Concord FaxAssist

Complete User Guide

Version 4.0

CONCORD
TECHNOLOGIES

More Information

Additional support can be provided through:

Email: premiumsupport@concordfax.com
Telephone: +1 (206) 441-3346, option 2
Fax: +1 (206) 441-7965
Website: https://concordfax.com/faxassist/

Premium Support hours are Monday – Friday, 6:00am to 6:00pm (Pacific Time)

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Préface

Welcome to Concord FaxAssist: a Windows utility that routes selected incoming fax communications to printers (for automatic printing) or to specific folder(s) or document management systems for storing.

For each account that is configured to retrieve faxes, the documents can be routed to any of the following three options:

- Print to a local or network printer
- Store in one or more folders
- A combination of the above

Who this Guide is for?

The Concord FaxAssist User Guide provides helpful information for any administrator tasked with installation and/or the configuration of service utility applications.

Getting Started

This chapter provides information required to get started with the FaxAssist application. The following topics are included:

- System Requirements

- Installation and Upgrade Procedures

- License Agreement

- Getting Familiar with the Interface

System Requirements

- To use Concord FaxAssist, you must have a Concord Fax account.

- Supported operating systems: Windows 2008, Windows 2008 x64, Windows 2008 R2, Windows 2012, Windows 2016

- FaxAssist requires a .Net version 4.7.2 or higher.

- FaxAssist requires at least 64 megabytes(MB) of RAM (128MB is recommended).

- FaxAssist requires at least 50 megabytes(MB) of available space on the hard disk (more may be required based on the level of traffic to handle).

Installation and Upgrade

If you are installing FaxAssist for the first time, please skip to the [step-by-step installation procedures](#). If you are upgrading FaxAssist to the latest version, please follow the instructions directly below.

Upgrading an Existing Install

To upgrade FaxAssist, you will first need to uninstall the current version of the application from your workstation.   Note: You will have the ability to migrate current settings to the new version, during the install.

The following screenshots will guide you to start this process:

➡ Go to **Control Panel -> Add Remove Programs/ Programs and Features**

➡ Right click on the **Concord FaxAssist** and click on **Uninstall/Change** to remove the application from the workstation.

➡ Click **Uninstall**.
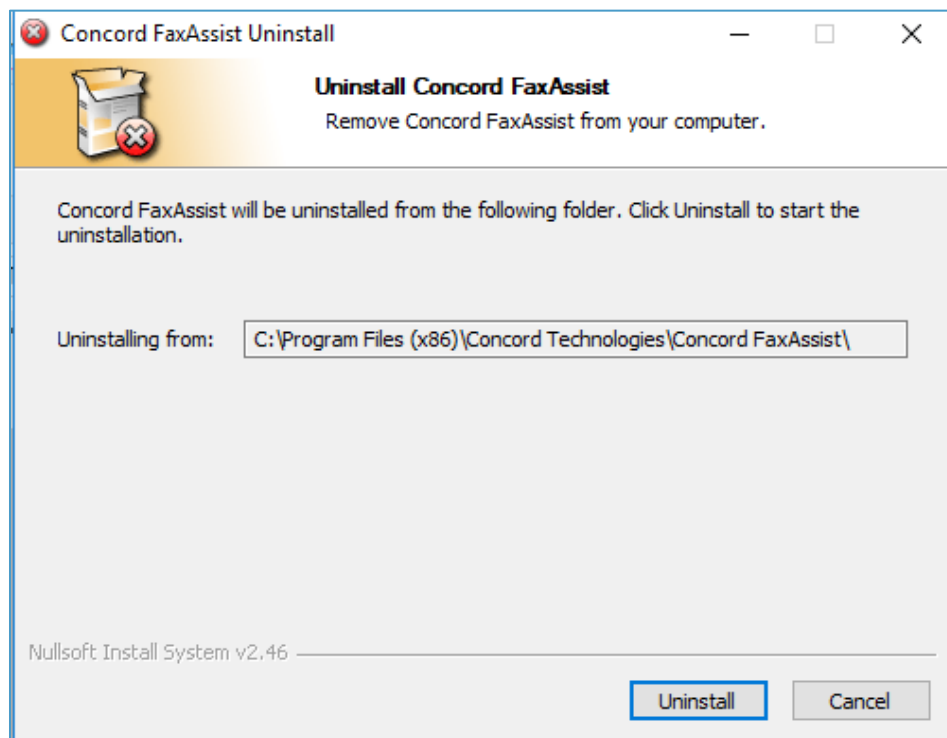
➡ On the successful completion of the uninstall, the following window will be displayed:
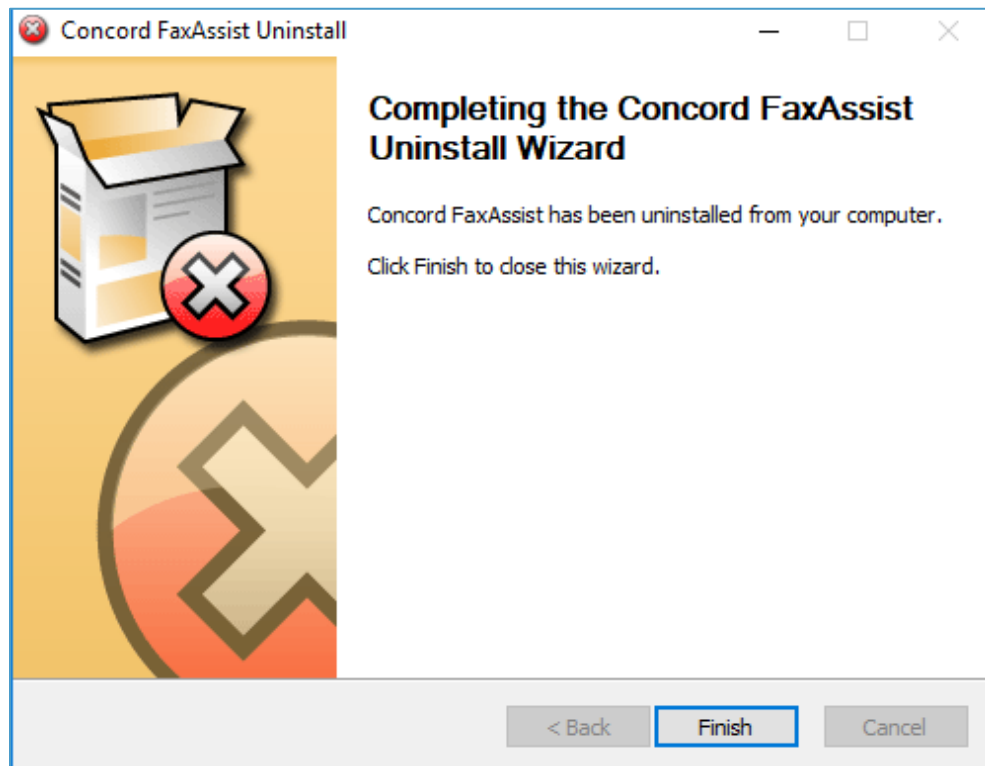
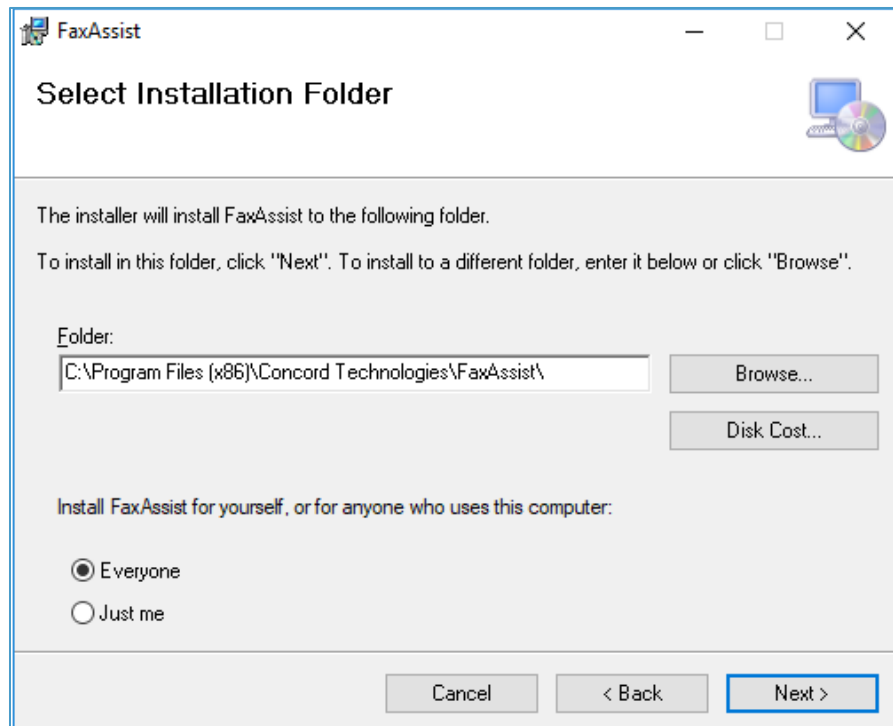➡ Then follow the step‐by‐step instructions as discussed in Step‐by‐Step Installation Procedure section above

Step-by-Step Installation Procedure

➡ Download the FaxAssist Installer

➡ Disable any anti-virus software before installing FaxAssist

➡ Run the install package by double clicking the FaxAssistInstall.msi file

➡ Click Next to initiate the install.
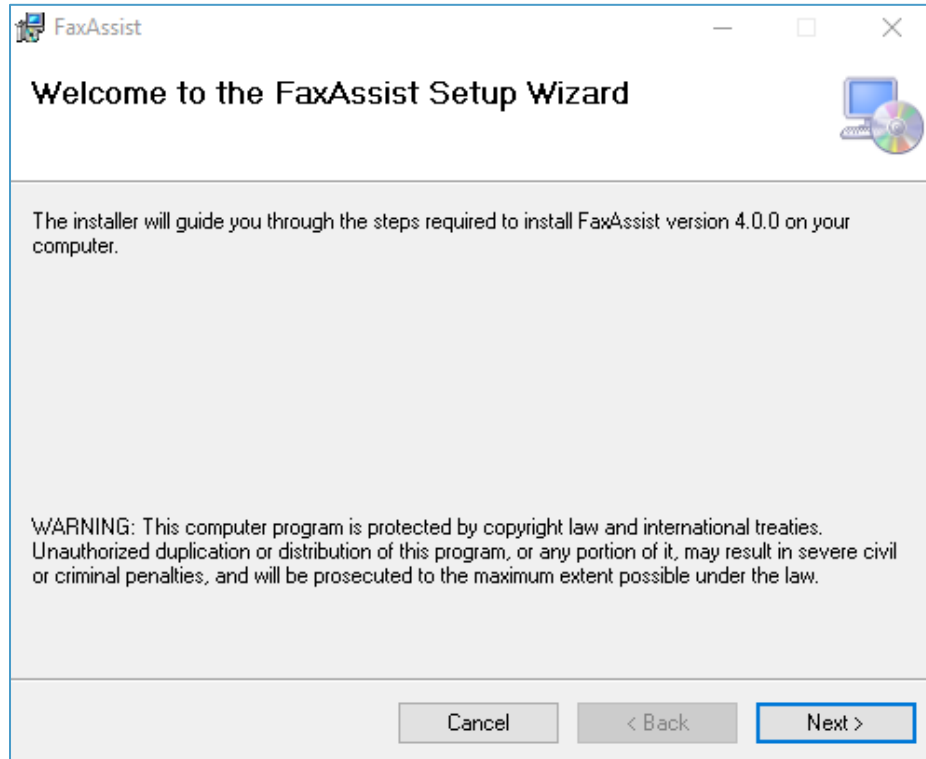
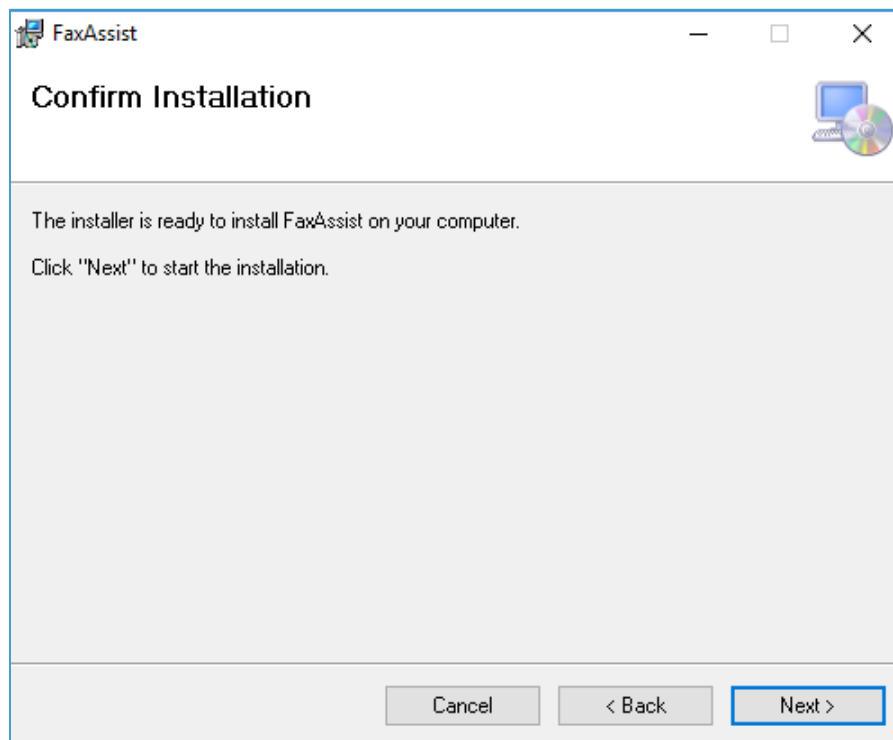➡ Accept the default Destination Folder and click Next

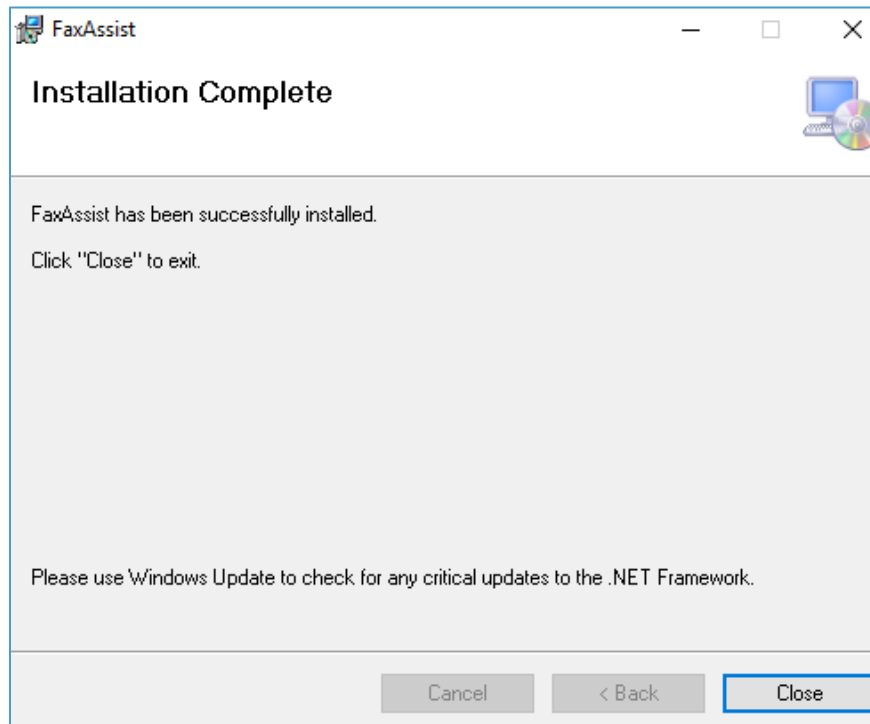*Note: If preferred, you can change the installation location.*

FaxAssist — □ ✕

Select Installation Folder

The installer will install FaxAssist to the following folder.

To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".

Folder:

C:\Program Files (x86)\Concord Technologies\FaxAssist\   [Browse...]

[Disk Cost...]

Install FaxAssist for yourself, or for anyone who uses this computer:

◉ Everyone

○ Just me

[Cancel]   [< Back]   [Next >]

➡ Click Next to start the installation.

FaxAssist — □ ✕

Confirm Installation

The installer is ready to install FaxAssist on your computer.

Click "Next" to start the installation.

[Cancel]   [< Back]   [Next >]

➡ A progress bar will display your installation progress

➡ Once finished, you will get the successful installation notification, click Close to exit the installer

FaxAssist

Installation Complete

FaxAssist has been successfully installed.

Click "Close" to exit.

Please use Windows Update to check for any critical updates to the .NET Framework.

Cancel   < Back   Close

Windows Service Security Settings (optional)

If this application needs windows permissions to print or save files to disk, then you must set the permissions for the Windows service using the username/password that has access to the resources.

To set permission go to **Start > Control Panel > Administrative Tools** and open **Services**. Find the service Concord FaxAssist as shown below.

Computer Browser	Maintains an updated list of computers on the network an...	Started
Concord FaxAssist	Processes email accounts and delivered to share/printer	Started
Concord Folder Fax	Concord Folder Fax	Started

Right click on the service and select **Properties**. Click on the **Log On** tab and change the "Log on as" to "This account" and type in the windows account that is required to access the remote resources such as printer or file storage. Note this is only required if the remote resource requires windows permissions to access.
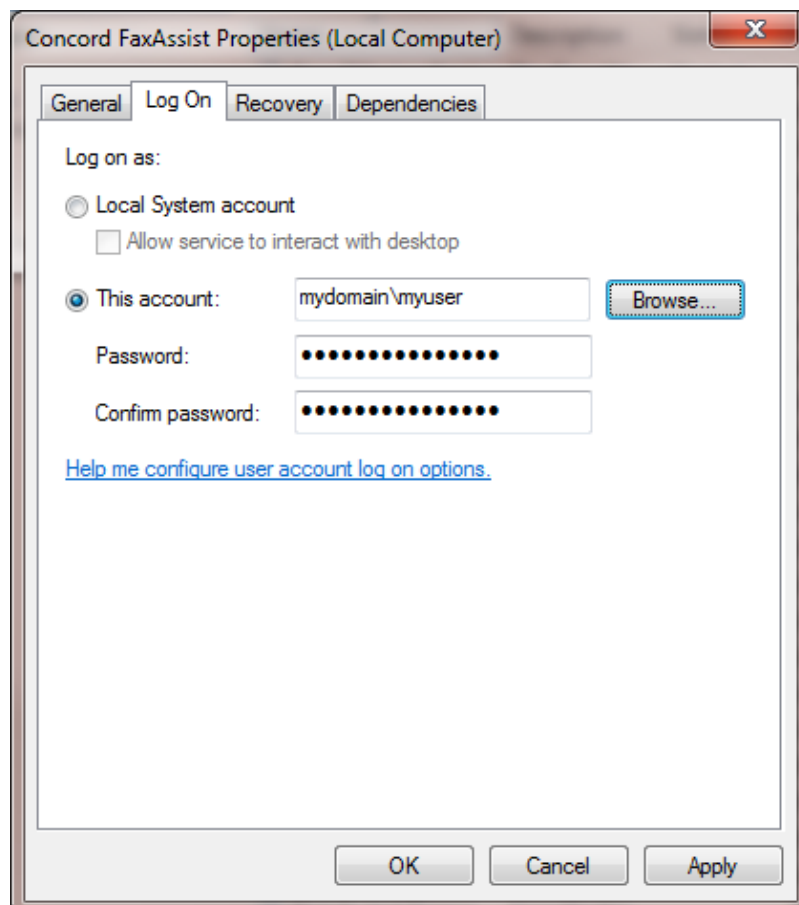
License Agreement

On the first launch of the FaxAssist application after installation, the software license agreement will be displayed. Confirm acceptance by clicking on **I AGREE**.
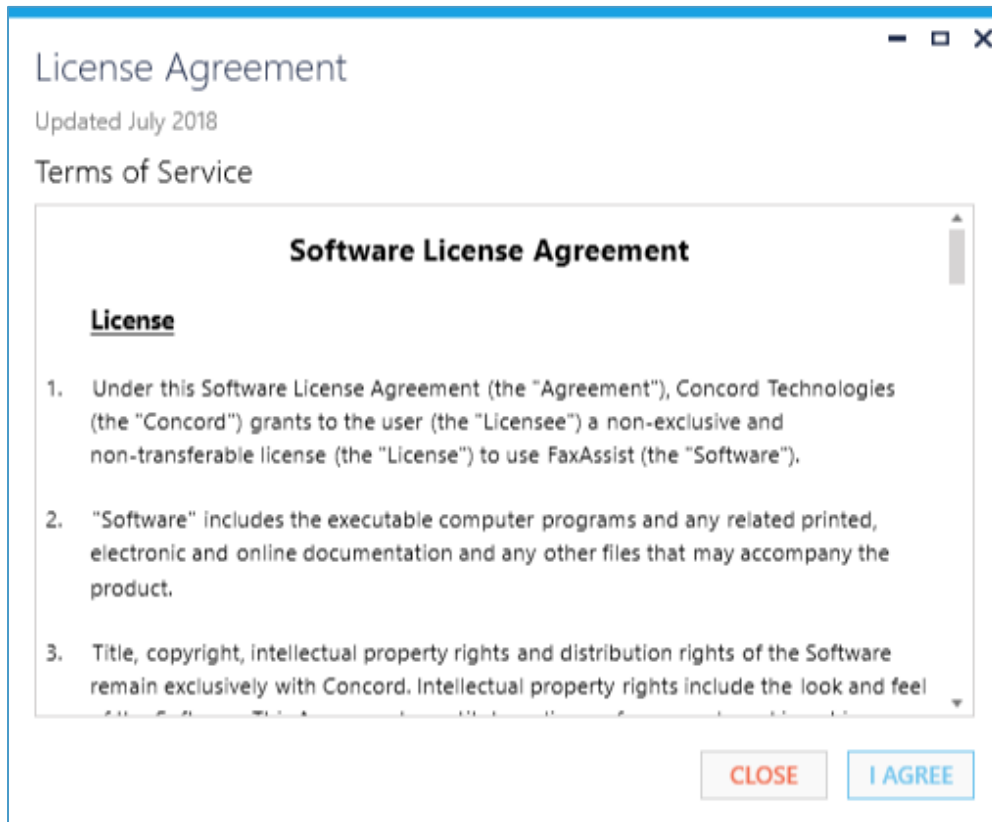
Note: This is a one-time notification and will no longer appear after installation.

Getting Familiar with the Interface

As a first-time user, it is recommended to take a few minutes to get familiar with the user interface.

The main screen is divided into 2 sections. On the left side of the screen is a list of configured accounts with an indicator if an account is currently not receiving faxes. Below this list are controls for starting and stopping the service. On the right side, will be the details associated with the account selected. Above the account information you will see a few additional options: Add Account, Setting, View Status, and About.

Add Account

Click on the Add Account button, to bring up a new screen to configure a new account. For more information about the account record please see the Account Configuration section of this document.


View Status

The View Status button will display the log viewer which allows you to monitor FaxAssist application activity, research problems or provide to technical support. For more information about the logs, please see the Troubleshooting section of this document.

Settings

The Settings screen allows you to configure the interval in which you want to retrieve your faxes.   Choices include: 1, 5, 10, 15, 30 and 60 minutes.
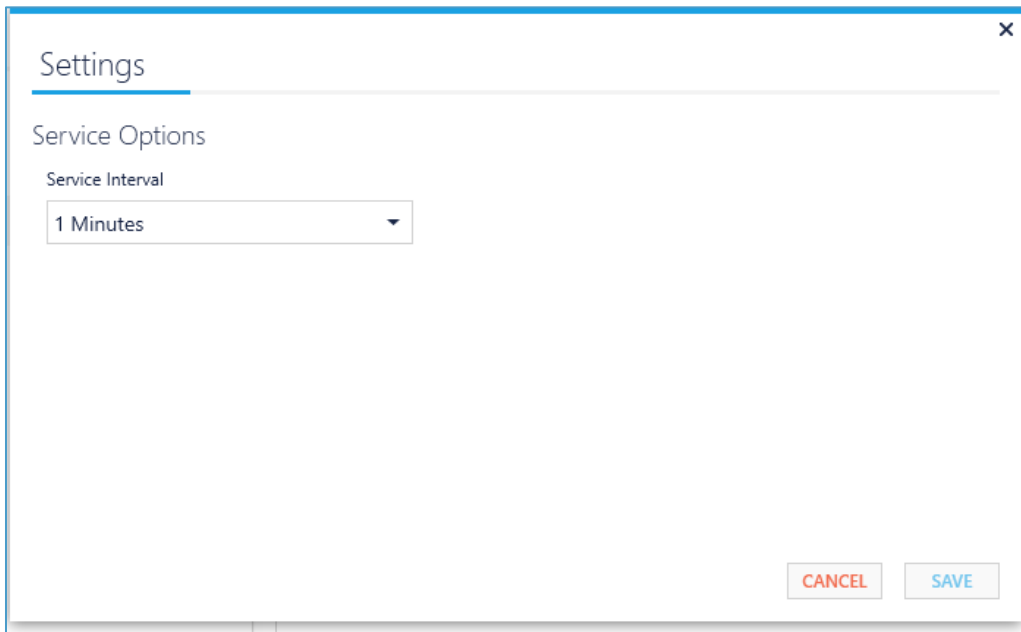
About

For version and licensing information, as well as instructions for requesting technical assistance, click on the **ABOUT** button.

FaxAssist Account Configuration

The Concord FaxAssist application is designed to retrieve faxes to be processed by one of two methods. Either by checking an IMAP email account, or directly through your Concord account which is setup with forwarding settings set to Inbound Web Services.

Not sure whether to use IMAP or InboundWS?   Please refer to the FAQs for more information on this topic.

The Account Info screen will display the necessary items for configuring an account using the selected retrieval method (InboundWS or IMAP).

This chapter provides information on the FaxAssist Configuration Settings applicable for each method, as well as the settings required for printing and/or storing the documents.

Inbound Web Services Setup (InboundWS)

Selecting InboundWS from the TYPE drop down list will set the FaxAssist service up for retrieving faxes from your Concord account using the Concord Inbound Web Services Interface. The window will look like the screenshot below. The information required for retrieving faxes is contained in the first section of fields.

Account Name

The Account Name field is used to identify the account profile you are creating. The only requirement for this alphanumeric field is that it must be unique. Some sample account names are the fax number, or the department associated with that fax account.

Username

Enter your Concord Fax Online Username here.   *Example: mbx1234567*

Password

Enter the Password that will be used to login to the Concord Fax account listed above.

Server Address

The Server Address is pre-populated with the url to access Concords Inbound Web Services.

Enable Mailbox

Selecting the Enable Mailbox checkbox will enable this account to retrieve messages. You can add additional entries and selectively enable or disable each.

Validate Mailbox

By clicking the Validate Mailbox button, FaxAssist will validate the credentials entered, confirming that it can access your faxes stored on the Concord network.   A pop-up window will appear displaying the results of the validation.
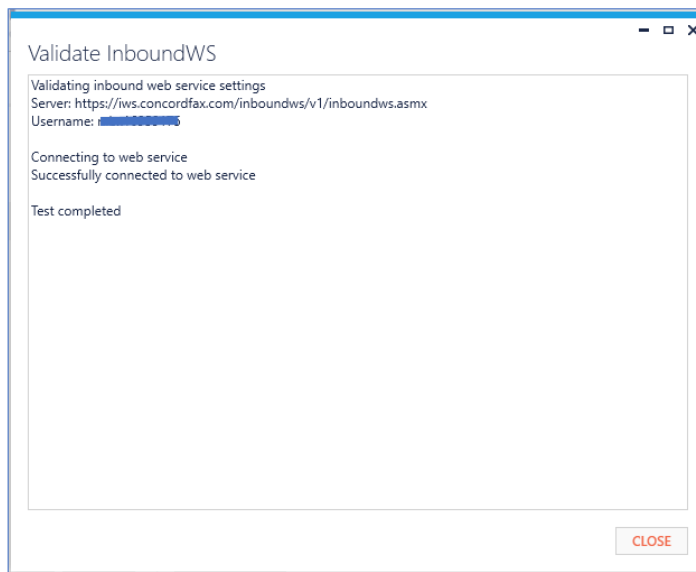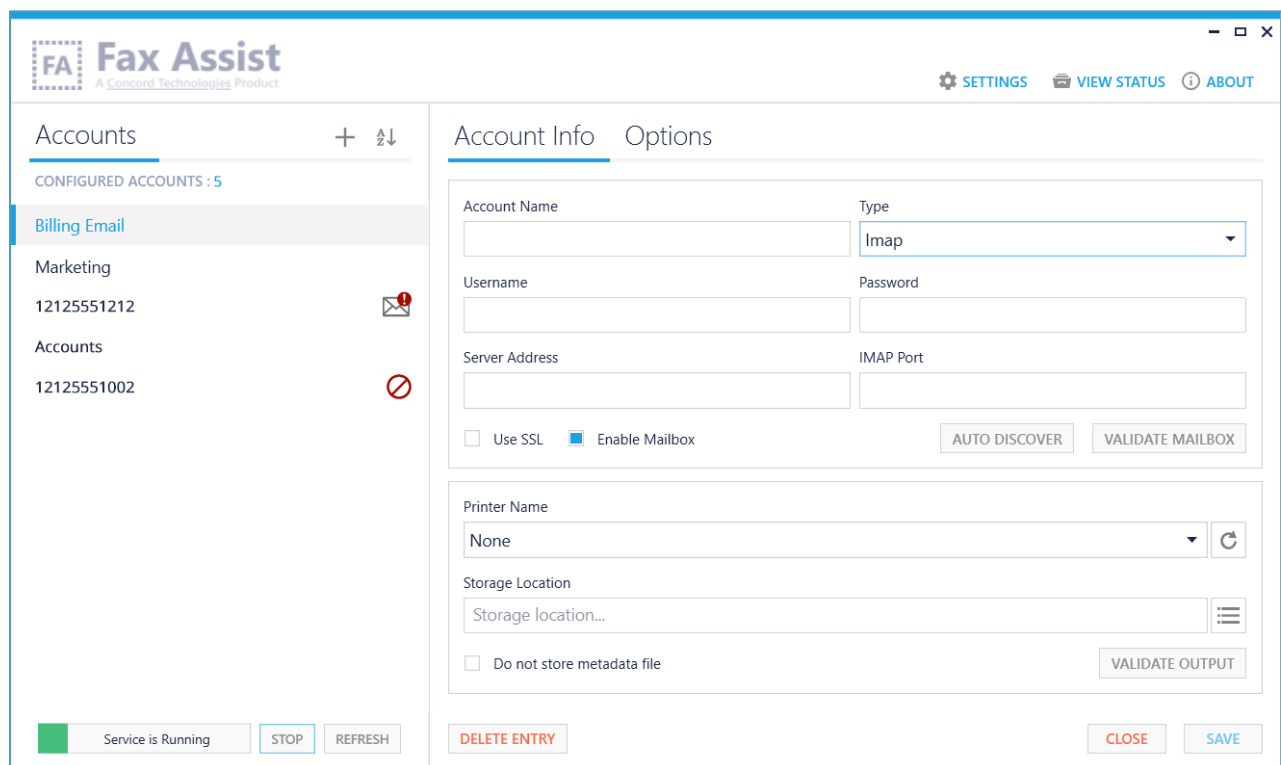
IMAP Setup

Selecting IMAP from the TYPE drop down list will set the FaxAssist Manager interface up for retrieving faxes from your IMAP email address.

> **IMPORTANT!!!** – Do not set up this service to check against email accounts used by anything other than the FaxAssist service as all messages that are processed are moved from the INBOX or deleted depending on the setup

The Account Info window will look like the screenshot below. The information required for retrieving faxes is contained in the first section of fields.

Account Name

The Account Name field is used to identify the account profile you are creating. The only requirement for this alphanumeric field is that it must be unique. Some sample account names are the fax number, or the department associated with that fax account.

Username

Enter the Username that will be used to login to the IMAP email account. If the server resides on a Microsoft Exchange server use the format user@domain.local in which the domain specified represents your internal active directory domain. This is not necessarily the same domain you accept emails from. Or you can specify netbiosdomain/username which again is a different format than your active directory domain. Note: It is important if you choose the second format that you use a forward slash.

Password

Enter the Password that will be used to login to the IMAP account listed above.

Server Address

Enter the Server Address that the IMAP account resides on.

IMAP Port

Leaving the IMAP Port field blank will use the default ports for SSL or non-SSL based on the Use SSL checkbox setting (993 or 143 respectively).

> *Note: If you use a non-standard port be sure to enter it here.*

Use SSL

Checking this will set FaxAssist to use SSL (Secure Socket Layer).

Enable Mailbox

Selecting the Enable Mailbox checkbox will enable this account to retrieve messages. You can add additional entries and selectively enable or disable each.

Auto Discover

FaxAssist can automatically detect the most secure settings supported by your IMAP server. Fill in the Username, Password, and Server and then click Auto Discover. An Auto Discover dialog will open and if permitted, it will automatically detect the settings necessary and upon closing will populate the necessary settings.
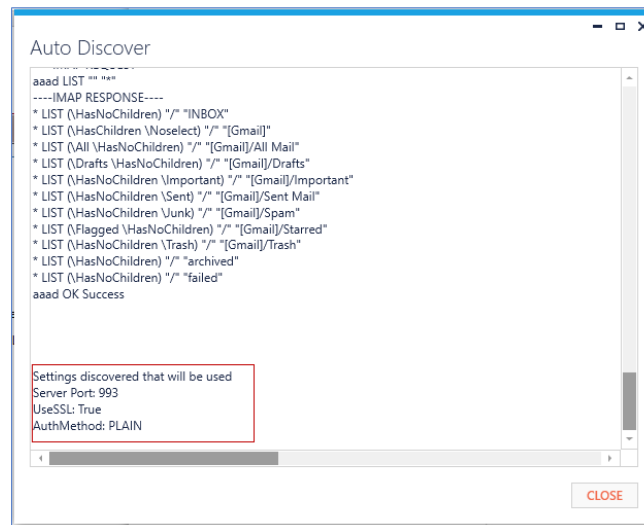
Validate Mailbox

By clicking the Validate Mailbox button, FaxAssist will validate the credentials, confirming that it can access the email account. A pop-up window will appear displaying the results of the validation.
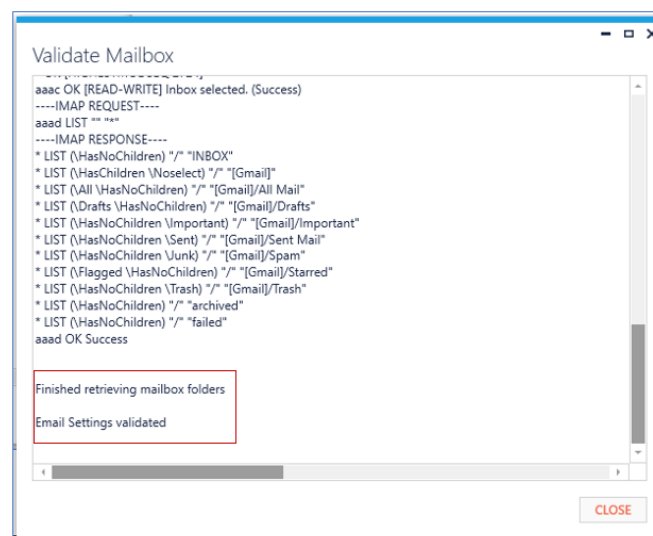
Routing Faxes

The information required for routing faxes is contained in the lower section of fields and applies to **both** retrieval methods (InboundWS and IMAP).

For each account that is configured for retrieving faxes, these documents can be routed to any of the following three options:

- Print to a local or network printer
- Store in one or more folders
- A combination of the above

By default, FaxAssist when storing faxes in a folder location, will also store an accompanying Metadata File.   This file includes the metadata associated with the incoming fax, such as Concord Message ID, Received Time, Duration of the fax call, Fax Number, the CSID of the sending fax machine, etc.   You can choose to disable the storing of the metadata file or the metadata file can be customized to meet the needs of

your workflow. Please see [Appendix B](#) for more information about customizing the Metadata File.

> *Notes: If you wish to have faxes both printed and placed in a storage location you can simply define both a printer and a storage location. When both are defined both actions will be performed for every fax processed.*

Printer Name

The FaxAssist service can print TIFF documents to a printer defined in the Printer Name field. Currently only TIFF attachments are supported so be sure that your Concord accounts are setup to forward the attachments to your email account as a TIFF attachment.

> *Note: If the Printer Name field is left empty then the print process will be skipped.*

Storage Location

The FaxAssist service can store documents in a folder location. If you wish to have documents stored to a folder location be sure to define the Storage Location with a path to a folder that the service running has permissions to write to.

On the right side of the screen is an Add Storage Location icon to ▤ add additional storage locations for a single account.

To enter multiple locations, click on Add Location icon [+] in the Storage Location List dialog box. From here, you can also change the storage location by clicking on Browse icon [•••] or delete a location by clicking on the Delete icon [🗑] .
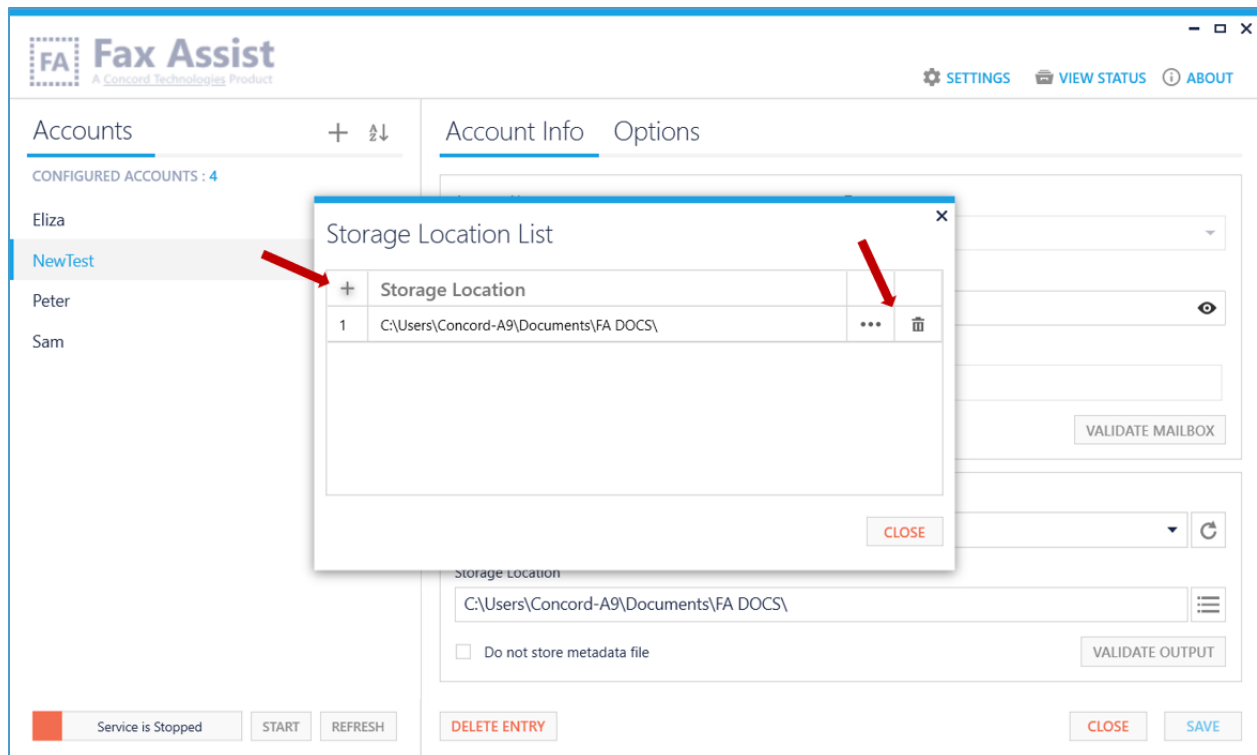
This can be defined as a UNC path \\server\folder or as a local folder location c:\folder\.

> *Notes:*
>
> - *If the field is left empty, the file storage process will be skipped.*
> - *If you are saving to a Network Storage location you will need to use the full UNC path (e.g. \\server\<user>\Faxes\FaxAssist)*

Do not store Metadata File

If you are retrieving faxes via inbound web services, or if you have metadata enabled on forwarded emails then you have the option to disable the storage of the received XML file.
If you do not wish to have metadata files stored enable this feature.
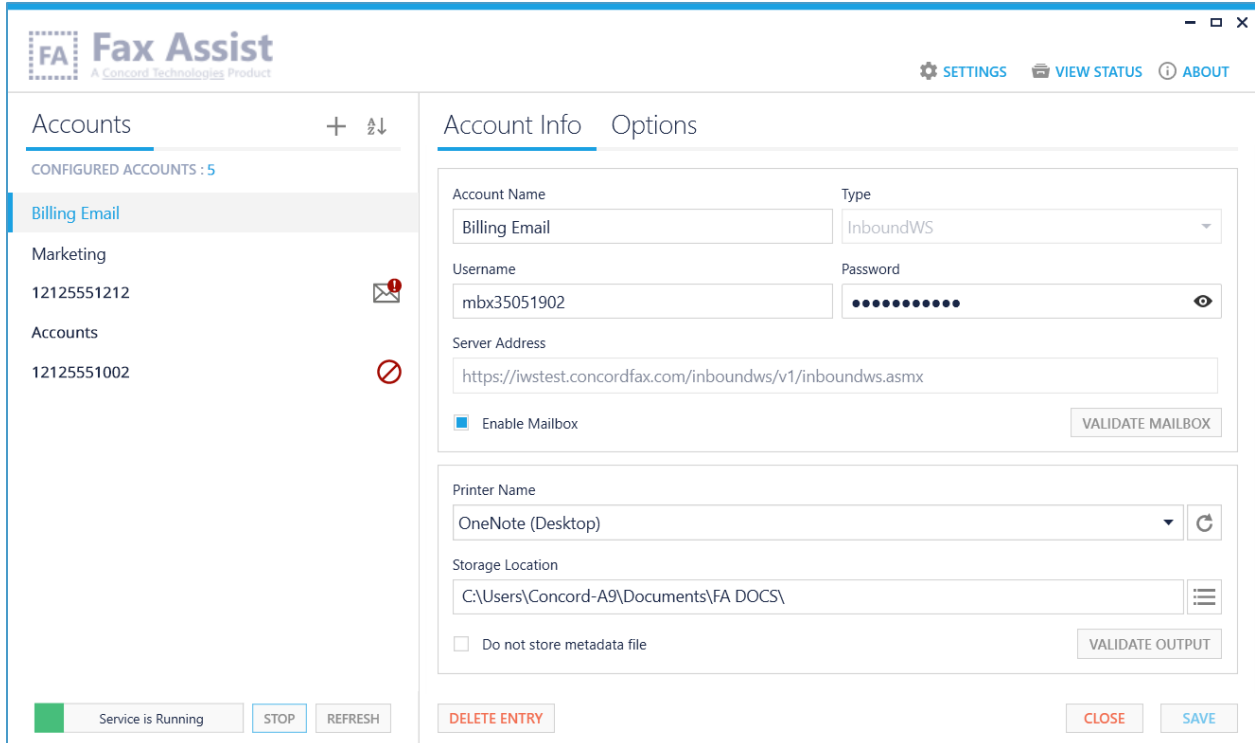
Validate Output

The Validate Option feature will test to ensure it can access your configured destination(s), whether that is a printer, or a folder location.

Accounts Panel

The Accounts panel displays a sortable list of configured accounts. Warning icons indicate the account is not currently receiving faxes:

- ⊠❗ Mailbox is not enabled
- 🚫 Invalid Credentials

Advanced Options

There are additional advanced features that can be configured in FaxAssist, which are accessible under the Options tab.   As some of these features are specific to the retrieval method chosen, they are documented separately.

InboundWS Advanced Options

File Name Format
The following feature **only** applies to InboundWS retrieved faxes.

By specifying a File Name Format in the FaxAssist Manager you can enable a custom filename to be saved on each account.   The filename can contain text and/or values based on the tokens chosen.

To enter tokens, start by entering a left curly bracket { and the list of available tokens will be displayed.

*Note: If you are using a date token in the File Name Format, invalid folder/file characters will be removed for you. Invalid characters are: \ / : * ? " < > |*

IMAP Advanced Options

The following features **only** apply to IMAP retrieved faxes.

Archive Mailbox

Archiving moves emails to a secondary folder as they are processed. This allows you to review faxes that have been processed in case of an error. To alleviate this folder from filling up you can set the Purge Days setting to automatically clean up this folder of messages older than the number of purge days.

Note: It is recommended that you set the archive folder so that processed emails can be accessed should something not work correctly. If you do not configure an Archive Mailbox, emails will be deleted after they are processed.

Failed Mailbox

By configuring a Failed Mailbox, emails that fail to be processed will be moved to a secondary folder. This allows you to take the necessary action.

Auth Type

This setting allows you to override the default authentication type. This is typically only required when you are pointing to a Microsoft Exchange server that requires NTLM authentication. Valid values are LOGIN, NTLM, CRAM-MD5 and PLAIN.
The Default = LOGIN.

Purge Days

If the Archive Mailbox has been setup, then this setting will determine the number of days that messages will remain in the Archive Mailbox folder before getting removed. This will default to 7 days if left blank and Archive Mailbox is defined.

Domain

The Domain is only required if enabling NTLM authentication which is typically used by Microsoft Exchange.

Available Filename Tokens

Token	Description	Sample Value
{account}	Concord Account ID assigned to the receiving account	68985
{calledNumber}	Number that received the fax call	12065772972
{callerNumber}	Caller Identification of the calling fax machine	12063745000
{completedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
{currentPage}	Current page being processed	1
{downloadedTime}	Date and Time the fax was processed by FaxAssist	02/26/2018 8:00 AM
{duration}	Number of seconds it took to receive the fax	15
{messageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
{randomid}	Random generated unique identifier	TDIAA8QHUG
{receivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
{resolution}	Resolution of the received fax	1
{senderCSID}	CSID received from sending fax machine	TESTCSID1
{speed}	Speed the fax was received at	26400
{timeZoneOffset}	Time Zone offset of received fax	-07:00
{totalPages}	Total number of pages in received fax	9

Example File Name Format:

{messageID}_{receivedTime}_{callerNumber}_{calledNumber}_{totalPages}
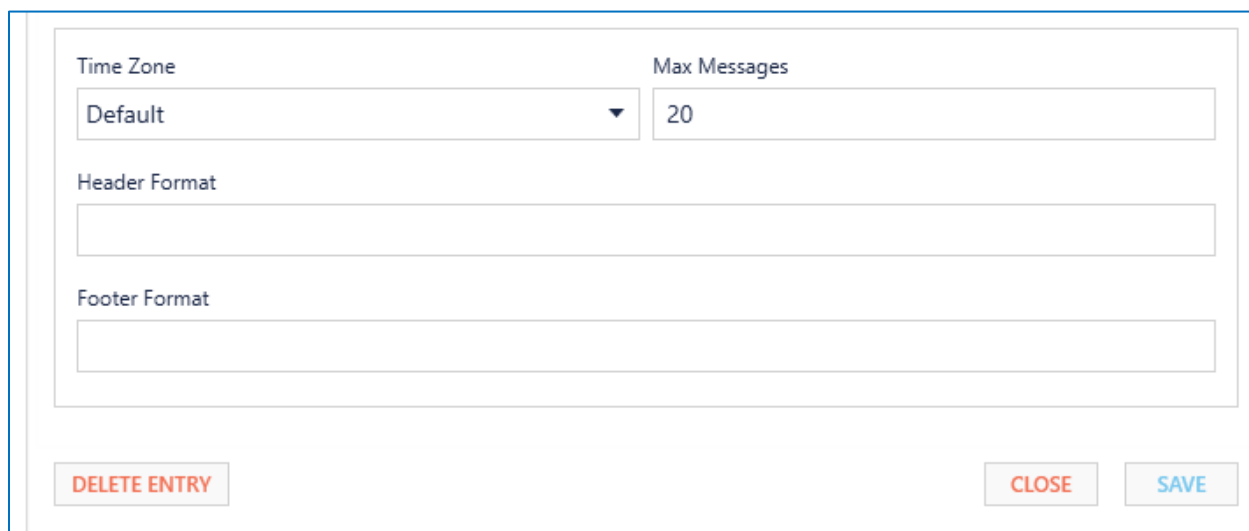
Resulting file will be saved as:

d:\faxes\<account>\archived\ct12065772972-20180226112513028-321-
1_02262018 800 AM_12063745000_12065772972_1.tif

*Note: The DateTime tokens used in the Header, Footer and File Format fields
have the ability of using the .Net DateTime formatting for customizing the output
of those tokens.   Please see the Appendix A for more information.*

Additional Advanced Options

The following features apply to **both** InboundWS and IMAP retrieved faxes.

Time Zone	Max Messages
Default ▼	20

Header Format

Footer Format

DELETE ENTRY   CLOSE   SAVE

Time Zone

The time zone field is a drop-down list of available time zones.   By setting this value you
can control the time zone on all date-time stamps that are displayed within the
document header, document footer, document filename, and also within the XML file.

Max Message

This field sets the maximum number of messages that the service will process for each mailbox at one time. If this field is left blank, the default value is 20 messages.

> *Note: If set to 0 this will force the application to retrieve all messages on every poll. Not recommended for high volume accounts as the memory required can be quite large.*

Header Format

By specifying a Header Format, you can enable a custom header to be printed on each document. The header can contain text and/or values based on the tokens chosen.

> *Note: The custom header only applies if the document type you are receiving is a PDF or TIFF.*

To enter tokens, start by entering a left curly bracket { and the list of available tokens will be displayed

Available Header Tokens

Token	Description	Sample Value
{attachmentName}	Name of fax file	ct12065772972-20180226112513028-321-1.tif
{account}	Concord Account ID assigned to the receiving account	68985
{calledNumber}	Number that received the fax call	12065772972
{callerNumber}	Caller Identification of the calling fax machine	12063745000
{completedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
{currentPage}	Current page being processed	1
{downloadedTime}	Date and Time the fax was processed by FaxAssist	02/26/2018 8:00 AM
{duration}	Number of seconds it took to receive the fax	15
{messageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
{randomid}	Random generated unique identifier	TDIAA8QHUG
{receivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
{resolution}	Resolution of the received fax	1
{senderCSID}	CSID received from sending fax machine	TESTCSID1
{speed}	Speed the fax was received at	26400
{timeZoneOffset}	Time Zone offset of received fax	-07:00
{totalPages}	Total number of pages in received fax	9

Example Header Format:

Received {receivedTime} from {callerNumber} to {calledNumber} Pg {currentPage} / {totalPages}

Resulting Header will display as:

Received 02/26/2018 from 12063745000 to 12065772972 Pg 1/1

Note: The DateTime tokens used in the Header, Footer and File Format fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens.   Please see the [Appendix A](#) for more information.

Footer Format

By specifying a Footer Format, you can enable a custom footer to be printed on each document. The footer can contain text and/or values based on the tokens chosen.

Note: The custom footer only applies if the document type you are receiving is a PDF or TIFF.

To enter tokens, start by entering a left curly bracket { and the list of available tokens will be displayed.

Available Footer Tokens

Token	Description	Sample Value
{attachmentName}	Name of file being printed or stored	ct12065772972-20180226112513028-321-1.tif
{account}	Concord Account ID assigned to the receiving account	68985
{calledNumber}	Number that received the fax call	12065772972
{callerNumber}	Caller Identification of the calling fax machine	12063745000
{completedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
{currentPage}	Current page being processed	1
{downloadedTime}	Date and Time the fax was processed by FaxAssist	02/26/2018 8:00 AM
{duration}	Number of seconds it took to receive the fax	15
{messageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
{randomid}	Random generated unique identifier	TDIAA8QHUG
{receivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
{resolution}	Resolution of the received fax	1
{senderCSID}	CSID received from sending fax machine	TESTCSID1
{speed}	Speed the fax was received at	26400
{timeZoneOffset}	Time Zone offset of received fax	-07:00
{totalPages}	Total number of pages in received fax	9

Example Footer Format:

Received {receivedTime} from {callerNumber} to {calledNumber} Pg {currentPage} / {totalPages}

Resulting Header will display as:

Received 02/26/2018 from 12063745000 to 12065772972 Pg 1/1

Note: The DateTime tokens used in the Header, Footer and File Format fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens.   Please see the [Appendix A](#) for more information.

Using the FaxAssist Service

Controls for starting, stopping and refreshing the service are provided on the bottom left corner of the interface.

Starting the FaxAssist Service

FaxAssist is intended to run as a service.   Once you have configured your accounts, the service should run continuously collecting and processing your inbound faxes.   You can configure FaxAssist to automatically start when your computer boots (see the FAQs section for more information), or you can manually start the service.

To start the service manually, click on the Start button. You may see an in-progress message, while the service is starting.
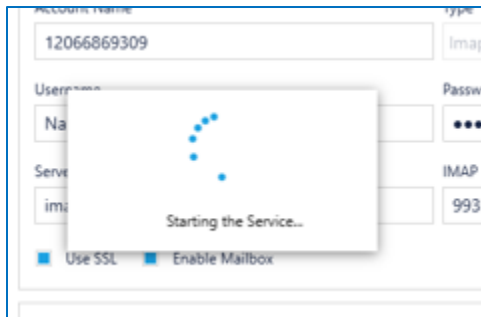
Once started, the status will turn green and display the service is running.

Stopping the FaxAssist Service

To stop the service, click on the Stop button, and the status will turn red and display that the service is stopped.

Refreshing the FaxAssist Service

Click on the Refresh button to refresh the status of the FaxAssist service.

Installation Verification

The FaxAssist application keeps a log of all actions that are performed by the service. This is a good starting point should things not appear to be working properly. You can access the log files by clicking on the View Logs button in the upper right-hand corner. Look for the word ERROR in the log file for any configuration issues or problems in processing email accounts.

> *Note: The logs will not be generated until the service has been started.*

Troubleshooting / FAQs

Question: I need help with Concord FaxAssist, what do I need when I contact you?

FaxAssist will create log files for all interactions, and any potential errors that may occur. If you experience any problems using the application, the Concord Support team will require these log files to troubleshoot the issue.
You can find these log files bundled in a zip file, by simply clicking on the Request Technical Assistance link found in the About screen.
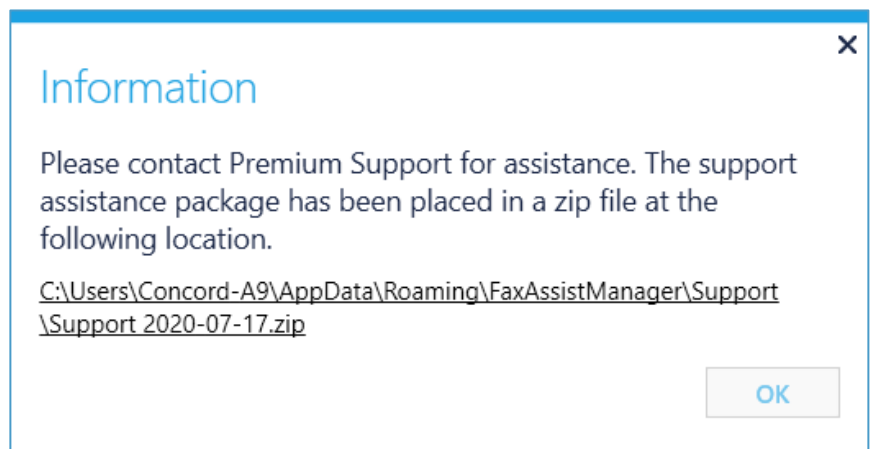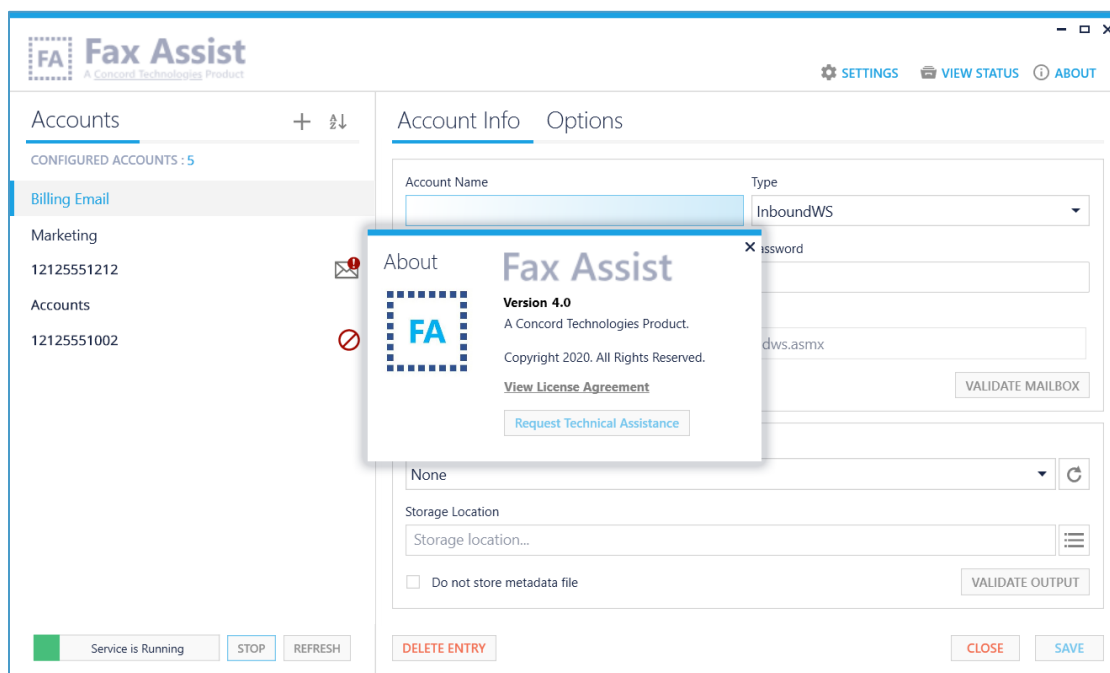
Question: Should I use IMAP or InboundWS?

The IMAP solution is intended for users who choose to have their inbound faxes delivered to an email account and want to route them to a printer or storage location. This approach provides an easy way to archive the faxes to an email archive folder.   To accomplish this, your inbound fax account must be configured on the Concord network to Receive Faxes Using Email.
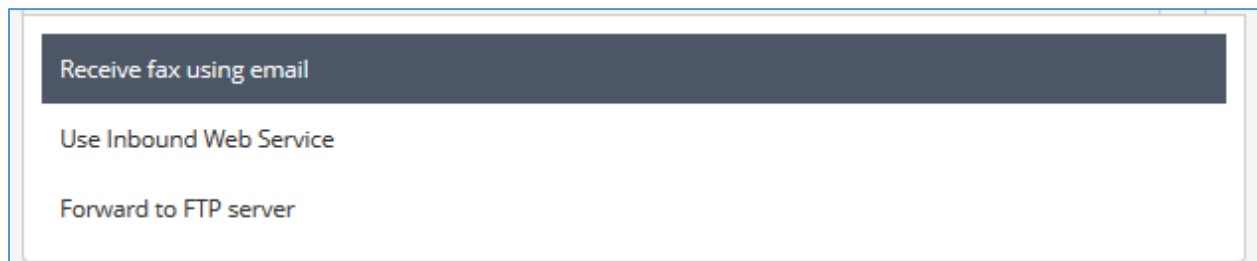
The InboundWS solution is a direct retrieval of inbound faxes from the Concord network.   This approach also supports routing faxes to multiple storage locations to allow for both a workflow process and an archive directory. To accomplish this, your inbound fax account must be configured on the Concord network to Use Inbound Web Services for receiving faxes.
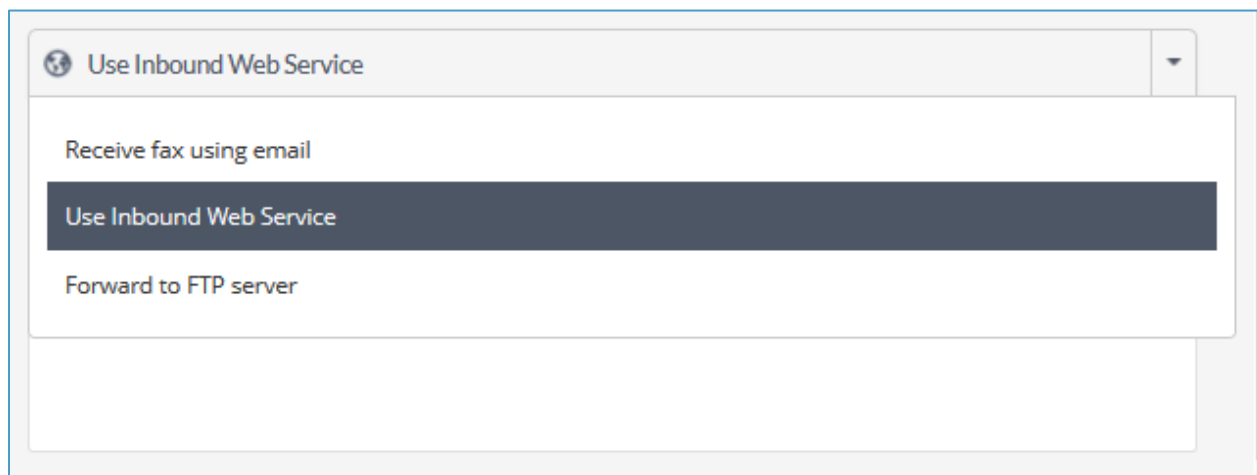
Question: How can I have FaxAssist Service start automatically when my computer boots?

By default, the Fax Assist Service will be a manual start (meaning you will need to start the service from the UI, or from the Services Manager).   However, you can configure this service to automatically start when the computer boots.   To do so, go into the Services Manager (type Windows+R keys to open the Run dialog, type services.msc and press Enter), and right click on the Concord Fax Assist service, and select properties.
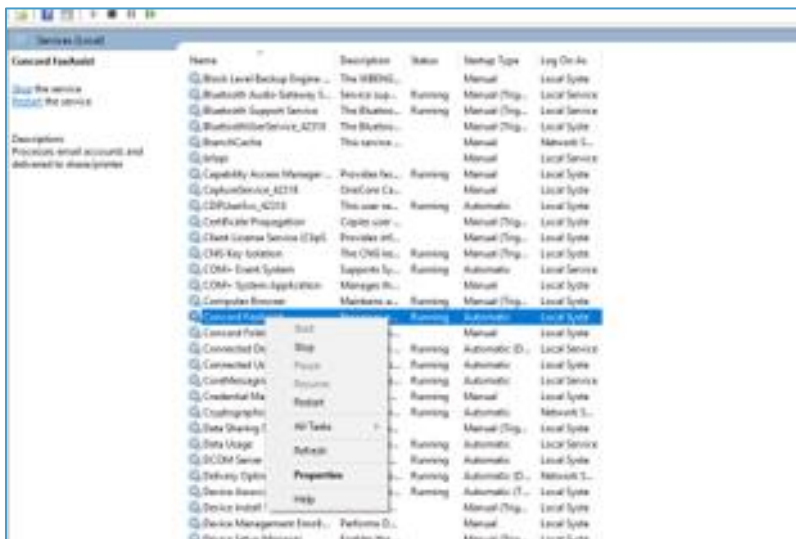
From the Startup Type dropdown, choose Automatic of Automatic (Delayed Start), and save your settings. To note, **Automatic** will **start** during the boot process, while services set to **start** as **Delayed** will **start** shortly after boot. **Starting** your service **Delayed** improves the boot performance of your server and has some security benefits
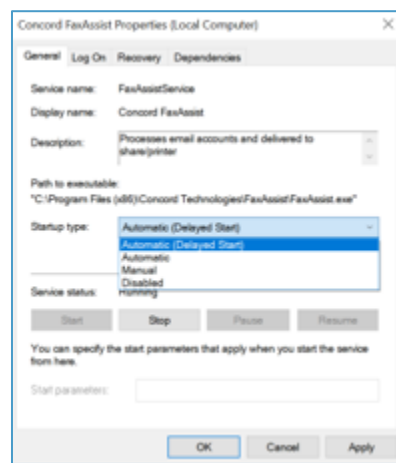
Question: How can I have FaxAssist Manager start automatically when my computer boots?

➡️ If you do not already have a shortcut to FaxAssist, you will need to create one, and drag it to the desktop.

➡️ Next, open **Run** command box by simultaneously pressing **Windows logo** and **R** keys (Windows logo + R). In the Run command field, type **shell:startup** and then press Enter key to open **Startup** folder.

➡️ Finally, copy and paste or cut and paste the app shortcut from the desktop to this **Startup** folder to add the app to startup.

Question: My faxes aren't saving to my mapped drive, why?

If you are saving to a Network Storage location, you will need to use the full UNC path (e.g. \\server\<user>\Faxes\FaxAssist) and will need to configure the FaxAssist service with a set of domain credentials that have permissions to write to the directory.

Question: Can I print any document type from FaxAssist?

If you are setting up a Printer as the destination, the User Account in the Portal must be configured to deliver TIFF files, other file types will not work at this time.

Question: Does FaxAssist work with FIPS?

As part of the 3.0.26.0 upgrade, FaxAssist will not work on a server that has FIPS enabled.

Question: Does FaxAssist support TLS?

FaxAssist was built on .Net 4.7.2 which by default supports TLS.

Concord Support

Should you need any assistance with FaxAssist or any other Concord product or service, please contact our Premium Support Team.

- Email: premiumsupport@concordfax.com
- Telephone: +1 (206) 441-3346, option 2
- Fax: + 1 (206) 441-7965

Premium Support hours are Monday – Friday, 6:00am to 6:00pm (Pacific Time)

Appendix A: DateTime Tokens

The DateTime tokens used in the Header, Footer and File Format fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens.
If no DateTime formatting is used the output of the token will make use of the current culture settings.
Please refer to the Microsoft documentation regarding DateTime formatting options: Standard DateTime formatting or Custom DateTime formatting.

> *Note: If you are using a date token in File Format, invalid folder/file characters will be removed for you.   Invalid characters include: \ / : * ? " < > |*

Valid date and time tokens:

- completedTime

- downloadedTime

- receivedTime

Examples using the date and time, 02/26/2018 8:17:23 AM:

Example Token	Example Output
{receivedTime}	02/26/2018 8:17:23 AM
{receivedTime:yyyy-MM-dd hhmmss}	2018-02-26 081723
{receivedTime:yy-MMM-dd h:m:s t}	18-Feb-26 8:17:23 A
{receivedTime:dd-MMMM-yyy hh:mm:ss tt}	26-February-2018 08:17:23 AM
{receivedTime:D}	Thursday, February 26, 2018
{receivedTime:o}	2018-02-26T08:17:23.0000000-7:00

Appendix B: Metadata Customization

As stated above, when storing faxes in a folder location, FaxAssist will also store an accompanying metadata file. This **ONLY** applies to faxes retrieved via InboundWS.

The MetadataTemplate.xml file found in the application folder for FaxAssist, can be customized, and is used in the output of any metadata file that FaxAssist creates for a fax document.   The filename MetadataTemplate is required, however the contents of the file and the file extension can be customized to better fit your workflow.

> **IMPORTANT!!!** – Only 1 MetadataTemplate file should exist in the application folder (regardless of the extension).

Below is the default MetadataTemplate.xml, which can be customized:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<faxdetails>
    <messageId>%{MessageID}</messageId>
    <messageType>%{ContentType}</messageType>
    <contenttype>%{ContentSubType}</contenttype>
    <attachmentName>%{FileName}</attachmentName>
    <account/>
    <senderCSID>%{RemoteCSID}</senderCSID>
    <callerNumber>%{CallerNumber}</callerNumber>
    <calledNumber>%{CalledNumber}</calledNumber>
    <userId>%{UserID}</userId>
    <receivedTime>%{ReceivedTime}</receivedTime>
    <timeZoneId>%{TimeZoneId}</timeZoneId>
    <timeZoneDisplayName>%{TimeZoneDisplayName}</timeZoneDisplayName>
    <timeZoneOffset>%{TimeZoneOffset}</timeZoneOffset>
    <numPages>%{NumPages}</numPages>
    <duration>%{Duration}</duration>
    <resolution>%{Resolution}</resolution>
    <speed>%{Speed}</speed>
    <status>%{Status}</status>
    <attachmentCount>1</attachmentCount>
    <attachments>
        <attachmentName1>%{FileName}</attachmentName1>
    </attachments>
</faxdetails>
```

For example, if your workflow uses the INI file format, you could rename the MetadataTemplate file to MetadataTemplate.ini and set the Tokens (as listed below) to the fields your workflow expects.

Example of the MetadataTemplate as an INI file, MetadataTemplate.ini:

```
[Fax Details]
MessageId=%{MessageID}
MessageType=%{ContentType}
Contenttype=%{ContentSubType}
AttachmentName=%{FileName}
SenderCSID=%{RemoteCSID}
CallerNumber=%{CallerNumber}
CalledNumber=%{CalledNumber}
UserId=%{UserID}
ReceivedTime=%{ReceivedTime}
TimeZone=%{TimeZone}
NumPages=%{NumPages}
Duration=%{Duration}
Resolution=%{Resolution}
Speed=%{Speed}
```

Available Metadata Tokens

Token	Description	Sample Value
%{CalledNumber}	Number that received the fax call	12065772972
%{CallerNumber}	Caller Identification of the calling fax machine	12063745000
%{CompletedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
%{ContentSubType}	The file format of the attachment	image/tiff/TIFFG4
%{ContentType}	Type of content	Fax
%{Duration}	Number of seconds it took to receive the fax	15
%{FileName}	Name of file being printed	ct12065772972-20180226112513028-321-1.tif
%{MessageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
%{NumPages}	Total number of pages in received fax	9
%{ReceivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
%{RemoteCSID}	CSID received from sending fax machine	TESTCSID1
%{Resolution}	Resolution of the received fax 1 – Standard Resolution 2 – High Resolution	1
%{Speed}	Speed the fax was received at	26400
%{TimeZone}	Time Zone offset of received fax	-07:00
%{UserID}	Concord Account ID assigned to the receiving account	68985