TRP Comm vFax

Quick-Start User Guide

Version 0722

Contents

Welcome

Thank you for choosing TRP Communications, Inc. We're excited that you've joined us for a cleaner, greener way to fax.

We want your experience to be positive, smooth and efficient. To help with this, our product is backed with live support to ensure you have the best experience possible. Our support is offered in a variety of options:

- Email: support@trpcomm.com
- Phone: (330) 273-5666

We look forward to hearing from you anytime.

About TRP Communications, Inc.

With over 20 years of experience behind it, TRP Communications has cautiously grown to become a telecommunications leader in Northeast Ohio and the surrounding states. It leads the industry in the installation and sale of phone and communication systems in Ohio.

While faxing is considered by many to be an aging technology, it is still a critical part of our communications systems today. That is why we have built a cloud-based faxing solution that is reliable and easy to use. Please don't hesitate to reach out with thoughts or concerns or to receive help at support@trpcomm.com.

Sending a fax from the secure web application

Sending a fax from the secure web application

Log into your account at https://fax.trpcomm.com/signin

Enter your 10-digit fax destination number in the box next to the flag icon.

You can also use the contact button to simply select a recipient from your contact list. In this case you do not need to type out the fax number, the system will automatically send to the fax number associated with the contact.

Next, you may select the file you wish to upload, drag and drop from your computer, or upload a file from your cloud storage.

Attachments

⬆

Click here or drag & drop your files in this area

Or insert file URL   Upload

Send   ⏱ Send later   👁

If you'd like to include a cover page, simply check the box that says "**include cover page**."

Send fax

Fax Number

🇺🇸 (500) 234-5678   ✕   +   👤

👤 John Snow   ✕

☐ Include Cover Page

Tags

Search tag...   +

If you wish to add a tag to the fax (this will show up in your fax history) simply click in the tag search bar and search or add tags here.

Click the **SEND** button.

That's it! You will see a pop-up notification confirming your fax was sent. You can always check the status of a fax on your Fax History page.

How to schedule a fax to send at a specific day and time

Users can schedule a fax to send at some day or time in the future directly through the web portal utilizing the "Send Later" feature.

Simply compose a fax like you normally would by entering the receiving fax number, using a cover page if you choose, and adding your files to fax.

Then, instead of clicking the main "**Send**" button (which would immediately process and send the fax) you will want to press the "**Send later**" button. This will activate a modal and allow you to enter in the date and time that you wish for the fax to process and send.
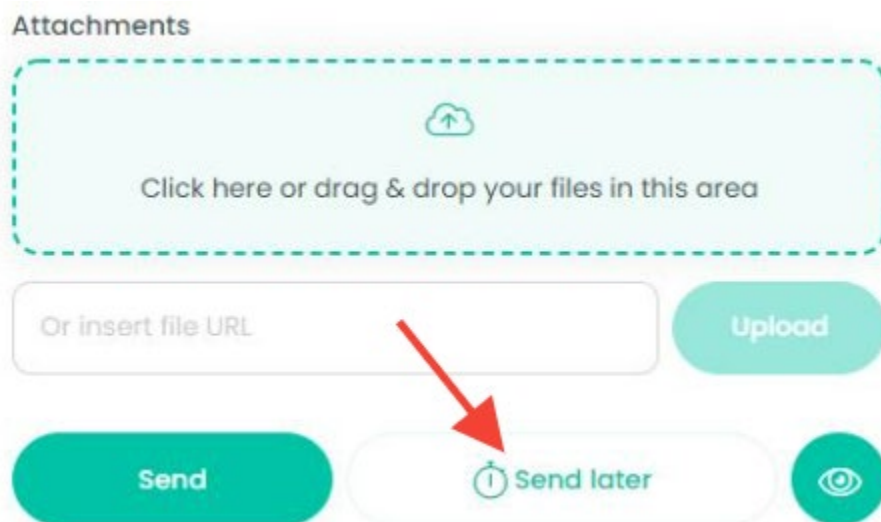
After entering the new date and time, click the "**Send**" button. If nothing further is done the fax will process and send at that time.

The fax will show with a watch icon on your history screen and be available to cancel any time prior to the fax processing. To cancel the fax, check the box to the left of the fax and click the red "**delete**" button at the top.

Receiving inbound faxes

Faxes can be received and viewed in multiple places but the main repository for inbound (and outbound) faxes is on the History page.

Fax history will show a complete record of every single fax received (and sent) from your account.

Fax history is accessible by clicking the "**history**" option on the left panel.

Clicking the filter drop down gives access to further filtering tools where you are then able to refine your searches and filtering using the fields provided.
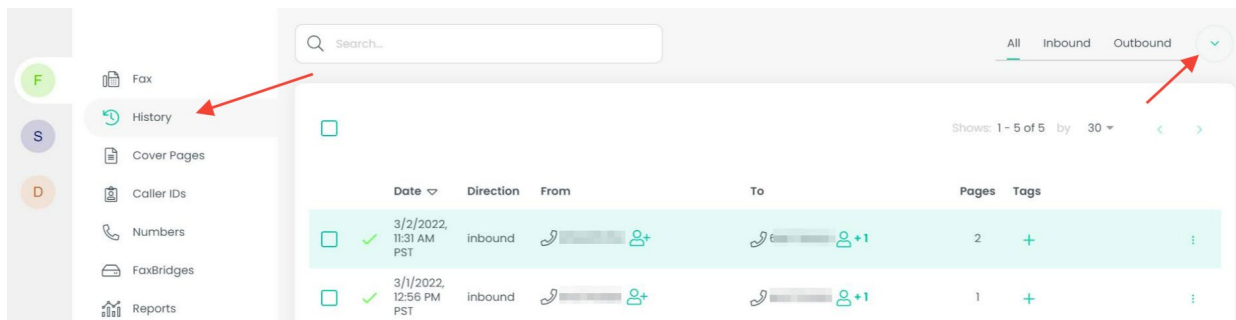
Inbound faxes can also be delivered directly to a user's email address. Using the notification settings, users are able to toggle on the ability for a copy of the fax to be attached to the email notification (Account in top right > Settings > Fax > Email Notifications).

Lastly are the advanced inbound routing features. Faxes can be routed via a webhook to an https endpoint or via an FTP/SFTP destination to a system folder.

These advanced inbound routing features can be set globally at the account level (shown above) or individually by number in the number settings (shown below).

How to send a fax from email

One of the features of Fax is the ability to send and receive faxes right from your email. Below you will find instructions on how to do this.

Note: This feature will only work from an email address associated with an active account in our system.

Addressing the email

To send a fax from email, compose a message from your email. In the To: field, type the 11 digit fax number (ex. 18885551212) followed by @sendfax.trpcomm.com


Note: It is important to always use an 11-digit fax number when formatting the email. This means you need to include a "1" for faxing any number in the USA or CANADA. For international faxing, digits will vary but always include the country code.

Faxes sent via email are limited to 10 recipients or less. Attempting to send to more than 10 recipients will result in an error.

Populating info onto a cover page

If you have your cover page setting turned on, Fax will automatically take details from your email and populate it directly onto a cover page. To turn this feature off, click your initials in the bottom left, select "**Your settings**" on the left, choose your "**fax**" tab, and toggle it off:
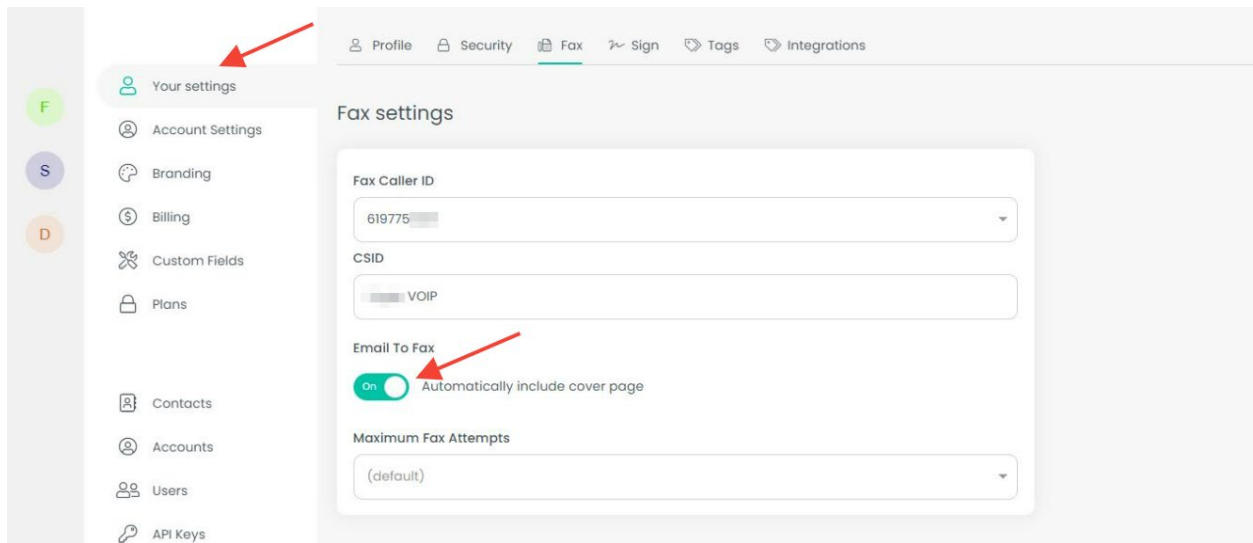
If this setting is enabled, the details you enter into your email will populate onto your cover page.
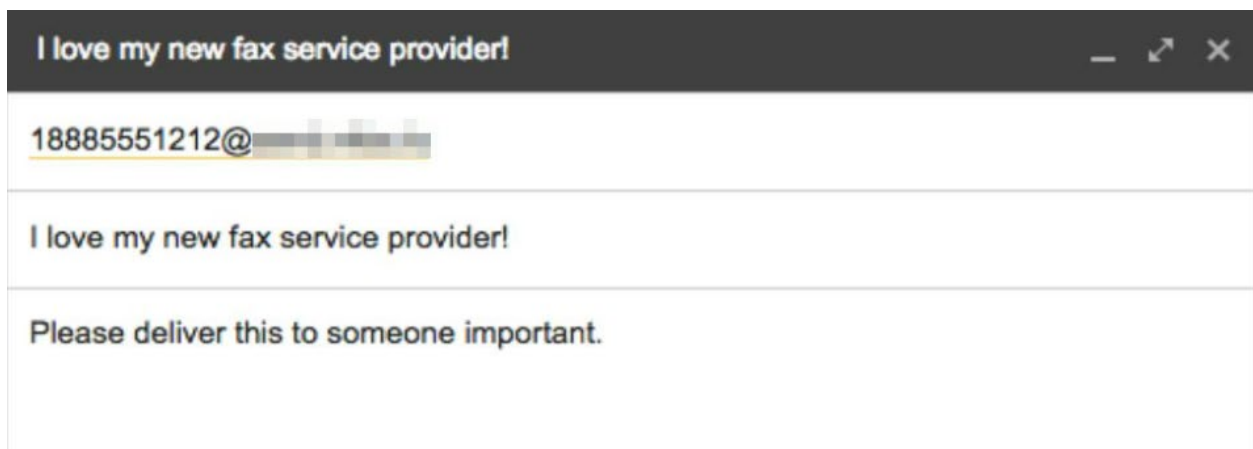
Email subject line will populate RE: field of the cover page. (See screenshot below.)

Body of the email will populate the Comments field of the cover page. (See screenshot below.)

Fax Transmission

To:	18885551212	**From:**	
Fax:	18885551212	**Date:**	5/28/2017 11:08:47 PM PDT
RE:	I love my new fax service provider!	**Pages:**	1

Comments:

Please deliver this to someone important.

Attach your document to fax

When sending a fax from email you can attach multiple document types (see below). You can attach a single document or multiple documents (varying formats is fine) and they will be rendered, converted to a faxable format, and sent to your destination fax number. Max file size is 25MB. Max amount of file attachments is 25.

Once your documents are attached, simply hit "**Send**." That's it! We'll take care of the rest.

Allowed Email Attachments:

Adobe Acrobat Documents (PDF)

Microsoft Office Files (DOC, DOCX, XLS, XLXS, PPT, PPTX)

Open Office Files (ODP, ODS, ODT)

Google Files (GDOC, GSLIDES, GSPREADSHEET)

Text Files (TXT, RTF)

Printer Files (PCL, EPS, PS)

Image Files (TIFF, TIF, GIF, PNG, JPEG, JPG)

Other Files (FXC, FODT, HTML)

Tips: If you create a file using a scanner or print to file, always choose the option of black and white for the output

Print Driver - Getting Started

The Print to Fax driver is a simple Windows application that allows you to send a fax directly from any application that allows you to print.

To get started, you must first download and install the driver.

Installation instructions:

Installing the print driver is simple and only takes a few minutes.
At the end of the installation process you will be prompted to enter an Authorization Key (Token). This token can be created from the web portal in Settings > API Keys (see screenshots below). Click the "**Create**" button:

Type a name for the device you've installed the driver on (you can have multiple devices/keys), click the drop-down menu and select "Print Driver" and click "**Create**." This will create a new token.

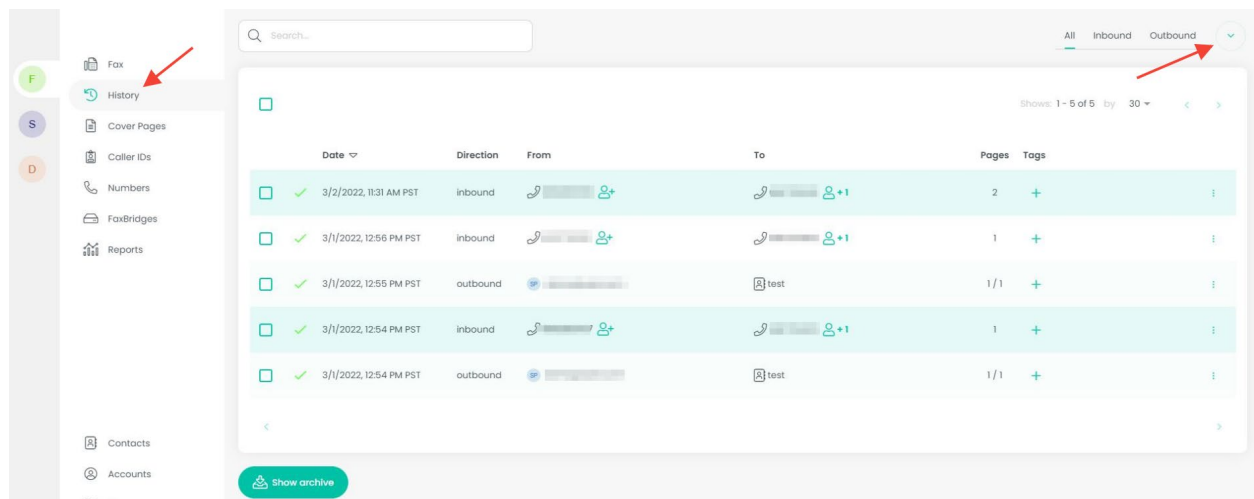Next, click the "**Copy**" button to copy the token to your clipboard.
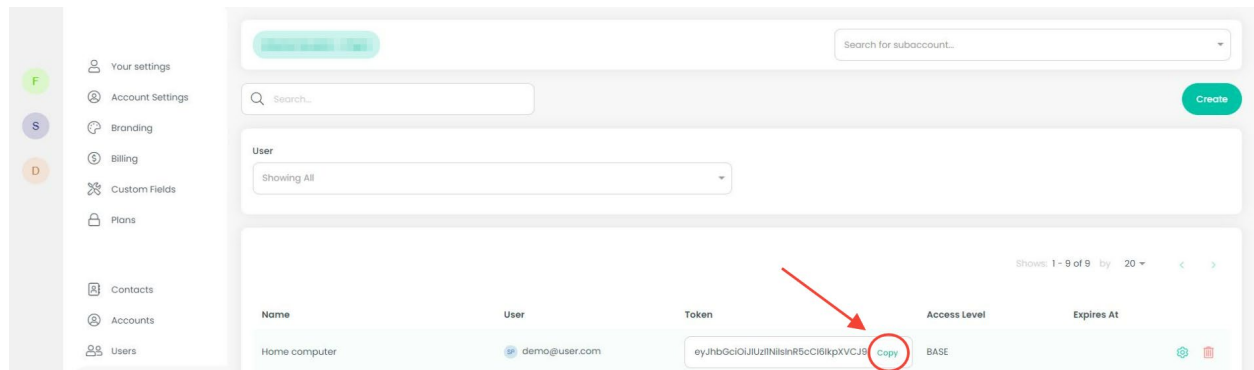
Lastly, paste the key into the field in the print driver setup screen and click "**Authenticate**."

That's it! This will complete the setup of your Print to Fax driver.

How do I view fax history or find a fax?

Click "**History**" on the left panel.

You can choose between viewing All, Inbound or Outbound fax history by selecting the tabs above the grid.

Using the search field will automatically narrow results by your query. Clicking the arrow will drop down the section allowing you even more options to filter by date range, user (if you are an Admin), and status of the fax. Make sure to hit "**filter**" once you're done to save your changes.

How to check the status of a fax

Checking the status of a fax can be done by looking on the History page. This page is accessible from the main view:

The far-left column of each fax will show the status of that fax.

A green check mark means the fax was successful.

| ☐ | ✓ | 10/25/2019 11:56 AM | outbound | king@thenorth.com | +1 760-490-0559 | 1/1 | + | ⋮ |

A red "X" means the fax failed.

| ☐ | ✗ | 12/31/2019 03:38 PM | outbound | king@thenorth.com | +1 202-517-6448 | 0/1 | + | ⋮ |

A spinning yellow arrow means processing.

| ☐ | ↻ | 12/31/2019 03:38 PM | outbound | king@thenorth.com | +1 202-517-6448 | 0/0 | + | |

Users can set up email notifications for both inbound and outbound faxes that will notify them for both successful and failed faxes. These notifications can eliminate the need for users to manually check fax status in the application.

Email notification settings

With Fax we give you the ability to customize how you receive email notifications for inbound and outbound faxes.

These can be set on the account level which will affect all users on the account, or on a user level. **Note:** If you disable notifications on the account level, users will not be able to enable them on the user level. Any admin on the account can adjust the account level email notification settings.

Below is a screenshot of what the email notification settings will look like by default.

Email Notifications

Outbound fax status

All ▼

On ⬤ Include Copy of Sent Fax

Inbound fax status

All ▼

On ⬤ Include Copy of Received Fax

Email To Fax

On ⬤ Send immediate confirmation when sending email to fax

You can set email notifications for inbound and outbound fax status from All to None, Success, and Failure.

None

All

Success

Failure

You can also customize the contents of email notifications by using the toggle button to turn On or Off certain content from being delivered over email.

You will only receive notifications for faxes based on those settings.

Note: To receive inbound fax notifications a user will need to be assigned to the fax number.

Setting Caller ID

First you will click your initials in the bottom left part of your screen. Then click the "**Your settings**" tab.
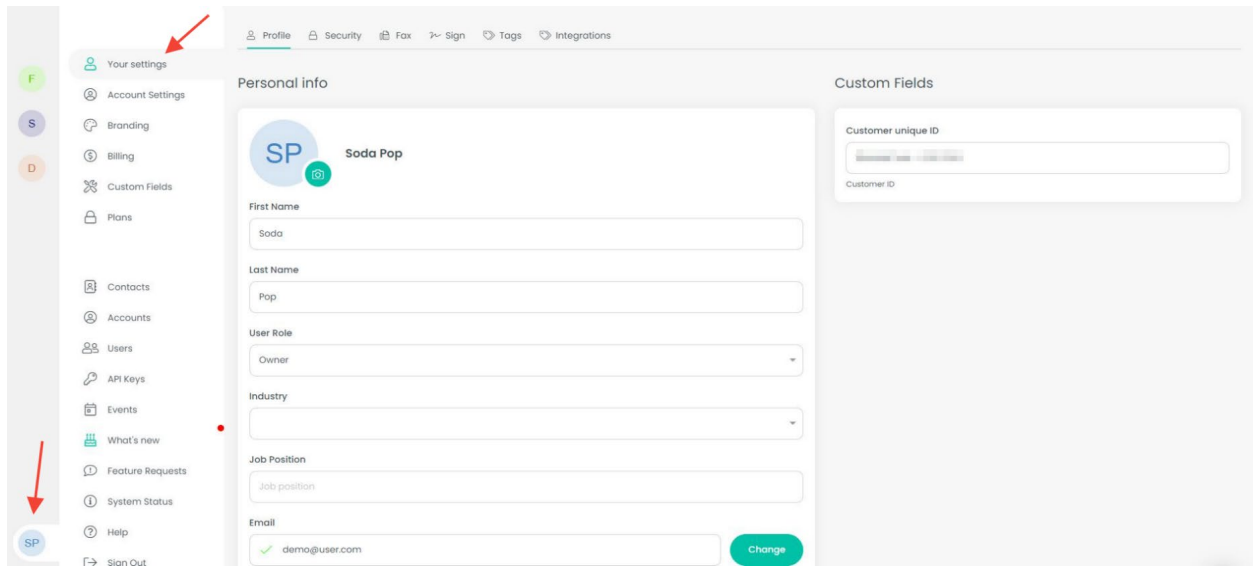
Next, click the "**Fax**" tab at the top. Then you will see "**Fax Caller ID**," and this is where you will put in the fax number that is owned by your account.
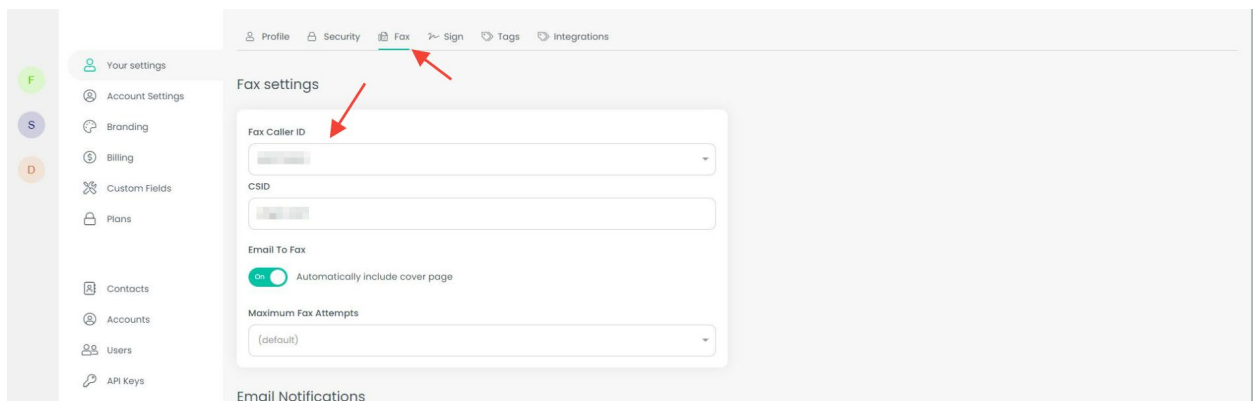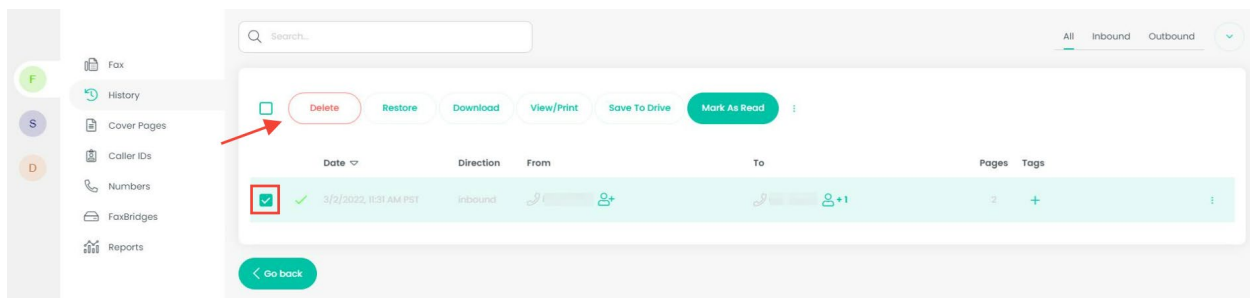

How to delete a fax

Deleting a fax from your history is quick and easy. Just follow these steps:

Go to the history tab in the app. Select the checkbox by the fax you would like to delete, select "**Archive**," then select "**Show archive**" at the bottom.
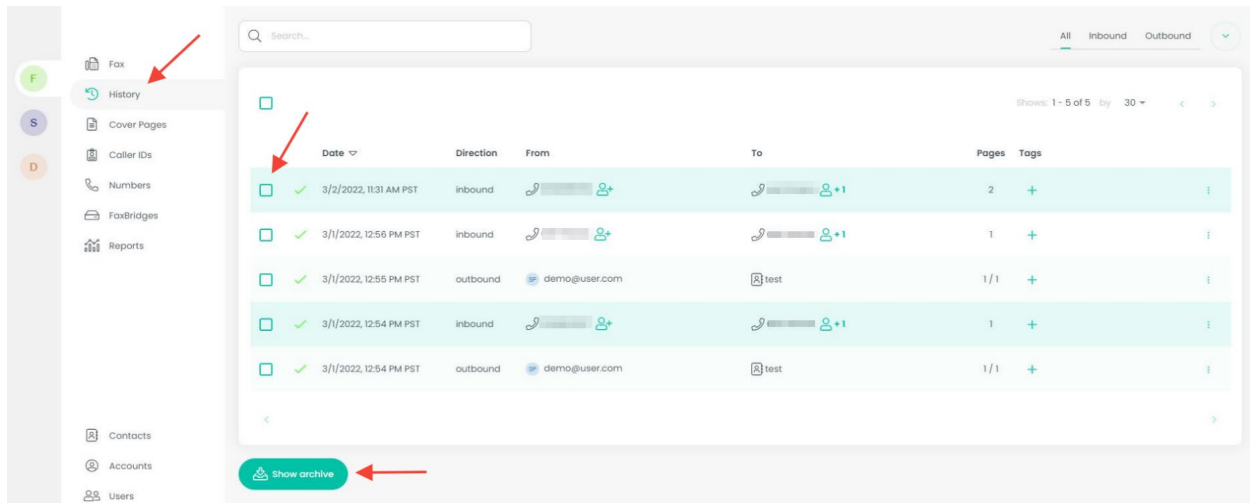
Select the check box for the fax you would like to delete then select "**delete**" at the top.

How to use File Converter

The File Converter is a feature that allows users to upload a variety of different file types and have them converted and downloaded as a single PDF or TIFF.

To get started, click in the file converter box to upload or drag and drop the desired files from your computer.
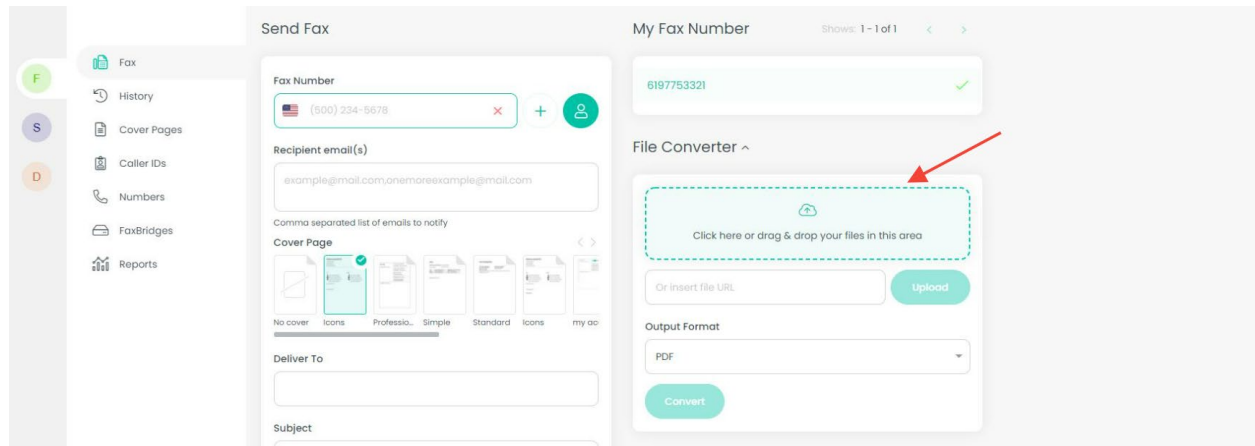
The following file types are supported for conversion:

tiff, gif, png, jpeg, jpg, pdf, txt, rtf, doc, docx, odt, xls, xlsx, ods, ppt, pptx, and odp

Once you have uploaded all of the files you want to convert, simply choose the file type you'd like the doc to be exported as (PDF or TIFF) and click the "**Convert**" button. The new file will be created and will automatically download to your machine.

How to create a contact (address book)

The contacts module can be accessed from the main nav by clicking the contacts icon.
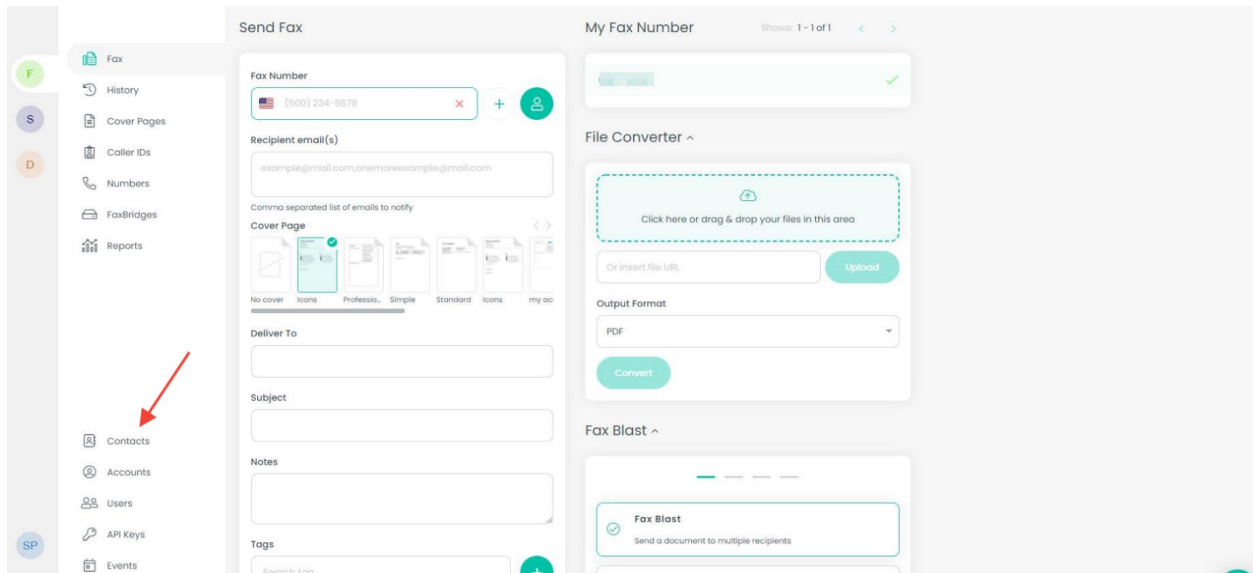
To create a single contact simply click the "**Create**" button and enter the requested information.
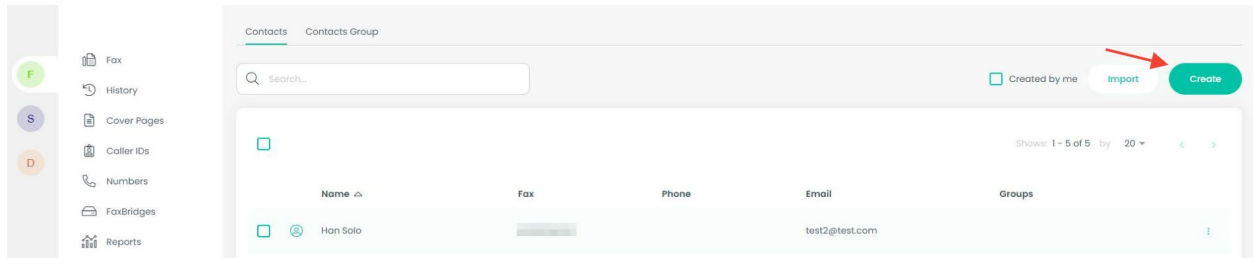
You will have options at the bottom of the contact record allowing you to keep the contact private to your user or available for anyone in the account to see. The same goes for being able to edit the contact.

NEW CONTACT　　　✕

Person　　　　　　　Organization

First Name

First Name

Last Name

Last Name

Email

Email

Fax Number

🇺🇸 (500) 234-5678

Phone Number

🇺🇸 (500) 234-5678

Connect With Organization

Select Organization

☐ Visible to account users

☐ Editable by account users

Create　　　Cancel

Contacts can be created/uploaded in bulk via CSV file by clicking the "**Import**" button and following the instructions.

You also have the ability to create organizations as contacts. Once an org is created you will have the ability to associate contacts to that org.

Contacts that are connected to an organization will then be nested under that organization for easier access.
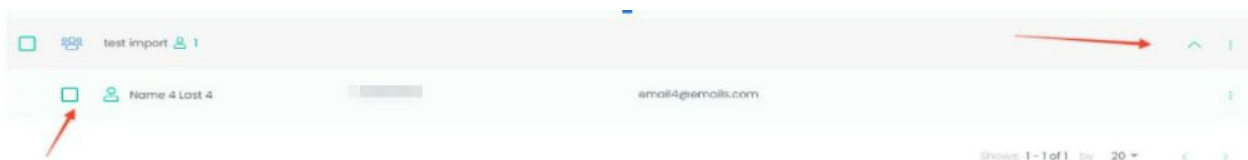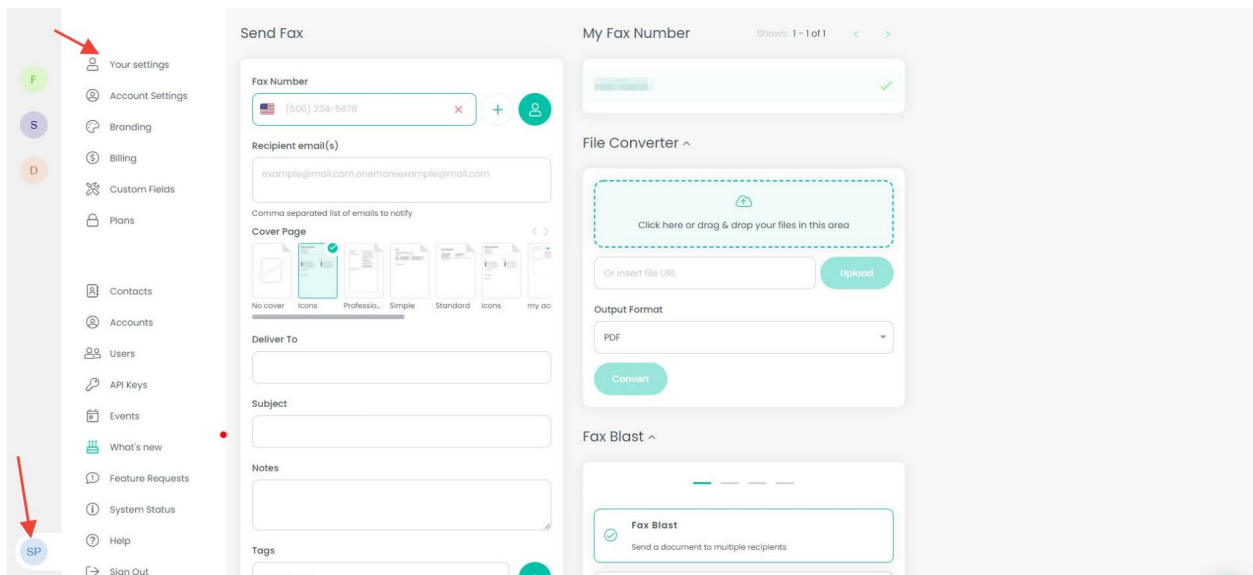

A search box is also provided on the page.

Contacts can be accessed from both the send fax screen as well as when faxing utilizing the print to fax driver.

How do I change or reset my password?

Click your name (user) in the bottom left. Click "**Settings**."

Click on the "**Security**" tab at the top.

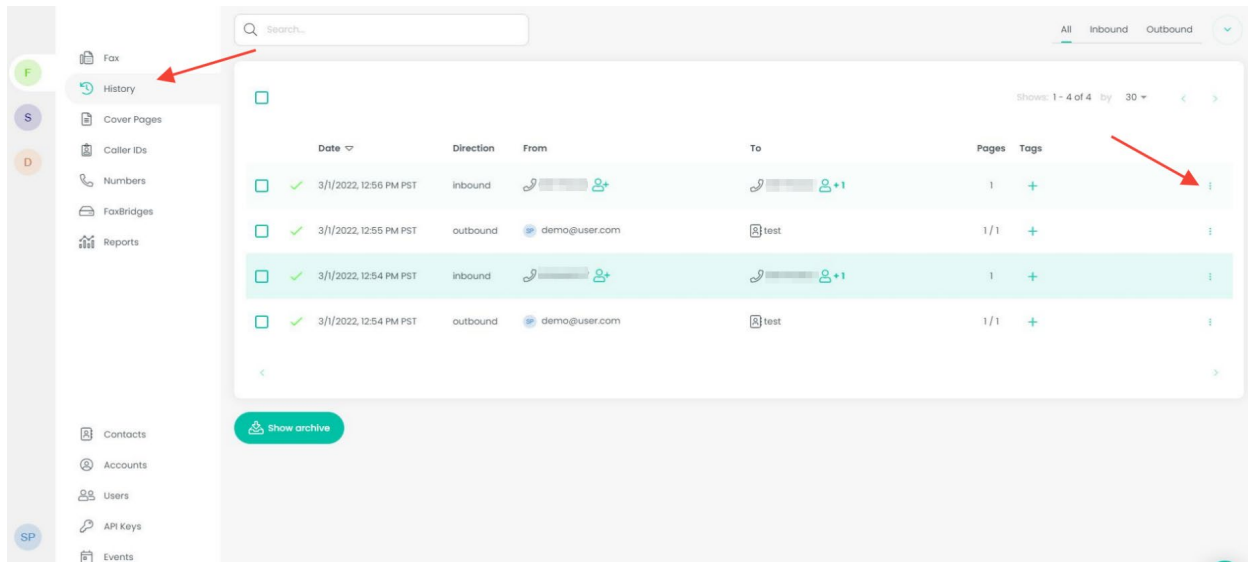Here, you must enter your current password as well as your desired password.

Resetting your password (if forgotten)

If you've forgotten your password, please contact your service provider.

How do I download/print a fax

Click "**History**" on the left side panel, then click the 3 dots on the row of the fax you want to download/print.

To print, click the "**View/Print**" option and then click the "**Print**" button after the fax opens.

To download, click the "**Download**" option and the fax will instantly download as a PDF.
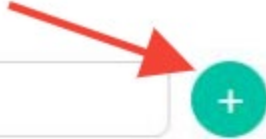
Getting Started with Tags

Tags allow you to mark faxes as well as fax numbers to help easily identify and search for specific groups of faxes.

You can filter in your history's filter settings for a specific tag to easily search for a group of faxes.
You can also add or create a tag right from the send fax screen, like shown in the screenshot below. You can create a tag by selecting the **(+) plus symbol** on the right-hand side. You can add a tag before sending the fax by clicking in the tags field and selecting the tags you'd like to add.

Tags

Search tag...

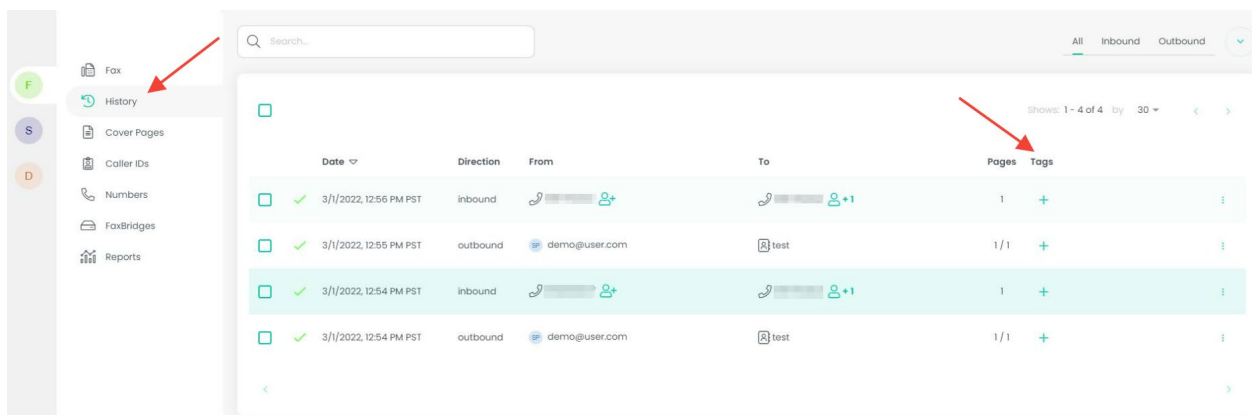☐ Mark as urgent

Urgent token must be included in cover letter

Attachments

Click here or drag & drop your files in this area

Or insert file URL   Upload

Send   ⓘ Send later

You can also tag faxes by navigating to your history tab on the portal, and you will see a tags column shown in the screenshot below. Click the **(+)** symbol.
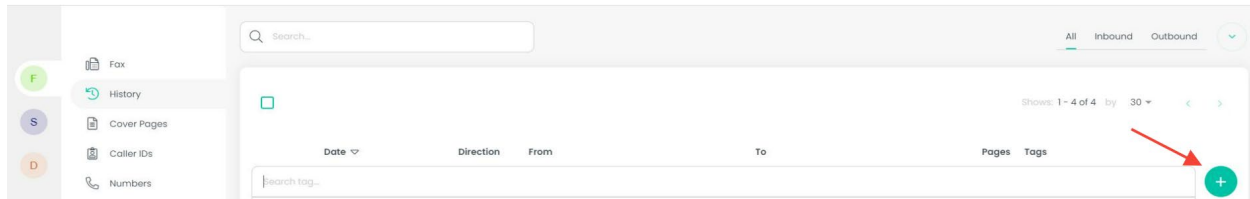
Once you have clicked on **(+)** you will have the option to create a tag by clicking the plus to right like shown in the screenshot below.

The screenshot below shows the create a tag screen, from this screen you will simply just need to name the tag, select a color for the tag, and if you would like it to be available to the whole account or just your user. You will also have the option to make it a user or account level tag.
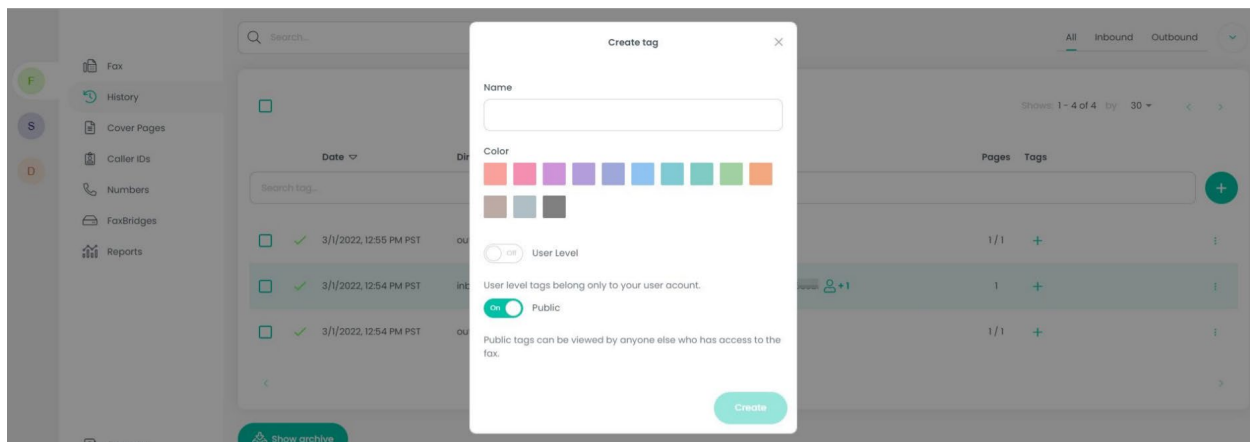
Once that tag is created, you will now just simply need to select the plus on the fax you would like to tag and select your tag to add that tag to that fax and you will now be able to filter your history by that tag to find any fax that has been labeled with that tag.

Below is a screenshot of how you can filter your history to search for a specific tag in your history.
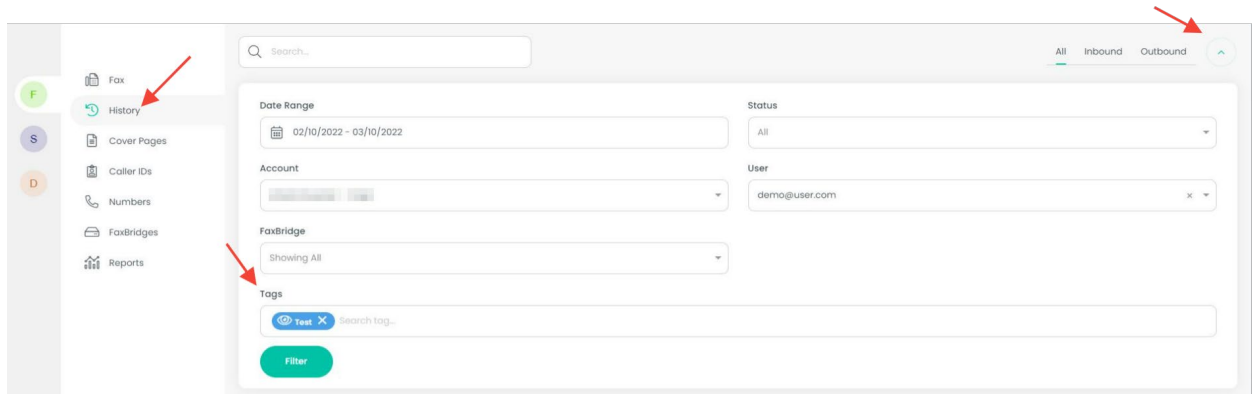
You can also add tags to numbers on your account. You can add tags to a number by navigating to your numbers tab and selecting the plus like shown in the screenshot below on the number you'd like to add a tag for. You will be able to add a current tag to your number or select the green plus on the right hand side to create a new tag. Once you have added a tag to a number, all inbound faxes received to that number will have your tag added to that fax.
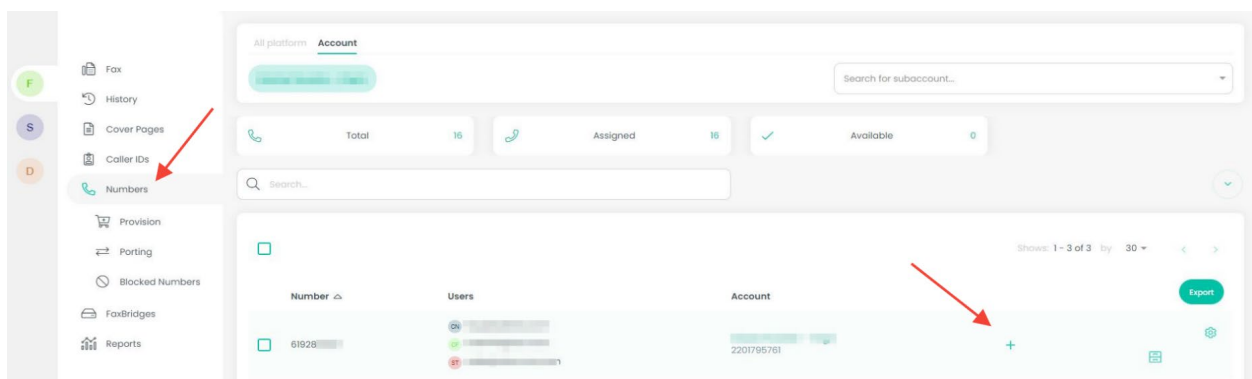
Need further help?

Please reach out through phone or email, so we can quickly connect you to someone who can provide you with excellent customer service.

We hope you don't need to contact us, because that means everything is working! But please know, we are here to help. If you have any issues, questions or even feature request, send them our way.

Thank you for cloud faxing with us

We sincerely appreciate your continued business and the trust you place in our systems and services.

Remember, we are here to help. Contact us today at (330) 273-5666 or support@trpcomm.com.

Speak with a representative today

by calling (330) 273-5666 or emailing

support@trpcomm.com