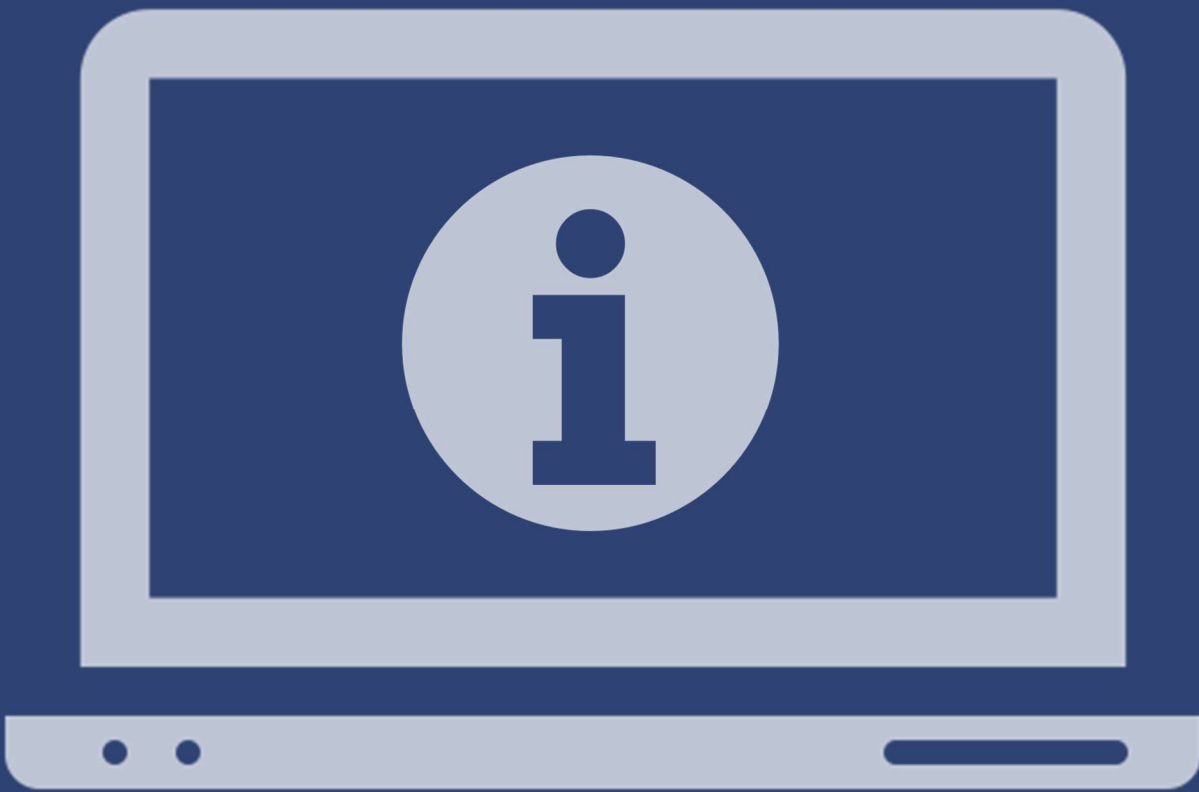


# Concord Print2Fax

## Complete User Guide

Version 4.X



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The contents of this publication and the specifications of this application are subject to change without notice.

The fax service who provided the software reserves the right to make changes without notice to this publication. The fax service provider and software shall not be responsible for any damages, consequential or otherwise, caused by reliance on the materials presented herein, including typographical errors.

### More Information

Additional support can be provided through:

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Fax:	+1 (206) 441-7965
Address:	Concord Technologies 101 Stewart Street - Suite 1000 Seattle, WA 98101 USA
Website:	<a href="https://concordfax.com/print2fax/">https://concordfax.com/print2fax/</a>

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# Préface

Welcome to Concord Print2Fax: a print driver and fax utility to convert any printable Windows document to a faxable image, transport that image to the Concord fax delivery platform, and transmit ( "fax" ) the image to your intended recipient(s).

Print2Fax is installed as a printer driver and will appear in your list of available printers. Using Print2Fax is as easy as printing a document, requiring just a few simple steps.

## About this Guide

This guide provides information on:

- ▶ Print2Fax Step-by Step Installation and Upgrading procedure
- ▶ Print2Fax Application Login
- ▶ Print2Fax Configuration and Preferences
- ▶ Print2Fax Application Usage
- ▶ Manage Fax Documents
- ▶ Manage Address Book

## Who this Guide is for?

The Concord Print2Fax Complete User Guide provides helpful information for any Print2Fax end user or help-desk team tasked with supporting Print2Fax. It is further useful for anyone considering using Print2Fax, with appropriate permissions to access the application.

# Getting Started with Print2Fax

This Chapter provides information required to get started with the Print2Fax application.

The following topics are included:

- System Requirements
- Installation and Upgrade Procedures
- License Agreement

## System Requirements

- To use Print2Fax, you must have valid Concord Fax Online user credentials (Account ID and Password)
- Supported Operating Systems: Windows Server 2012 (x64), Windows Server 2019 (x64), Windows Server 2022 (x64), Windows 10 (x86 / x64), Windows 11 (x64).
- Print2Fax requires a .Net version 4.7.2 or higher.
- Print2Fax requires at least 128 megabytes (MB) of RAM (256 MB is recommended).
- Print2Fax requires at least 100 megabytes (MB) of available space on the hard disk.
- Print2Fax requires a Microsoft mouse or compatible pointing device.

## Installation and Upgrade

If you are installing Print2Fax for the first time, please follow the step-by-step Installation procedures provided below.

If you are upgrading Print2Fax please check your current version. If the version you are currently using is Print2Fax 2.0 or higher, you can follow the Installation procedures below, for Print2Fax will do an automatic upgrade, removing the previous version and files.

For administrators that wish to install the application using command-line options to enforce behavior for users, please refer to [Appendix A: Administrator Installation Procedures](#).

### Step-by-Step Installation Procedure

- ➔ Disable any anti-virus software before installing Print2Fax
- ➔ Double-click on "Print2FaxSetup.msi" file.
- ➔ Accept the default "Destination Folder", click "Next", and click "Install" .
- ➔ A progress bar will display your installation progress.
- ➔ Upon progress complete you will get the successful installation notification.

*In your Start menu, go to Start -> Programs -> Print2Fax.*

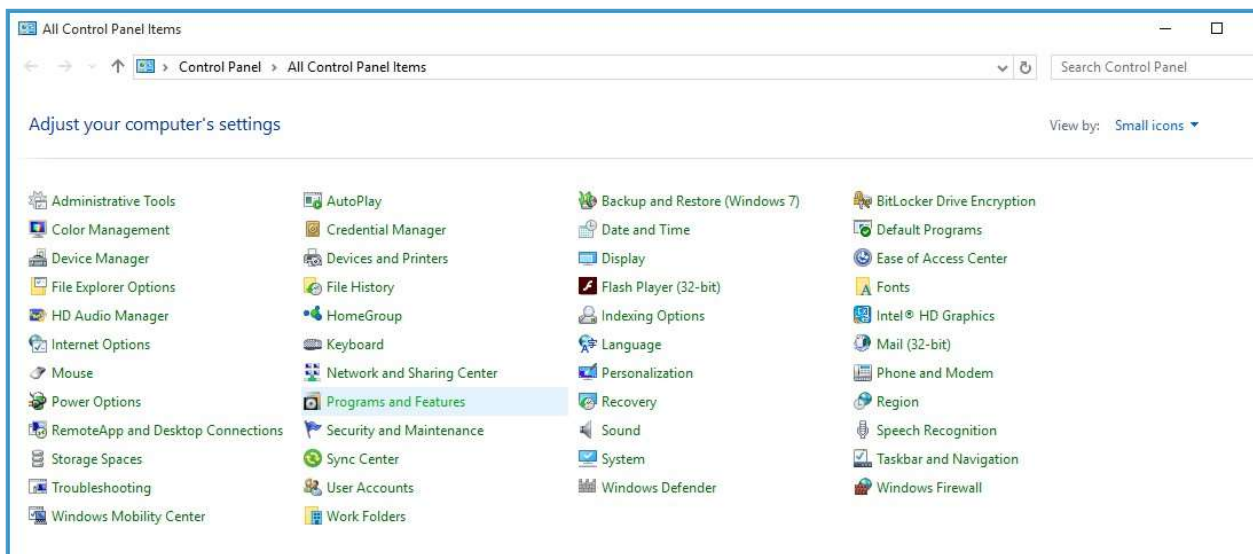
- ➔ This will add the (Print2Fax icon) to the system tray and from here you will be able to access Print2Fax Preferences to configure the application. You will also see a new printer installed with the name "Print2Fax".

## Step-by-Step Upgrade Procedure

As mentioned above, if your current version of Print2Fax is 2.0 or higher, there is no need to manually uninstall. Print2Fax will automatically replace the previous version, so please refer back to the [Installation procedures](#) above.

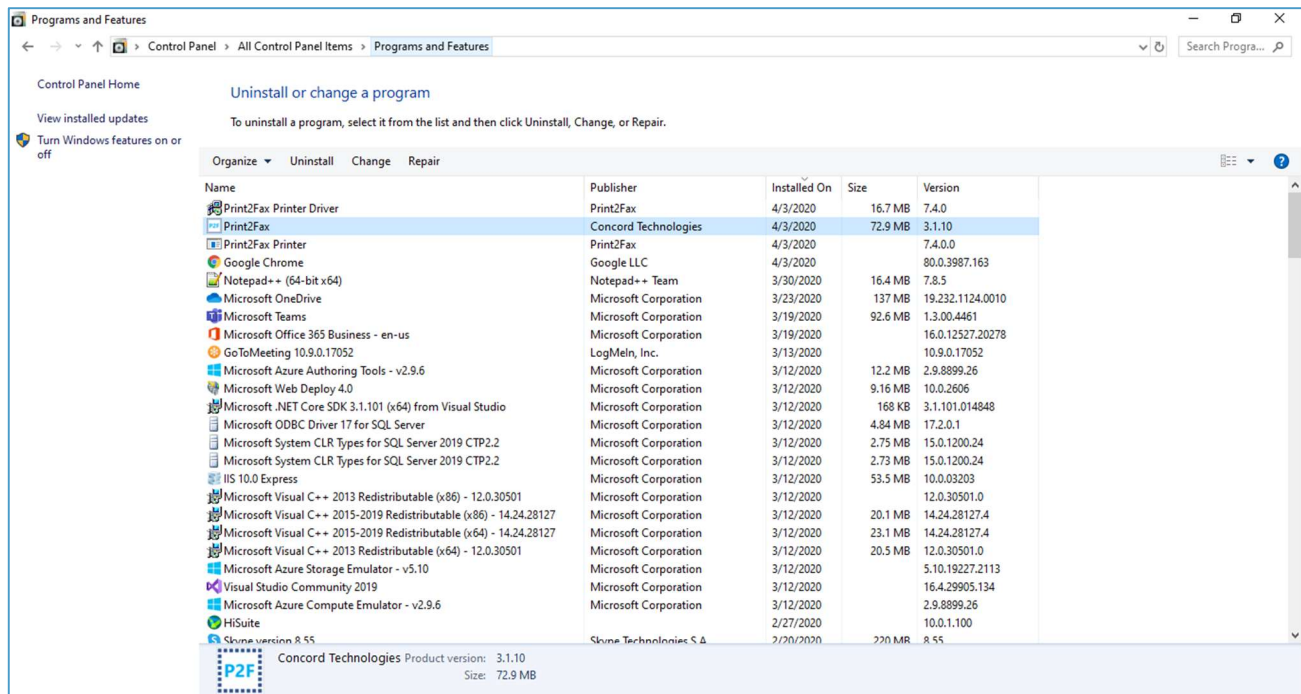
If you are running an older version of Print2Fax (prior to version 2.0), you will first need to uninstall the current version of the application from your workstation. The following 2 screenshots will guide you to start this process:

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



Click **Programs and Features** and select Print2Fax programs in the order as shown below:





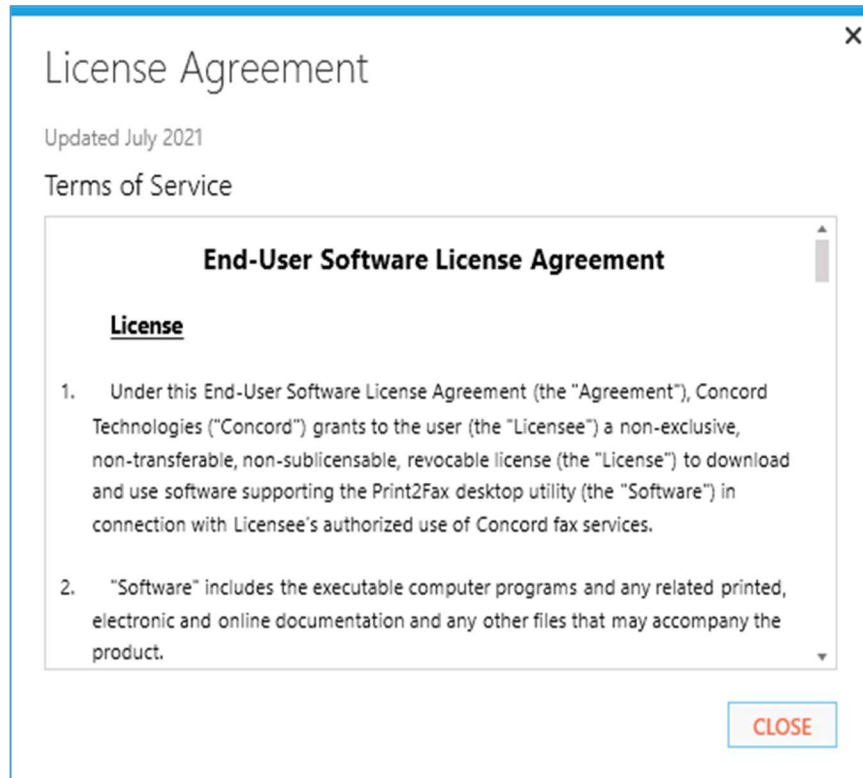
From the above screen, do the following:

- ➔ Select **Print2Fax application** and click **Uninstall** button enabled on the top of the Program Grid.
- ➔ Performing all the above operations will display an alert message to confirm removing the application.
- ➔ Click "**Yes**" and this will remove the current version of Print2Fax completely.
- ➔ Then check if the Print2Fax icon is in the system tray. If it is displayed, right-click and choose exit to remove the existing Print2Fax from memory.
- ➔ Then follow the step-by-step instructions as discussed in "**Step-by-Step Installation Procedure**" section above.

*NOTE: Control Panel screens may differ in respective Windows OS Versions.*


## License Agreement

On the initial launch of the Print2Fax 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 Print2Fax installation.*

This chapter provides information on Print2Fax Configuration Settings. There are several options available to customize the default behavior and transmission method in Print2Fax. To access the settings, launch Print2Fax and click on the **SETTINGS** icon, in the upper, right-hand corner of the Print2Fax application:


Print2Fax

mbx35052134
SETTINGS
ABOUT
LOGOUT

## Recipient Information

Enter the name and number of the person you want to send the fax to or click Address Book to select a fax recipient.

Name

Company

Fax Number

ADDRESS BOOK
ADD TO ADDRESS BOOK
ADD RECIPIENT

To send to multiple recipients, type each recipient's information above, and click Add Recipient to add the recipient to the list below.


FAX DELIVERY: IMMEDIATE

NAME	COMPANY	FAX NUMBER		
Any1	anyComp	12253727728		
Any2	anycomp	12253727729		

CANCEL
REMOVE RECIPIENT
OPTIONS
COVER PAGE
SEND FAX

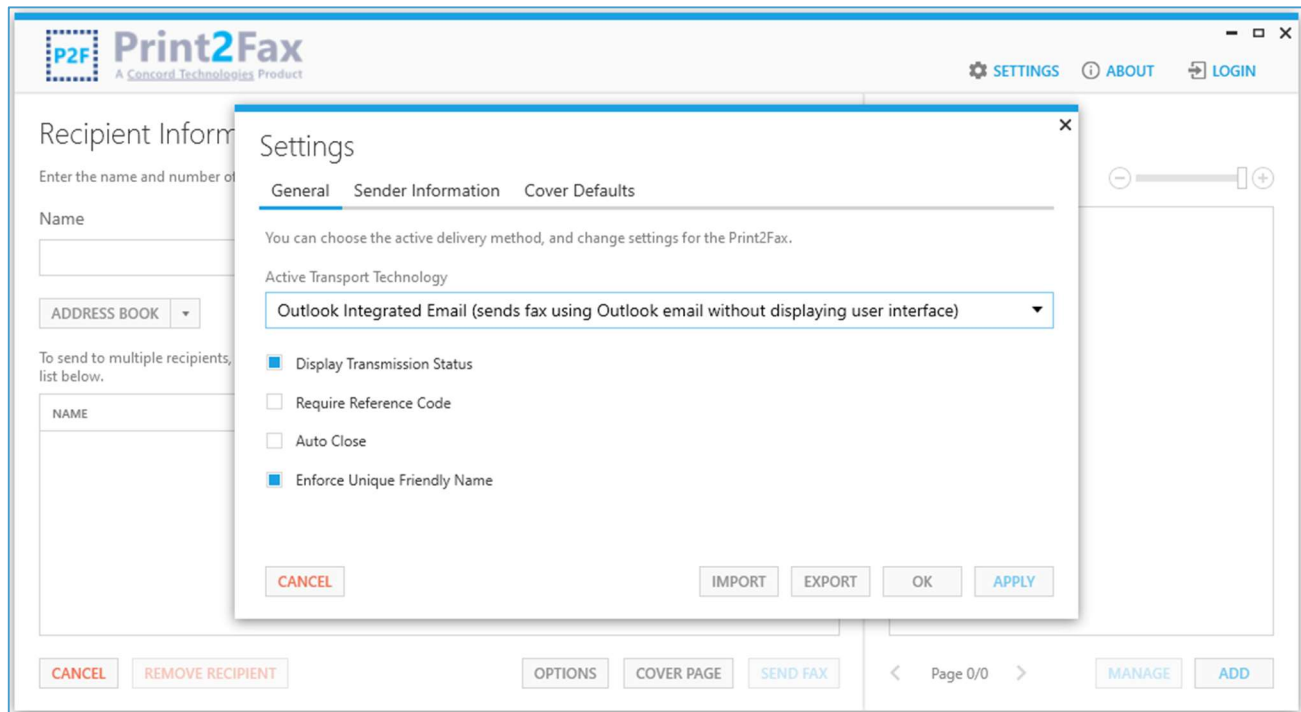
## Preview

0 Document(s) 0 Page(s)



<
Page 0/0
>
MANAGE
ADD

## General Settings



### Display Transmission Status

By selecting the **Display Transmission Status** option, a dialog window will be displayed, confirming the fax transmission status as either success, or failure and remain open. If the feature is disabled the transmission status window will automatically close if all recipients have been successfully submitted, otherwise it will remain open.

*Note: If you also select the Auto Close feature, the transmission status window will automatically close if all recipients have been successfully submitted.*

### Require Reference Code

By selecting the **Require Reference Code** option, the application will prompt you to enter a Reference ID.

## Auto Close

By selecting the **Auto Close** option, the application will automatically close after you have successfully sent the fax job.

## Enforce Unique Friendly Name

The Enforce Unique Friendly Name feature enables a work-around for a documented Microsoft issue, whereby the email address is changed based on the Friendly Name. This issue may impact Outlook users who utilize an email transport method for submitting faxes from Print2Fax. When **Enforce Unique Friendly Name** is enabled, the recipient name ('friendly name' in the email address) is prepended with the word **FAX**. For more information regarding the Microsoft issue, [click here](#).

## Export/Import

The **Export** feature allows you to save the Print2Fax configuration and preferences to a file to a local or network directory. The **Import** feature allows you to import a set of preferences (e.g., a previously exported file from another workstation, server, etc.).

## Active Transport Technology

This menu provides various options to transmit your fax jobs to Concord. There are three transmission options available for delivering your Print2Fax transmissions, allowing greater functionality when faxing with the Print2Fax application.

- Outlook Integrated Email
- Other Desktop Email
- Direct Submission (Secure)

## Outlook Integrated Email

The **Outlook Integrated Email** option leverages your locally installed Microsoft Outlook application to transmit your fax job using SMTP protocol. This option will insert your

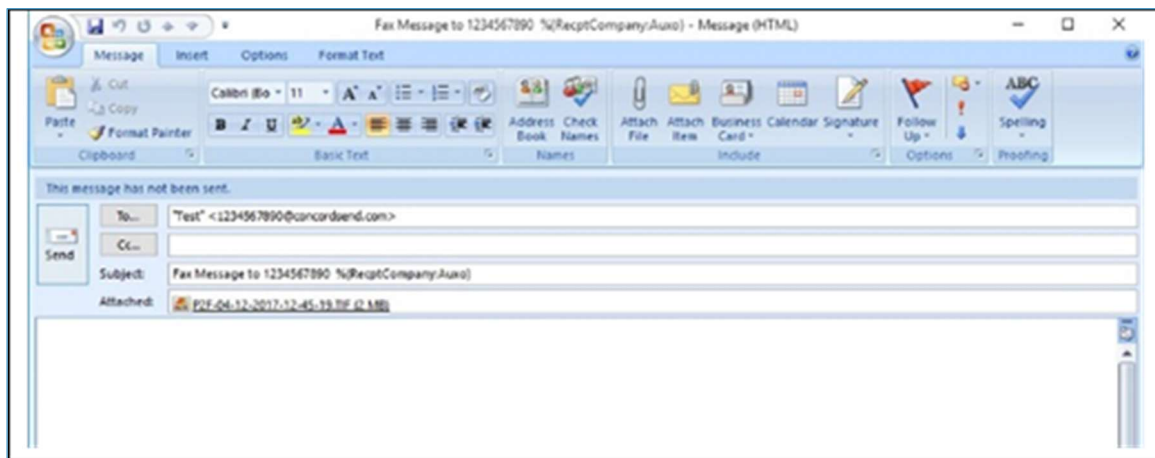
message into your **Outlook Outbox**. The fax will be sent using background processes, so no further interaction is necessary once you click **Send Fax**.

*Note: Outlook Integrated Email is the default option if Outlook is installed on your workstation.*

## Other Desktop Email

The **Other Desktop Email** option leverages your local email client to transmit the fax to the Concord Fax Platform.

When sending with the **Other Desktop** Email transport method, a **New Mail** window will be pre-populated with the recipient and cover page information entered in the **Send Mail** dialog:



*NOTE: Both **Outlook Integrated Email** and **Other Desktop Email** require that the sending Email address is registered with your fax provider to authorize sending faxes.*

## Direct Submission

**Direct Submission** (secure) allows the transmission of a fax directly to the Concord Fax Platform via HTTPS protocol. This method does not require a local installation of Microsoft Outlook or other email clients.

As Direct Submission requires a valid set of credentials, when choosing this method, you will be prompted to complete the Sender Information required for access to the Concord Fax Platform.

### *Direct Submission: Sender Information Tab*

The fields in this tab are required and must be completed to allow Direct Submission to the Concord platform.

The screenshot displays the Print2Fax application interface. In the background, the 'Recipient Information' form is visible, featuring a 'Name' input field, an 'ADDRESS BOOK' dropdown, and a section for multiple recipients. Overlaid on this is a 'Settings' dialog box with three tabs: 'General', 'Sender Information' (which is active), and 'Cover Defaults'. The 'Sender Information' tab contains a 'User Login' section with the username 'mbx3505XXXX' and a 'LOGOUT' button. Below this is a checkbox for 'Remember Credentials on Application Exit'. The 'Email Notifications' section has three radio buttons: 'Required', 'Ask', and 'None' (which is selected). There is also a text input field for 'Enter notification email address' and a checkbox for 'Include document with notification'. At the bottom of the dialog are buttons for 'CANCEL', 'IMPORT', 'EXPORT', 'OK', and 'APPLY'. The main application window has a top bar with the Print2Fax logo, a user ID 'mbx35051853', and links for 'SETTINGS', 'ABOUT', and 'LOGOUT'. The bottom of the window shows a 'Page 0/0' indicator and buttons for 'CANCEL', 'REMOVE RECIPIENT', 'OPTIONS', 'COVER PAGE', 'SEND FAX', 'MANAGE', and 'ADD'.

### *Direct Submission: Credentials*

The Credentials fields must be entered with the Concord **Username** and **Password** to authenticate with the Fax Platform and allow the transmission. Click **VALIDATE**, to ensure that your credentials are valid, and have been correctly entered.

### *Direct Submission: Email Notifications*

If selected, the Email Notifications field indicates the email address to which Delivery Confirmations will be sent upon fax completion. By leaving the setting as **None**, no email notification will be generated, and no further action is required.

- By selecting **Required**, you must enter an email address to which all notifications will be sent. To ensure the email address is inserted correctly, you will be required to enter it a second time and it will be validated for an exact match.

The screenshot shows the Print2Fax web interface with a 'Settings' dialog box open. The dialog has three tabs: 'General', 'Sender Information' (selected), and 'Cover Defaults'. In the 'Sender Information' tab, the 'User Login' section shows 'Username : mbx3505XXXX' and a 'LOGOUT' button. Below this is a checkbox for 'Remember Credentials on Application Exit' which is checked. The 'Email Notifications' section has three radio buttons: 'Required' (selected), 'Ask', and 'None'. Below the radio buttons are two text input fields, both containing the email address 'rgarrison@globex.com'. At the bottom of the dialog are buttons for 'CANCEL', 'IMPORT', 'EXPORT', 'OK', and 'APPLY'. The background shows a 'Recipient Information' form with fields for 'Name' and 'ADDRESS BOOK', and a table for recipients.



- By selecting **Ask**, for each subsequent transmission, you will be asked if an email notification should be sent. If confirmed, you will need to enter an email address twice for verification.
- By selecting **Include document with notification**, the email notification will include a copy of the delivered document.



**PLEASE NOTE:** *As the email notification and document may contain sensitive information, you should take extra care to ensure the email address is correct. To send email notifications you will be required to confirm the email address and accept responsibility that your communications comply with State and Federal privacy laws.*

## Cover Default Settings

When using the **Direct Submission** transport option, the **Cover Defaults Tab** enables you to define the default values of the Sender information you wish to include on your cover page (Sender Company, Sender Name, Sender Phone, and Sender Fax), as well as which cover page will be included by default.

In addition, you can enforce the use of a cover page on all faxes you send using the Print2Fax application by clicking **Always Send Cover Page**.

If you utilize the **Direct Submission** transport option, or if you choose to login to the P2F application, your **Cover Default Settings** page will be populated with your default configuration settings store within the Concord Fax Platform. You may, of course modify these settings and save them as default settings.

The screenshot shows the Print2Fax web application interface. A 'Settings' dialog box is open, displaying the 'Cover Defaults' tab. The dialog box contains the following fields and options:

- Sender Company:** Sales
- Sender Name:** John Manager
- Sender Phone:** 12121234567
- Sender Fax:** 15551234567
- ☐ Always Send Cover Page
- Hosted Cover Page:** Concord Default

At the bottom of the dialog box are buttons for CANCEL, IMPORT, EXPORT, OK, and APPLY. The background shows the main application window with a 'Recipient' list and a 'SEND FAX' button.

# Using the Print2Fax Application

## Starting Print2Fax

To Start Print2Fax, do one of the following:

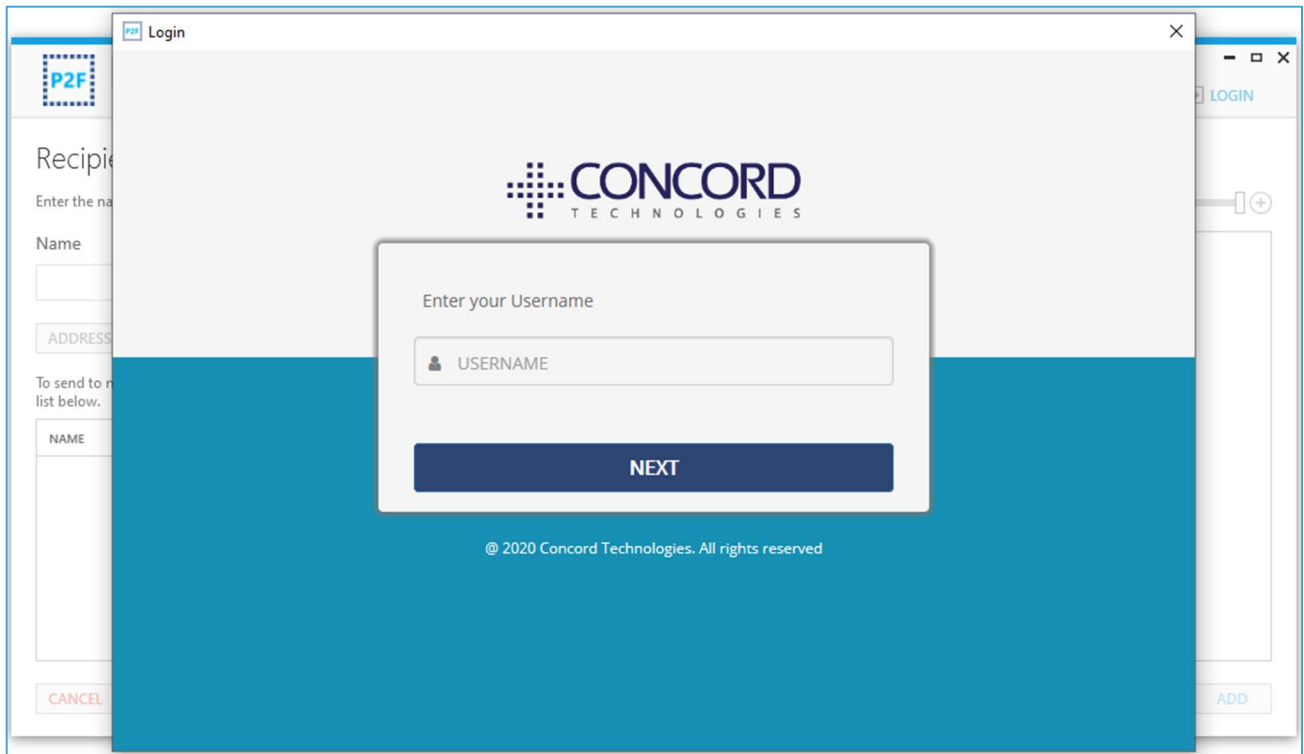
- Choose Program Files → Print2Fax from the Windows Start menu in the program group.
- From your desktop, choose the Print2Fax shortcut.
- When printing a document, choose Print2Fax from the list of available printers
- Right-click on the document you wish to fax and select the **Send To** option from the pop-up menu.

## The ABOUT Button

For version and licensing information, as well as requesting technical assistance, click on the **ABOUT** button in the upper right-hand corner of the Print2Fax main window.

## Application Login / Single Sign-On Support

Users with valid credentials can log into the application which enables access to account information stored on the Concord Fax Platform, such as cover sheets and other user-defined information. To log in to the application, click on the **LOGIN** button in the upper, right-hand corner of the Print2Fax main window. You will be directed to the Concord login page, where you will enter your credentials.



### *Federated Partners*

If your organization is a Concord Federated partner, you can login to Print2Fax using your existing organizational credentials, such as your Windows username or corporate email address. You will no longer need to use or remember Concord-provided credentials. Just enter the login name and password associated with your organization, and your credentials will be validated by your company's authentication servers, then you can access the features of Print2Fax. This feature improves the ease of use, as additional credentials do not

have to be remembered or managed. It also improves security, as with fewer credentials to manage the likelihood of unauthorized access of those credentials is reduced.

### *Non-Federated Partners*

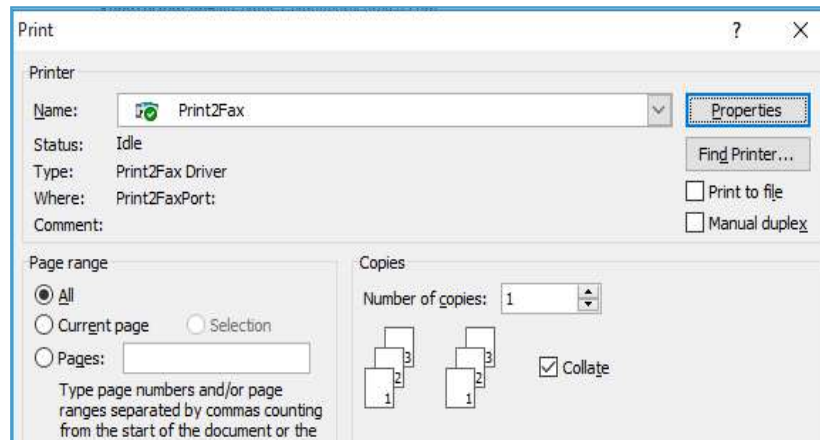
If your organization is not a Federated partner, via a web browser, you can still login to Print2Fax by entering your Concord credentials. Your successful authentication can be remembered by the application and the Concord platform for a period of time, meaning that you can remain logged in and not have to re-enter your credentials upon application start.

*TIP: Check the "Remember Credentials On Application Exit" check box for the system to remember the login credentials on next application start.*

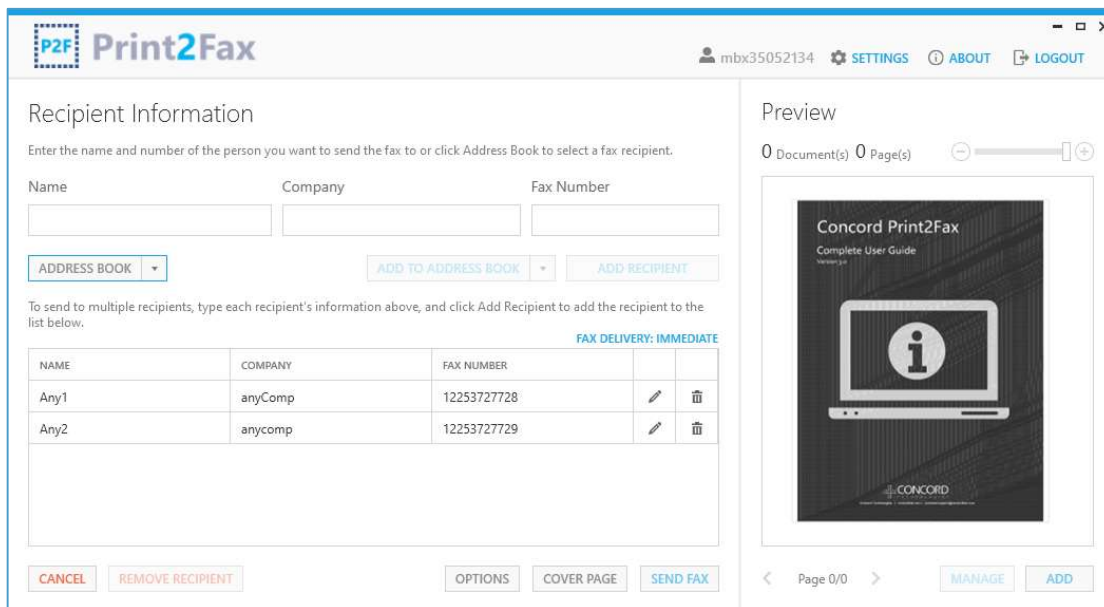
## Sending a Fax

### Sending a Fax via Print

Upon Print2Fax installation and configuration, sending a fax is as simple as clicking the Print button or selecting **File** → **Print** from within the document you wish to fax, and then selecting the Print2Fax option:

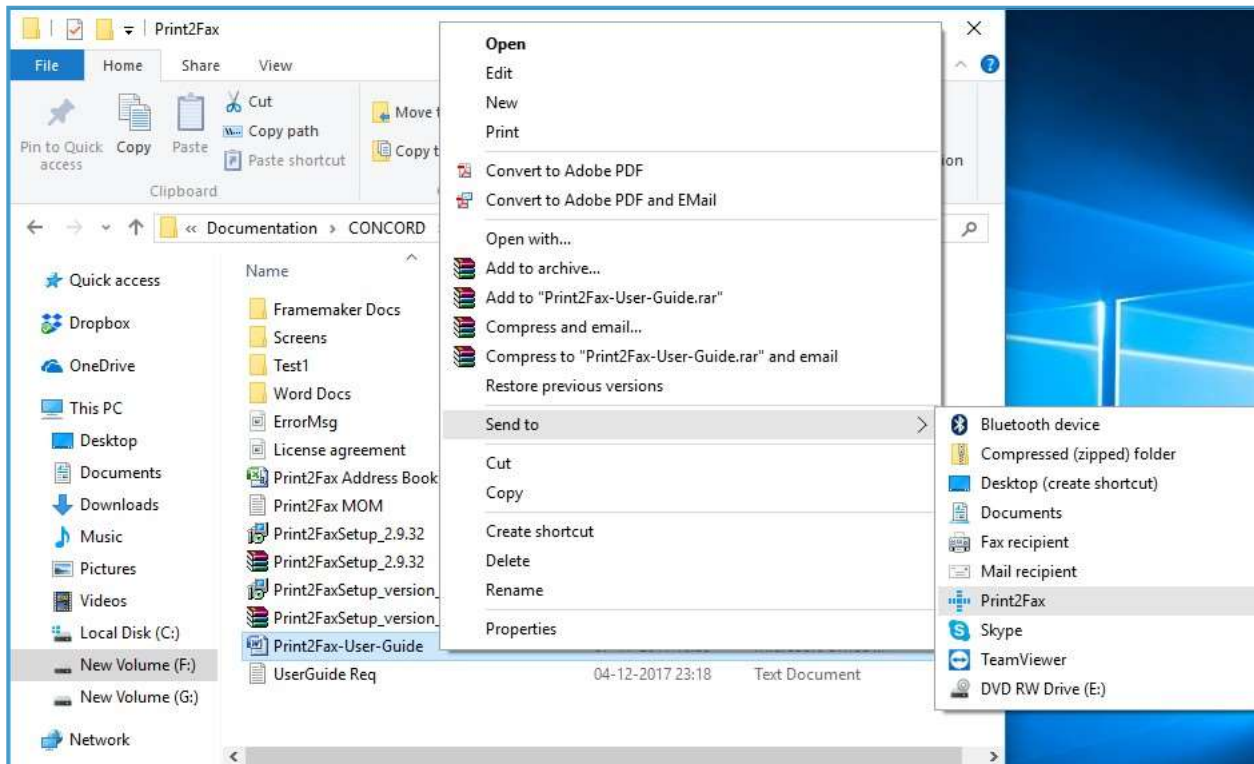


Once you click print, the Print2Fax interface will be launched as follows:



## Sending a Fax via Send-To


The **Send To** feature empowers end users to send a selected document to the Print2Fax application. Right-click on the required document and select the **Send To** option from the pop-up menu:



Now click on **Print2Fax** from the sub-menu as shown above. This will automatically open the document in the **Manage Documents** window of the Print2Fax application with a successful “Printed” message.

## Sending a Fax via Add Documents

When inside the Print2Fax application you can initiate the process by clicking the **Add Documents** button on the bottom right-hand corner of the main screen. You will be prompted to browse and select documents you wish to include within the fax.

 **Print2Fax**

mbx35052134

SETTINGS

ABOUT

LOGOUT

### Recipient Information

Enter the name and number of the person you want to send the fax to or click Address Book to select a fax recipient.

Name

Company

Fax Number





ADDRESS BOOK

ADD TO ADDRESS BOOK

ADD RECIPIENT

To send to multiple recipients, type each recipient's information above, and click Add Recipient to add the recipient to the list below.

FAX DELIVERY: IMMEDIATE

NAME	COMPANY	FAX NUMBER		
Any1	anyComp	12253727728		
Any2	anycomp	12253727729		

CANCEL

REMOVE RECIPIENT

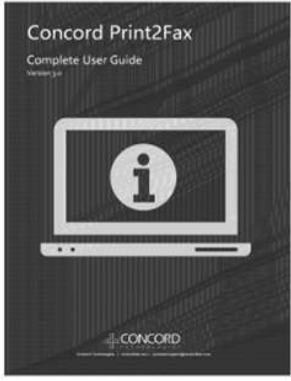
OPTIONS

COVER PAGE

SEND FAX

### Preview

0 Document(s) 0 Page(s)



< Page 0/0 >

MANAGE

ADD



## Add and Remove Recipients

The fax recipient information can be entered either by manually completing the **Recipient Information** fields or by adding recipients from the **Address Book**.

*Note: The number of recipients may be limited by the fax service provider or email host. Print2Fax will return an error if this limit has been exceeded.*

### Add Recipients Manually

To manually add a recipient, enter the **Name**, **Company**, and **Fax Number** fields and click on the **ADD RECIPIENT** button.

*Note: Only the Fax Number field is required for sending a fax.*

*Note: The fax number format may vary (based on the fax provider), but the default format should include the country code and full fax number (including area code).*

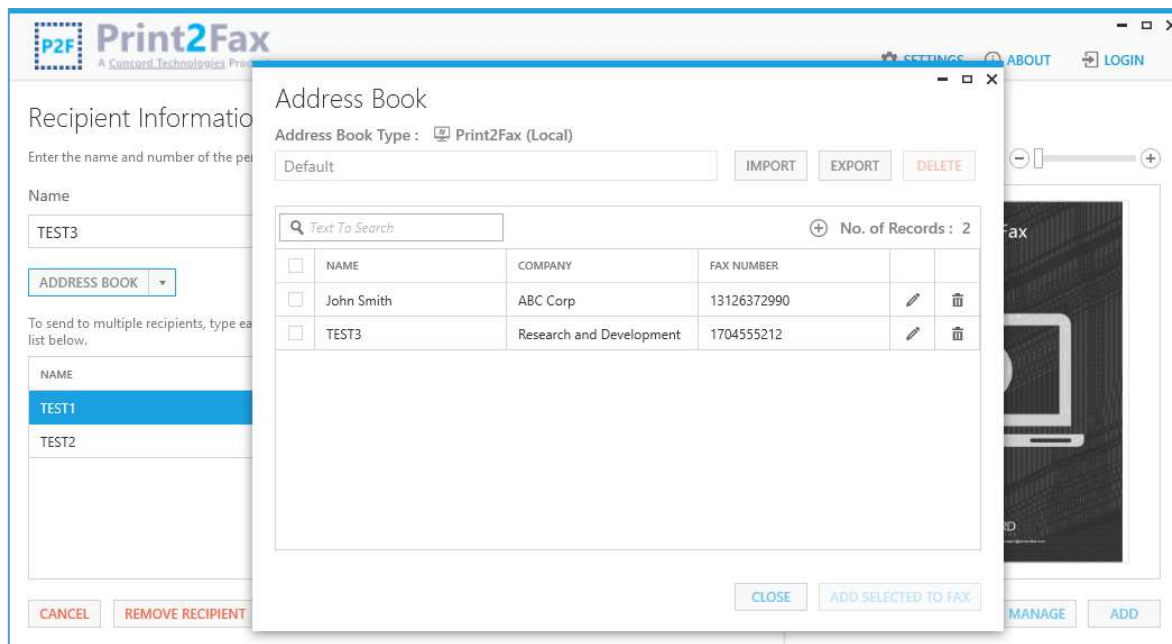
Multiple recipients can be *added* to the same job by populating the Recipient information fields and clicking on the **ADD RECIPIENT** button. Recipients can be *removed* from the current fax job by selecting the **REMOVE RECIPIENT** button.

The screenshot displays the Print2Fax web application interface. The top navigation bar includes the Print2Fax logo, a user profile icon with the email 'mbx35052134', and links for 'SETTINGS', 'ABOUT', and 'LOGOUT'. The main content area is split into two panels. The left panel, titled 'Recipient Information', contains instructions to enter recipient details or use the address book. It features three input fields for 'Name', 'Company', and 'Fax Number', an 'ADDRESS BOOK' dropdown, and 'ADD TO ADDRESS BOOK' and 'ADD RECIPIENT' buttons. Below these is a table for managing recipients, with columns for NAME, COMPANY, FAX NUMBER, and edit/delete icons. The table contains two entries: 'Any1' with company 'anyComp' and fax number '12253727728', and 'Any2' with company 'anycomp' and fax number '12253727729'. At the bottom of this panel are 'CANCEL', 'REMOVE RECIPIENT', 'OPTIONS', 'COVER PAGE', and 'SEND FAX' buttons. The right panel, titled 'Preview', shows a document titled 'Concord Print2Fax Complete User Guide' with a page count of '0 Document(s) 0 Page(s)'. The preview image shows a laptop with an information icon on its screen. At the bottom of the preview panel are 'Page 0/0', 'MANAGE', and 'ADD' buttons.

NAME	COMPANY	FAX NUMBER		
Any1	anyComp	12253727728		
Any2	anycomp	12253727729		

## Add Recipients Using the Address Book

Recipients can also be added to a fax job from the **Address Book** by clicking on the **ADDRESS BOOK** button:



The **Address Books**, pop-up window is displayed when clicking on the **ADDRESS BOOK** button. You can edit or delete the recipient information by clicking the "**EDIT**" and "**DELETE**" buttons. You may also click on **ADD SELECTED TO FAX**, to add a designated recipient.

*Note: The **ADD SELECTED TO FAX** button is enabled only when the recipient information is selected.*

For more information on Address Books, refer to the [Print2Fax Address Book Management](#) section.

## Preview Documents

The main interface includes a **Preview** section, to allow users to navigate between the desired pages by clicking "<" and ">" symbols, respectively, without ever leaving the main screen. Users are also able to directly type the page number in the provided text box to navigate to the intended page.

Dragging the seek bar above the **Preview** section (or, by clicking "-" and "+" signs), will enable users to Zoom in and out of the images. The total number of Documents and Pages uploaded in the application will also be displayed to the user.

The screenshot displays the Print2Fax web application interface. The top header includes the Print2Fax logo, a user profile icon with the ID 'mbx35052134', and links for 'SETTINGS', 'ABOUT', and 'LOGOUT'. The main content area is divided into two panels. The left panel, titled 'Recipient Information', contains a form for adding recipients with fields for Name, Company, and Fax Number. Below these fields are buttons for 'ADDRESS BOOK', 'ADD TO ADDRESS BOOK', and 'ADD RECIPIENT'. A table below the form lists existing recipients with columns for NAME, COMPANY, and FAX NUMBER. The right panel, titled 'Preview', shows a document titled 'Concord Print2Fax Complete User Guide' with a preview image of a laptop displaying an information icon. A seek bar and zoom controls are located above the preview image. At the bottom of the interface, there are buttons for 'CANCEL', 'REMOVE RECIPIENT', 'OPTIONS', 'COVER PAGE', 'SEND FAX', and a page indicator 'Page 0/0' with 'MANAGE' and 'ADD' buttons.

**Recipient Information**

Enter the name and number of the person you want to send the fax to or click Address Book to select a fax recipient.

Name:  Company:  Fax Number:

To send to multiple recipients, type each recipient's information above, and click Add Recipient to add the recipient to the list below.

**FAX DELIVERY: IMMEDIATE**

NAME	COMPANY	FAX NUMBER		
Any1	anyComp	12253727728	<input type="text"/>	<input type="text"/>
Any2	anycomp	12253727729	<input type="text"/>	<input type="text"/>

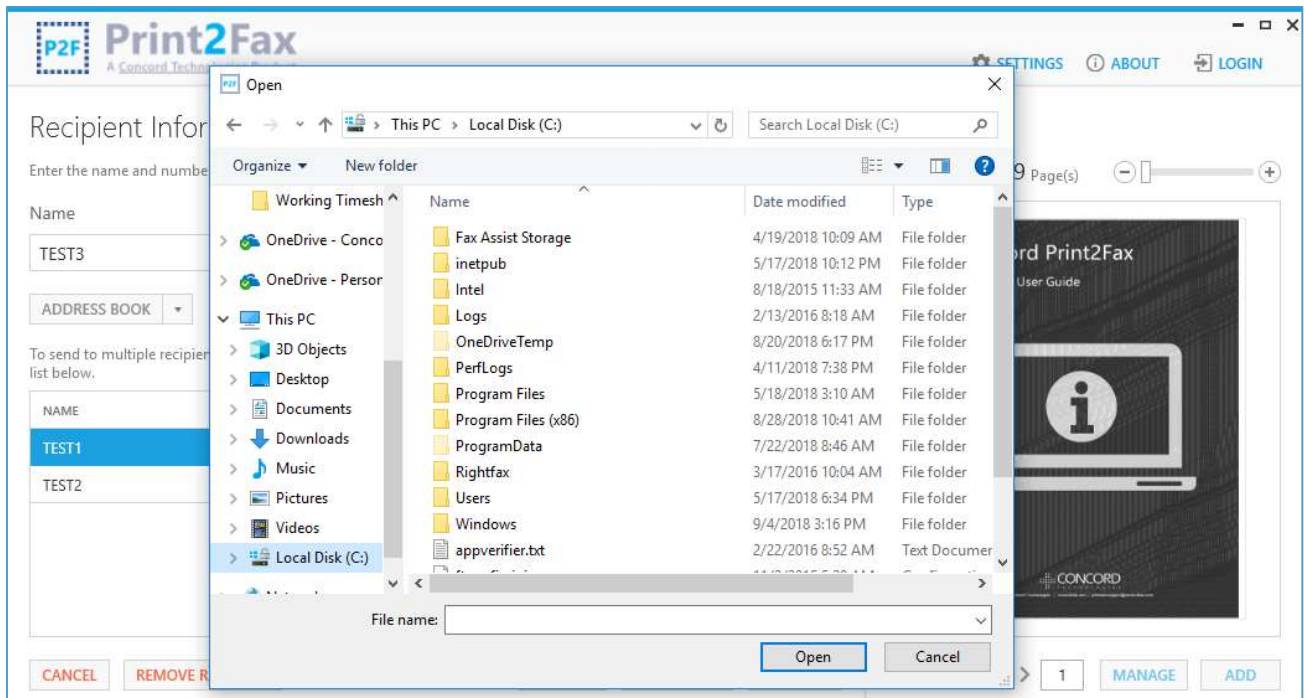
**Preview**

0 Document(s) 0 Page(s)

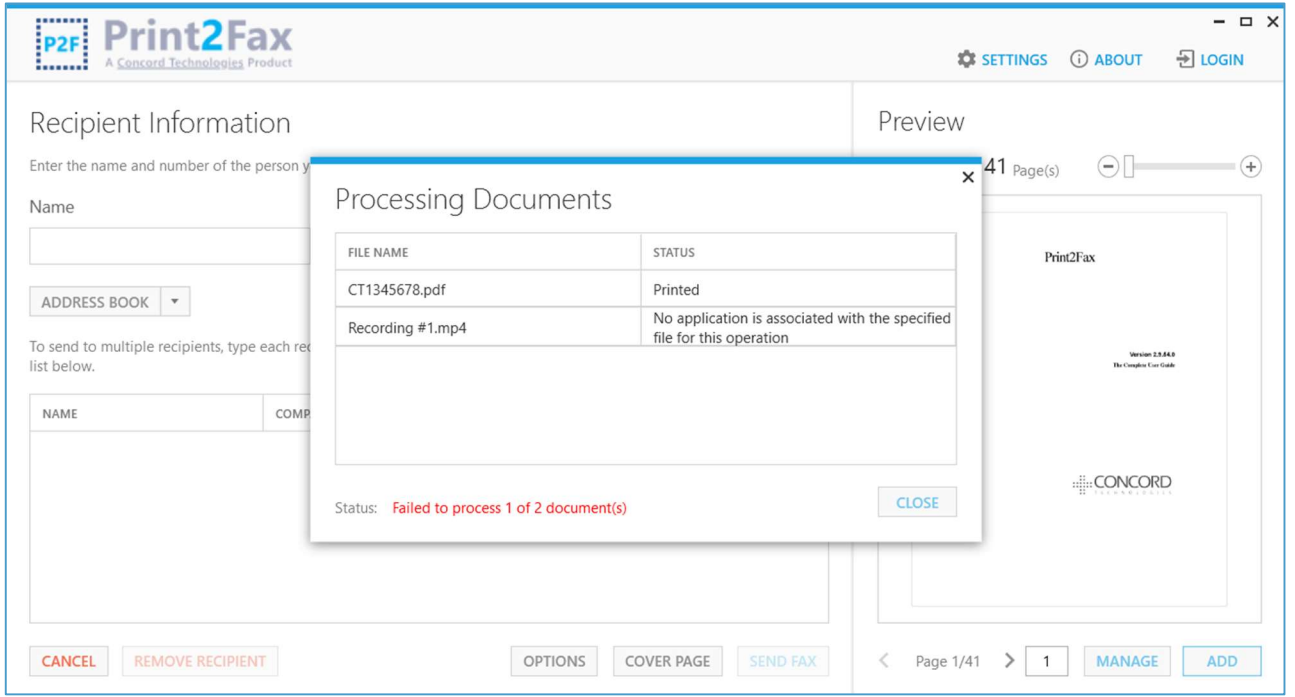
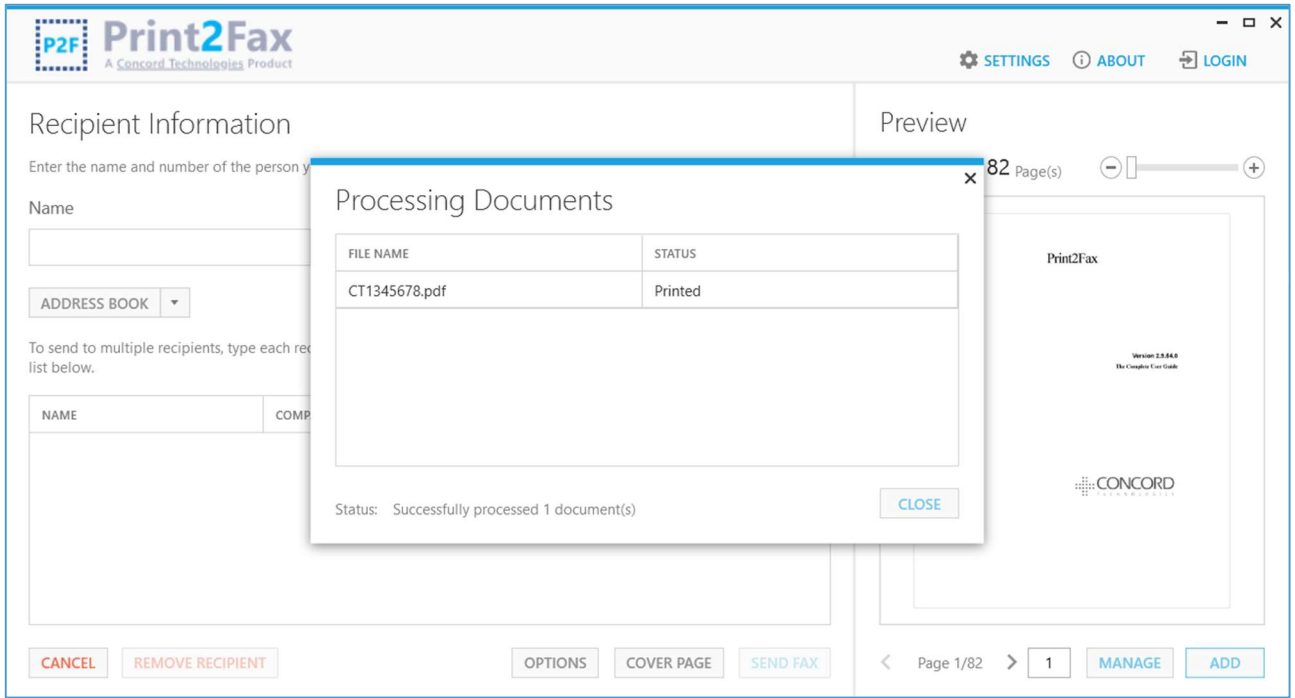
Page 0/0

## Add and Manage Fax Documents

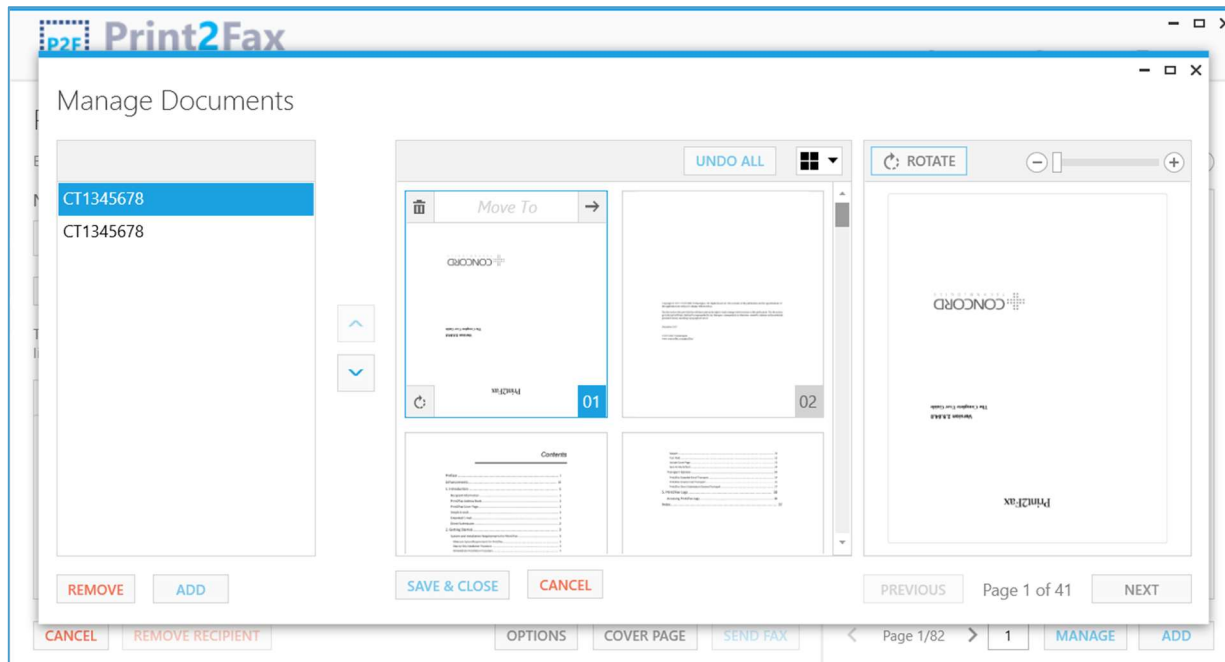
Print2Fax allows you to add, remove, and reorganize multiple documents in a fax job. You can either click the **MANAGE** button to open the **Manage Documents** interface, or click **ADD** (lower, right-hand corner) to launch Windows Explorer, allowing you to browse to add additional documents to your current fax job. Locate the desired file and click **Open**.



Upon successful file selection, the selected document will be opened and closed to enable the Print2Fax file processing. Also, upon unsuccessful file selection, message appears for the count of documents that failed to process. Document processing will be displayed in the **Processing Documents** pop-up window:



Upon successful document processing, the **Manage Documents** window is displayed showing the document(s) to be included in the fax, as shown in the screen, below:



The **Manage Documents** window can also be accessed by clicking **MANAGE**, allowing you to:

- Remove entire documents
- Remove specific pages
- Add additional documents
- Re-order pages within a document
- Re-order documents
- Easily undo recent changes
- Page Zoom-in/out
- Preview and navigate between documents
- Preview and navigate between pages
- 180 degree page rotation

*NOTE: If using either **Outlook Integrated Email** or **Other Desktop Email** transport method, your email host may impose a limit on the total file size that can be sent in a single job. Print2Fax will generate an error if that limit is exceeded.*

## Print2Fax Cover Page

Provided your Concord account is set to allow the use of a cover page, you can select and personalize your cover page by clicking on the **Cover Page** button in the Print2Fax main window.

**Print2Fax**  
A Concord Technologies Product

Recipient Information

Enter the name and number of the person you want to send a fax to.

Name: TEST3  
Company: Research

ADDRESS BOOK

To send to multiple recipients, type each recipient's info in the list below.

NAME	COMPANY
TEST1	ABC Incorporated
TEST2	Small Business

**Add Cover Page**

Cover Page Name: Sales Org

Sender Company: Sales  
Sender Name: Mary Smit  
Sender Phone: phone@concordfax.com  
Sender Fax: 12123336666

Subject:

☒ Include Cover Page ☐ Save as My Default

CANCEL OK

This screen allows you to enter the Sender information you wish to use for a customized cover page when using the **Direct Submission** transmission method. Check boxes at the bottom of the **Add Cover Page** screen allow you to automatically include a cover page (**Include Cover Page**), and to set the newly added cover page as your default (**Save as My Default**).

If you are a registered user, your Cover Default Settings page will be populated with your default configuration settings stored within the Concord Fax Platform. You may, of course modify these settings and save them as default settings for future use.



## Cover Page Name

This field indicates the name of the cover page to be used as stored on the Concord Fax Platform. The **Cover Page Name** field is both case and space sensitive and requires the exact cover page name be entered.

If you are a registered user, you can browse the **Cover Page Name** drop down to select from a list of all available cover pages.

## Sender Information Fields

**Sender Company** Enter the Company Name of the Fax Sender

**Sender Name** Enter the Name of the Fax Sender

**Sender Phone** Enter the Phone Number of the Fax Sender

**Sender Fax** Enter the Fax Number of the Fax Sender

*NOTE: Sender Information fields can be populated as preferred based on the cover page assigned to the user. None of the fields are mandatory.*

## Subject

Enter the information you wish to appear in the **Subject** line of the cover page.

## Body Text Field

The Body Text Field in the **Add Cover Page** screen allows you to input up to 3000 characters of text. If you are using **Outlook Integrated Email**, you may further select whether that text should be bold, italicized, underlined, centered, aligned to the left or right margins, as well as select the font, and font size.

## Include Cover Page

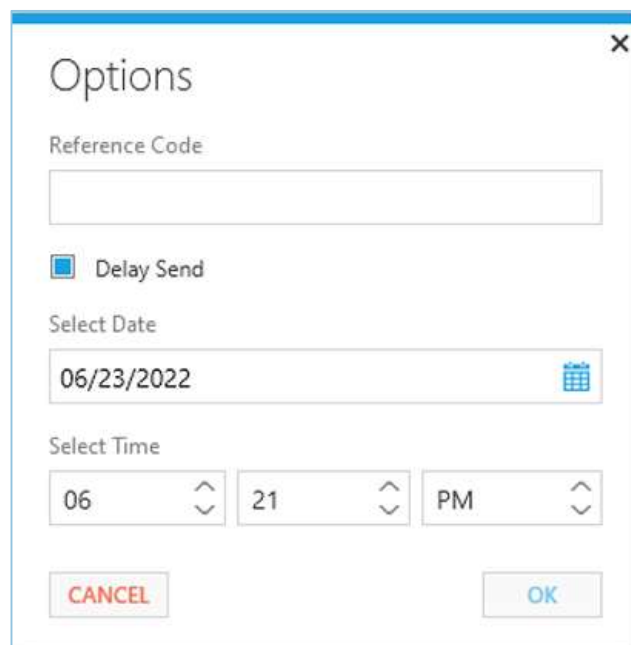
This option must be checked to include the cover page.

## Save As My Default

This option will be checked if the sender wants to make the cover page the default cover page for all future fax even.

## Delay Send

By clicking on the **OPTIONS** button, you can delay the send of your fax for up to 4 days in the future. From this window you can select both the date and the time for Concord to initiate the sending of your fax. Simply click on the calendar and select the desired send date, and either scroll to select the hour, minute and period, or type in the desired send time. To apply your settings, click on the OK button. Or you can cancel the delay by clicking on the cancel button.



The image shows a software dialog box titled "Options" with a close button (X) in the top right corner. Inside the dialog, there is a "Reference Code" label followed by an empty text input field. Below this is a checked checkbox labeled "Delay Send". Underneath the checkbox is the "Select Date" label and a date input field showing "06/23/2022" with a small calendar icon to its right. Below the date field is the "Select Time" label and three time selection fields: "06" with an up/down arrow, "21" with an up/down arrow, and "PM" with an up/down arrow. At the bottom of the dialog are two buttons: "CANCEL" on the left and "OK" on the right.

## Reference Code

By clicking on the **OPTIONS** button, a **Reference Code** can be added. There is a 60-character limit for this field. This information will be included in the metadata stored for this job and can also be used to populate a corresponding Reference ID field in a custom Cover Page.

## Closing Print2Fax

If you are not in the process of creating a fax job, you can close the Print2Fax application by either clicking on the X in the upper right-hand corner, or by clicking on Cancel button in the lower left-hand corner.

If you have begun the process of creating a fax job, you can close the application by clicking on the X in the upper right-hand corner. A pop-up window will appear, confirming that you wish to cancel and close Print2Fax. Click **YES** to close; click **NO** to remain in Print2Fax.

## Exiting Print2Fax

To exit the Print2Fax application, right click on the Print2Fax icon in your system tray and choose **Exit**.

# Address Book Management

## Address Book

The Print2Fax address book allows you to access a stored list of contacts that can be added as recipients to any fax job.

The **Address Book** field displays the titles of the Address Books (e.g., "Default"). Click the **Address Book** button from within the primary Print2Fax interface to launch the Address Books window:

Recipient Information

Enter the name and number of the person you want to send the fax to or click Address Book to select a fax recipient.

Name Company Fax Number

ADDRESS BOOK

Contacts

Default

Local

Remote

Add New Address Book

COMPANY	FAX NUMBER
anyComp	1225372728
anycomp	1225372729

FAX DELIVERY: IMMEDIATE

CANCEL REMOVE RECIPIENT OPTIONS COVER PAGE SEND FAX

Preview

0 Document(s) 0 Page(s)

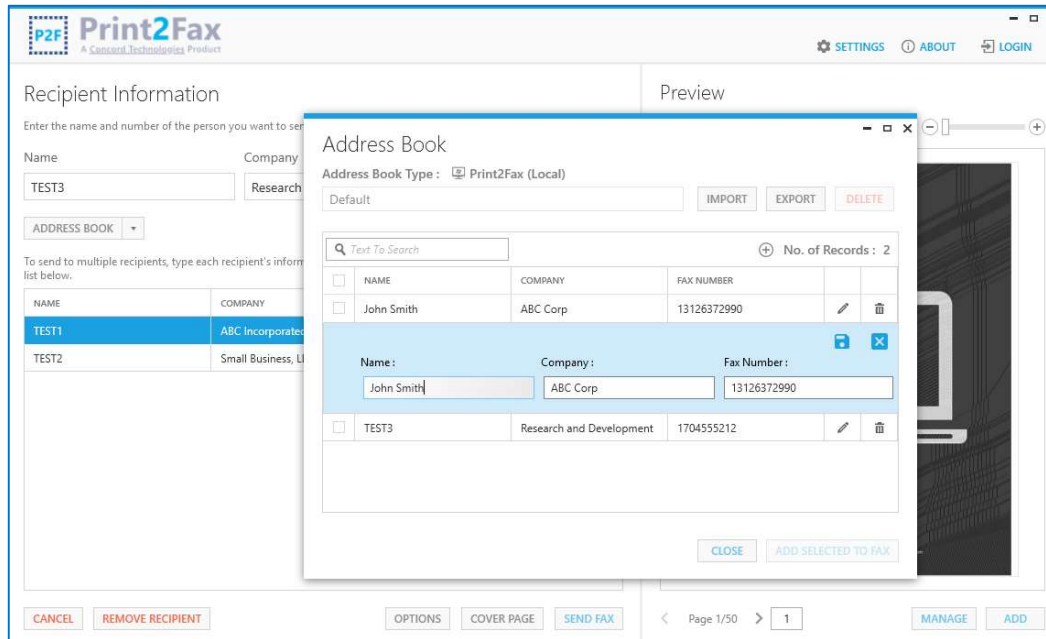
Concord Print2Fax Complete User Guide

Page 0/0

MANAGE ADD

Print2Fax allows you to add, remove or modify contacts within your Print2Fax address book.

*NOTE: For Exchange and Outlook address books, the ability to Add / Edit / Delete contacts is based on the permissions defined by your administrator. By default, you will have the ability to make these changes to your personal address books.*



## Add Contact

To add a contact, click on the + (add) icon in the Address Book Type grid:

Enter the Name, Company, and Fax Number, clicking the **Save** button to retain the details entered.

## Edit Contact

To Edit a contact, first check the box containing the contact record and click the **Edit** button to modify information. When finished, click the **Save** button to retain your changes.

## Remove Contact

To Delete a contact, first check the box containing the contact record and click the **Delete** button to remove it.

When finished making changes to the Address Book, click the **SAVE & CLOSE** button to exit the Address Book.

## Importing / Exporting Address Books

The **Import** feature will allow you to import an address book from a back-up file, or from another computer or server. If any contacts are found which are identical to an existing entry, they will be skipped to prevent duplication.

The **Export** feature will allow you to save the address book to a back-up file or transfer the address book to another computer or server.

Print2Fax supports the option to **Import** and **Export** the **Address Books** as Excel (.xls) or CSV (.csv) files. Files can be imported to the application to automatically add contacts to the Print2Fax Address Book, in bulk. Files can be exported from the system to store the available contact information in system-defined Excel sheets.

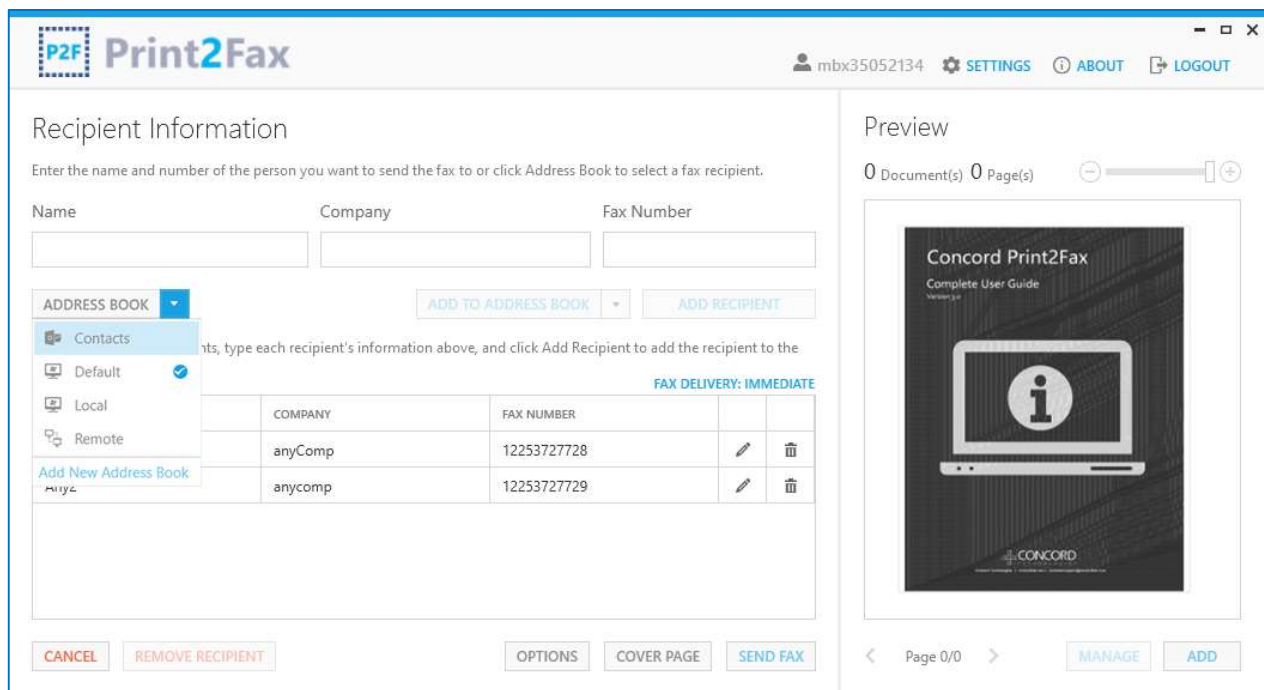
### *TIPS:*

1. Only CSV or Excel files are supported for Import/ Export operation.
2. A predefined Excel template will contain "Name" , "Company" , and "Fax Number" columns, respectively.
3. Users have the option to select or choose the Excel sheets from the files imported in Print2Fax application.





## Adding a New Address Book

In addition to offering a local address book stored within the Print2Fax application, Print2Fax also supports importing and exporting Address Book files from a local workstation or server, as well as providing the ability to actively sync with a **Print2Fax Remote Address Book**. This allows for a single Address Book file to be maintained and accessed by multiple users without requiring a new import each time the Address Book has been updated.

To add an Address Book, click the  drop down, as shown below:



The screenshot displays the Print2Fax web application interface. The top navigation bar includes the Print2Fax logo, a user profile icon with the email 'mbx35052134', and links for 'SETTINGS', 'ABOUT', and 'LOGOUT'. The main content area is divided into two panels. The left panel, titled 'Recipient Information', contains a form for adding a new recipient. It includes input fields for 'Name', 'Company', and 'Fax Number'. Below these fields is a dropdown menu labeled 'ADDRESS BOOK' with a blue arrow icon. The dropdown menu is open, showing options: 'Contacts', 'Default' (selected with a blue checkmark), 'Local', and 'Remote'. Below the dropdown is a table with two columns: 'COMPANY' and 'FAX NUMBER'. The table contains two rows of data: 'anyComp' with '12253727728' and 'anycomp' with '12253727729'. Each row has edit and delete icons. To the right of the table is a button labeled 'ADD TO ADDRESS BOOK'. Below the table is a button labeled 'ADD RECIPIENT'. At the bottom of the left panel are buttons for 'CANCEL', 'REMOVE RECIPIENT', 'OPTIONS', 'COVER PAGE', and 'SEND FAX'. The right panel, titled 'Preview', shows a preview of a fax cover page. The cover page is titled 'Concord Print2Fax Complete User Guide' and features a laptop icon with an 'i' inside. Below the preview are buttons for 'MANAGE' and 'ADD'. The bottom of the right panel shows 'Page 0/0' and navigation arrows.

COMPANY	FAX NUMBER		
anyComp	12253727728		
anycomp	12253727729		

By clicking **Add New Address Book** from the drop-down list, the following pop-up window will be displayed:

The screenshot shows the Print2Fax application interface. In the foreground, a pop-up window titled "Add Address Book" is open. It features a "Address Book Type" dropdown menu with "Print2Fax (Local)" selected, and an adjacent "Address Book Name" text input field. Below these fields is a table with columns for "NAME", "COMPANY", and "FAX NUMBER". The table is currently empty. At the bottom left of the pop-up is a checkbox labeled "Set as Default", and at the bottom right is a "CLOSE" button. The background interface shows the "Recipient Information" section with a "Name" field containing "TEST3" and a "Company" field with a "Research" button. Below this is a table with columns "NAME" and "COMPANY", containing rows for "TEST1" (ABC Incorporated) and "TEST2" (Small Business, U). The "Preview" section on the right shows a document preview. The bottom of the interface has navigation buttons: "CANCEL", "REMOVE RECIPIENT", "OPTIONS", "COVER PAGE", "SEND FAX", "Page 1/50", "MANAGE", and "ADD".

From here, you choose the type of Address Book to add:

### **Print2Fax (Local):**

This address type allows you to create a local Address Book file within Print2Fax.

### **Print2Fax (Remote):**

This address type allows you to select an existing shared Address Book from a local folder or remote location.

### **Link to Print2Fax:**

This address type allows you to link to an existing Print2Fax Remote Address Book to the Print2Fax application.

### **Outlook:**

This address type enables you to include contacts from your **Personal Outlook Address Book** or a **Shared Outlook Address Book**

### **Exchange:**

This address type allows you to connect with Microsoft Exchange or Office 365 Service to access your contacts.



## Steps to Add Personal Outlook Address Book

The screenshot shows the 'Add Address Book' dialog box in the Print2Fax application. The dialog is titled 'Add Address Book' and has a close button (X) in the top right corner. It contains the following fields and options:

- Address Book Type:** A dropdown menu with 'Outlook' selected.
- Outlook Profile:** A text field with 'Outlook' entered.
- Mailbox List:** A dropdown menu with 'mgarrison@globex.com' selected.
- Address Books:** A dropdown menu with 'Contacts' selected.
- Address Book Name:** A text field with 'Contacts' entered.
- Table:** A table with three columns: NAME, COMPANY, and FAX NUMBER. The table is currently empty.
- Set as Default:** A checkbox that is currently unchecked.
- Buttons:** 'CANCEL' and 'SAVE & CLOSE' buttons at the bottom right.

The background application window shows the 'Recipient Information' section with a 'Name' field, an 'ADDRESS BOOK' dropdown, and a table for multiple recipients. The bottom of the application window shows a navigation bar with buttons like 'CANCEL', 'REMOVE RECIPIENT', 'OPTIONS', 'COVER PAGE', 'SEND FAX', 'Page 1/55', '1', 'MANAGE', and 'ADD'.

- ➔ **Address Book Type:** Select *Address Book Type* from the list as "Outlook".
- ➔ **Select Outlook Profile:** Select the specified *Outlook Profile* corresponding to the *Address Book Type* selected.
- ➔ **Mailbox List:** Select the desired shared mailbox you wish to add from the *Mailbox List*.
- ➔ **Outlook Address Books:** Select from available Address Books as *Contacts*, *All Contacts*, or *Global Address List*.
- ➔ **Address Book Name:** Enter the desired *Address Book Name* or choose to prefer the default *Address Book Name* already available in the Address Book Name field.
- ➔ **Set as Default:** Click the check box to set the selected Address Book as default.
- ➔ **Save & Close:** Click the button to save the selection and close the Address Book window.


## Steps to Add Shared Outlook Address Book

An Outlook Shared Mailbox is a mailbox that multiple users can use to read and send email messages. Shared mailboxes are also used to store shared contact lists, allowing multiple users to send emails and faxes to common recipients.

In order to add a Shared Mailbox as an address book in Print2Fax, the user must have the necessary permissions to access the mailbox.

Once the Shared Outlook Mailbox is added as an address book in Print2Fax, the user can send faxes to contacts from this address book. In addition, if the user has full access, they will be able to add, modify and delete contacts in the address book, and shared mailbox.

## Steps to Add a New Address Book

- ➔ **Address Book:** Click on the  dropdown as shown below and select **Add New Address Book**.
- ➔ **Address Book Type:** In the **Add Address Book** dialog box, select "Outlook" from the *Address Book Type* list.
- ➔ **Mailbox List:** Select the desired shared mailbox you wish to add from the *Mailbox List*.

**Add Address Book**

Address Book Type: Outlook

Outlook Profile: Outlook

Mailbox List: mgarrison@globex.com

Address Books: Contacts

NAME	COMPANY	FAX NUMBER
mgarrison@globex.com		
Print2FaxShared		
muthalagum@concordtest.onmicrosoft.com		

☐ Set as Default

**CANCEL** **SAVE & CLOSE**

➔ **Address Book Name:** Enter the desired Address Book Name.

**Add Address Book**

Address Book Type: Outlook

Outlook Profile: Outlook

Mailbox List: Print2FaxShared

Address Books: Contacts

Address Book Name: Contacts-Globex

NAME	COMPANY	FAX NUMBER
anto	ss	1232223232
Anto Testq	Home page	125556669999
Ashis 1255	Tes 1255	

☐ Set as Default

**CANCEL** **SAVE & CLOSE**

➔ **Set as Default:** Click the check box to set the selected Address Book as default.

➔ **Save & Close:** Click the button to save the selection and close the Address Book window.

## Steps to Add Exchange Address Book

- ➔ **Address Book Type:** Select "Exchange" from the *Address Book Type* list.
- ➔ **Email ID:** Enter the *Exchange Email ID*.
- ➔ **Password:** Enter the *Exchange Password*.
- ➔ **CONNECT:** Click the button to connect with the Exchange server.
- ➔ **Exchange Address Books:** Select from the list as *Contacts* or *Global Address List* populated corresponding to the *Exchange Email*.
- ➔ **Address Book Name:** Enter the desired *Address Book Name* or choose the default *Address Book Name* already available.
- ➔ **Set as Default:** Click the check box to set the selected Address Book as default.
- ➔ **Save & Close:** Click the button to save the selection and close the Address Book.

## Steps to Add Print2Fax Local Address Book

The screenshot shows the Print2Fax web application interface. A modal dialog titled "Add Address Book" is open. In the background, the "Recipient Info" form is visible with a "Name" field containing "TEST3" and an "ADDRESS BOOK" dropdown menu. The dialog box contains the following elements:

- Address Book Type:** A dropdown menu with "Print2Fax (Local)" selected.
- Address Book Name:** A text input field containing "Sales Department Address Book".
- Table:** A table with columns "NAME", "COMPANY", and "FAX NUMBER". The table is currently empty.
- Set as Default:** A checkbox that is currently unchecked.
- Buttons:** "CANCEL" and "SAVE & CLOSE" buttons at the bottom right of the dialog.

The background interface includes a top navigation bar with "SETTINGS", "ABOUT", and "LOGIN" links. The main content area shows a list of recipients with "TEST1" selected. At the bottom, there are buttons for "CANCEL", "REMOVE RECIPIENT", "OPTIONS", "COVER PAGE", "SEND FAX", and a page indicator "Page 1/50".

- ➔ **Address Book Type:** Select "Print2Fax (Local)" from the *Address Book Type* list.
- ➔ **Address Book Name:** Enter the desired *Address Book Name*.
- ➔ **Set as Default:** Click the check box to set the selected Address Book as default.
- ➔ **Save & Close:** Click the button to save the selection and close the Address Book.

## Steps to Add Print2Fax Remote Address Book

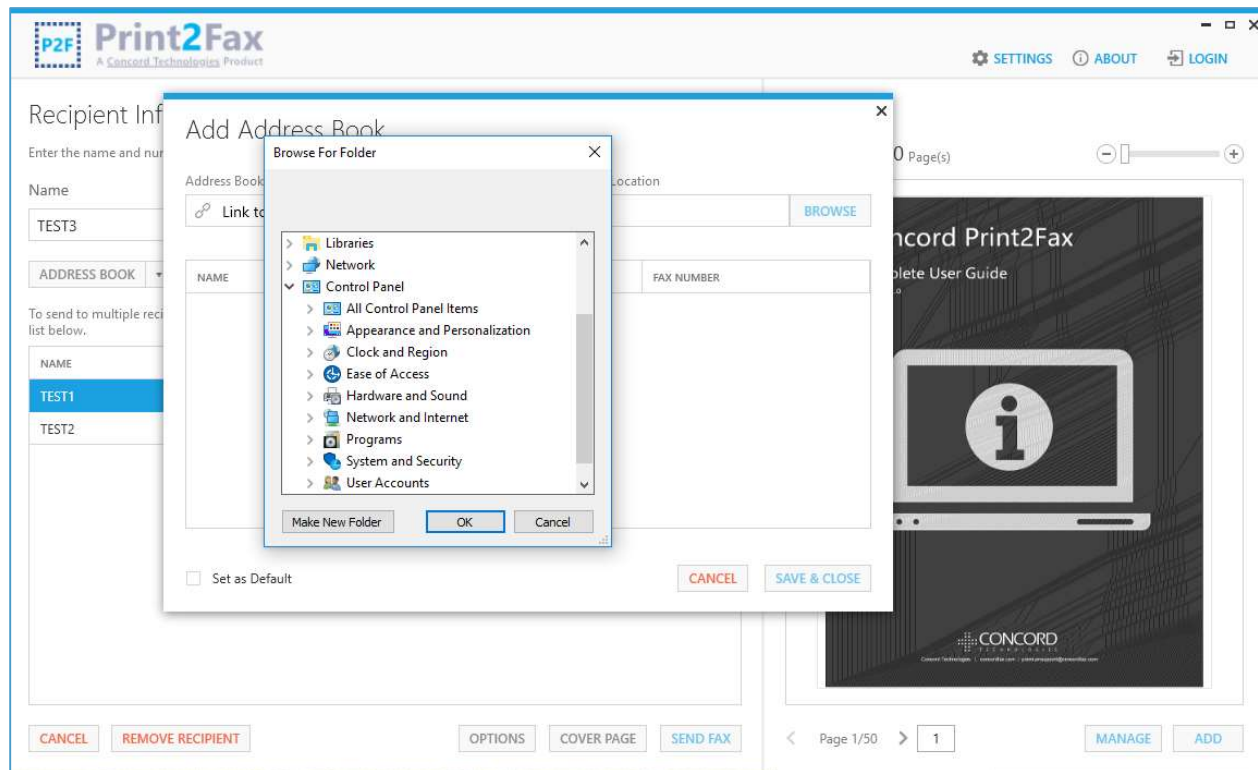
The screenshot displays the Print2Fax web application interface. A modal dialog titled "Add Address Book" is open in the center. The dialog contains the following elements:

- Address Book Type:** A dropdown menu currently showing "Print2Fax (Remote)".
- Address Book Name:** A text input field containing "Sales Department Shared Address Book".
- Address Book Location:** An empty text input field with a "BROWSE" button to its right.
- Table:** A table with three columns: "NAME", "COMPANY", and "FAX NUMBER". The table is currently empty.
- Set as Default:** A checkbox at the bottom left of the dialog.
- Buttons:** "CANCEL" and "SAVE & CLOSE" buttons at the bottom right of the dialog.

In the background, the "Recipient Info" page is visible. It includes a "Name" input field with "TEST3", an "ADDRESS BOOK" dropdown, and a list of recipients: "TEST1", "TEST2", and "TEST3". At the bottom of the page, there are buttons for "CANCEL", "REMOVE RECIPIENT", "OPTIONS", "COVER PAGE", "SEND FAX", "MANAGE", and "ADD".

- ➔ **Address Book Type:** Select "Print2Fax (Remote)" from the *Address Book Type* list.
- ➔ **Address Book Name:** Enter the desired *Address Book Name*.
- ➔ **Address Book Location:** Click the **BROWSE** button and navigate to the desired location for this remote Address Book.
- ➔ **Set as Default:** Click the check box to set the selected Address Book as default.
- ➔ **Save & Close:** Click the button to save the selection and close the Address Book.

## Steps to Link to a Remote Print2Fax Address Book



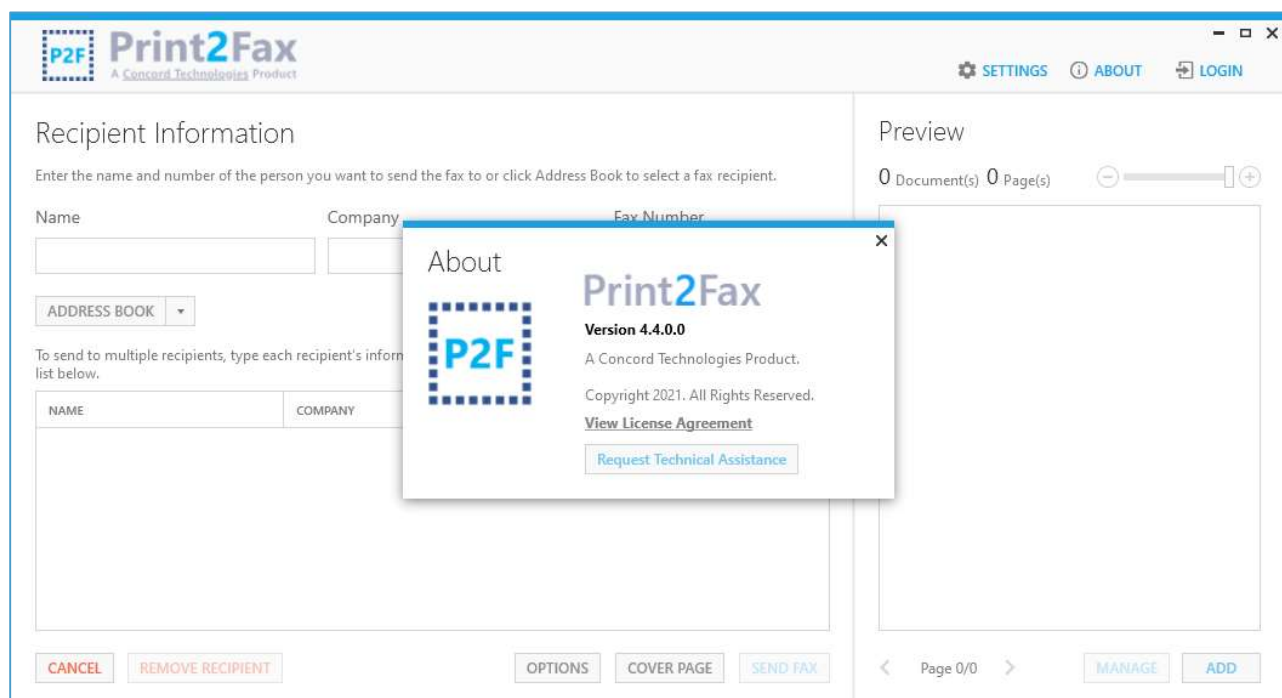
- ➔ **Address Book Type:** Select "Link to Print2Fax" from the *Address Book Type* list.
- ➔ **Address Book Location:** Click the **BROWSE** button and navigate to the desired location for this remote Address Book you wish to access.
- ➔ **Set as Default:** Click the check box to set the selected Address Book as default.
- ➔ **Save & Close:** Click the button to save the selection and close the Address Book.

# Troubleshooting

This chapter provides information on receiving assistance from the Concord Premium Support team in order to troubleshoot issues.

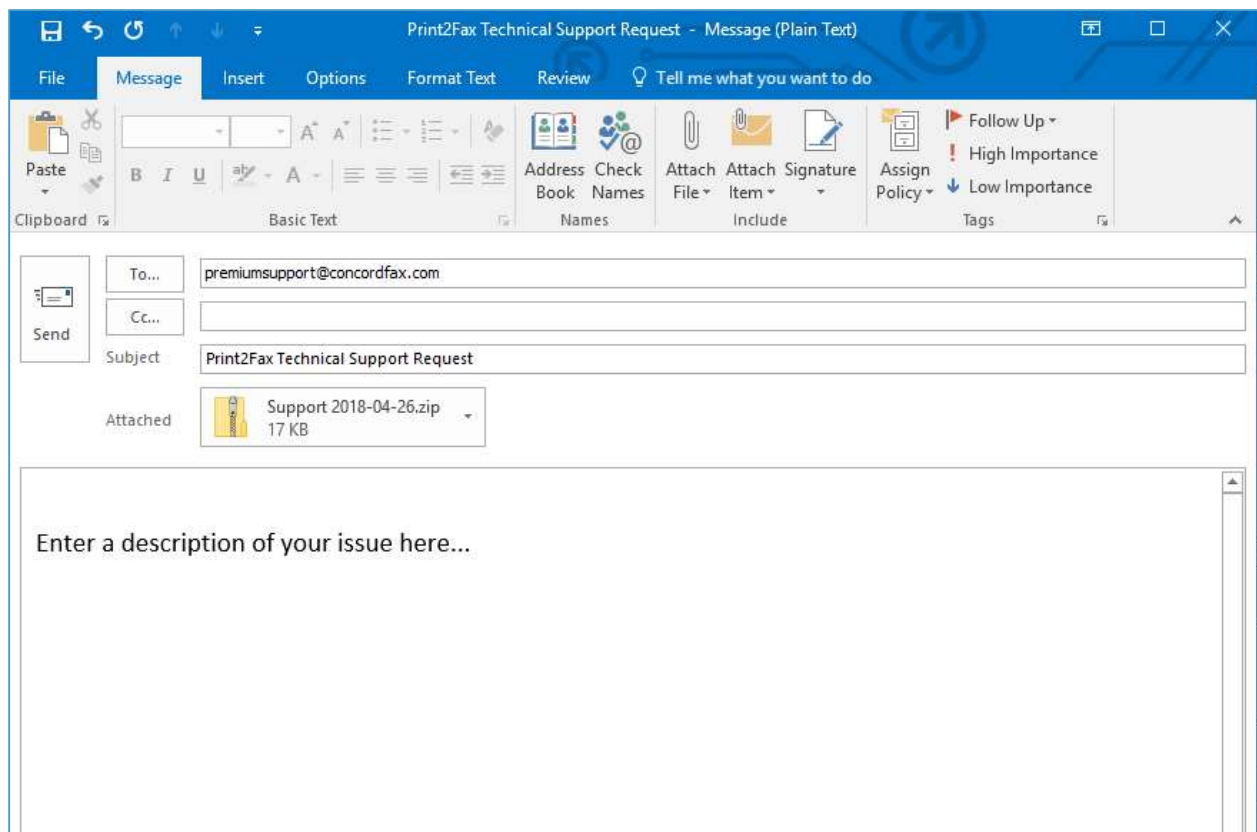
Print2Fax will create log files for all user interactions, and any potential errors that may occur. If a user experiences any problems when using Print2Fax, Concord will require these log files to troubleshoot the issue.

Click on the **Request Technical Assistance** button on the About Us screen, and the application will gather and zip up the necessary log files.

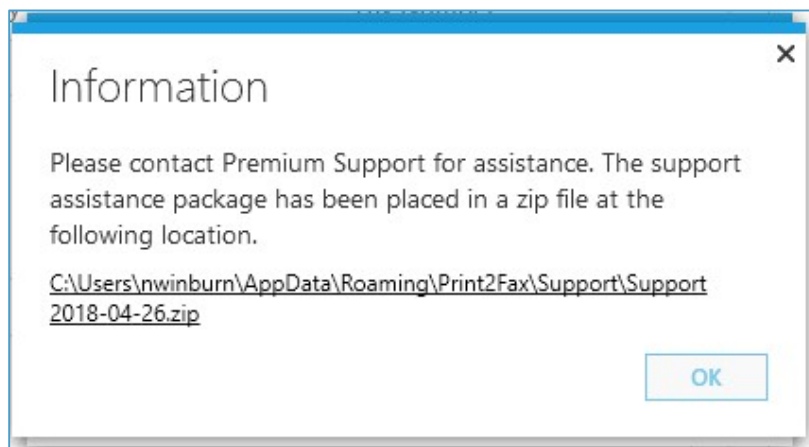


If you have an email client installed on your workstation, the application will launch a new email message with the zip file attached, to be sent to Premium Support. You can include any specific information regarding your issue within the body of the email.





If you do NOT have an email client installed on your workstation, the application will provide you with the location of the zip file containing the log files so that you may provide them to the Concord Premium Support team.



## Concord Support

Should you need any assistance with Print2Fax, or any other Concord product or service, please contact our Premium Support Team.

- Email: [premiumsupport@concord.net](mailto:premiumsupport@concord.net)
- 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: Administrator Install / Un-install Procedures

The executable program that interprets packages and installs products is called as Msiexec.exe. Msiexec also sets an error level on return that corresponds to system error codes. Command-line options used during the installation or un-install process are case-insensitive.

### Print2Fax Installation Command-line Switches

Switch	Example	Description
ActiveTransportTechnology	Outlook Integrated Email Other Desktop Email Direct Submission	Defines which method will be used to send your document to the fax platform. Extended Email = Uses outlook integration mode, Simple Email = Default email client, Direct Submission = Directly submit faxes to fax platform via HTTPS.
AgreeLicenseAgreement	True False	Setting this to true is accepting the license agreement and avoids being prompted for license agreement when the application first launches.
AutoClose	True False	If set to true, the application will close after successfully sending the fax job.
DirectSubmissionNotificationEmailAddress	myemail@domain.com	Only applicable if using direct submission and EmailNotification has been set to required. Email address supplied will receive the notification of the final status for faxes that have been completed.
DisableLogin	True False	If set to true, the user will not have the ability to login to the application. This is intended for an installation that pre-populates the login credentials.
DisplayRememberCredentials	True False	If set to true, the option to Remember Credentials On Application Exit will be exposed to the user. Default Setting: True

Switch	Example	Description
EmailNotifications	None Ask Required	Only applicable if using direct submission and determines if an email notification will be generated once the fax has completed. <b>None</b> = No email notification required, <b>Ask</b> = Application will ask on each send if a notification should be generated and ask to supply the email address, <b>Required</b> = Always generate an email notification. Default Setting: None
EnableRequiresLogin	True False	If set to true, will require user to log into the application. Default Setting: False
EnforceUniqueFriendlyName	True False	If set to true. will ensure the email Friendly Name is unique. Default Setting: True
FaxUsername	mbx012345	Username assigned to your fax account
FaxPassword	mypassword	Password associated with fax account
HostedCoverPageName	Concord Default	When set defines the fax platform cover page that will be included.
RememberCredentialsOnApplicationExit	True False	If set to true, the user's credentials will be remembered when they exit the application. Default Setting: True
RequiresReferenceCode	True False	If set to true will require and prompt for a reference code to be supplied if not already set.
SenderName	First Last	Will pre-populate the Sender Name field on the cover page
SenderCompany	My Company	Will pre-populate the Sender Company field on the cover page
Sender Phone	11231231234	Will pre-populate the Sender Phone field on the cover page
SenderFax	11231231234	Will pre-populate the Sender Fax field on the cover page

### Simple Interactive Installation

```
msiexec /i "c:\P2FSetup\Print2FaxSetup.msi" /norestart /log E:\install.log
```

### Simple Non-Interactive Installation

```
msiexec /i "c:\P2FSetup\Print2FaxSetup.msi" /quiet /qb /norestart /log E:\install.log
```

### Advanced Non-Interactive Installation

```
msiexec /i "c:\P2FSetup\Print2FaxSetup.msi" /quiet /qb /norestart /log E:\install.log  
AgreeLicenseAgreement=true FaxUsername= mbx012345 FaxPassword= mypassword  
EmailNotifications=Required DirectSubmissionNotificationEmailAddress=myemail@domain.com  
ActiveTransportTechnology="Direct Submission" HostedCoverPageName="Concord Default"  
SenderName="First Last" SenderCompany="My Company" SenderPhone=12123334444  
SenderPhone=19543334444 RequiresReferenceCode=true DisableLogin=TRUE AutoClose=True
```

*Note: The FaxUsername and FaxPassword are meant to be examples and are not authorized credentials.*

## Print2Fax Un-Install Command-line Switches

Switch	Example	Description
FullUninstall	True False	If set to true, an uninstall will remove all files associated with Print2Fax

When utilizing a command line to uninstall the application, administrators can choose to reference the MSI file (which must be in an accessible location), or to reference the product GUID. It is also important to note, to perform a non-interactive uninstall, the administrator will need to include either the FullUninstall command-line switch, or the switch for a silent uninstall "/qn".

Examples of non-interactive installs using the MSI file or the product GUID are provided.

### Non-Interactive Uninstalls Referencing the MSI:

```
msiexec /x C:\Users\UserName\...\ConcordPrint2FaxInstall.msi FullUninstall=true
```

```
msiexec /x C:\Users\UserName\...\ConcordPrint2FaxInstall.msi /qn
```

```
msiexec /x C:\Users\UserName\...\ConcordPrint2FaxInstall.msi FullUninstall=true /qn
```

*Note: When referencing the MSI file, the full path to the file location is required*

### Non-Interactive Uninstalls Referencing the Product GUID:

```
msiexec /x {...} FullUninstall=true
```

```
msiexec /x {...} FullUninstall=true /qn
```

```
msiexec /x {...} /qn
```

*Note: When referencing the product GUID, please refer to the table in Appendix B for the product GUID associated with the application version and insert in place of "...".*

## Appendix B: Product GUID per Application Version

The **Product GUID** is globally unique identifier and will vary by application version.

Application Version	Product GUID
3.2.0	{69ECC037-EC08-4CAB-B516-F23104382575}
4.0.0	{46402F10-D425-4B8F-ACFF-7D06EB3AB173}
4.1.0	{D69AF5DF-FA6A-4D39-BC3F-7431B23040AA}
4.3.0	(8B0C72B8-EA28-408F-939D-C58B219CCA8F)
4.4.0	{F54AE552-1DCD-41DF-96EA-013C5491C461}
4.5.0	(FE0F0919-865C-4FD6-8E9F-679D1DD8428D)
4.6.0	{8EB30BBE-9AA5-4E2D-B6E5-3A089C78A139}
4.7.0	{EDDACD8D-BF90-41E7-8E02-9C4D8581A6C1}
4.8.0	{D8A8FBB1-53A4-447A-A62A-8E857CD7A531}
4.9.0	{90ABEF26-13E7-4264-A894-658C58562762}
4.14.0	{8ED5B2C9-E160-4E23-B3A8-7C4BDFBBC95A}