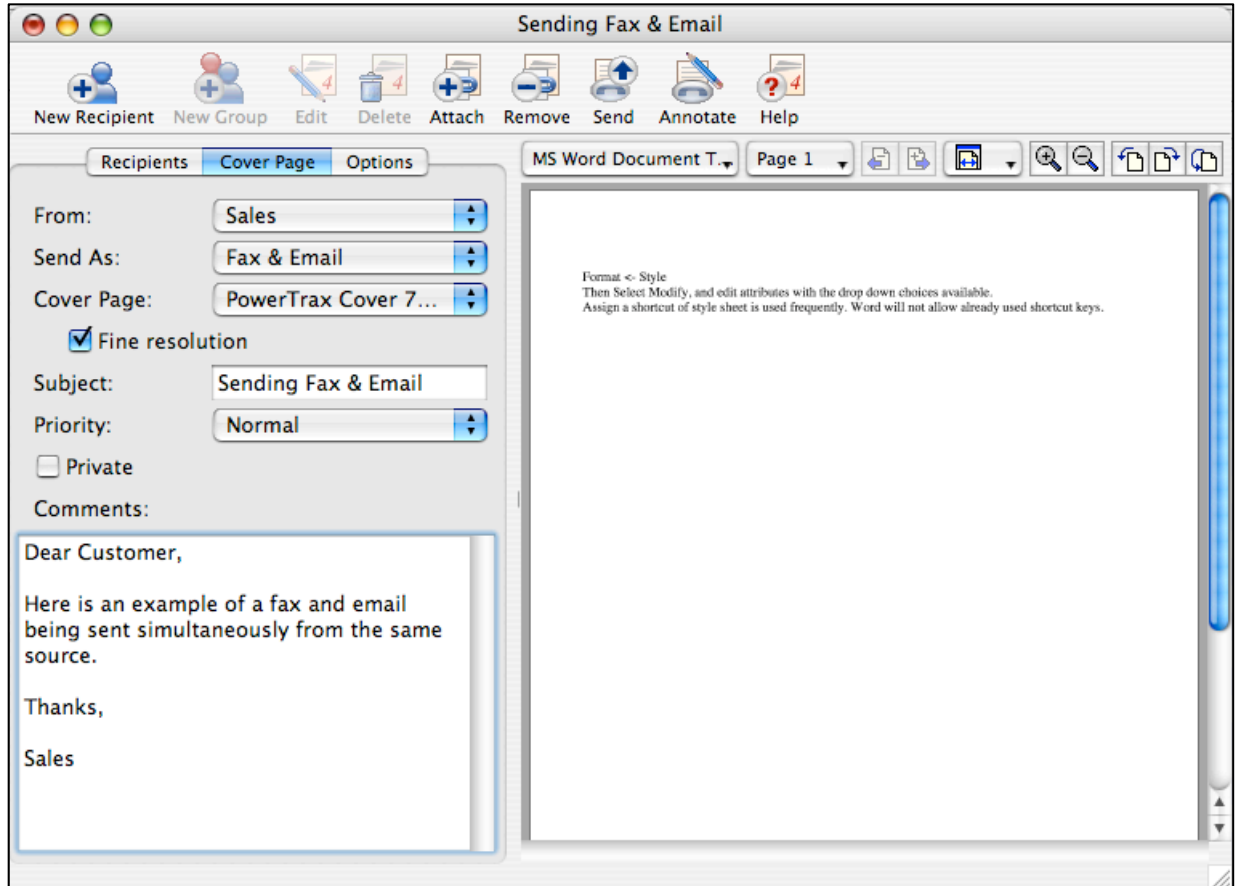
If the user needs email forwarding enabled, check the box under "Enable email forwarding" and provide a forwarding and a From: email address.

If the user needs email to fax enabled, check the box under "Enable email to fax" and provide email addresses that *will send* faxes to the server.

After completing these two sections, click OK at the bottom right to save and exit the settings.

## Testing the Results

Now that we've completed the configuration on the Server side, it is now time to check the settings on the Client side. Open up 4-Sight FAX Client and begin to create and send a FAX.



If you've completed the user setup for the Email Suite, the "Send As" drop-down box should now include "Fax & Email" as well as "Email".

To test the setup of the mail servers, send a FAX and check the receipt confirming the sending:

fax@softsinc.com, 10/8/07, 3:4, Fax Sent - Please order parts and come out tomorrow

Fax Sent - Please order parts and come out tomorrow

Date: 08 Oct 2007 15:47:48 -0400  
From: fax@softsinc.com  
To: accounting@softsinc.com  
Subject: Fax Sent - Please order parts and come out tomorrow  
X-ELNK-Received-Info: spv=0;  
X-ELNK-AV: 0  
X-ELNK-Info: sbv=0; sbrc=.0; sbf=00; sbw=000;

Date sent - 10/8/07  
Time sent - 3:46 PM  
From - Accounting  
From Company - Soft Solutions, Inc.  
To - ACS Heating  
To Company - ACS Heating  
Fax Number - 770939-5522  
Subject - Please order parts and come out tomorrow


Date: 10/8/07	To: ACS Heating
Time: 3:46 PM	ACS Heating
From: Tim Maratine	Fax Number: 770939-5522
Soft Solutions, Inc.	Status: Sent Successfully

---

Soft Solutions, Inc. [770-451-9800] 10/8/07 3:46 PM Page 1/1

x Cover Sheet •

*Soft Solutions, Inc.*



2900 Chamblee Tucker Road  
Building 12 Suite 200

The contents of this generated PDF will match the settings you outlined when defining the mail and receipt settings. You're set to go!

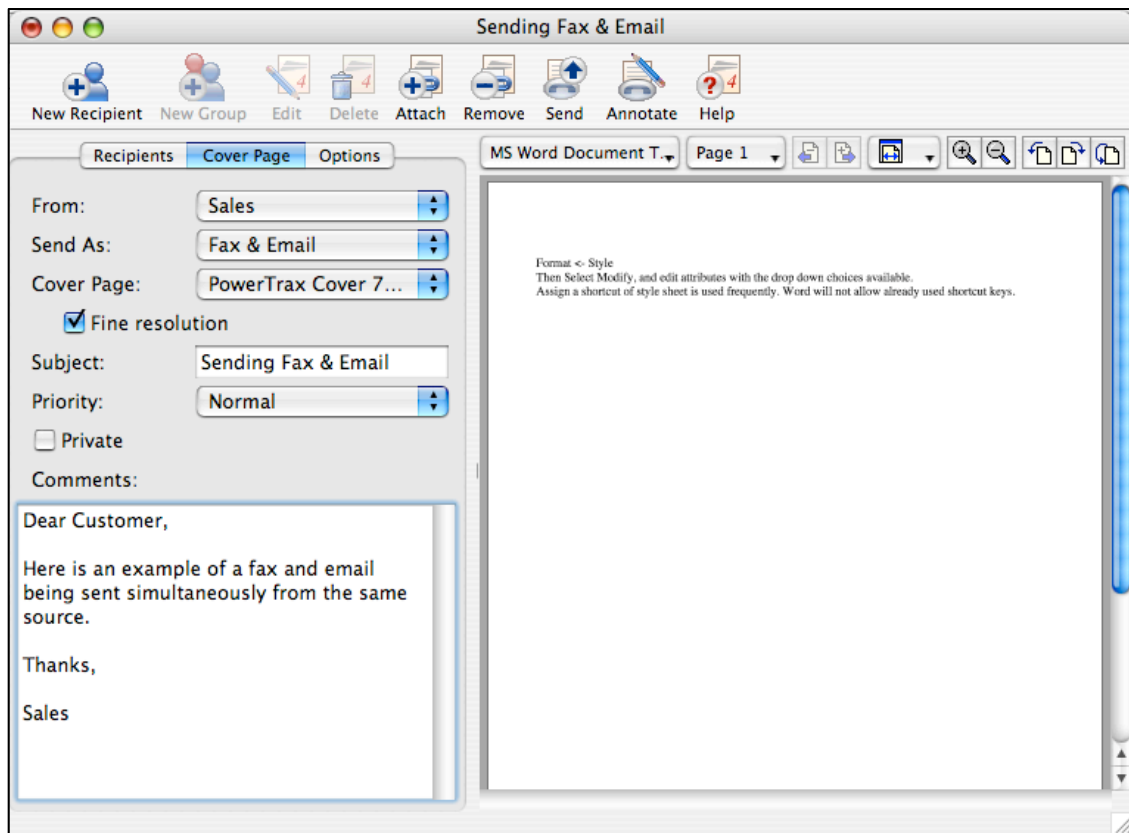
# The Email Suite

## Introduction

The 4-Sight FAX v7.5 Email Suite option extends the capabilities of the 4-Sight FAX product in several ways.

## Sending Emails from 4-Sight FAX Client

From within 4-Sight FAX Client, you have the option of sending the document as a FAX and email, or simply as an email.



*4-Sight FAX Client's 'Create a FAX' page.*

Use the Send As drop-down box to select 'Fax & Email' or 'Email' alongside the standard choices.

*Note that these may not appear and/or function correctly if the Setup Guide has not been completed.*

## Email Forwarding

A user, if setup for the functionality, can have all of their faxes forwarded to their email accounts. All forwarded emails would arrive as PDF attachments to the notification email.

Date: 21 Feb 2008 10:21:04 -0500  
From: fax@softsinc.com  
To: accounting@softsinc.com  
Subject: New Fax - Low Premiums  
X-ELNK-Received-Info: spv=0;  
X-ELNK-AV: 0  
X-ELNK-Info: sbv=0; sbrc=.0; sbf=00; sbw=000;

Subject - Low Premiums  
Date received - 2/21/08  
Time received - 10:19 AM  
Number of pages - 1

To: 17704549800      From: 1-888-224-0681      02/21/2008 7:18 AM      P. 1 of 1

**Can life insurance rates  
really be so low???**

**AGENT/BROKER OPPORTUNITY AVAILABLE**

*Rates quoted are for preferred-plus 10 year level term plans.  
Non smoking-monthly premiums-Carriers rated A+ or better by AM Best.*

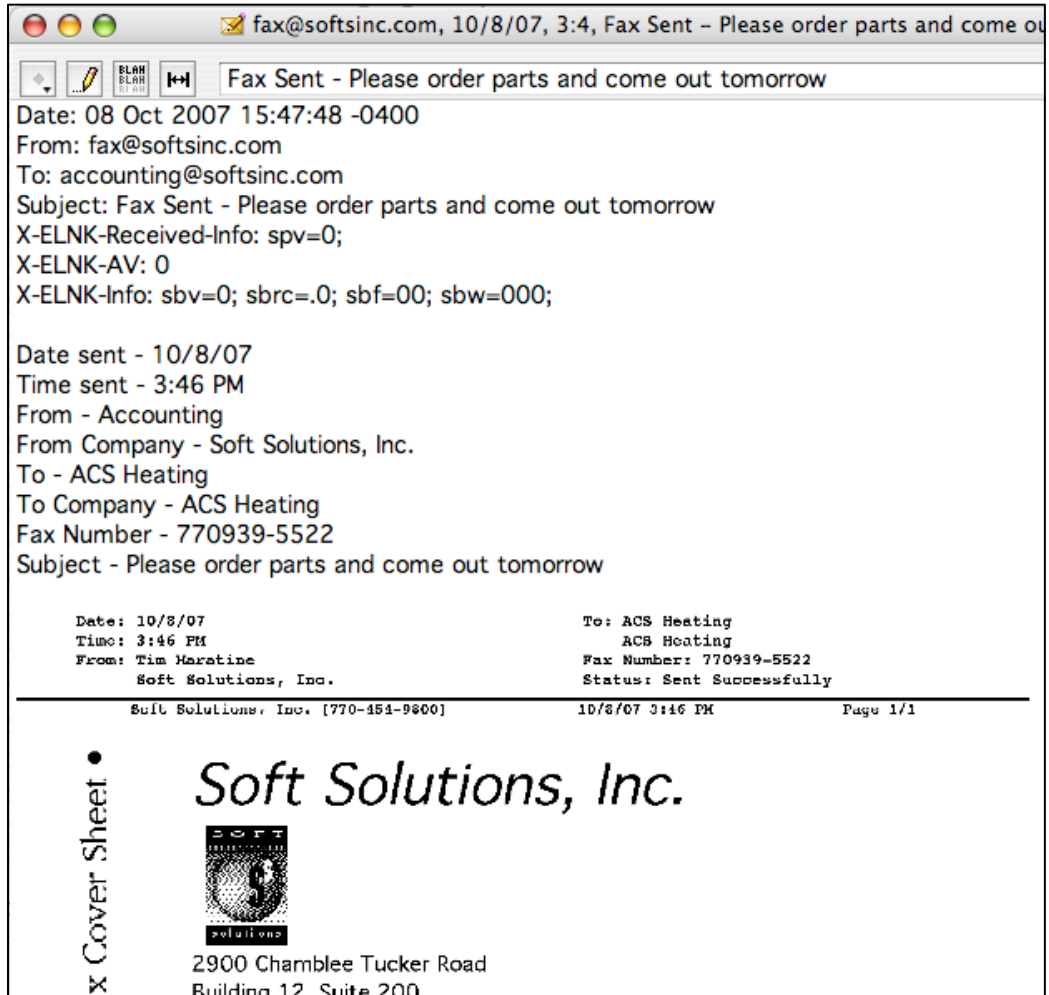
Female Rates				
Age	\$100,000	\$250,000	\$500,000	\$1,000,000
35	\$6	\$8	\$14	\$22

Male Rates				
Age	\$100,000	\$250,000	\$500,000	\$1,000,000
35	\$7	\$8	\$14	\$24

*An example of email forwarding, with header information.*

## Email Confirmation of Sent Faxes

The 4-Sight FAX Server can also send confirmation faxes whenever a fax is sent to ensure its delivery. Like the Email Forwarding, the notification email arrives with the fax as a PDF attachment.



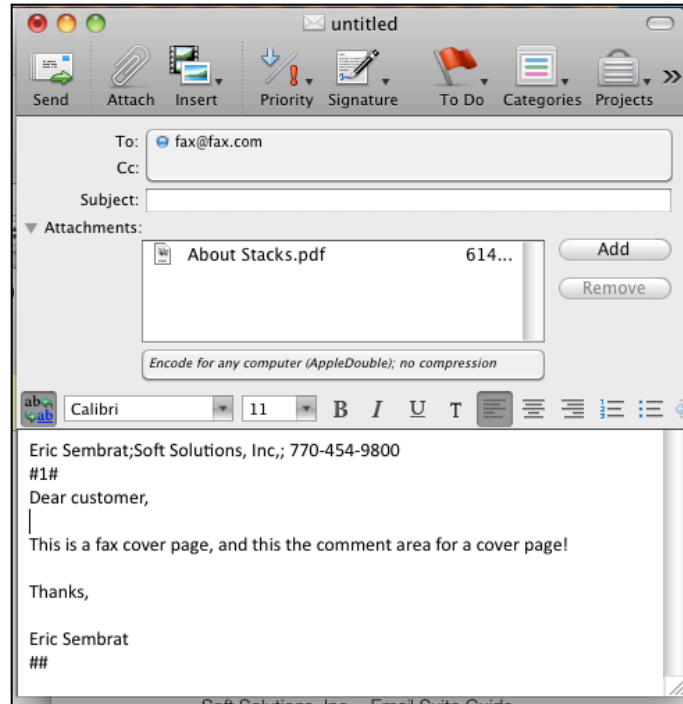
*An example of fax notifications, with header information.*

## Email to FAX

New to 4-Sight FAX v7.5 is the email-to-FAX functionality. You can use email-to-FAX to send multiple attachments to multiple people via FAX, all with one email message.

Acceptable attachment formats are PDF, PNG, and TIFF.

*Note that you must be an accepted sender to the Email-to-Fax for this to work. If you are not sure, consult the Email Suite Setup Guide.*



The format of the email-to-fax's header is as follows:

- **To:** Your FAX server email queue. This is the email address you defined in the FAX Server settings to receive faxes to get sent out.
- **Subject:** The subject of your cover letter, if applicable.
- **Attachments:** Send a PDF, PNG, or TIFF files as faxes. Multiple attachments are supported.

The format of the email-to-fax's body is as follows:

- **[Recipient Name];[Company Name];[Recipient Fax]** - The first line of every email-to-fax must contain the three items. Type them in, and put a semicolon (;) after each field. A semicolon is not needed at the last line. For example, the following recipients work:

President Barack Obama;The White House;555-555-5555

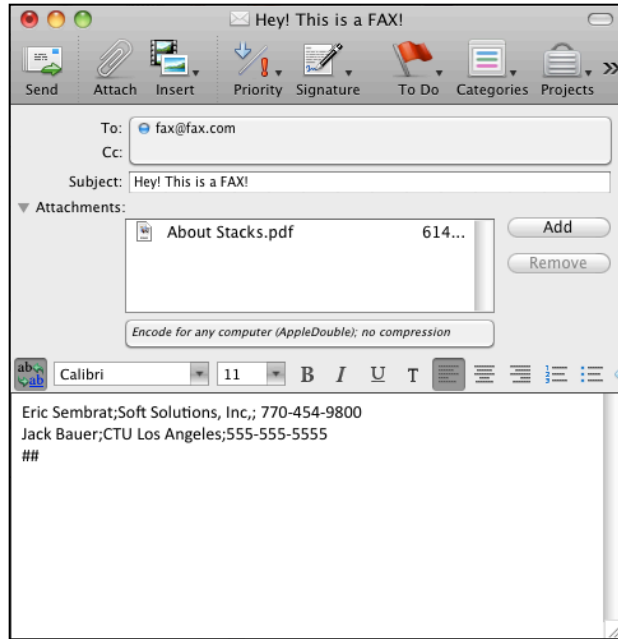
John Locke;The Island;555-555-5555

Jack Bauer;CTU Los Angeles;555-555-5555

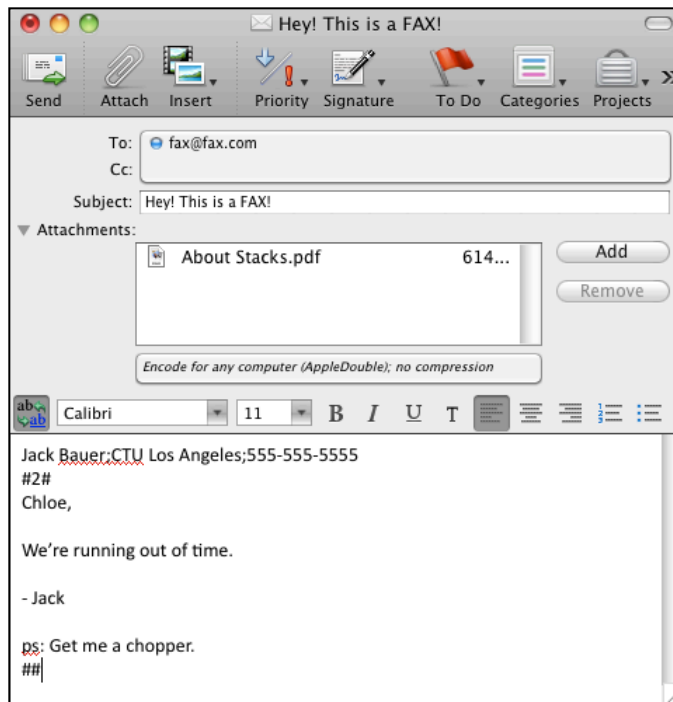
- **#[number]#** - The second line denotes which cover page to include from the 4-Sight FAX Server. If you do not wish to use a cover page, simply type **##** and do not include any of the additional steps. Use only numbers 1 through 14.
- **[content]** - Every line following the cover letter type will be included in the Comments section of the cover letter.
- **##** - You *must* include this at the end of the email. This signals the end of the FAX email.

See the following section for examples.

## Email to FAX Examples



Example 1: A FAX to two recipients with no Cover Letter.



Example 2: A single recipient with Cover Letter 2 from the Server.

## Questions?

Questions or comments about this guide? Need clarification? Email [support@softsinc.com](mailto:support@softsinc.com) with your comments or questions and we'll be glad to help.