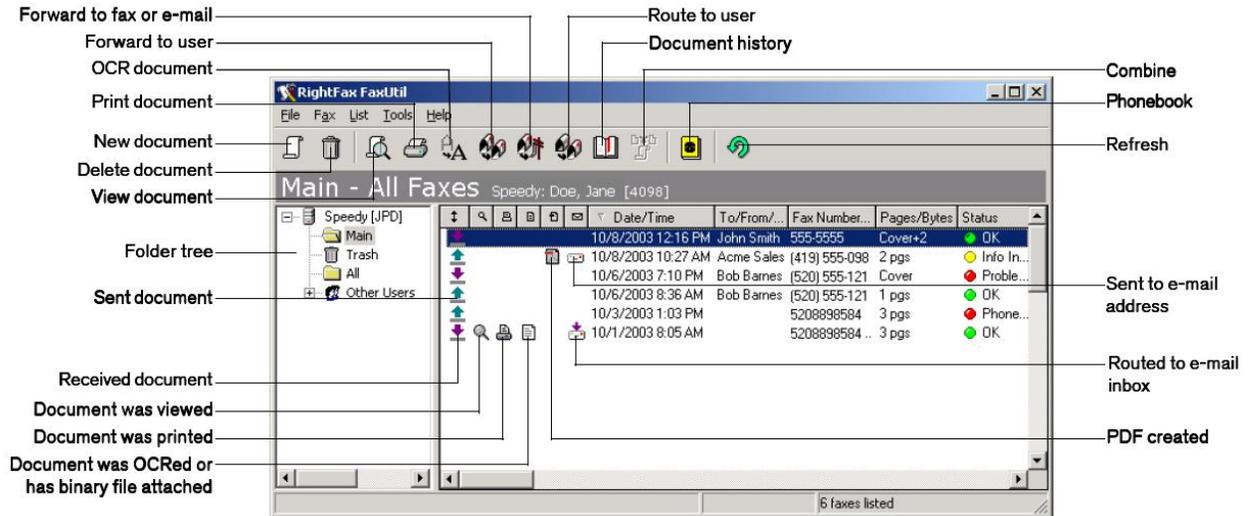# QUICK REFERENCE GUIDE

Captaris® RightFax® Quick Reference Guide

RightFax 9.4 FaxUtil Client for Windows

Captaris®
RightFax®

Running FaxUtil

To open FaxUtil, click the RightFax tray icon 🖨 on your Windows taskbar, and select **FaxUtil** on the shortcut menu, or select **Start > Programs > FaxUtil**.

Creating and Sending Documents

To Create a New Document to Send:

1 Click the **New Document** button 🗋 . This opens the **Fax Information** dialog box.

2 In the **Fax Information** dialog box, add one or more fax or e-mail recipients. Specify your cover sheet notes and options, file and library document attachments, and other sending preferences.

3 Click **Send** to send the document.

To Send Your Document to a Fax Address:

1 In the **Fax Information** dialog box, click the **Main** tab.

2 Click the arrow next to **Fax Number** and select **E-mail Address** or **SMS Number** on the shortcut menu. Enter the recipient's name, e-mail address or SMS number, and other contact information. Entries marked in bold are required. Documents sent to e-mail addresses will be sent as file attachments. Documents sent to SMS numbers will only transmit the cover sheet notes.

To Select an Address from Your Phonebook:

1 In the **Fax Information** dialog box, click the **Main** tab.

2 Click the **Phonebook** button to display all of the entries in your RightFax phonebook.

3 Double-click each phonebook entry to which you want to send the document. Each selected address is displayed in the **Current Recipients** list.

4 Click **OK** to return to the **Fax Information** dialog box. If you select one phonebook entry, the recipient's addressing information is automatically listed in the addressing boxes. If you select multiple phonebook entries, the total number of recipients is listed in the **Name** box.

To Include a Cover Sheet with Your Document:

1 In the **Fax Information** dialog box, click the **Main** tab and select the **Use cover sheet** option.

2 Click the **Cover Sheet Notes** tab.

3 In the **Notes** box, type any notes that you want added to the cover sheet. You can enter up to 21 lines of text.

4 Click the **More Options** tab.

5 In the **Cover Sheet File** box, select a cover sheet from the list. The cover sheet can only be changed if you have been granted permission by the RightFax administrator.

6 In the **From** boxes, enter the contact information that you want on the cover sheet.

To Attach Library Documents:

Library documents are frequently-used documents that your fax administrator has stored on the server for easy access. Marketing materials, price lists, and product specifications are commonly stored as library documents.

1 In the **Fax Information** dialog box, click the **Attachments** tab.

2 Double-click each library document that you want to attach. Each selected attachment is displayed in the **Selected Attachments** list. Library documents will be added to the end of the document in the order they appear in the **Selected Attachments** list.

To Attach Files to Your Document:

1 In the **Fax Information** dialog box, click the **Attachments** tab.

2 Click the **Browse** button to search for the files to attach. Attach as many files as you want. Each selected file is displayed in the **Selected Attachments** list. File attachments will be added to the end of the document in the order they appear in the **Selected Attachments** list.

When sending to an e-mail address, you can check the **Native** option in the **Selected Attachments** list to send an attached file in its native file format, rather than being converted to fax format.

To Add an Overlay Form to Your Document:

Overlay forms are image files that combine with your document so the two images appear together. Company letterhead is a commonly used overlay form. You can add one overlay form per document.

1 In the **Fax Information** dialog box, click the **More Options** tab.

2 Select the **Use Form** option, and then select the overlay form you want from the list.

To Assign Billing Codes to Your Document:

Billing codes may be used by the RightFax administrator to identify the sender, the recipient, or the content of documents. Billing codes do not normally appear in your documents but are stored with each document on the server.

1 In the **Fax Information** dialog box, click the **Main** tab.

2 Under **Accounting**, enter one or two billing codes, or click **Lookup** to select from a list of available billing codes.

Adding Phonebook Entries

FaxUtil lets you create a personal phonebook of fax and e-mail addresses. You can add both individual entries and group entries that let you easily send one document to multiple recipients. Phonebook entries can be private or published. Private phonebook entries can be viewed only by you. Published phonebook entries can be viewed by any other FaxUtil user on the network.

To Create an Individual Phonebook Entry:

1   Click the **Open Phonebook** button in the FaxUtil toolbar.

2   Click **New Entry**.

3   Enter a name for the phonebook entry in the **ID** box.

4   To create an entry for a fax address, enter the fax number in the **Fax Number 1** box, then complete the remaining address boxes. To create an entry for an e-mail address or SMS number, click the arrow next to **Fax Number 1** and select **E-mail Address** or **SMS Number** on the shortcut menu. Enter the e-mail address or SMS number, and then complete the remaining address boxes.

5   Check any options you want and click OK. The new entry will appear in your phonebook preceded by a Fax Address icon , an E-mail Address icon , or an SMS Number icon .

To Create a Group Phonebook Entry:

1   Click the **Open Phonebook** button in the FaxUtil toolbar.

2   Click **New Group**.

3   Enter a name for the group phonebook entry in the **ID** box.

4   In the list of existing phonebook entries, select each entry you want to add to the new group, and click the **Add to Group** button to move the entry to the **Group Members** list. You can add both individual phonebook entries and group phonebook entries to the new group.

5   Check any options you want and click **OK**. The new entry will immediately appear in your phonebook preceded by a **Group** icon .

Forwarding and Routing Documents

When you forward a document from your FaxUtil mailbox, a copy of the document is sent to the recipient and the original document remains in your mailbox. When you route a document, the original document is sent to the recipient and is removed from your mailbox.

To Forward a Document to a Fax Number or E-mail Address:

1 Select the document to forward and click the **Forward to New Number** button in the toolbar.

2 Complete the addressing boxes in the Fax Information dialog box and click **OK** to send.

To Forward a Document to Another FaxUtil User on Your Network:

1 Select the document to forward and click the **Forward to User** button in the FaxUtil toolbar. This opens a list of FaxUtil users.

2 Double-click each user that should receive the document and click **OK** to send.

To Route a Document to Another FaxUtil User on Your Network:

1 Highlight the document to route and click the **Route to User** button in the FaxUtil toolbar. This opens a list of FaxUtil users.

2 Double-click each user that should receive the document and click **OK** to send.

Forwarding and Routing Documents

To Sort Documents:

- Click any column header in the document list to sort the documents in that column in ascending order.
- Click the same column header again to sort the documents in that column in descending order.
- Right-click any column header to open a list of filter options.

To View Other Users' Mailboxes:

RightFax administrators, group administrators, and delegates all have the ability to view the contents of other RightFax users' mailboxes. If you have the ability to view other mailboxes, an **Other Users** entry is included in your FaxUtil folder tree.

1 Click **+** next to **Other Users** in the folder tree to expand the list. The list may include both RightFax groups and individual mailboxes. Continue to expand the tree as necessary until you have listed the folders in the mailbox you want.

2 Click a folder to view its contents.

Viewing Documents

To open the RightFax Viewer, double-click any sent or received document in your document list.
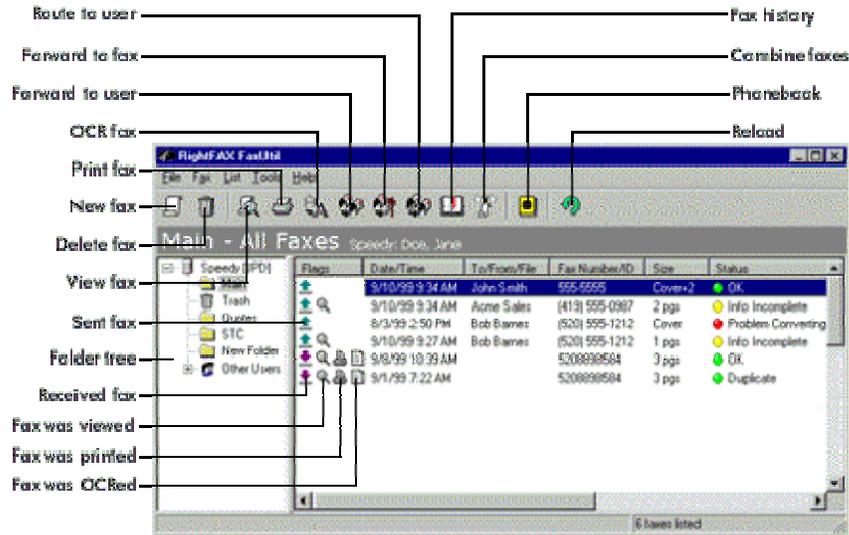
The OCR tab will only appear if you have the Optical Character Recognition (OCR) feature enabled and have performed OCR on this fax. The PDF tab will appear only when viewing sent documents for which you have created Portable Document Format (PDF) output. To view PDF images in FaxUtil, you must have installed Adobe Acrobat Reader version 3.0 or higher.