Cloud Fax
User Guide

Contents

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About Concord Cloud Fax

Concord Cloud Fax consists of a suite of features designed to meet the faxing needs of enterprise and mid-sized organizations. Concord Cloud Fax includes two user-level components that will form the basis of this documentation:

- SMTP Outbound (Email-to-Fax) Delivery and SMTP Inbound (Fax-to-Email) Reception: Paperless processing of fax documents, coverpage generation, and a variety of fax sending and delivery options.

- Concord Web Portal: Online application where Users can view inbound and outbound fax activity and account settings.

Audience

This guide is an instruction manual that is structured to provide helpful guidance to Concord Cloud Fax end users sending and receiving via email. This guide covers sending and receiving faxes via SMTP email and end user access to the Concord Web Portal.

Sending a fax via email-to-fax (E2F)

Email-to-Fax (E2F) refers to the process of sending outbound faxes via email. By sending faxes in the same manner as sending an email attachment, the document remains in an electronic format and the handling of a printed/paper documents is avoided.

To send a fax via email (E2F), follow these steps:

1. Create a new message in your email application (e.g., "**New Email**")

2. The document(s) you wish to send as a fax should be added as **attachments.** The attachments will become the fax pages, sent in the order the documents are attached. (See Appendix B for supported file types).

3. In the "**To**" field, insert the recipient's fax number, followed by the sending domain associated with your service.

   a. The default syntax for sending outbound is **<faxnumber>@concordsend.com**.

   b. TLS security can be enforced by sending to **<faxnumber>@secure.concordsend.com**.

   c. You may also have a custom sending domain replacing the 'concordsend.com' domain which would be used in place of the default.

4. Confirm Coverpage Option

   a. If the user account is configured to include coverpages "**Automatically,**" a coverpage will be included, irrespective of any text entered into the body of the email.

   b. If the user account is configured to include coverpages "**With Body Text,**" a coverpage will be included whenever there is text in the body of the email. This may include a user's signature. All text will appear in the "message" section of the coverpage.

   c. If the user account is configured to include coverpages "**On Demand,**" type the corresponding coverpage token, **%{cover}** in the subject line field. The token will not appear in the subject line of the coverpage.

   d. If your account is set to "**No Coverpage,**" then a coverpage will not be included. Text entered into the body of the email will be ignored.

5. In the email subject area, type the **Subject** you want to include on your coverpage, in addition to the coverpage token, if necessary. Subject text will be displayed in the "subject" or "regarding section of the coverpage.

6. In the email message area, type the **Text Message** that you would like to appear on the coverpage. This will be added to the "body" or "notes" section of the cover page.

7. Send the message (e.g., click "**Send**").

NOTE: Protected Health Information **(PHI)** or Personally Identifiable Information **(PII)** should not be included in the subject or body of the email request as this data is stored separately from any retained fax pages.

Formatting the Fax Number

Remember to enter the fax number as an email address when you create the email. The email address will resemble this model:

<number>@<sendingdomain>.<tld>

Using the Concord default sending domain as an example, a fax sent to the number +1 (800) 555-1212 should be entered as:
18005551212@concordsend.com.

Note that the Country Code ("1") does not need to be included in a domestic US/North American transmission, but the **area code** for a domestic fax must always be included.

If sending a fax to a location outside of North America, insert the international access code "**011**" before typing the rest of the fax number. A fax sent to the number +44 2 123456 should be entered as: **011442123456@ concordsend.com**.

Naming a Recipient

An Email-to-Fax (E2F) message can be sent with a "**Recipient Name**" included as part of the email address "To" syntax. This allows for a designated recipient name to be included in the fax cover sheet and will also populate the Recipient Name to the delivery notifications used to confirm the status of the fax transmission.

To include a recipient name, extend the "To" address in the following way:

Recipient Name <faxnumber@concordsend.com>

The <> brackets are intentional and should be included in the "To" field, following the Recipient Name, as in the below example:

Peter Billingsley <18889876543@concordsend.com>

Sending Limits

Each outbound submission is subject to the following limits by default:

- The total number of pages being transmitted cannot exceed 250 pages. This can be raised to a maximum of 999 pages with approval.

- The total number of recipients cannot exceed 250 addresses/fax numbers.

- The total file size for all included attachments cannot exceed 20MB. Note that Cloud Fax users are also subject to any internally set limit, per their company email policy (i.e., while Concord may accept a 20MB file, User may not have the ability to send attachments in excess of 10MB).

Sending a Fax-Friendly Document

Documents should be formatted in a manner conducive to fax transmission and should be **black & white**. A color document, or a document created with grayscale or shading, will appear pixilated when transmitted.

If scanning a document to fax, choose the "black & white" option, rather than "photo-quality" to best ensure legibility.

Delivery Notifications

After you have sent your fax, a series of **email notifications** will be sent to you, alerting to you to the status of the initial acceptance of the fax request and the final status of the delivery attempts.

By default, User accounts are set to first receive a notification confirming Concord's receipt of your request. You will receive a "success" notification if the attachments are valid and the fax number is of a proper length and format. This is your indicator that the fax has been queued for delivery and attempts will be made to transmit the fax to your recipient destination:

Your fax has been successfully submitted to Concord Fax Online at 01-17-2023 3:42 PM and has been queued to be sent to +17328538542. Additional notifications will follow regarding the outcome of the transmission.

Tracking Number:	709-8565774
Fax Number:	17328538542
Recipient:	John McFadden
Subject:	E2F Fax Example
Custom Reference:	
Time Submitted:	01-17-2023 3:42 PM

If for some reason your submission fails to meet the necessary criteria to make a fax attempt, a notification will be sent to you so you can take the necessary corrective action. Note that the reason for the error is included:

Queue Failed

Your fax to +17328538542 has encountered an error in preprocessing. This error is terminal and your fax will not be queued to be sent. Please correct the error and resubmit the fax for transmission.

Error Description:	No file attached.
Tracking Number:	704-8249819
Fax Number:	+17328538542
Recipient:	17328538542
Subject:	E2F No Attach
Custom Reference:	
Time Submitted:	20:44:05 2023-01-17

Upon successful delivery of your fax, you will receive a notification confirming the delivery:

Success

Your 3 page fax has been successfully delivered to +17328538542 on 01-17-2023 3:43 PM.

Tracking Number:	709-8565774
Fax Number:	+17328538542
Recipient:	John McFadden
Subject:	E2F Fax Example
Time Delivered:	01-17-2023 3:43 PM
Pages Delivered:	3

If for some reason the delivery attempts failed, a failure notification will be sent to you noting the reason for the delivery failure. This will come after multiple attempts are made to deliver the fax message. Please see **Appendix C** for a complete list of **Error Descriptions**.

Failed

Your 3 page fax was unable to be delivered to +17326048654 after multiple attempts.

Error Description:	Voice Answer
Tracking Number:	710-8246858
Fax Number:	+17326048654
Recipient:	17326048654
Subject:	FAIL
Pages Delivered:	0
Pages Failed:	3

Outbound notifications can be turned off by your Fax Online Administrator. It is **strongly recommended** that the default notifications listed above remain activated.

Receiving a fax (fax-to-email)

Faxes sent to your Concord Cloud Fax **Fax-to-Email** enabled number will be converted to your preferred image type and forwarded to your designated email address. You may elect to choose up to three (3) addresses for the forwarding of received messages. Additional email address recipients can be added by your company administrator.

In addition to the attached fax image, the following message is included in the body of the email:

New Fax

A fax of 3 pages has been received on 2023/01/17 15:43:09 at your Concord Fax Online fax number (+17328538542) and has been attached to this email.

Tracking Number:	ct17328538542-20230117124309138-282-51
Received from (CSID):	Fax Services
Received from (Caller ID):	13125489942
Number of Pages:	3 pages
Time Received:	2023/01/17 15:43:09

Fax messages, by default, are forwarded to you as a **PDF** file. You also have the option to receive your messages in TIF and XPS formats. Should your business process demand it, there are expanded TIF options including High Resolution TIF, and TIF files sent with the extension, ".fax".

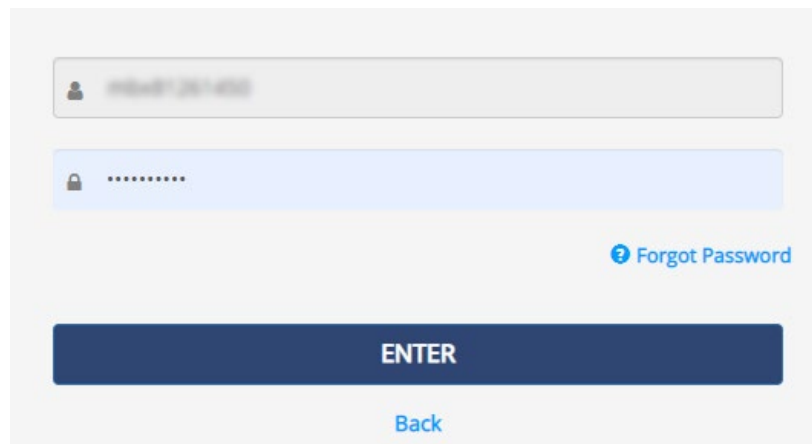All of these options are controlled by your **Cloud Fax company administrator**.

Concord Web Portal

The Concord **Web Portal** is a web-based application that enables Concord Cloud Fax Users to view detailed information regarding their inbound and outbound fax activity and access settings associated with their account.

The Concord Web Portal is accessible via the Internet at https://portal.concordfax.com/Administration .

Chrome is recommended as the optimal browser for accessing the portal.

Your **Username** and **Password** information will be communicated to you by your Cloud Fax company administrator. You will be prompted to enter your **Username** and **Password:**

Enter your Username and Password and click **ENTER**.

Note: If your company organization is a Federated Partner with Concord, entering your Username will redirect you to your local Identity Provider.

Dashboard

The home screen of the Concord Web Portal consists of a **Dashboard** overview of your fax activity. This summary of activity can be used to display fax activity dating back as much as two years. A graph of **Inbound** and **Outbound** Fax Pages is displayed in the top left portion of the home screen.

Outbound traffic is noted in green; inbound traffic is noted in orange:
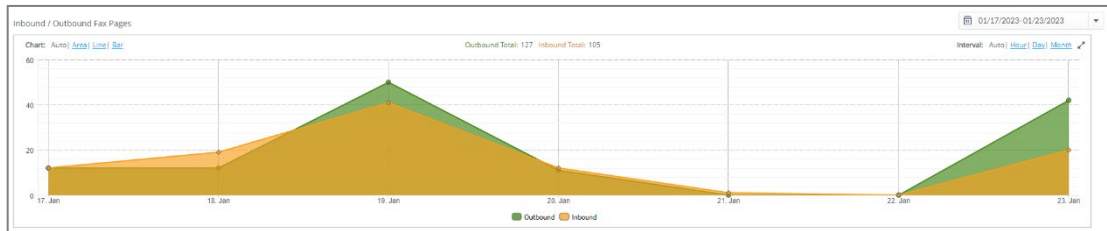
You can select the time period you wish to view using the **Time/Date** selection drop-down in the top right corner of the graph:

This allows for several possible queries as well as a **Custom Range**:

By clicking on the Chart options, you can update the display to show data as an Area, Line or Bar graph:

Chart: Auto| Area| Line| Bar

To display only Outbound or Inbound traffic, click the appropriate traffic you want to display:

Outbound   Inbound

The Interval setting determines time interval that will be displayed based on the selections you've made:

Interval: Auto| Hour| Day| Month

In the lower left portion of the Dashboard, you will see a map of your outbound **Top Destinations**. This will display outbound page totals according to area code or international locations, based on the fax numbers you are sending messages to.

The time period displayed is based on the Time/Date settings used in the Outbound/Inbound Pages selection.

Top Destinations (Outbound)
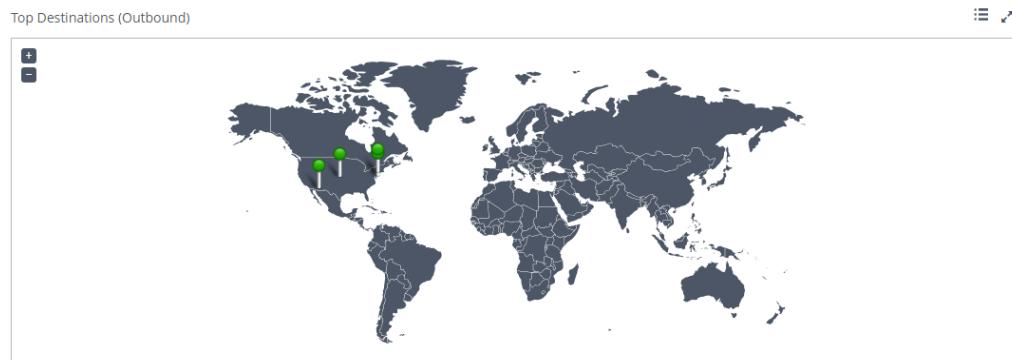
Note that you are able to use the +/- "Zoom" feature to view particular geographic locations. By clicking on the ☰ icon, you can see a general overview of your outbound activity.
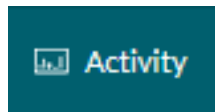
To the right of the map, you will see these destinations listed as **Top Areas:**

Top Areas (Outbound)	
🇺🇸 New Jersey, USA	118
🇺🇸 New York, USA	4
🇺🇸 Arizona, USA	3
🇺🇸 +1866, USA	2

Outbound Activity

To access detailed, message level reports on Outbound and Inbound traffic, click on **Activity** on the top menu bar:

From there, you will have the choice of two (2) options:

- Outbound Activity
- Inbound Activity

By selecting **Outbound Activity**, you can review outbound activity for your user account for the last 90 days.
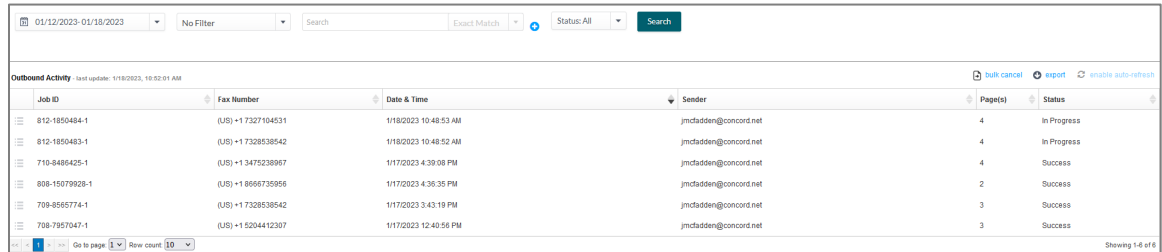
To view today's activity with no filters applied, simply click **Search**.

If you want to view data for a specific period, select the **Date Range** for the time period that you are interested in viewing.

You can refine your search by selecting a variety of filters (such as Fax Number, Reference ID, Job ID, etc.). Click the **Plus** icon to apply multiple filters.

You can apply another layer of filtering by **Status** of the Outbound Activity (e.g., Success, Failed, In Progress).

When you have refined your search options to your desired values, click **Search**. All outbound fax activity within your selected ranges and filters will be returned.

From here you can select the number of records you would like to see on each page, by selecting different values under **Row Count** (10, 15, 20, 50, 100, 250, and 500).

To add or edit columns of data, right-click in the **column headers** and select additional columns to view as needed.

To export data to a spreadsheet file, click **Export.**

To access **Job Details** for a specific message, click on the **Details** icon in the left column of the list of fax jobs. The list of Activity Details is extensive, including information on the sender and recipient, as well as transmission data of the outbound fax.

From the details section you may also have the option to view, resend or cancel a fax message.

Viewing a Fax from the Concord Web Portal

Concord provides the option to view outbound fax documents from the Web Portal. Access to images is based on the retention settings applied to your Concord account and the time period that has elapsed since the original outbound fax transmission was submitted.

Concord's default retention period is 7 days, but this could be set such that outbound fax content (page images) are deleted after the fax job completes. In this scenario, no images would be available to view.
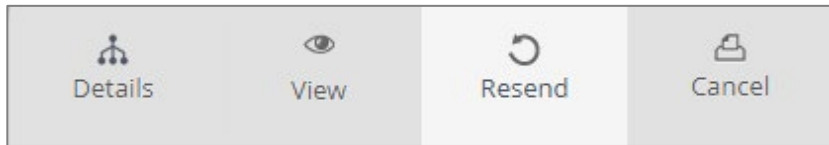
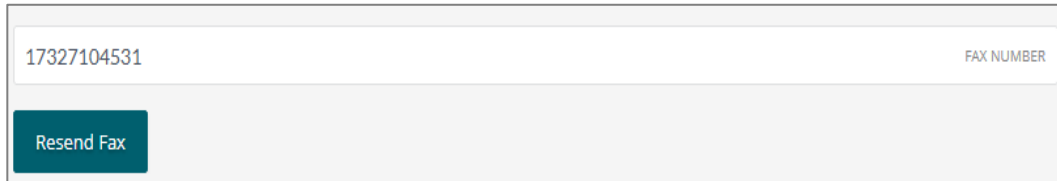If the fax document is available, click **View** to see it:

Details	View	Resend	Cancel
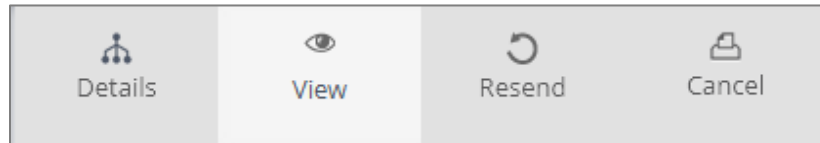
From the view screen you have the option to page through the document, zoom to review and to download the document.

Resending a Fax from the Concord Web Portal

From the second tab of the Activity Details page, you will see the option to resend the fax. Click **Resend:**

You will now have the option to change the recipient fax number. By default, the original recipient fax number will be pre-populated:

If you wish to change the recipient fax number, enter the new recipient number into the **Fax Number** field. If the correct number is listed in the **Fax Number** field, click **Resend Fax**. Your fax will then be submitted, and a new job identifier will be generated.

Cancelling a fax transmission from the Concord Web Portal

Messages may be cancelled if they are still in progress delivering pages or awaiting retries on a previous attempt's failure.

Note that Concord's Outbound Activity Reporting is not a real-time service and some delay between actual fax delivery status and the status reported should be expected. However, if a fax message remains in progress, it can be canceled by clicking **Cancel**:
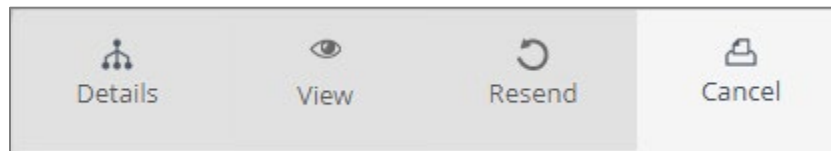
Here you will confirm that you wish to cancel the message. If the message has already completed, you will be notified that the fax transmission can no longer be cancelled.

Inbound Activity

By selecting **inbound Activity**, you are able review inbound activity for the last 90 days.

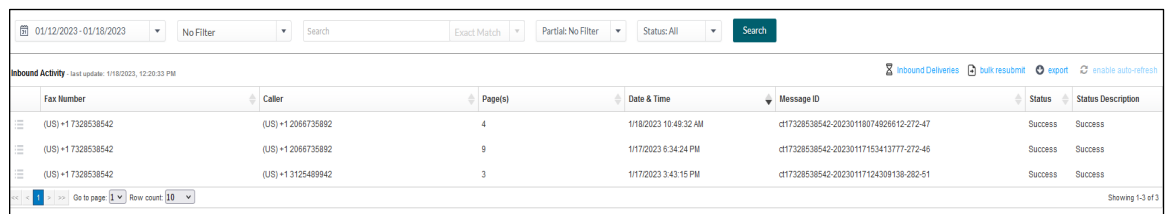To view today's activity with no filters applied, simply click **Search**.

If you want to view data for a specific period, select the **Date Range** for the time period that you are interested in viewing.

You can refine your search by selecting a variety of filters (such as Fax Number, Caller, CSID, etc.). Click the **Plus** icon to apply multiple filters.

There are two filters that can be applied for **Inbound Activity Status**. The first will determine whether the search should contain possible **Partial** messages, which may include transmissions that did not fully complete, resulting in partial fax page receipt. Use the **True** and **False** selections to include or exclude possible partials.

The second selection for **Status** allows you to select whether to include failed transmissions, which typically includes calls that were dialed to your fax number from which no complete or partial pages were received. Choose whether you want to include All messages or those that were considered a **Success** or **Failed** to return the results you're looking for.

When you have refined your search options to your desired values, click **Search**. All Inbound fax activity within your selected ranges and filters will be returned.

From here you can select the number of records you would like to see on each page, by selecting different values under **Row Count** (10, 15, 20, 50, 100, 250, and 500).

To add or edit columns of data, right-click in the **column headers** and select additional columns to view as needed.

To export data to a spreadsheet file, click **Export**.

For job details, click on the **Details** icon in the left column of the list of fax jobs. The list of Activity Details includes information regarding the Caller ID of the sender (**Caller**), the fax number receiving the call (**Fax Number**), as well as the number of pages and duration of the transmission.

The Activity Details also includes Message Events which will display data related to the receipt of the fax as well as the subsequent activity related to delivering that fax message to the destination associated with the inbound fax number. This may include delivery to your email address or other routing possibilities.

In some instances, such as when an archive route is added to a fax account, post-receipt activity may include more than one transmission, as in the below example:

Message Events

Date	Event Type	Receiving Address	Status
1/18/2023 10:49:32 AM	Message received		Success
1/18/2023 10:49:34 AM	Message forwarded	jmcfadden@concord.net	Success
1/18/2023 10:49:35 AM	Archiving completed	jmcfadden@concord.net	Success

Resubmit a Received Fax from the Concord Web Portal

From the **Activity Details** page, you have the ability to resubmit inbound faxes to the **authorized forwarding address(es) associated with your inbound fax number**.

Resubmission is possible while Concord retains the document received as an inbound fax. If the retention period has passed or your account does not retain fax content beyond transmission, you will not have the ability to resubmit.

From the second tab of the Activity Details page, you will see the option to resubmit the fax. Click **Resubmit**.
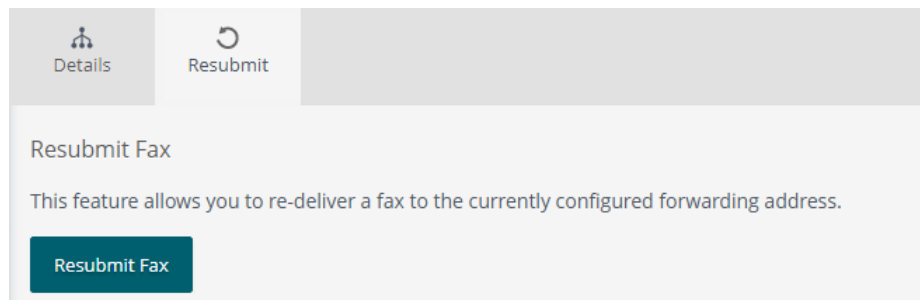
To complete the re-transmission of data, Click **Resubmit Fax**.

Alternatively, you can resubmit multiple messages simultaneously by clicking on **Bulk Resubmit**. This will update the results screen with check boxes next to each inbound fax job.

To resubmit the jobs, check those you want to resubmit and click **Submit**.

A listing of the status of each resubmission will be displayed until all messages are resubmitted:

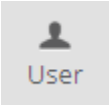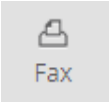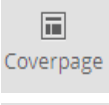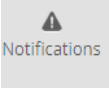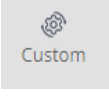| Bulk Resubmit	
Messages Selected: 3 of 3	Progress: 3 of 3

Message ID	Status
ct17328538542-20230118074926612-272-47	Success
ct17328538542-20230117153413777-272-46	Success
ct17328538542-20230117124309138-282-51	Success

My Settings

My Settings provides access to view, and in some cases change, settings associated with your Cloud Fax account.

To access My Settings, click the ⚙ icon in the top right of the Dashboard screen.

From here you can access various settings that govern the data and functionality associated with your Cloud Fax account:

User	– View and edit contact information such as name, address, phone and fax.
	– Update the existing password associated with your user account.
Fax	– View existing fax numbers and email addresses assigned to your account.
Coverpage	– View the custom coversheet assigned to your account.
Notifications	– View the notifications configured for initial and delivery confirmation.
Custom	– View and edit the time zone configured for your account.
	– View and edit the time and date display configured for your account.

To confirm and save your edits, click **Save.**

Appendix A – Fax User's Quick Refer

Sending a Fax	- Open a new email message - Enter the fax number in email-to-fax format e.g. 18005551212@concordsend.com - Attach one or more documents to form your fax pages - Enter the Subject for placement on the fax cover page and/or status notification - (As needed) Add the cover page token to include a cover: %(cover) - (Optionally) Enter text in the body of the email for placement on the cover page (excluding any PHI or sensitive information) - Click Send to send the email to Concord and begin the fax transmission process - Monitor your email for status notifications on fax processing and delivery
Receiving a Fax	- Monitor relevant email addresses for inbound fax-to-email with documents attached - View, save and/or print the attached fax document as needed
Accessing the Web Portal	- Open a web browser and navigate to: https://portal.concordfax.com/Administration - Login using your username and password or applicable Federated account - From the Dashboard, view Outbound and Inbound Pages and Top Destinations - From Activity, view message details for Outbound and Inbound Activity - From My Settings, view or edit account settings

Appendix B – Supported File Formats / Email Clients

The following file types can be attached to an email message and converted to a fax by the Concord Cloud Fax platform. Other file types have not been tested for compatibility. Results may vary and fax submissions may be rejected if other file types are used.

- Microsoft Word (*.doc, *.docx)
- Microsoft Excel (*.xls, *.xlsx)
- Microsoft Power Point (*.ppt, *.pptx)
- Microsoft Visio (*.vsd)
- HyperText Markup Language (*.html, *.mhtml)
- Adobe Acrobat (*.pdf)
- TIFF image (*.tif, *.tiff)
- ASCII Text (*.txt)
- Rich Text (*.rtf)
- JPEG (*.jpg, *.jpeg)
- GIF Image (*.gif)
- Portable Network Graphics (*.png)

JPEG (*.jpg, *.jpeg), GIF (*.gif) and PNG (*.png) files are generally supported but not recommended as fax files, and may not be supported in all circumstances.

NOTE: Be mindful of the file sizes of the documents you are faxing, particularly if you are sending scanned images, as they can be quite large. While most

source documents are usually quite small (less than 200 KB), Concord will limit the maximum size of attached file(s) with either a single file or multiple files. The current limit is 20MB.

Files exceeding these limits are often high-resolution, multi-color, scanned images. In addition to exceeding size limits, such images are not typically "fax friendly". Documents should contain no color, shading, or grayscale and should never be printed as "photo-quality."

Color, or shaded documents do not translate well to fax and will contribute to exceedingly large file sizes and longer transmission times. Documents with graphic art content should be limited to solid black, with no shading, or grayscale.

Supported Email Clients

- Microsoft Outlook
- Email clients that support standard SMTP messaging
- Webmail clients that support standard SMTP messaging

Appendix C – Fax Error Codes

Busy

"Busy" indicates that the called number (phone line) is already in use or engaged.

Exceeded ECM Retransmit

"Exceeded ECM Retransmit" indicates the call was answered by a fax device and connected using ECM or Error Correction Mode. The failed attempt required an excessive amount of data to be retransmitted to the receiving device prior to confirming acknowledgment of successful transmission completion. The call was aborted to allow a retry or new attempt to get a better connection.

Fast Busy

"Fast Busy" indicates that there was no available path to the receiving fax number. This normally indicates that the destination is currently not reachable. This may be caused by an outage, severe weather conditions, circuit overloads, or other conditions. In many cases, "Fast Busy" conditions are temporary. Please confirm the validity of the fax number by calling from a handset device. If the recipient answers with a fax tone, but a fax fails when sending through Concord, contact customer service for further assistance.

General Error

"General Error" indicates that another uncommon error not listed has occurred, resulting in the failure to transmit the fax. Please retry the fax job. If you receive the same error, please contact Concord Premium Support for further assistance.

Invalid Attachment

"Invalid Attachment" indicates the attachment is not one of the file types listed below, the document should be converted into a supported format.

- TIF/TIFF (Tagged Image File Format) G3/G4 Black & White only.
- TXT (Plain Text)
- RTF (Rich Text Format)
- DOC, DOCX (Microsoft Windows - Word 97-2019 and Office 365
- XLS, XLSX (Microsoft Windows - Excel 97-2019 and Office 365
- PPT, PPTX Windows PowerPoint 97-2019 & Office 365
- PDF (Adobe Portable Document Format) - (v1.0-v1.7)
- VSD (Microsoft Visio Windows - Visio 2000-2016)
- JPG/JPEG (Joint Photographic Experts Group - Strongly discouraged / Not Advisable.
- GIF (Graphics Interchange Format) - Strongly discouraged / Not Advisable.
- PNG (Portable Network Graphic) - Strongly discouraged / Not Advisable.

Invalid Fax Number

"Invalid Fax Number" indicates a problem with the destination fax number. You must address the fax request with the full fax number, including area code (including Country Code for international fax) Please correct the fax number and try again.

Job Cancelled

"Job Cancelled" indicates that the job or recipient number was cancelled or the set time for delivery expired.

Negotiation Failed

"Negotiation Failed" indicates the call was answered by a fax device but during the initial training phase of the call, communication between the fax transmitter and the receiving fax device failed or the two devices could not agree on the parameters to be used for the call. This often indicates a phone line quality issue and may occur at the beginning of the fax transmission, or during the fax transmission between pages on a multi-page fax.

No Answer

"No Answer" indicates that the line was not picked up (answered) by a fax machine or person before timing out. The timeout is sufficient to ensure at a minimum of 58 standard rings, which is actually a duration of 55 seconds.

No Attachment

"No Attachment" Indicates that there was no document attached to the fax request. You must attach the document you wish to fax in an accepted format, such as .DOC or .PDF. Please see https://concord.net/cloud-fax/cloud-fax-faq/ for a comprehensive list of acceptable file types.

Not a Fax Machine

"Not a fax machine" indicates that a fax device has failed to answer the call. Specifically, fax tones or the fax signal from a remote machine has not been detected. This may happen for a number of reasons, including but not limited to, a wrong number, a machine not configured to automatically answer, or a device that has stopped answering because it is out of paper or has a paper jam.

Sit-Tone / Operator Msg

"Sit-Tone / Operator Msg" indicates that the call was intercepted by the special situation information tones followed by an operator message, examples include "The number you have dialed is disconnected or is no longer in service. Please check the listing and try your call again.", "The number you have dialed has been changed...the new number is...XXX-XXX-XXXX", "All circuits are currently busy, please try your call again later". "Operator Msg" indicates the same issue however the special situation information tones were not detected.

Transmission Failed

"Transmission Failed" indicates the receiving fax machine has answered and connected but the fax was not able to be fully and successfully transmitted. This can be caused by line quality issues, fax device issues, the sharing of phone line with other devices such as credit card processing terminals. Temporary conditions such as severe weather conditions in the destination area can also cause transmissions failures.

Unauthorized Sending Address

"Unauthorized Sending Address" indicates that the email address from which an email-to-fax request was sent is not registered with Concord. The origin email address must be added as a valid sender via the Concord Web Portal. Please login to the Concord Web Portal to add the email address. If you are unable to do so or need instruction with this process, please contact Premium Support for assistance.

Voice Answer

"Voice Answer" indicates that either a person or voicemail message answered the call.

Concord Technologies Customer Service

Customer service hours are Monday–Friday from 9:00 AM to 9:00 PM EST

Email: premiumsupport@concord.net

Telephone: +1 (206) 441-3346 or 1-800-792-0329 (toll-free)

We recommend that you visit our web site at www.concord.net for links to documentation and video tutorials.