SimplyCast

FAX USER GUIDE

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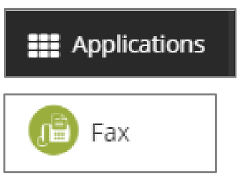
Overview

The SimplyCast Fax channel provides organizations with a communication tool that can be used to send information to others with or without an internet connection. Faxes can be sent without ever having to touch a fax machine as SimplyCast allows you to create, send, and manage your fax campaigns entirely through your computer.

With a simple drag-and-drop editor, create and design your fax within SimplyCast, or simply upload a PDF you have previously created and saved to your device. Fax is an invaluable mode of communication, as it allows management to send sensitive documents over a secure line of communication.

Fax Dashboard



In order to set up and send a fax campaign in the SimplyCast platform, first you will need to go to the Fax dashboard. Fax can be found in the top bar in the Applications dropdown menu. From here, you will be brought to the main Fax dashboard where you are able to create a new project, copy an existing project, see a list of all the fax campaigns that have already been created, sent out, or are pending activation.

From the Fax dashboard, you are able to:

Create a New Fax Campaign

If you wish to create a new fax campaign, there is a green Create Campaign button at the top of the Fax Dashboard.

Clicking this button will bring up the naming pop-up window where you can name the campaign before moving onto the main fax campaign creation and scheduling process. Refer to the *Create a New Fax Campaign* section to learn how to create and set up your fax campaign.

View the List of Fax Campaigns

Below the Create Campaign button, you will see a list of all of the fax campaigns you have created, with the most recent appearing at the top. If there are no campaigns listed, this means none have been created yet.

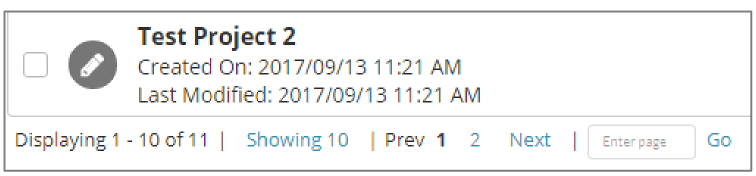
You will be able to see the following pieces of information:

- **Campaign Name:** The name you gave your fax campaign
- **Created On:** The date the campaign was created
- **Last Modified:** The date the campaign was last modified
- **Edit:** A blue button containing options to either Edit, Copy, Rename, or Delete a fax campaign draft
- **Copy:** A blue button containing options to either Copy, Rename, View Reports, or Delete the completed fax campaign

Navigate Multiple Pages of Fax Campaigns

To view a fax campaign that does not immediately appear in the list:

- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of fax campaigns created.
- To show more fax campaigns, click the “Showing” button to change the amount of campaigns displayed.
- To jump to a certain page, enter the page number in window next to the page numbers and click ‘Go.’

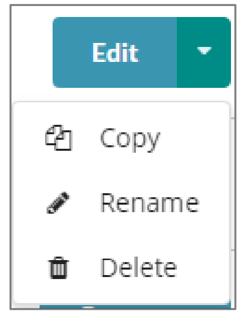


Search Fax Campaigns

If you are looking for a particular fax campaign you have created, you can search through your campaigns in the list on the Fax dashboard by:

- Selecting the search box that appears in the top right-hand corner of the page.
- Type in the text you would like the system to search and the list will automatically filter.
- To remove the search filter, delete all the text in the search box.

Edit / Copy / Rename / Delete Fax Campaigns



Once you have created a fax campaign draft, a blue Edit button will appear to the far right of the fax campaign on the Fax dashboard.

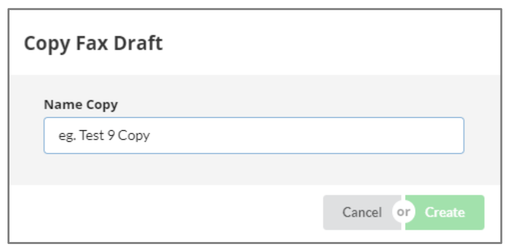
To edit a fax project:

- Click the blue Edit button located at the far right of the screen across from the corresponding campaign name.

Note: Only fax campaigns that have a gray, circular icon with a pencil will have this blue Edit button. Sending Fax campaigns will have a blue, circular icon with a paper airplane, and completed fax campaigns will have a green, circular icon with a checkmark.

- Make your edits in the campaign editor and click Save at the bottom of the page to save your edits. Or, click Back to Dashboard to return to the main Fax dashboard without making any changes.

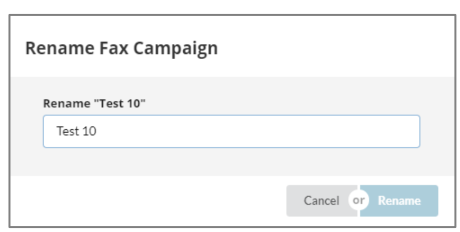
To copy a fax campaign:



- Click the arrow attached to the blue Edit button that appears to the right of the fax campaign name
- Once you have clicked the button, click the Copy option from the small dropdown that appears
- A pop-up window will appear where you can type in the name you would like to give to the copy.
- When you have entered a name, click the green Create button to create the copy or press the gray Cancel button at the bottom of the pop-up window to stop the duplication and not be taken to the Fax Editor for the copied campaign.

Note: You can copy the structure of already-sent fax campaigns. Locate the blue Copy button to the right of the campaign name (in the place of the blue Edit button) and give the copied campaign a new name in the pop-up window that appears when the button is clicked.

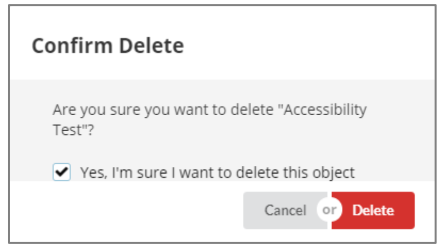
To rename a fax campaign:



- Click the white arrow attached to the blue Edit button that appears to the right of the fax campaign name.
- Once you have clicked the button, select the Rename option from the dropdown that appears.
- A pop-up window will appear where you can enter a new name for the campaign.

- Click the blue Rename button at the bottom of the pop-up to finish renaming the campaign, or Cancel to close the pop-up without renaming the fax campaign.

To delete a fax campaign:



- Click the arrow attached to the blue Edit button that appears to the right of the fax campaign name.
- Once you have clicked the button, click the Delete option from the small dropdown that appears.
- A pop-up window will appear confirming your intent to delete the project. To confirm the deletion, click the checkbox.
- To finalize the deletion, click the red Delete button at the bottom right-hand corner of the pop-up window or cancel the deletion by clicking the gray Cancel button.

Note: Delete multiple fax campaigns at once by selecting the checkboxes located to the left of the campaigns you wish to delete, or select all campaigns by clicking the checkbox to the left of the green Create Campaign button. A red Delete Campaign(s) button will appear to the right of the green Create Campaign button that can be clicked to delete the selected project(s).

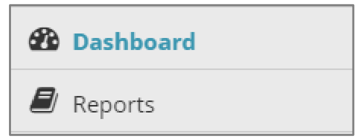
Abort a Fax Send

When you have a fax queued to send, the icon next to the fax project's title will change to blue with an image of a paper plane as it prepares to send. If you've made an error or would like to stop the send, you can do so now by aborting the send.

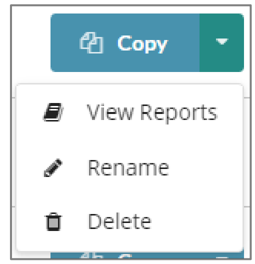
To abort a fax send:

- Click the red Abort button located to the right of the fax project's title, where the blue Edit button used to be.
- A pop-up window will appear confirming you want to abort the send. To confirm, click the checkbox.
- Click the red Abort button at the bottom right-hand corner of the pop-up window or cancel the abortion by clicking the gray Cancel button.

Access Fax Reports



To view the report for any fax campaign that has been sent out, enter the Reporting interface by navigating to the list of tabs on the left-hand side of the screen in the Fax dashboard. Click the Reports tab which will take you to the Fax Reporting page where all the information received for completed fax campaigns will be displayed.



Note: For completed Fax campaigns (those with the green, circular checkmark icon) you can access the report for that campaign by clicking the arrow next to the blue Copy button across from the campaign name and selecting the View Report option that appears in the dropdown menu.

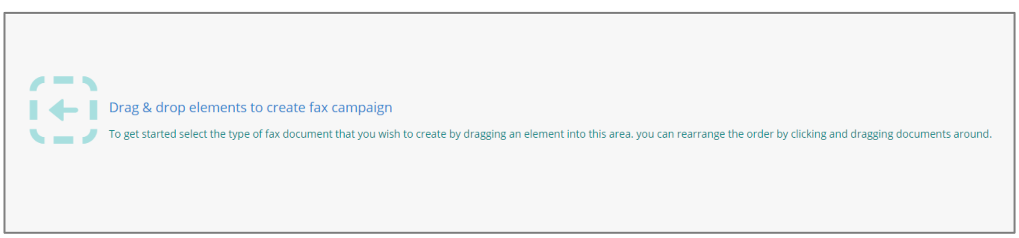
For more information about fax reports, refer to the *Reports* section.

Create a New Fax Project

After clicking on the green Create Campaign button in the Fax Dashboard, a pop-up window will appear asking you to name your new fax project.

Click the green Create button located at the bottom right of the pop-up once you have provided a name to proceed to the main setup page or click the gray Cancel button to return to the main Fax dashboard without creating a new project.

When you arrive at the Fax Setup page, you will see the workspace in the center containing the drag-and-drop instructions with two columns on either side: Add Element (on the left) and Settings (on the right):

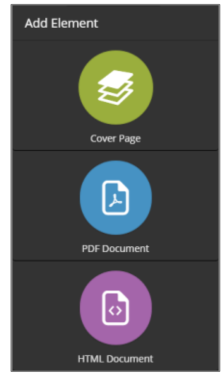


- **Add Element:** You can create a cover page for the fax, upload a PDF, or build a document using HTML or text.
- **Settings:** This column provides an overview of information pertaining to your send. It includes the name of the project, the number of elements in the campaign, the page amount, and the ability to preview and save the campaign.

To save your campaign, click the green Save button at the bottom of the Settings column.

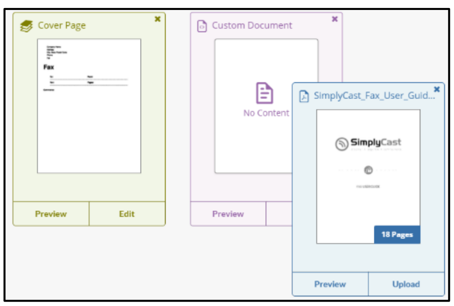
To begin setting up your fax campaign:

Choose Your Fax Types and Order



On the Fax Setup page, you can add a new fax document by clicking and dragging one or more of the three options available in the Add Element column:

- **Cover Page:** A document often sent in advance of the main document as a preface to let the recipient know what they are about to receive and from whom.
- **PDF Document:** A pre-created document saved as a PDF file.
- **Build a Document:** A document you can create within the application using HTML or text elements.

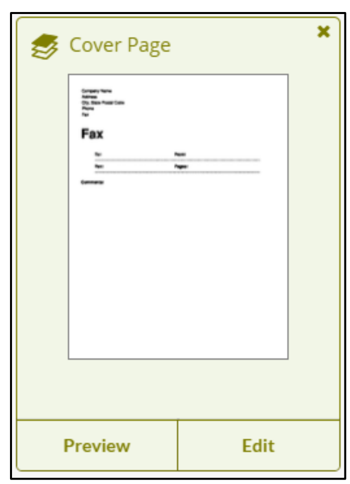


Re-order your documents in the workspace by clicking and dragging them within the space until you are satisfied with the sending order. The first document you wish should be placed in the top left-hand corner of the workspace.

Note: You are able to drag in multiples of the same document type, for example, a cover page followed by three PDF documents.

Configure Fax Documents

To configure a fax document that you have dragged and dropped into the workspace, click the Edit or Upload buttons under the respective document.

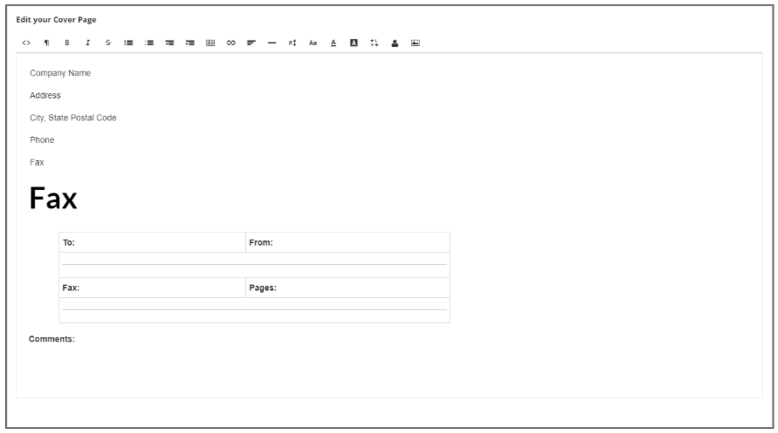


Cover Page

Clicking the green Edit button on the Cover Page option will open the Cover Page setup where you can create and/or edit the cover page of your fax document.

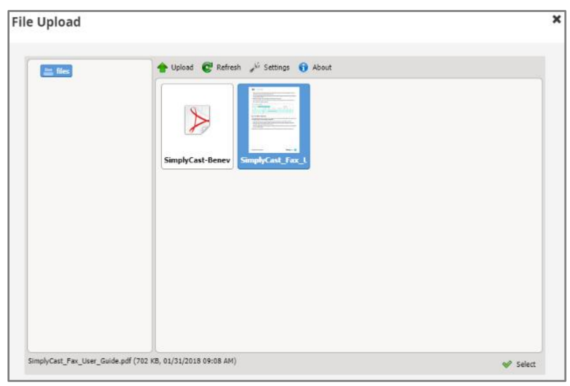
From this window:

- Either use the cover page template provided to fill in the necessary information or customize your cover page with the text editor tools available at the top of the window.
- Among these custom options, you will notice a Merge button, which allows you to add merge tags to your fax document. Merge tags help personalize the fax to each recipient by pulling the relevant information from their CRM profile and replacing the merge tag text with this information. By clicking the Merge button, you are provided with a list of merge tag options you can add to the cover page such as the recipients' name, address, or company.



- Once you have finished configuring your cover page, click the blue Complete Editing button located at the bottom of workspace to automatically save and return to the fax workspace.

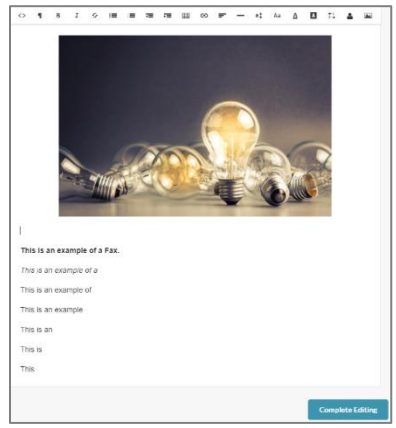
PDF



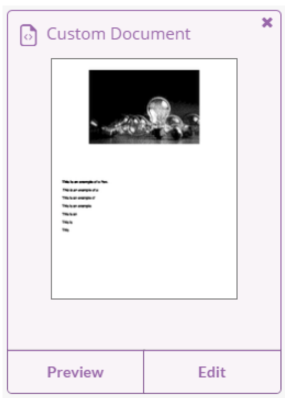
Upon dragging in a PDF document, a File Uploader pop-up window will appear where you are able to choose the file from your device that you would like to add to your fax send. Or, clicking the blue Upload button at the bottom of the element will also bring up this pop-up window. In the right side of the pop-up window you will see a list of PDF files that have been uploaded by your account that you can choose from if desired. If there are no options available in this list, or you would like to upload a new PDF document, click on the Upload button that appears at the top of the pop-up window and choose the file from your device. The PDF will be added to the File Uploader pop-up.

Once you have uploaded your file, click the Select button at the bottom right of the pop-up window to add the PDF file to your document. The PDF Document element in your fax project will now show your selected PDF as well as the number of pages it contains.

Build a Document



Upon dragging in a Build a Document element and clicking the purple Edit button the document creation workspace will appear where you can create and/or edit a fax document using a variety of text-based and HTML tools available, including images.

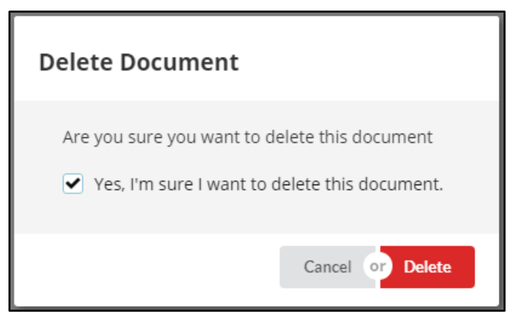


Like editing a cover page, you are able to add merge tags to your fax as well as images, links, and other special characters.

Click the blue Complete Editing button located at the bottom of workspace to automatically save and return to the main fax setup process.

Delete a Fax Element

To remove a fax element from your campaign:



- Click the "X" button located at the top right of the element you wish to delete. A pop-up window will appear asking you to confirm the deletion of the element.
- Check off the box in the pop-up window and click the red Delete button to delete the element.
- Or, click Cancel to close the pop-up window without deleting the campaign element.

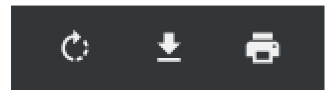
Preview Your Fax Campaign

Once you have finished creating your fax content, you are able to preview how each page will look as well as the overall campaign.

To preview a fax document:

- Locate the Preview button underneath any of the created fax documents, next to the Edit button (or Upload in the case of a PDF document).
- When you click this button, a drawer will appear showing the document's contents.
- To view an example of how any merge tags you included will appear to a contact, click on the dropdown menu appearing at the top of the Preview window and choose a contact list to use in order to view a merged preview.

- To download, print, or rotate the document, hover over the top of the document window and select the turning circle (rotate), downward arrow (download), or printer (print).



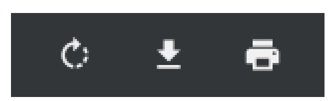
- To zoom in and out of a document preview, hover over the document and select the white, circular + and – buttons near the bottom of the preview. To fit the document to either the width or the page, click on the third white, circular button with the image of four page corners.

- When you have finished viewing the document, click the blue Exit button at the bottom right corner of the drawer to return to the main campaign page.

To preview the entire fax project:

- Locate the blue Preview Campaign in the Settings column on the right-hand side of the screen in the Settings section.
- When you click this button, a drawer will appear showing each page of your fax in the order they will be sent.
- To view an example of how any merge tags you included will appear to a contact, click on the dropdown menu appearing at the top of the window and choose a contact list to use in order to preview a merged copy of the fax with a sample insert of the merge tag's information

- To download, print, or rotate the document, hover over the top of the document window and click the turning circle (rotate), downward arrow (download), or printer (print)



  - To zoom in and out of a document preview, hover the document and select the white, circular + and – buttons near the bottom of the preview. To fit the document to either the width or the page, click on the third white, circular button with the image of four page corners
  - When you have finished viewing the document, click the blue Exit button at the bottom right corner of the drawer to return to the main campaign page.

Configure Send Settings

Once you are satisfied with the content of your fax project, click on the black Next button located at the bottom of your screen to proceed to the next page of the Fax setup process. This is where you'll be able to configure your send settings, select your contact lists, schedule the fax project, and set sending restrictions.

To begin configuring your send settings:

- Enter a sender name in the corresponding field located in the field at the top of the screen. This is the name the fax will be indicated as having been sent from. This is a mandatory field.

- Next, in the field beside the Sender Name field, enter your sender number, which allows you to specify where the fax appears to be coming from.

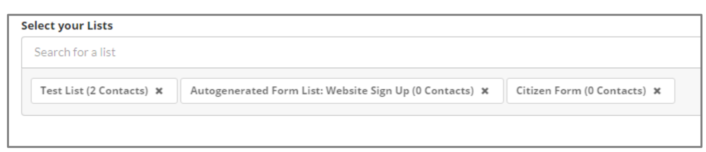
Note: For example, if you would like the fax to appear as if it came from your office, this is where you would input your office's fax machine number. However, it will still be the SimplyCast system that will be sending the fax.

- Then, set your redial limit by using the dropdown menu provided next to the Sender Number field. This number reflects the number of times the system will re-attempt to send the fax in the event of a failure. Two retries is the maximum number allowed.

Choose Your Contact Lists

Once you have finished entering your sender name, sender number, and redial limit, you can choose which contacts you wish to receive your fax.

To select a contact list:



- Click the Search for Lists field underneath Select Your Lists and a dropdown will appear with your existing contact lists. You can also enter the name of the list you are looking for.
- From the dropdown, select the contact list(s) to send the fax to.

- When you have selected your list(s), close the dropdown menu by clicking outside dropdown menu. The contact list(s) you have chosen will appear beneath the Select Your Lists textbox.

Note: To deselect a contact list, click the small “X” on the right side of the list name you wish to remove.

The total number of selected contacts (i.e. the contacts that have a fax number listed in their profile) and the total number of lists is automatically calculated on the right, underneath your selected contact lists.

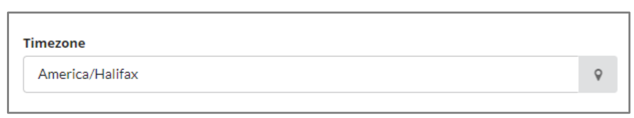
If you do not have any contact lists already created in your CRM, no lists will be present in the dropdown menu. To create or upload a contact list, refer to the *SimplyCast CRM User Guide* for more information.

Schedule Your Fax Campaign

After selecting the contact lists you want to send to, you can schedule the fax to send.

There are two ways you can choose to send your fax campaign:

- **Send Now:** Clicking this radio button will cause your fax to begin sending the moment the setup process is complete.
- **Schedule:** Clicking this radio button will allow you to choose when you would like the fax campaign to be sent. Once this option is selected, additional fields will appear below the sending options where you can select the day, time, and time zone in which you would like the fax to be sent using the dropdown menus provided.



Note: To segment fax sends, apply percentage splits and timed delays to fax campaigns in the SimplyCast 360 channel. Refer to the *SimplyCast 360 User Guide* for more information.

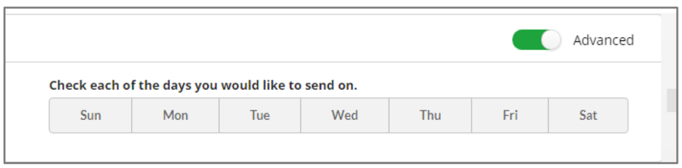
Enable Sending Restrictions

The last section of the fax setup process is where you have the option to configure any sending restrictions you may require. Sending restrictions help the system determine exactly when it is allowed to send faxes to selected contacts. This is an optional step in the setup process and may be skipped if desired.

To enable sending restrictions for your fax campaign:

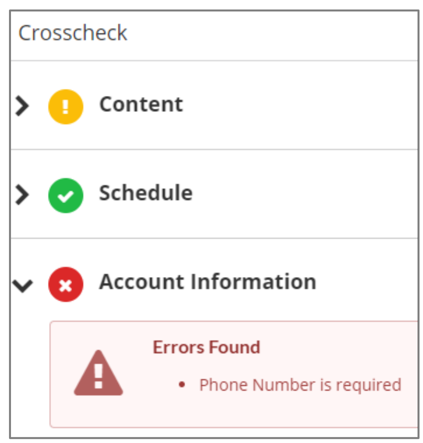
- Click on the red Default toggle that appears on the right side of in this section, so it is positioned on the right-hand side, green, and re-labeled Advanced.
- Once the toggle is positioned, more fields will appear in the section below. The first set of fields allows you to restrict your fax sending to a specific window of time determined by clicking on each of the time fields and selecting your desired times from the dropdown that appears.

- You can further restrict your fax sending to certain days of the week. Click on the days of the week you want to your campaign to be sent on to restrict the sending to those days.



Review the Campaign's Crosscheck

Once you click the Next button to complete the campaign setup, a crosscheck page will appear to let you know if you have configured your campaign correctly and whether there are any sections that need to be fixed before the campaign can send. There are three different colored icons that you may see:



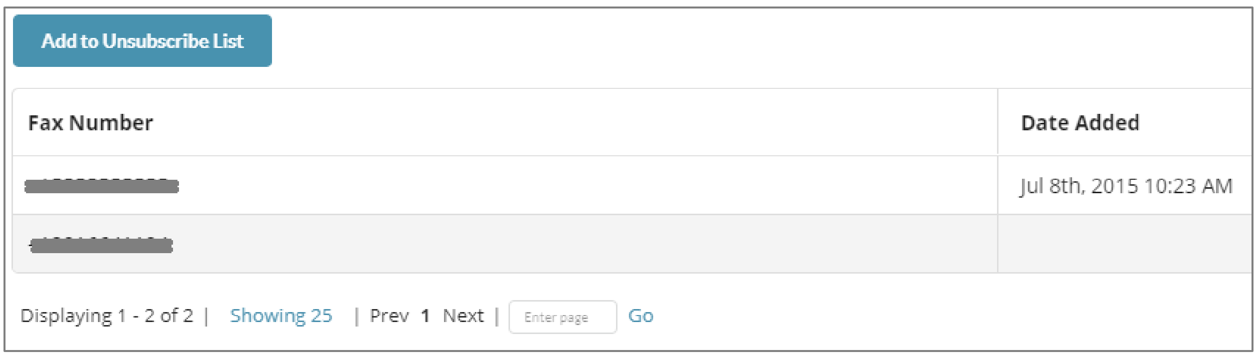
- **Green with a check mark:** If the circle icons next to each section are green, the campaign can be sent.
- **Yellow with an exclamation point:** If there are yellow circles, that means there is a minor issue with the campaign but it can still be sent.
- **Red with an "X":** Red circles mean you must go back into the campaign and make the necessary changes before the campaign can be sent.

Each crosscheck section will explain any issues that were encountered and provide you with a blue Edit button, which will take you back to that section to fix any errors.

Note: Click the black Complete button located on the bottom right-hand corner of the page once your campaign is clear to send.

Unsubscribes

Selecting the Unsubscribes tab in the left-hand menu will direct you to the Fax Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add fax numbers to this list.



Note: You may not contact anyone in the unsubscribe list per SimplyCast's Terms and Conditions.

In the Unsubscribe List, there are seven fields:

Email Address: The email address added to the unsubscribe list

Date Added: The date the email address was added to the unsubscribe list

Hard Bounce Date: The date the email address hard bounced, if applicable.

Actor Who Unsubscribed: The individual who unsubscribed the contact (generally, either the contact themselves or an account user)

Source Mechanism: The source mechanism of the unsubscribe (e.g. a link in an email or the Unsubscribes tool).

Campaign Type: The type of campaign that the source mechanism was associated with.

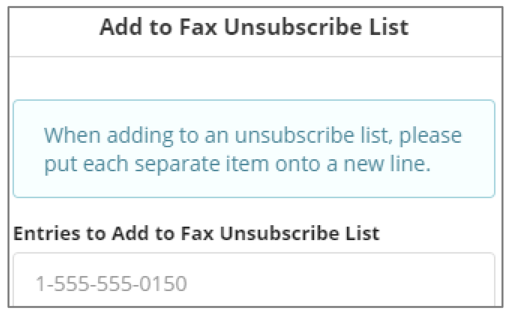
Associated Campaign: The specific campaign that the source mechanism was associated with.

To view a fax number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of fax numbers by clicking the page number you would like to visit. The Next button will take you to the next page of fax numbers or enter the page number in the textbox provided and click Go. Choose how many numbers to display at once by clicking on the "Showing…" link located to the right of the number of displayed fax numbers.

To find a particular fax number, use the search bar located at the top right of the screen above the unsubscribe list. As you type in the name of the number, the results will automatically filter.

To manually add contacts to the fax unsubscribe list:

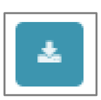
- Click the blue Add to Unsubscribe List button above the fax unsubscribe list.
- In the sidebar on the right side of the screen, type each fax number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.

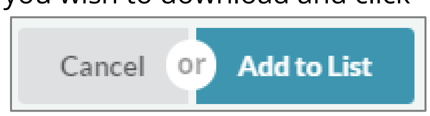


Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

Note: Once a fax number is added to the unsubscribe list, it cannot be removed. The contact can re-subscribe to your sending list through a signup form or another method but cannot be removed from the unsubscribe list manually. This is a security feature added to ensure unsubscribed contacts won't receive messages if they don't wish to.

To download the unsubscribe list, click the blue download button located at the top right of the page. You can choose to download the list as a CSV or XLSX file. You will then be redirected to the Downloads page, where you must click on the list you wish to download and click the blue Download Report button that will become active. The list will be downloaded to the Downloads folder of your device.

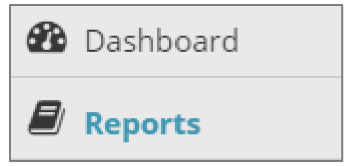




Reports

To view a report for any of your fax campaigns, you must navigate to the SimplyCast Reporting interface:

- Return to the main Fax dashboard.
- Click the Reports option located in the menu on the left side of the screen to be directed to the Reports interface.



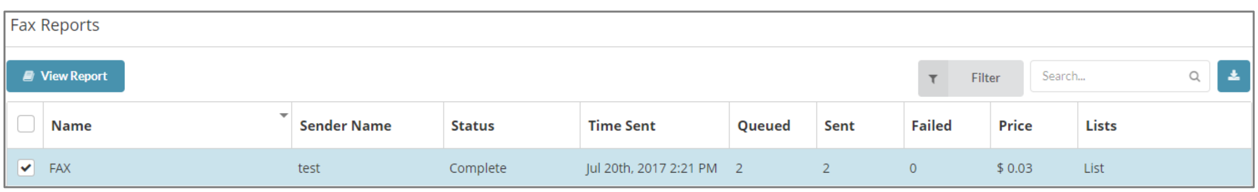
Once in the Fax Reporting Dashboard, you are able to:

View the List of Reports

When you enter the Fax Reports Dashboard, you should see a list of all the faxes you have deployed with the most recent fax being at the top of the list. If there are no fax campaigns in the list, you have not yet created any or none have been sent.

Each report in the list is broken down into nine columns:

- **Name:** The title you gave to the fax campaign when you created it.
- **Sender Name:** The name of the person/organization the fax campaign appeared to be from.
- **Status:** Whether the campaign is scheduled, sending, aborted, active, complete, or Unknown error.
- **Time Sent:** The date and time the fax campaign was sent.
- **Queued:** The number of contacts the fax campaign was queued to send to.
- **Sent:** The number of fax messages that were sent successfully.
- **Failed:** The number of contacts the fax campaign could not send to due to an error.
- **Price:** The cost of the fax project.
- **Lists:** The name of the contact list(s) the campaign was sent to.



Navigate Multiple Pages of Reports

If you have created enough fax campaigns, they will be displayed on multiple pages in the Reports Dashboard. To view a campaign that does not appear on the first page of the list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of fax campaigns by clicking either the page number to visit or the Next button to take you to the next page of campaigns. Enter the desired page of reports in the Enter Page field and press

Go to be

directed to that page of reports. Choose how many fax reports to display at a time by clicking on the "Showing…" link located to the right of the number of displayed reports.

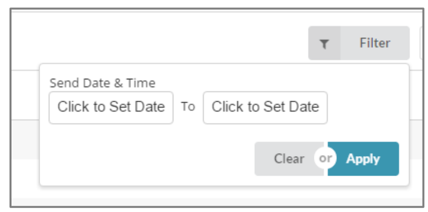
Search Reports

To find a particular fax report, use the search bar located at the top right of the screen above the list of all the reports in the Fax Reporting page.

As you type in the name of the report you are looking for, the results will automatically search.

Filter Reports

You can filter fax reports to show campaigns created or sent on a particular date, at a particular time, or within a certain window of time.

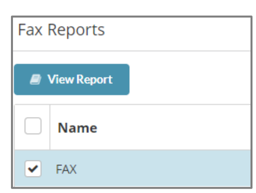


To filter your fax campaigns:

- Find the gray Filter button that is located at the top right-hand side of your screen.
- Click the Filter button and a dropdown menu will appear with two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time where you can manually insert the date and time you would like to filter fax reports from.
- Below these fields there is a calendar you can also use to choose the date to filter reports from.
- Click the blue Apply button to implement the filter. Or, click Clear if you do not wish to filter your reports, which will close the dropdown menu.

Note: When a filter is applied, the formerly gray Filter button will appear green. To remove a filter, click the green button and then select Clear.

View a Report



To view the report of a particular fax project:

- Select the fax campaign to see the report for by checking off the box that appears to the left of the project's name.
- The blue View Report button on top of the campaign list will become active and able to be selected once you have checked off a fax campaign report.
- Click the View Report button to be directed to the report for that fax project.

Overview Tab

The first section you will see in the report of your fax campaign is the Overview tab.

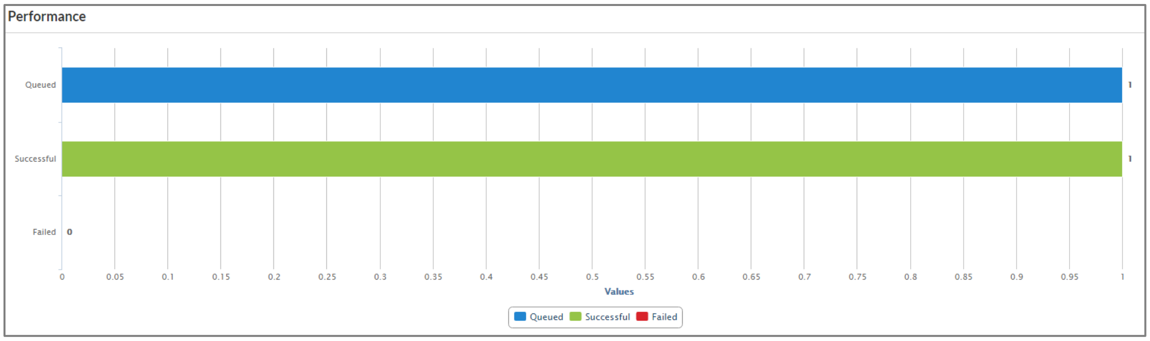
The Overview section will display up to 10 separate boxes with the following information:

- **Sender:** The name of the campaign sender, who the fax appears to be from.
- **Queued:** The number of faxes the system attempted to send.
- **Successful:** The number of contacts your fax campaign successfully sent to until this point.
- **Failed:** The number of contacts the fax campaign reached up until this point.
- **Price:** The cost of sending the fax campaign.
- **Status:** The current status of the fax campaign.
- **Pages:** The number of pages included in the fax campaign.
- **Time Queued:** The date and time the fax campaign was scheduled to send.
- **Time Sent:** The date and time the fax campaign was sent.
- **Time Zone:** The time zone the fax campaign was told to adhere to when sending.

Performance

The second section in the Report Overview Tab is the Performance section, where you can see a graph of which contacts have received your fax message and any messages that failed to reach their destination.

There are three bars visible in this graph:



- **Queued:** A blue bar representing how many faxes were queued to send.
- **Successful:** A green bar representing the number of faxes sent successfully.
- **Failed:** A red bar representing the number of faxes that failed to send.

Lists

The third section in the Report Overview tab is the Lists section. This section is where you can see a breakdown of each of the lists the fax campaign was sent to.

This section is broken down into four columns:

- **Name:** The name of the list you sent the fax campaign to.
- **List Size:** The number of contacts in the list.
- **Queued:** The number of faxes that were queued to send (the numbers of contacts in the list with a sendable fax number).
- **Successful:** The number of faxes that were sent successfully.

Lists

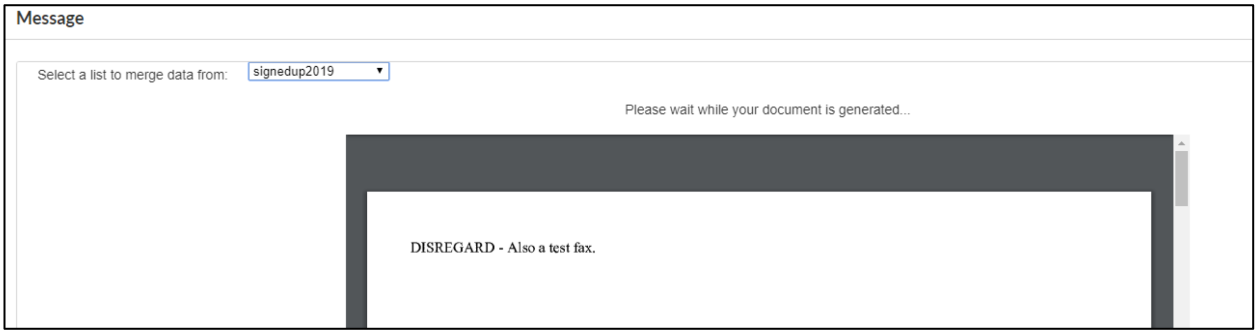
Search...

Name	List Size	Queued	Sent
Test A	3	2	2

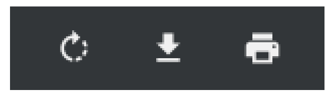
Message

The fourth section in the Report Overview tab is the Message section. This section is where you can see a preview of the fax campaign that was sent. You can also view a merged preview of the campaign.

To view an example of how any merge tags you included will appear to a contact, click on the dropdown menu appearing at the top of the Message window and choose a contact list to use in order to view a merged preview of the document.



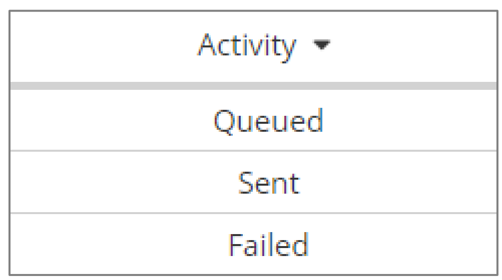
To download, print, or rotate the document, hover over the top of the document window and select the turning circle (rotate), downward arrow (download), or printer (print).



To zoom in and out of a document preview, hover over the document and select the gray, circular + and – buttons near the bottom of the preview. To fit the document to the entire Message section, click on the third white, circular button with the image of four page corners.

Activity Tab

Next to the Overview tab located at the top of the fax report, you will see the Activity tab where, when selected, you can choose from up to three activity options to view the information for:



- Queued
- Sent
- Failed
- Call Attempts

Queued

The Queued section in the fax campaign report displays the contact information pertaining to the messages that were queued to send as part of your fax project.

The section is broken down into 10 columns:

- **Name:** The name of the contact the fax was queued to send to.
- **Fax Number:** The phone number of the fax recipient.
- **Caller ID:** The phone number that shows up on the caller ID of the fax recipient (the sender number).
- **Message:** Whether or not the fax was delivered successfully.
- **Attempts:** The number of tries the system required to send the fax.
- **Last Attempt:** The date and time the most recent delivery attempt was made.
- **Price:** This displays the cost of the fax.
- **List:** This is the list the fax recipient belongs to.
- **Job Time:** How long the campaign took to send.
- **Connection Time:** How long the system took to connect to the receiving fax machine.

Activity: Queued

Search...

Name	Fax Number	Caller ID	Message	Attempts	Last Attempt	Price	List	Job Time	Connection Ti...
Alexander Jone...	[redacted]		Successful	1	Jul 20th, 2017 2:...	$ 0.00	Test A	1:1	0:59
Alexander Jone...	[redacted]		Successful	1	Jul 20th, 2017 2:...	$ 0.03	Test A	0:47	0:47

Displaying 1 - 2 of 2 | Showing 25 | Prev 1 Next | Enter page Go

Sent

The Sent section in the fax campaign report displays the contact information pertaining to the messages that were sent successfully as part of your fax project.

The section is broken down into nine columns:

Activity: Sent

Search...

Name	Fax Number	Caller ID	Attempts	Last Attempt	Price	List	Job Time	Connection Time
Alexander Jones	[redacted]		1	Jul 20th, 2017 2:...	$ 0.00	Test A	1:1	0:59
Alexander Jones	[redacted]		1	Jul 20th, 2017 2:...	$ 0.03	Test A	0:47	0:47

Displaying 1 - 2 of 2 | Showing 25 | Prev 1 Next | Enter page Go

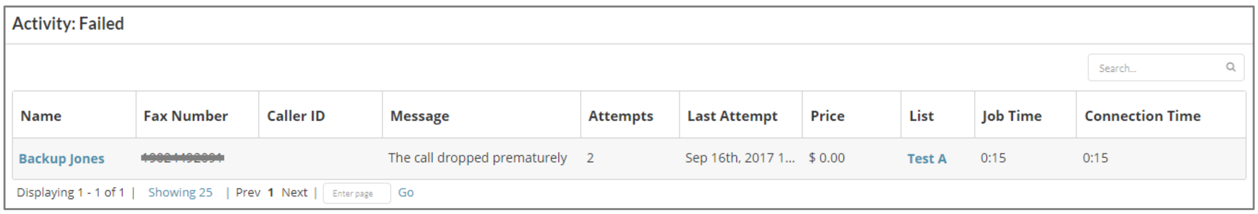
- **Name:** The name of the contact the fax was sent to.
- **Fax Number:** The phone number of the fax recipient.
- **Caller ID:** The phone number that shows up on the caller ID of the fax recipient (the sender number).
- **Attempts:** The number of tries the system required to send the fax.
- **Last Attempt:** The date and time the most recent delivery attempt was made.

- **Price:** The cost of the fax.
- **List:** The list the fax recipient belongs to.
- **Job Time:** How long the campaign took to send.
- **Connection Time:** How long the system took to connect to the receiving fax machine.

Failed

The Failed section in the fax campaign report displays the contact information pertaining to the faxes that failed to send as part of your fax project.

The section is broken down into 10 columns:


Activity: Failed

Search...

Name	Fax Number	Caller ID	Message	Attempts	Last Attempt	Price	List	Job Time	Connection Time
Backup Jones	[redacted]		The call dropped prematurely	2	Sep 16th, 2017 1...	$ 0.00	Test A	0:15	0:15

Displaying 1 - 1 of 1 | Showing 25 | Prev 1 Next | Enter page Go

- **Name:** The contact the fax was queued to send to.
- **Fax Number:** The phone number of the fax recipient.
- **Caller ID:** The phone number that shows up on the caller ID of the fax recipient (the sender number).
- **Message:** Any error message that may have appeared when the fax failed to send.
- **Attempts:** The number of times the system attempted to send the fax.
- **Last Attempt:** The date and time the most recent delivery attempt was made.
- **Price:** The cost of the fax.
- **List:** The list the fax recipient belongs to.
- **Job Time:** How long the system used to try to send the fax.
- **Connection Time:** How long the system used to try to connect to the receiving fax machine.

Call Attempts

The Call Attempts section in the fax campaign report displays a record of the total number of call attempts made by the system when attempting to send faxes, as well as the result of each attempt.

The section is broken down into seven columns:

- **Contact Name:** The name of the contact the fax attempted to send to.
- **Fax Number:** The phone number of the fax recipient.
- **Result:** Whether the call attempt was successful or not.
- **Connection Time:** The length of time the system was connected to the receiving machine.

- **Pages Sent:** The number of fax pages that were sent with the call attempt.
- **Price:** The cost of the fax.
- **Send Time:** The date and time the call attempt was made.

Activity: Call Attempts

Search...

Contact Name	Fax Number	Result	Connection Time	Pages Sent	Price	Send Time
erin	1902[redacted]	Complete	0:34	1	C$ 0.0300	Jan 14th, 2020 10:57 AM

Displaying 1 - 1 of 1 | Showing 25 | Prev 1 Next | Enter page Go

Possible Error Codes

When a mass fax is sent unsuccessfully, the receiving machine provides an error message output to let the bulk fax service understand the reason for the failure. This error message, or error code, helps the online fax broadcasting service determine whether or not the recipient's number should be retried, delayed, or removed. Within your fax reports you'll find a Failed section, as seen in the section above.

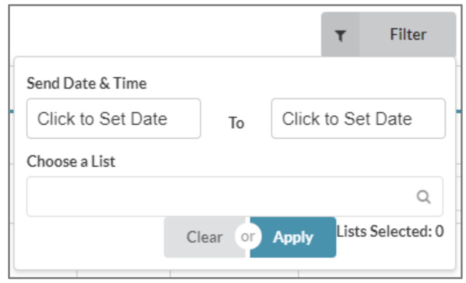
Some possible error codes you may encounter are:

- **Connection failed:** There was no receiver on the other end of the call to connect to.
- **Document generation error:** There was an error while generating the document. This could be due to the file being deleted before the sending.
- **Failed to train with any of the compatible modems:** A remote fax machine was detected, but the sending and receiving modems could not establish communication.
- **Fax transmission not established:** The system could not detect a remote fax machine. This could be due to there being no fax machine on the receiving end, or a lack of call clarity.
- **Log entry lost:** The call started, but the log entry for the call was lost/incomplete. In practice, this should be rare and may indicate a system problem.
- **No response after sending a page:** The remote fax machine did not acknowledge that a fax page was received. Depending on the remote machine's behavior, it may still have printed the page along with any preceding pages.
- **Received no response to DCS (Digital Command Signal) or TCF (Training Check Frame):** The bulk fax service could not successfully determine the remote machine's fax capabilities.
- **The call dropped prematurely:** The call dropped due to a non-fax transmission error. It is likely the receiver hung up.
- **The HDLC (High-level Data Link Control) carrier did not stop in a timely manner:** The fax service initiated a fax transmission with the receiver, but there was a synchronization (timing) error that could not be resolved.
- **Timed out waiting for initial communication:** A call was established with the receiver and

the online fax broadcasting service attempted to establish a fax session, but there was no response from the receiver. This could be due to there being no fax machine on the receiving end, or a lack of call clarity.

- **Timed out waiting for first message:** A call was established with the receiver and the bulk fax service attempted to establish a fax session, but there was no response from the receiver. This could be due to there being no fax machine on the receiving end, or a lack of call clarity.
- **Unexpected DCN while waiting for DCS or DIS (Digital Information Signal):** The remote fax machine unexpectedly sent a disconnect message when the fax service asked for the remote fax machine's fax capabilities.
- **Received bad response to DCS or training:** An unexpected message was received when the bulk fax service asked for the remote fax machine's fax capabilities.
- **Invalid response after sending a page:** Unexpected message was received after successfully sending a page. Depending on the remote machine's behavior, it may still have printed the sent page as well as any preceding pages.
- **Disconnected after permitted retries:** The fax service attempted to send the same message multiple times unsuccessfully. This may be due to a call clarity issue.
- **Far end cannot receive at the resolution of the image:** The remote fax machine does not support receiving faxes sent at the resolution that our service sends at.
- **Received a DCN from remote after sending a page:** The remote fax machine responded with a disconnect message after a page was sent successfully. Depending on the remote machine's behavior, it may still have printed out the sent page as well as any preceding pages.
- **Unexpected message received:** The fax service received a message that it did not expect given the current context.
- **Received other than DIS while waiting for DIS:** The fax service expected to receive the remote fax machine's fax capabilities but received an unexpected message instead.
- **Unexpected DCN after EOM (End of Message) or MPS (Multi-page Signal):** The remote fax machine disconnected unexpectedly after receiving a page of a multi-page fax. Depending on the remote machine's behavior, it may still have printed the sent page as well as any preceding pages.
- **Document loading error:** The fax service attempted to generate the message to send, but a document was missing.
- **Invalid ECM (Error Correction Mode) received from receiver:** The fax service received an invalid error correction message from the remote fax machine.
- **Unexpected DCN after RR/RNR (Receiver Ready/Receiver Not Ready) sequence:** The remote fax machine disconnected unexpectedly after indicating it was not ready to initiate a

fax session.

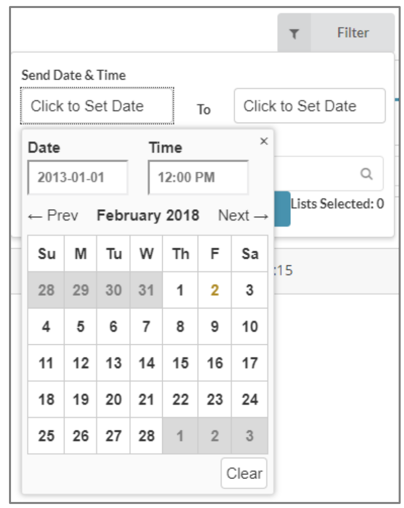


Filter the Report

You can filter your fax report to show faxes sent on a particular date, at a particular time, or within a certain window of time.

To filter your messages:

- Find the gray Filter button that is located at the top right-hand side of your screen, directly above the Activity section.
- Click the Filter button and a dropdown menu will appear with two boxes that say Click to Set Date.
- Click on the Set Date box and another dropdown menu will show up with two fields labeled Date and Time.
- Manually insert the date and time you would like to filter your faxes from.
- Below the Date and Time fields there is a calendar you can also use to choose the date that you would like to filter faxes from.
- You can also filter your report by contact list. Click the Choose a List field and a dropdown of lists will appear that were used in the send. Or, type in the name of the contact list you would like to use to filter the report.
- Options will automatically search.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your report. This will close the dropdown menu.



Note: When a filter is applied, the formerly gray Filter button will appear green. To remove a filter, click the green button and then select Clear.

Download the Report

To download the entire fax report to your device, there is a blue download button located to the right of the Filter button, on top of the Activity tab in the report.

When you click the download button:

- A sidebar will appear from the right of your screen.
- Enter a name for your download into the Name field. Or, leave it as the default name provided.
- Choose to download the report in either CSV or XLSX format by selecting the appropriate option from the File Type dropdown menu.
- Next, you need to decide what information you would like to include in report download. By default, all information is selected but you may not need to download all report information. There are four sections of information available which will each produce a separate report document when downloaded:

  > **Queued:** Clicking this section will open it to display a collection of information fields that can be included in the downloaded file. De-select any unnecessary fields by clicking the “X” button next to the field names in this section. Search for fields to re-add to the download using the search field and associated dropdown menu and select which field(s) to add to the report. Click the toggle button on this section so that it is positioned to the left and colored red to disable this section and not have the Queued report included in the downloaded file.

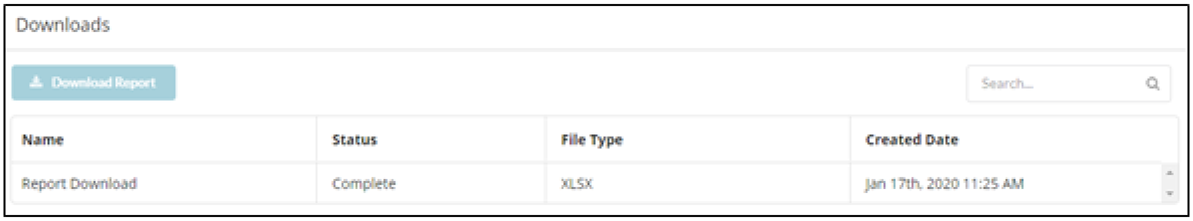
  > **Successful:** Clicking this section will open it to display a collection of information fields that can be included in the downloaded file. De-select any unnecessary fields by clicking the “X” button next to the field names in this section. Search for fields to re-add to the download using the search field and associated dropdown menu and select which field(s) to add to the report. Click the toggle button on this section so that it is positioned to the left and colored red to disable this section and not have the Successful report included in the downloaded file.

  > **Failed:** Clicking this section will open it to display a collection of information fields that can be included in the downloaded file. De-select any unnecessary fields by clicking the “X” button next to the field names in this section. Search for fields to re-add to the download using the search field and associated dropdown menu and select which field(s) to add to the report. Click the toggle button on this section so that it is positioned to the left and colored red to disable this section and not have the Failed report included in the downloaded file.

  > **Call Attempts:** Clicking this section will open it to display a collection of information fields that can be included in the downloaded file. De-select any unnecessary fields by clicking the “X” button next to the field names in this section. Search for fields to re-add to the download using the search field and associated dropdown menu and select which field(s) to add to the report. Click the toggle button on this section so that it is positioned to the left and colored red to disable this section and not have the Call Attempts report included in the downloaded file.

- Once you have determined what information to include in the download file, click the blue Download button at the bottom of the sidebar. Or, click Cancel to close the sidebar without continuing the download.

- You will be directed to the Downloads page with all of your requested downloads in a table showing the name of the report, the status, the file type, and the date it was created.
- Click the report you wish to download and then click the blue Download Report button on this page to complete the download of the report.

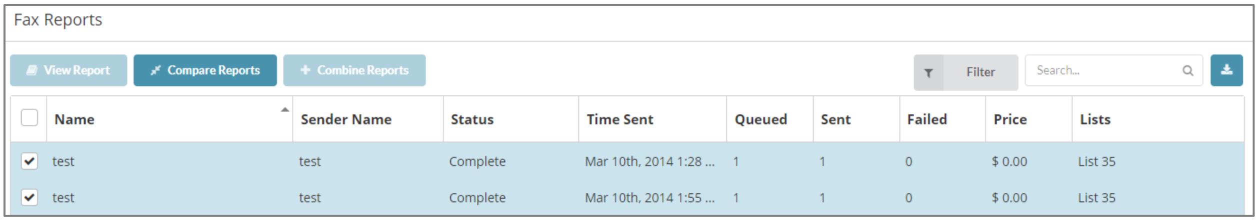


Compare Reports

Compare Reports allows you to have two or more Fax reports placed side by side for a comparative analysis.

To compare multiple fax reports:

- On the Fax Reporting Dashboard, check off the boxes next to the name of the reports you would like to compare.
- When multiple fax campaigns have been checked off, two new blue buttons will appear next to the View Report button at the top of the list of reports.
- Click the Compare Reports button located on the left-hand side of these two new buttons and it will direct you to a copy of the report.
- Please refer to the *View a Report* section for a breakdown of the elements of the report.
- In each section of the report you will see the information from each separate fax campaign displayed one after the other for simple comparison.



Combine Reports

Combine Reports allows you to take two or more fax reports and merge the data together into a single report.

To combine reports in the Fax Reports Dashboard:

- Check off the boxes next to each of the campaign names of the reports you would like to Combine.
- When multiple fax campaigns have been checked off, two new blue buttons will appear next to the blue View Report button at the top of the list of reports.
- Click the Combine Reports button located on the right-hand side of these two new buttons and it will direct you to the merged report.

Please refer to the *View a Report* section for a breakdown of the elements of the report.