



Soft Solutions, Inc.



4-Sight FAX 7.5

Getting Started

Introduction

Thank you for your interest in 4-Sight FAX version 7.5. This guide documents the general configuration for using 4-Sight FAX.

For a detailed description of any of the steps outlined here, please refer to the product manuals by viewing the PDF files below:

Fax Server Manual - http://www.4sightfax.com/Download/v7/4-Sight_Fax_v7.5_Server.pdf

Fax Client Manual - http://www.4sightfax.com/Download/v7/4-Sight_Fax_v7.5_Client.pdf

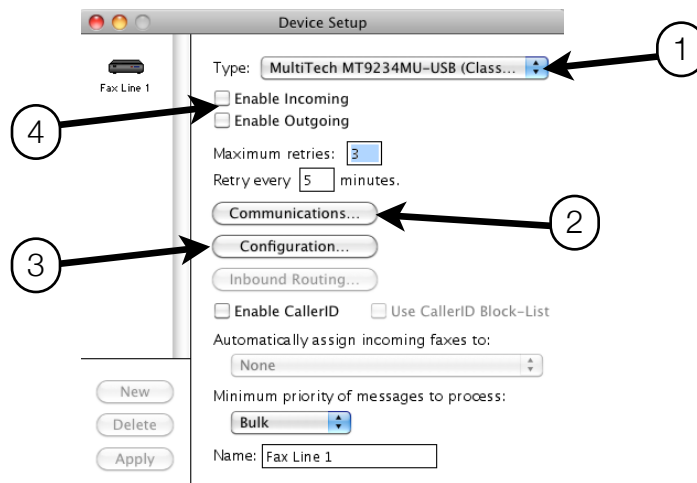
Web Client 7.5 Manual - http://www.4sightfax.com/PDFs/v7_5/4SightFaxWebClient75.pdf

Email Suite Manual - http://www.4sightfax.com/PDFs/v7_5/4SightFaxEmailSuite75.pdf

Server - Getting Started

Setting up the Modem

These configuration settings will setup your modem to correctly function with the 4-Sight FAX Server. To access the modem configuration screen, select Setup → Security Setup from the menu on the Fax Server.



From the Device Setup menu, configure the following:

1. Choose the appropriate modem from the drop down list. If you are unsure of the modem, select the 'Detect..' option and 4-Sight FAX will locate and select the correct driver.
2. Click the 'Communications...' button and select the appropriate port for the modem. Note that the port names differ for each brand of modem.
3. Click the 'Configuration...' button and edit, if necessary, the options for adding a predial prefix (for access to an outside line) and customizing the header line for outgoing faxes.
4. Enable Incoming and/or Outgoing for the modem. For single fax line installations, both options are normally enabled.

Setting up the First User

Once the modem settings have been configured, an initial user must be set up on the Fax Server as the Administrator. To access the User Setup screen, select Setup → Security Setup → User Setup from the menu on the Fax Server.

Select 'New' to create a User on the Server.

The image shows a 'New User' configuration window with the following sections and callouts:

- Callout 1:** Points to the 'Name' field containing 'George P. Burdell' and the 'Password' field.
- Callout 2:** Points to the 'Login and Access' section, which includes checked options for 'Administrator access to server', 'Full queue access', and 'Allow automatic login'.
- Callout 3:** Points to the 'Faxing Privileges' section, which includes checked options for 'Priority fax', 'Broadcast fax', and 'Private fax'.
- Callout 4:** Points to the 'Dialing and Routing' section, which includes the 'Enable In-Bound Routing' checkbox and the 'Specify Outgoing Fax Line' dropdown menu set to 'Next Available'.

Other sections in the window include 'Group Membership', 'Email Suite' (with 'Enable email forwarding' checked), 'Phone Card', 'Server Address Book Privileges', 'Printing' (with 'Use General Settings' selected), and 'Text Message Notifications'.

Fill in the following sections to configure the first user:

1. Type in a user name and password for this account.
2. Enable 'Administrator access to the server', 'Full queue access', and 'Allow automatic login'. This sets up this user as an Administrator for the Fax Server.
3. Enable all three faxing privileges (Priority, Broadcast, and Private) for the administrator.
4. Select 'In-Bound Routing' only if your fax system has Direct-Inward-Dial (DID). Select a 'Specify Outgoing Fax Line' option to restrict a user to a specific line, if your Fax Server has two or more fax lines.

The remaining options are not mandatory for setup. Details of each section and their options are available in the Fax Server Manual.

Setting up Email

The Email Section is responsible for enabling Email to Fax and Email Forwarding. If you wish to have either of these options enabled for testing, these server options must be configured.

The screenshot shows the 'Email Setup' dialog box with three numbered callouts:

- 1** points to the 'Sending email:' section, which includes fields for SMTP server (smtp.yourdomain.com), SMTP port (25), a checked checkbox for 'SMTP server requires authentication', Account ID (username), Password (masked), and 'From' email address (username@yourdomain.com).
- 2** points to the 'Email Forwarding:' section, which includes a checked checkbox for 'Enable', a 'Subject line:' field with the text 'A Fax From:', and checked checkboxes for 'Plus fax number' and 'Plus fax subject'.
- 3** points to the 'Email to Fax:' section, which includes a checked checkbox for 'Enable', POP server (pop.yourserver.com), POP port (110), Account ID (fax@yourserver.com), and Password (masked).

Buttons for 'Cancel' and 'OK' are located at the bottom right of the dialog box.

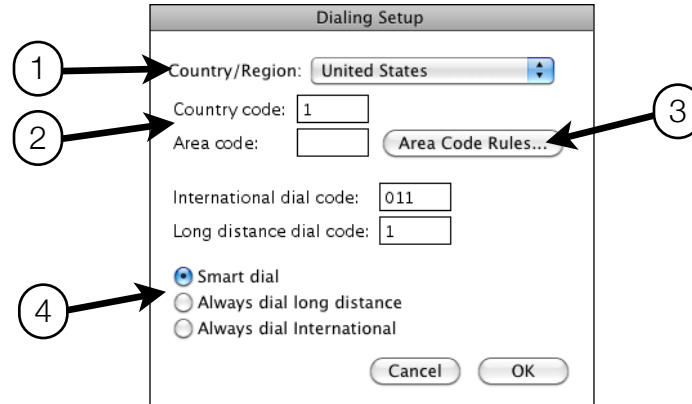
Before continuing, make sure there is an email account for the Fax Server to use for outgoing and incoming emails, such as fax@domain.com. Contact your Systems Administrator to create an email account if one has not already been set up.

1. Under the SMTP Server, type in your outgoing email server. This is usually 'smtp.yourdomain.com', although this differs between email servers. If the server requires authentication, provide the Account ID and password to the fax email account.
2. If you wish to have Email Forwarding enabled, check the 'Enable' checkbox and fill in the required details. Email Forwarding allows the server to send confirmation emails for sent faxes and forward received faxes to an email address.
3. If you wish to have Email to Fax enabled, check the 'Enable' checkbox and fill in the required details. Email to Fax allows users to send properly formatted emails and attachments to a designated email address, which then are sent out as a fax.

For more information on configuration of Email Forwarding and Email to Fax, refer to the Server Documentation.

Setting up Dialing Information

Before testing outgoing and incoming faxes, the Dialing settings must be set up.



To access the Dialing Setup, go to the menu bar for the Fax Server and select Setup → Dialing.

1. Choose the Country in which you are operating your Fax Server from.
2. Input your country code, area code, international dial code, and long distance dial code.
3. Click 'Area Code Rules...' to configure dialing options for areas with multiple area codes for local numbers.
4. Select your Smart Dial preferences. The Smart Dial option determines the appropriate fax number to dial based on the local area codes and dialing options specified.

That's It!

Congratulations, you've configured the general setup for 4-Sight FAX's Server! Please note that particular setups (Direct-Inward-Dial, for example) require additional configuration not documented here. For more information regarding these options, refer to the Fax Server Manual.

Client - Getting Started

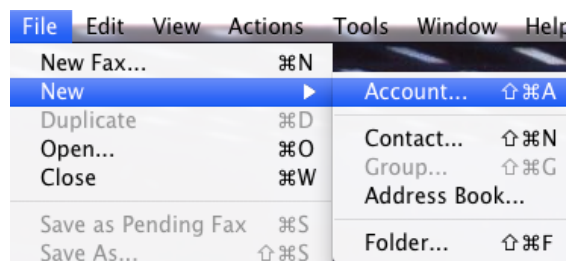
Setting up the Client

Once the Fax Server setup is completed for a user, the user can then access their account on the Fax Client.

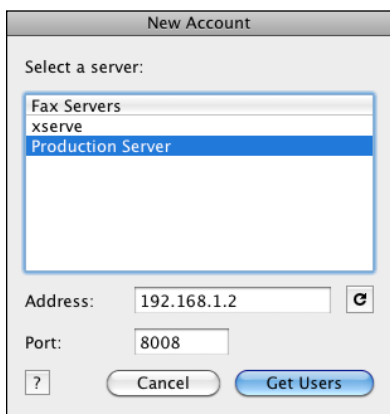
When installing 4-Sight FAX's Client on a machine for the first time, you will be presented with a series of questions that set up the Fax Client. From these prompts, you will also choose a user name from the server list of users.

Creating Your Account

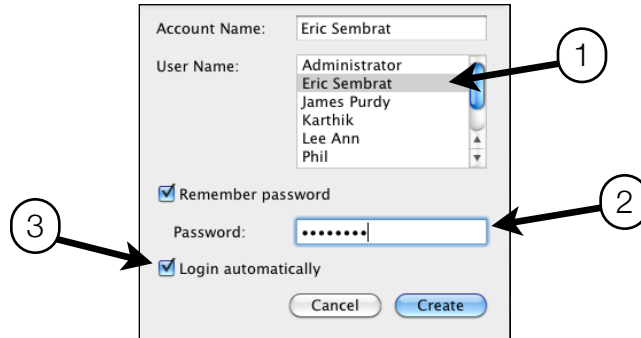
Obtain your username and password from the 4-Sight FAX Administrator.



From the Fax Client menu, select File → New → Account...



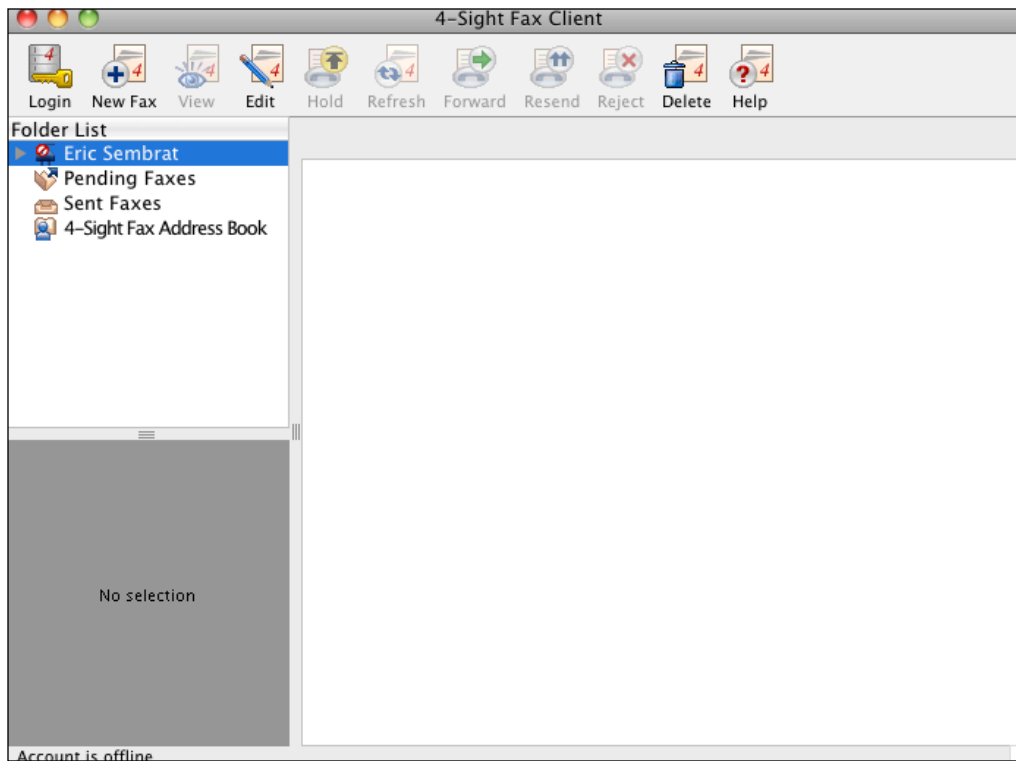
Select your server name from the list of available local 4-Sight Fax Servers and click 'Get Users'. If you are connecting remotely, type in the remote (or "static") IP address.



Complete the following information:

1. Choose your user name from the list of available users on the 4-Sight FAX Server.
2. If you wish to save your password, select 'Remember password' and type in your password.
3. Select 'Login automatically' to have 4-Sight FAX Client automatically login the user when opened.

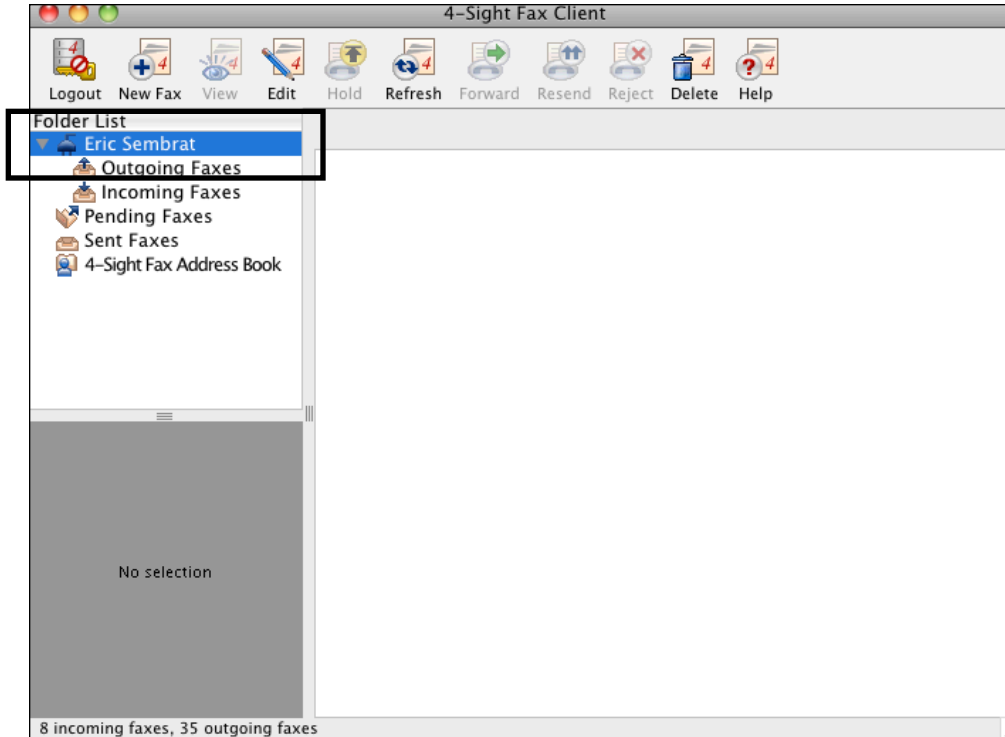
Click 'Create' to save your user settings and return to the 4-Sight FAX Client window.



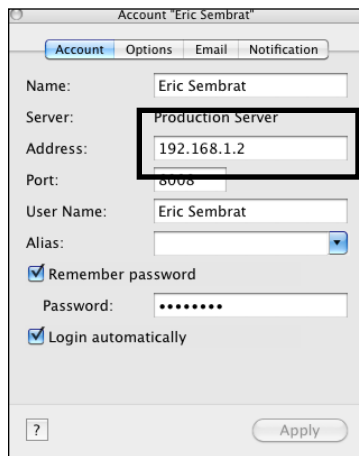
The basic setup of the Fax Client is now complete.

Setting up 4-Notify

To set up 4-Notify (the notification application), double click on your user name located under "Folder List" on the left side of the Fax Client:

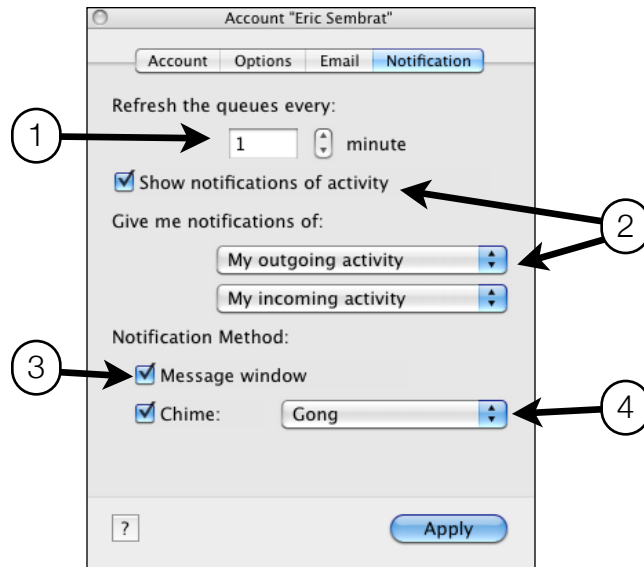


The following window appears:



Note that the IP address specified should be the local IP address for the Fax Server within a local area network (LAN). For setup outside a LAN, a static (or “external”) IP address must be specified to access the Fax Server.

Navigate to the fourth tab, ‘Notification’, to set up the 4-Notify notification tool.



The following configuration options are available:

1. Choose how often you want 4-Notify to check the Fax Server for new faxes.
2. Check 'Show Notifications of Activity' and choose which notifications you wish to receive.
3. Check the 'Message window' to have the notification window appear on your screen.
4. Check 'Chime' if you want an audible notification of new faxes. Select the desired sound from the drop down menu.

That's It!

Congratulations, you've configured the general setup for 4-Sight FAX's Client! For more information regarding these options, refer to the Fax Client Manual.

Questions? Comments?

Questions about this guide? Feel free to contact us at support@softsinc.com with any questions, comments, or suggestions.