



GFI[®]

GFI FaxMaker[™]

ADMINISTRATOR GUIDE

Find out how you can manage and customize GFI FaxMaker. Tweak settings according to your requirements and troubleshoot any issues encountered.



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1 Introduction

GFI FaxMaker is a fax server that enables your network users to send and receive faxes and SMS directly from their machine. GFI FaxMaker centralizes your fax infrastructure, without maintaining multiple fax machines distributed across the office(s) and eliminates the need to print a fax before sending or when receiving a fax.

GFI FaxMaker for Exchange/SMTP integrates with various mail servers such as Microsoft® Exchange Server, Lotus Notes and with other SMTP/POP3 mail servers.

While every effort is made to ensure that all functionality and references to third party software are correct, there might be discrepancies due to updates at the discretion of the aforementioned third party vendors.

1.0.1 Conventions used in this manual

Convention	Description
>	Step by step navigational instructions to access a specific function.
Bold text	Items to select such as nodes, menu options or command buttons.
<i>Italics text</i>	Parameters and values that you must replace with the applicable value, such as custom paths and file names.
Code	Indicates text values to key in, such as commands and addresses.

1.1 How fax receiving works



Step 1: Receive fax call

The sender transmits the fax. This is received by GFI FaxMaker either from a fax line or from a [hosted fax service](#).

Step 2: GFI FaxMaker processes fax & content

GFI FaxMaker processes the received fax. Amongst others:

- » (Optional) Blocks junk faxes.
- » (Optional) Optically recognizes text in fax (OCR).

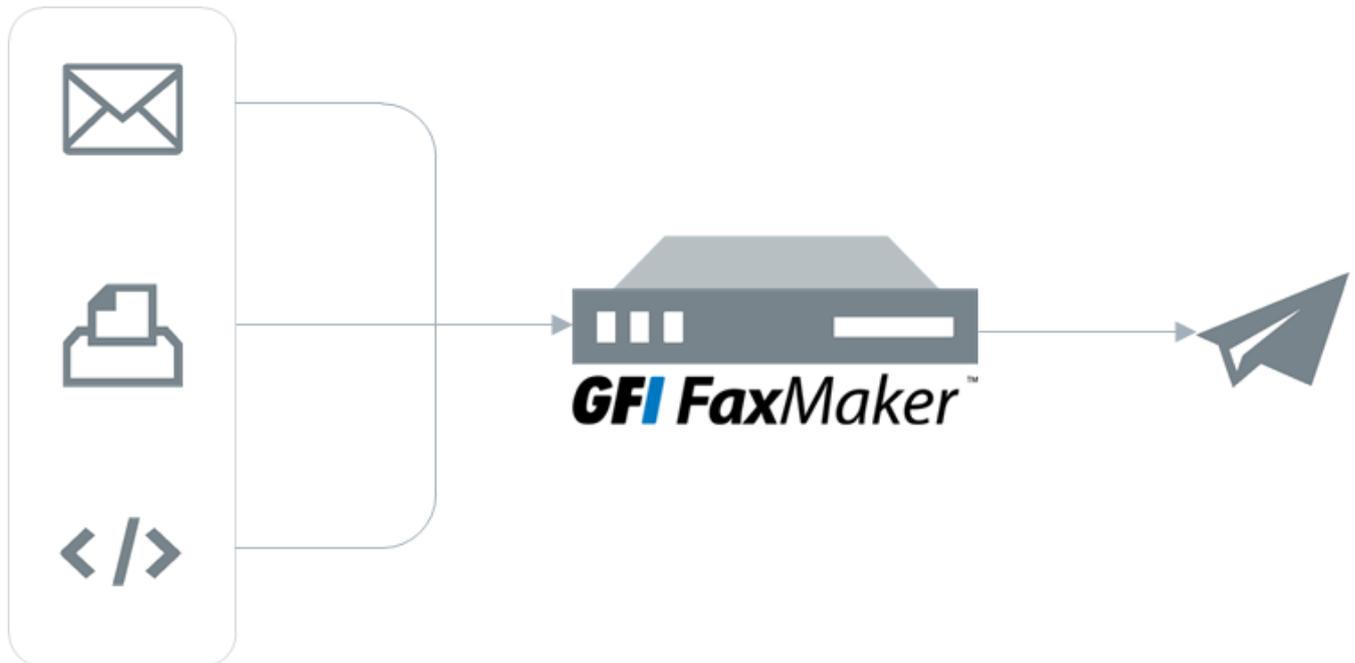
- » Determines recipients according to fax routing settings.
- » Forwards fax by email to appropriate users.

For more information, refer to [Configuration - Receiving faxes](#) (page 161).

Step 3: Recipients receive the fax

The fax recipients receive the fax in their mailbox. For more information, refer to [How users view received faxes](#) (page 71).

1.2 How fax sending works



Step 1: Various methods used to send a fax

The fax content is sent to GFI FaxMaker using one of the various supported methods:

- » Via email
- » Web Client
- » NetPrintQueue2Fax
- » Text, XML or Web Service API

For more information, refer to [How users send faxes](#) (page 65).

Step 2: GFI FaxMaker processes fax content

GFI FaxMaker processes the received content and prepares it for transmission. Amongst others, GFI FaxMaker:

- » Resolves and formats the number to dial
- » Converts content to fax format
- » Adds any coverpages
- » Adds any headers and footers

For more information, refer to [Configuration - Sending faxes](#) (page 127).

Step 3: Fax transmission

GFI FaxMaker transmits the fax:

- » to an installed fax device which in turn transmits the fax over the telephone line
- » or to a [hosted fax service](#).

2 System Requirements

Before installing GFI FaxMaker, ensure that the system meets or exceeds the below requirements. If these requirements are not met, you may encounter problems during installation or in functionality.

NOTE

The below requirements are for GFI FaxMaker software only. Third-party software or hardware (such as fax cards and their drivers) may have higher or different requirements. Ensure that the system meets or exceeds the requirements for both GFI FaxMaker and third-party software/hardware.

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2.1 Software requirements

Supported operating systems

Install GFI FaxMaker on any 64-bit versions of the operating systems listed below.

Operating system (64-bit only)	Supported editions and notes
Windows Server® 2016	Supported editions: Datacenter, Standard & Essentials
Windows Server® 2012 R2	Supported editions: Standard, Datacenter, Essentials & Foundation
Windows Server® 2008 R2	Supported editions: Standard & Enterprise
Windows® SBS 2011	Supported editions: Standard & Premium
Windows® 10	Supported editions: Pro & Enterprise For more information, refer to Installing GFI FaxMaker on Windows 10, 8 or 7 (page 63).
Windows® 8 and 8.1	Supported editions: Pro & Enterprise For more information, refer to Installing GFI FaxMaker on Windows 10, 8 or 7 (page 63).
Windows® 7	Supported editions: Ultimate, Enterprise & Professional For more information, refer to Installing GFI FaxMaker on Windows 10, 8 or 7 (page 63).

Supported mail servers

GFI FaxMaker can be installed in an environment with any of the mail servers listed below.

Mail server type

Microsoft® Exchange Server 2010 or later

Microsoft® Exchange cluster environments 2010 or later

Lotus Notes/Domino

Hosted mail servers

Other SMTP/POP3 servers

For more information, refer to [Mail server configuration](#) (page 15). If no mail server is available, refer to [Using GFI FaxMaker without a mail server](#).

NOTE

The GFI FaxMaker server requires a public IP address when using a hosted email service, such as Microsoft® Office 365™ or Google Apps for Business. For more information, refer to [Hosted email](#) (page 34).

Other required components

Component	Environment
Microsoft® .NET Framework 4 or over	Required as from GFI FaxMaker version 2013 Service Release 3.
IIS SMTP service	Required except when installing GFI FaxMaker on the Microsoft® Exchange server. NOTES: <ul style="list-style-type: none">» Ensure that the SMTP service is running in the Services applet.» This service is not available on Microsoft® Windows® 10, 8 or 7. In this case, fax/SMS emails cannot be routed to GFI FaxMaker via this service. Use an alternative method of sending faxes instead. For more information, refer to Installing GFI FaxMaker on Windows 10, 8 or 7 (page 63).
IIS WWW service	Required to access the GFI FaxMaker web interface. If not found, this is automatically installed by GFI FaxMaker during installation.
Hub Transport role	Required when installing on a Microsoft® Exchange Server 2010 or newer.
Internet Explorer®	Required for HTML cover pages.

2.2 Hardware requirements

Install GFI FaxMaker on a server with the following minimum specifications.

Component	Minimum requirement
Processor	Intel Pentium or compatible - 2GHz 32 bit processor
Memory	1GB RAM (dedicated to GFI FaxMaker)
Physical storage	500 MB required for GFI FaxMaker installation only. Note: Temporary fax storage, archiving and backup require extra space depending on the amount and size of faxes processed.

2.2.1 Fax transmission

GFI FaxMaker requires **at least one** medium that enables sending and receiving of faxes.

Component	Description
Fax device	A professional fax modem class 2, 2.0 or 2.1 using either the Microsoft® or the GFI fax modem drivers, such as: Brooktrout TR 1034 or Trufax fax board, a Dialogic Diva Pro/Server fax card or an AVM active fax card. For a complete list of supported devices, refer to: http://go.gfi.com/?pageid=FM_Devices NOTE: For more information related to the installation of fax devices go to: http://go.gfi.com/?pageid=FM19help&lang=en#cs hid=FDIManual NOTE: Minimum requirements for particular fax devices may be higher than GFI FaxMaker's.
Fax over IP	Use a supported Fax over IP (FoIP) implementation to transmit faxes over the IP network, such as to a VoIP PBX, Media Gateway or a SIP trunk provider. Supported FoIP implementations include TE-SYSTEMS XCAPI and Dialogic Brooktrout SR140. For more information related to the installation of fax devices go to: http://go.gfi.com/?pageid=FM19help&lang=en#cs hid=foip
Online fax service	An account with a supported online fax provider. For more information go to http://go.gfi.com/?pageid=FM_FaxServices . To use this service, the GFI FaxMaker machine must be able to connect to the fax provider via Internet.

2.3 Backup software

Backup software can cause GFI FaxMaker to malfunction if GFI FaxMaker is denied access to some of its files.

Backup GFI FaxMaker installation files only when GFI FaxMaker services are not running. From the Services applet, stop the following services:

- » GFI FaxMaker Fax Server
- » GFI FaxMaker Message Transfer Agent
- » GFI FaxMaker Attendant

For more information, refer to [How to backup GFI FaxMaker settings](#) (page 181).

2.4 Anti-virus software

Anti-virus software causes GFI FaxMaker to malfunction if GFI FaxMaker is denied access to some of its files. Add an anti-virus exclusion that prevents the anti-virus engine from scanning the GFI FaxMaker installation folder and other folders used by the product, such as the Text and XML API folders.

2.5 Firewall settings

Configure your firewall to allow connections from the GFI FaxMaker server on the following ports:

Port	Protocol	Description
25	TCP	IIS SMTP - Used by GFI FaxMaker to communicate with mail server.
80	TCP	The default port used to access the GFI FaxMaker web interface using a web browser. This can be customized in IIS, for example when using a secure HTTP connection which by default uses port 443.

Port	Protocol	Description
135-139	TCP/UDP	Microsoft® file sharing Server Message Block (SMB) - Used by the GFI FaxMaker remote management tools to connect to the GFI FaxMaker share.
445	TCP/UDP	Direct-hosted SMB traffic without a network basic input/output system (NetBIOS) - Used by the GFI FaxMaker remote management tools to connect to the GFI FaxMaker share.
8555	TCP	Used by the GFI FaxMaker Client and Web Services API. This port can be automatically opened whilst running the GFI FaxMaker Configuration Wizard . For more information refer to http://go.gfi.com/?pageid=FM19help&lang=en#csid=FirewallPorts

3 Mail server configuration

When users send fax or SMS by sending an email to *number@faxmaker.com*, the mail server must route this email to GFI FaxMaker to enable fax transmission. To enable this functionality, configure routing connectors on your mail server that route all emails addressed to ***@faxmaker.com** and ***@smsmaker.com** to GFI FaxMaker.

NOTE

When installing GFI FaxMaker on Microsoft® Windows® 10, 8 or 7, faxes cannot be routed to GFI FaxMaker using connectors. Use a POP3 mailbox instead. For more information, refer to [Installing GFI FaxMaker on Windows 10, 8 or 7](#) (page 63).

Choose the email service type:

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3.1 Microsoft Exchange

In a Microsoft Exchange environment, GFI FaxMaker can be installed **directly on the Microsoft Exchange server** or **on a separate machine**.

For Microsoft Exchange clusters, refer to [Microsoft Exchange cluster](#).

3.1.1 Install directly on Microsoft Exchange server

GFI FaxMaker can be installed directly on a Microsoft® Exchange Server 2010/2013/2016 environment, that includes the Hub Transport role. For more information, refer to [System Requirements](#) (page 11).



Screenshot 1: GFI FaxMaker installed on the Exchange server

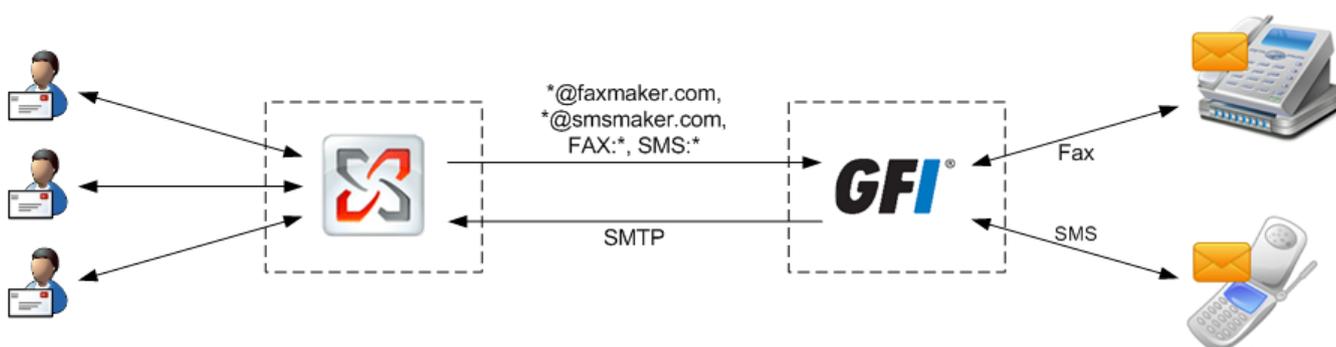
During installation, GFI FaxMaker automatically configures Microsoft® Exchange to process faxes and SMS. No further configuration is required post-installation.

Process	Description
Client side	Users send faxes/SMS via email using Microsoft® Outlook® or via the GFI FaxMaker Client application.
Sending faxes/SMS	The mail server is automatically configured to route all emails addressed to faxmaker.com , smsmaker.com , Fax: & SMS: to GFI FaxMaker.
Received faxes/SMS	After determining the users to whom to forward incoming faxes/SMS, GFI FaxMaker sends transmission report via Microsoft® Exchange.

3.1.2 Install on a machine separate than Microsoft Exchange

When GFI FaxMaker is not installed directly on the Microsoft Exchange server, configure connectors on the mail server that route fax and SMS to GFI FaxMaker.

3.1.3 How it works



Screenshot 2: GFI FaxMaker installed on a dedicated server

Process	Description
Client side	Users send faxes/SMS via email using Microsoft® Outlook® or via the GFI FaxMaker Client application.
Sending faxes/SMS	SMTP connectors on the Microsoft® Exchange server forward all emails addressed to *@faxmaker.com , *@smsmaker.com , Fax: & SMS: to GFI FaxMaker.
Received faxes/SMS	After determining the users to whom to forward incoming faxes/SMS to, GFI FaxMaker sends transmission report via SMTP to the Microsoft® Exchange server.

Creating the connectors

Create SMTP connectors on Microsoft® Exchange to route all emails addressed to **faxmaker.com**, **smsmaker.com**, **fax:** and **sms:** to GFI FaxMaker.

NOTES

1. To use this setup, install the IIS SMTP service on the GFI FaxMaker server.
2. The default fax (**faxmaker.com**) and SMS (**smsmaker.com**) domains can be customized by the GFI FaxMaker administrator. For more information, refer to [Fax and SMS domain names](#) (page 105).

1. Run the GFI FaxMaker setup on the Microsoft® Exchange server (the Hub Transport role for Microsoft® Exchange 2007 onwards).
2. When choosing the components to install, disable **GFI FaxMaker Fax Server** and select **Exchange SMTP connector**.
3. In the next screen, specify the IP address or server name of the GFI FaxMaker server.

4. Proceed with installation.

The setup creates the required connectors on Microsoft Exchange. For more information, refer to [Microsoft® Exchange 2010/2013/2016 Connector](#) (page 17).

3.1.4 Microsoft® Exchange 2010/2013/2016 Connector

When using GFI FaxMaker in a Microsoft® Exchange 2010/2013/2016 environment, configure SMTP connectors to route all emails addressed to **faxmaker.com**, **smsmaker.com**, **fax:** and **sms:** to GFI FaxMaker.

NOTE

The default fax (**faxmaker.com**) and SMS (**smsmaker.com**) domains can be customized by the GFI FaxMaker administrator. For more information, refer to [Fax and SMS domain names](#) (page 105).

Creating the connectors automatically

GFI FaxMaker installed on Microsoft® Exchange Hub Transport Server

During installation, GFI FaxMaker automatically configures Microsoft® Exchange to allow processing of faxes and SMS.

The setup creates a **Foreign Connector** and a **Receive Connector** named **GFIFaxMaker**.

No further configuration is required post-installation.

GFI FaxMaker installed on a separate machine

To configure connectors when installing GFI FaxMaker on a separate machine than Microsoft® Exchange 2010/2013/2016 Hub Transport role server:

1. Run the GFI FaxMaker setup on the Microsoft® Exchange Hub Transport server.
2. When choosing the components to install, disable **GFI FaxMaker Fax Server** and select **Exchange SMTP connector**.
3. In the next screen, specify the IP address or server name of the GFI FaxMaker server.
4. Proceed with installation.

The setup creates a **Send Connector** and a **Receive Connector** named **GFIFaxMaker**.

For more information, refer to [Installation procedure](#) (page 48).

Creating the connectors manually

GFI FaxMaker installed on Microsoft® Exchange Hub Transport Server

Use the following Microsoft® Exchange Management Shell commands to create the connectors manually when GFI FaxMaker is installed on Microsoft® Exchange Hub Transport Server. This procedure is not usually required since GFI FaxMaker automatically configures the connectors automatically during installation.

1. Create a **Receive Connector**:

```
new-receiveconnector -name "GFIFaxMaker" -Bindings "0.0.0.0:25" -RemoteIPRanges "127.0.0.1" -AuthMechanism "ExternalAuthoritative" -PermissionGroups "ExchangeServers" -fqdn "faxmaker.com"
```

2. Create and set a **Foreign Connector**:

```
New-ForeignConnector -Name GFIFaxmaker -AddressSpaces "SMTP:faxmaker.com" ,  
"SMTP:smsmaker.com" , "FAX:*" , "SMS:*
```

```
Set-ForeignConnector -Identity GFIFaxmaker -DropDirectory "C:\Program Files  
(x86)\GFI\FAXmaker\Sinkdrop"
```

Change `C:\Program Files (x86)\GFI\FAXmaker` with the path to your GFI FaxMaker installation folder.

NOTE

A Send Connector should not be created when GFI FaxMaker is installed on the Hub Transport Server.

GFI FaxMaker installed on a separate machine

To create the connectors manually, when GFI FaxMaker is installed separately from the Microsoft® Exchange Hub Transport server:

1. From the Microsoft® Exchange Management Shell, create a **Receive Connector**:

```
new-receiveconnector -name "GFIFaxMaker" -Bindings "0.0.0.0:25" -RemoteIPRanges  
"10.10.10.10" -AuthMechanism "ExternalAuthoritative" -PermissionGroups  
"ExchangeServers" -fqdn "faxmaker.com"
```

Replace `10.10.10.10` with the IP address of the GFI FaxMaker machine.

2. Create a **Send Connector**:

```
new-sendconnector -name "GFIFaxmaker" -AddressSpaces SMTP:faxmaker.com ,  
SMTP:smsmaker.com , FAX:* , SMS:* -DNSRoutingEnabled:$false -SmartHosts  
"10.10.10.10"
```

Replace `10.10.10.10` with the IP address or name of the GFI FaxMaker machine.

NOTES

1. The default fax (`faxmaker.com`) and SMS (`smsmaker.com`) domains can be customized by the GFI FaxMaker administrator. If using custom domains, key in the custom domains instead.
2. A Foreign Connector should not be created when installing GFI FaxMaker separately from the Hub Transport Server.

3.1.5 Microsoft Exchange cluster

To install GFI FaxMaker in a Microsoft® Exchange cluster environment:

1. Install GFI FaxMaker on a machine that does not form part of the cluster.
2. On each cluster node, setup Microsoft® Exchange SMTP connectors to forward emails addressed to ***@faxmaker.com**, ***@smsmaker.com**, **Fax:** & **SMS:** to GFI FaxMaker.
 - Microsoft® Exchange 2010/2013/2016:

NOTE

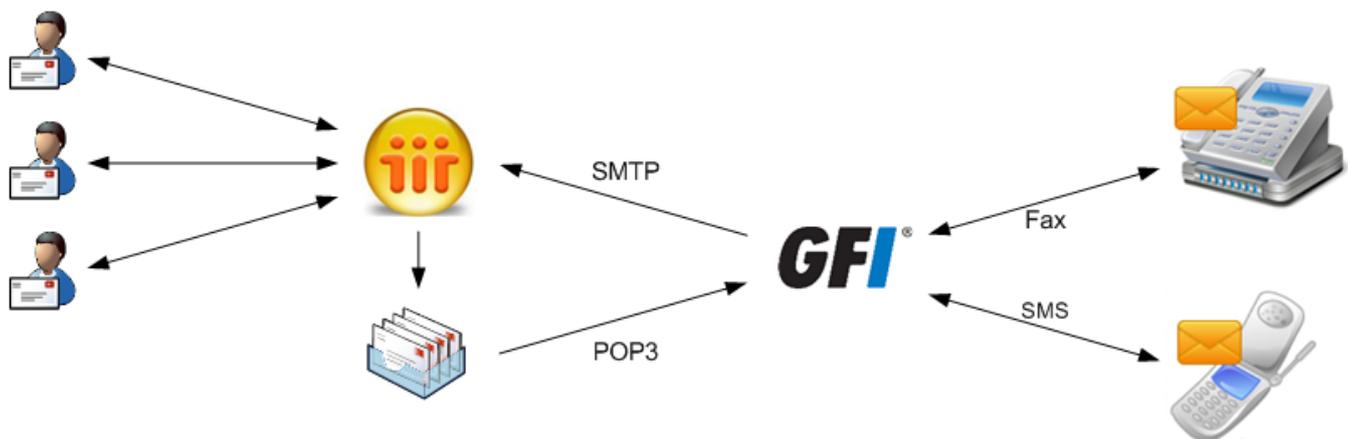
The default fax (`faxmaker.com`) and SMS (`smsmaker.com`) domains can be customized by the GFI FaxMaker administrator. If using different domains, specify your custom domains. After installation, specify the domains in the GFI FaxMaker Configuration. For more information, refer to [Fax and SMS domain names](#) (page 105).

3.2 Lotus Notes/Domino

Use Lotus Notes/Domino with GFI FaxMaker to send faxes and SMS.

GFI FaxMaker can be installed in a Lotus Domino/Notes 4/5/6/6.5 environment, either directly on the server or on a separate machine. For larger networks it is recommended to install GFI FaxMaker on a separate machine than Lotus Notes/Domino.

3.2.1 How it works



Screenshot 3: GFI FaxMaker installed on the Lotus Notes machine

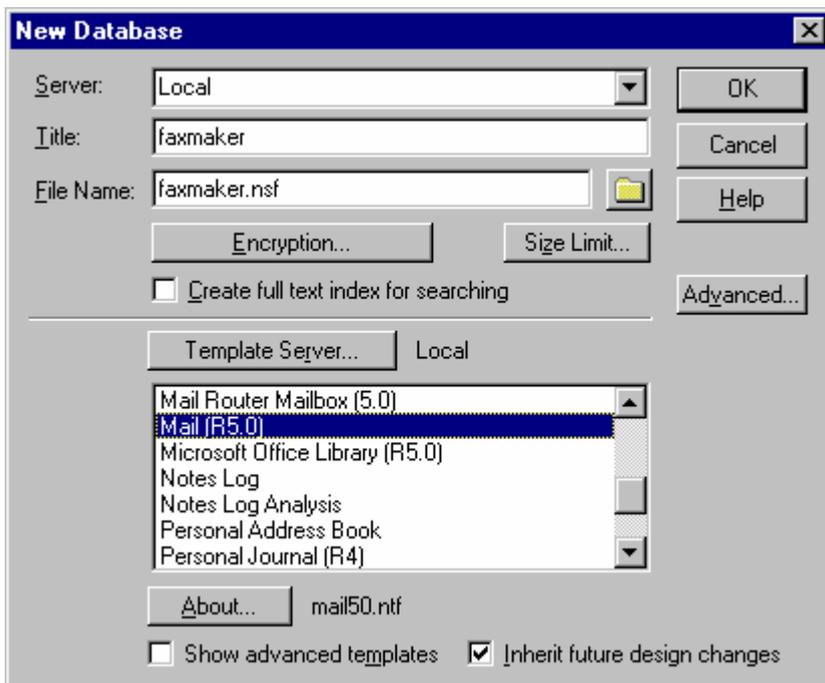
Process	Description
Client side	<p>Users send faxes/SMS using:</p> <ul style="list-style-type: none"> » GFI FaxMaker Client - via the Fax Message Form. » Lotus Notes/Domino email client - send email to fax/SMS using the following address format <faxnumber>@faxmaker.com or <smsnumber>@smsmaker.com. <p>NOTE: The default fax (faxmaker.com) and SMS (smsmaker.com) domains can be customized by the GFI FaxMaker administrator. Use the configured fax or SMS domain accordingly. For more information, refer to Fax and SMS domain names (page 105).</p>
Sending faxes/SMS	<p>Lotus Notes/Domino routes faxes/SMS to a dedicated mailbox. GFI FaxMaker retrieves faxes/SMS from this mailbox via POP3. To do this:</p> <ul style="list-style-type: none"> » Create a dedicated mailbox for GFI FaxMaker in Lotus Notes/Domino. » Route all emails addressed to *@faxmaker.com and *@smsmaker.com to this mailbox. » Configure GFI FaxMaker POP3 Connector to retrieve emails stored in this mailbox. <p>NOTE: The default fax (faxmaker.com) and SMS (smsmaker.com) domains can be customized by the GFI FaxMaker administrator.</p>
Received faxes/SMS	<p>After determining the users to forward incoming faxes/SMS to, GFI FaxMaker sends transmission report via SMTP to the Lotus Domino/Notes server.</p>

Select the appropriate version:

- » [Lotus Domino/Notes server 6.5](#)
- » [Lotus Domino/Notes server 6](#)
- » [Lotus Notes 4 and 5](#)

3.2.2 Lotus Notes 4 and 5

Step 1: Create a dedicated database for GFI FaxMaker



Screenshot 4: Creating a Notes Fax database

1. In the Notes Workspace select **File > Database > New**.
2. In **New Database** dialog, set the following options:

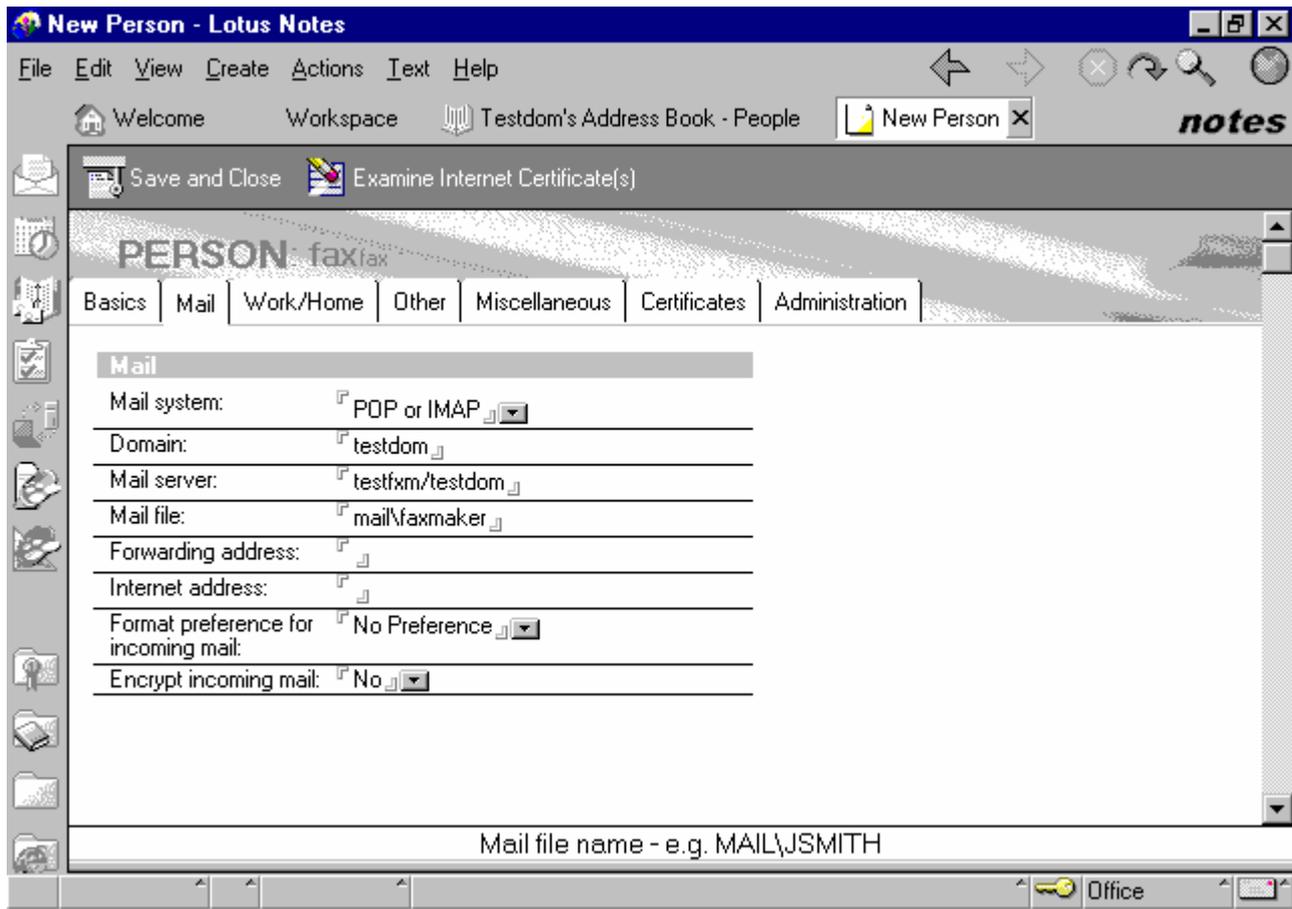
Option	Setting
Server	Local
Title	GFI FaxMaker
Template Server	Local
Template	Mail (R5.0/6.0).

Click **OK**.

3. Right-click new database and select **Access Control**.
4. In **Manager rights**, enable **Delete document** option.

Step 2: Define the database as a POP Mailbox

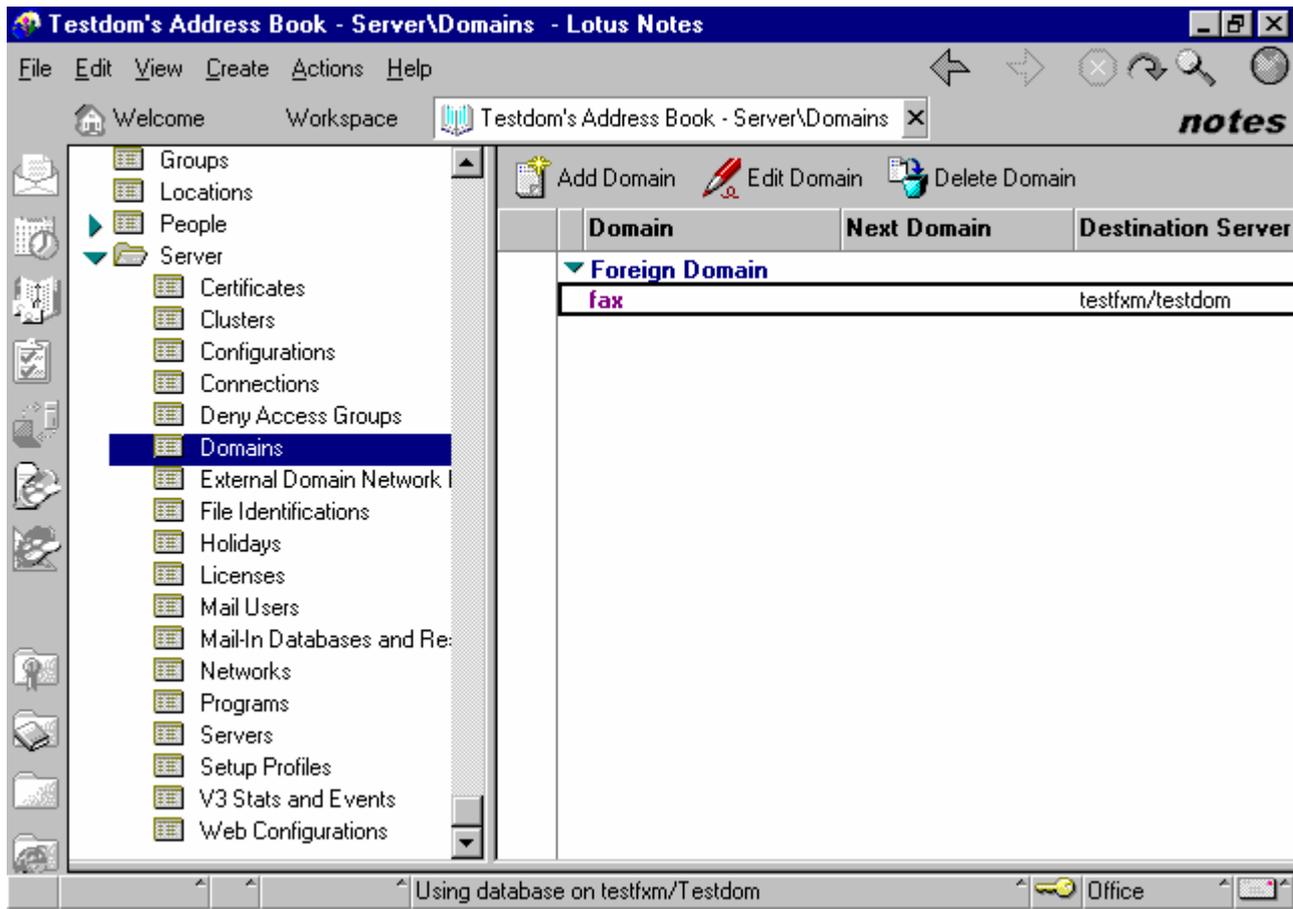
1. From the Notes Workspace, navigate to **Server** and open the server **Address book**.
2. Click **Add Person**.
3. From **Basics** tab, enter a **Name** and **Password** for the Mailbox and set the user name **Fax**.
4. From **Mail** tab, set **Mail system** to **POP** or **IMAP**.
5. From **Internet message storage** option, set **Mail** section to **Notes and Internet Mail**.
6. Click **Save** and **Close**.



Screenshot 5: Setting up the POP mailbox for GFI FaxMaker

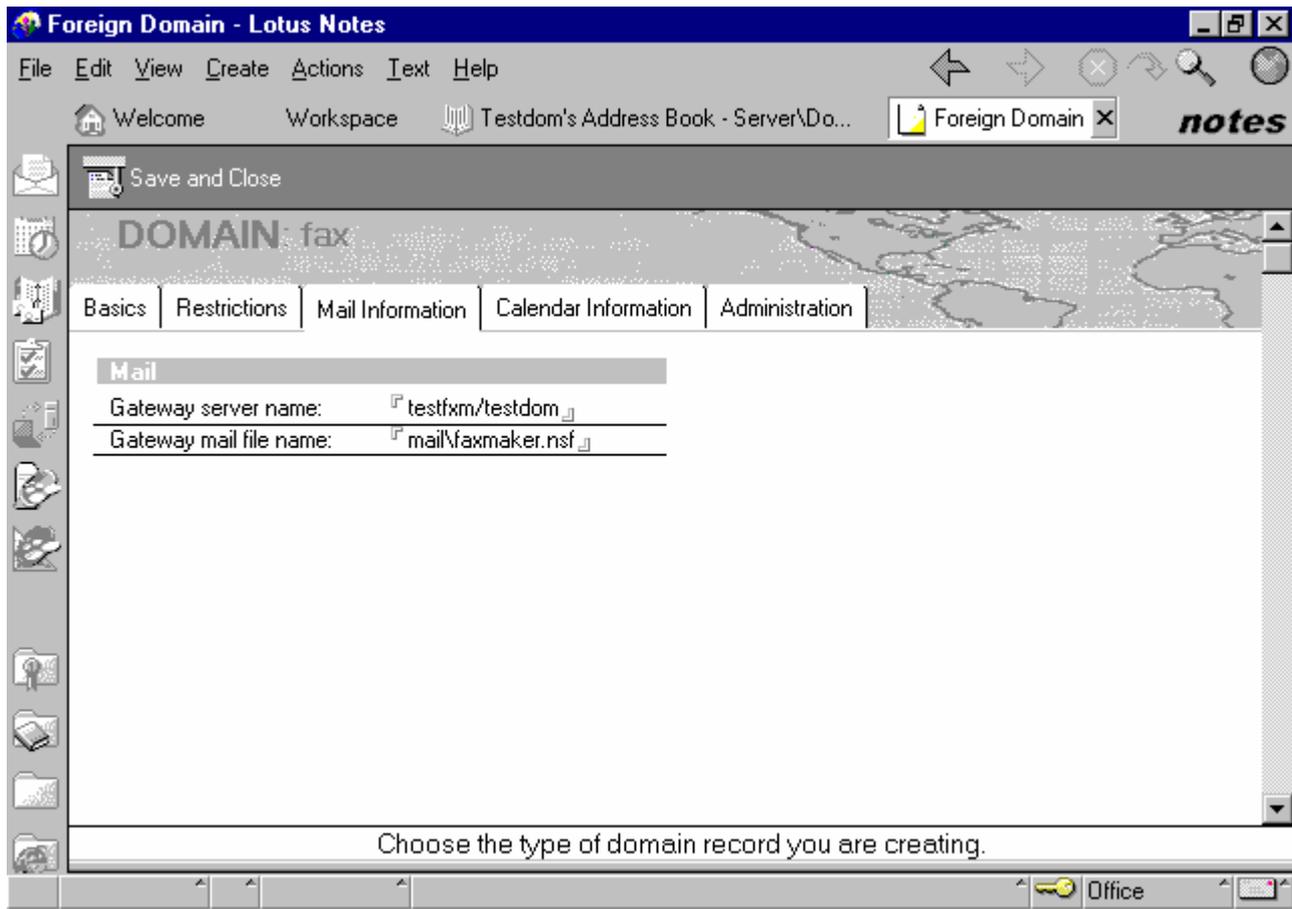
Step 3: Set up forwarding of the domain

1. From the Lotus workspace, open the address book and navigate to **Server > Domains**.



Screenshot 6: Setting up a Foreign Domain in Lotus Notes

2. Click **Add domain**.
3. In the **Basics** section, set **Domain type** to **Foreign Domain**.
4. In the **Foreign Domain Name** field, enter the name of the domain you want to set up (for example, fax).
5. Select the **Mail information** tab.



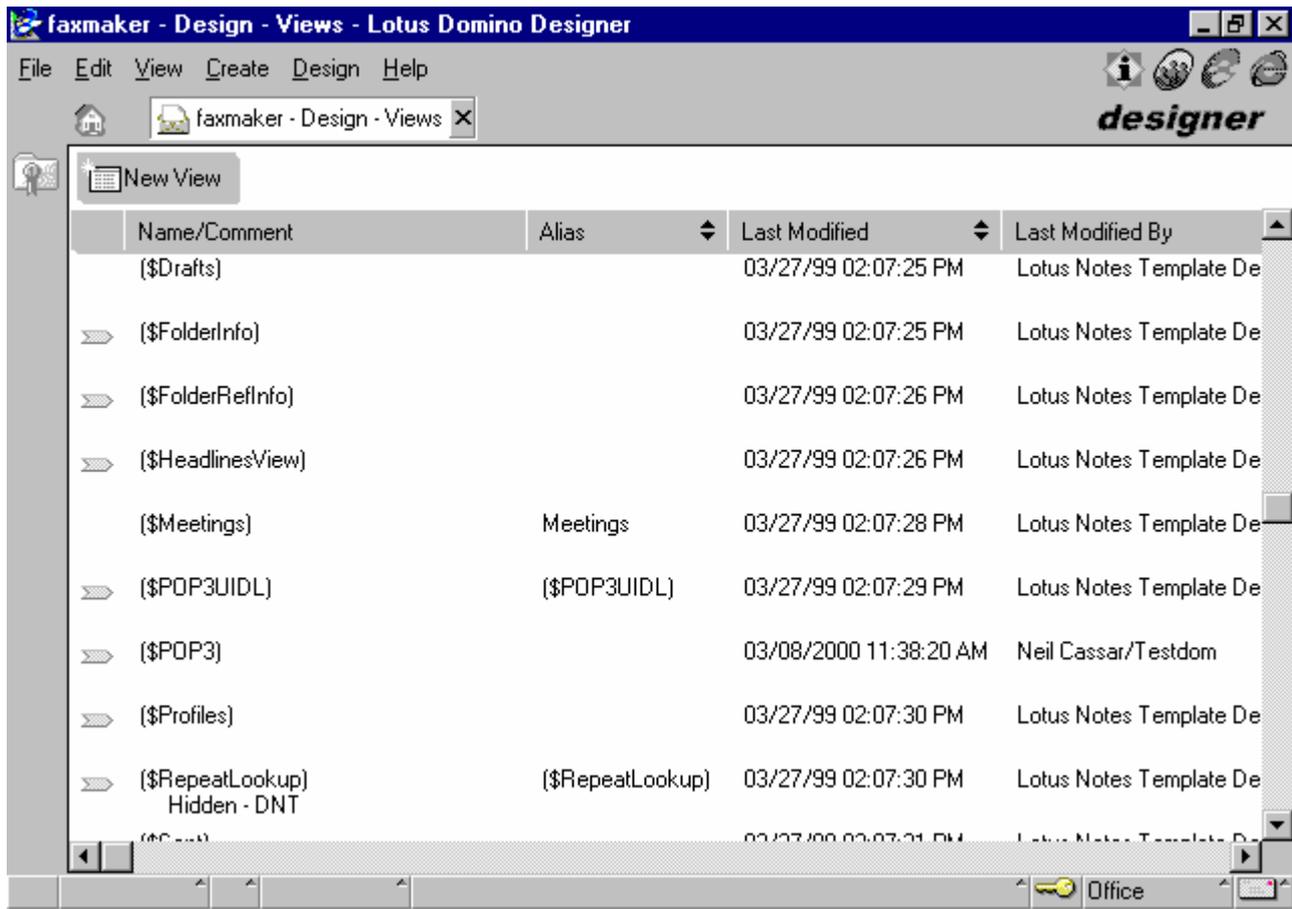
Screenshot 7: Foreign Domain options

6. In **Gateway server name**, key in the name of the server where the GFI FaxMaker mailbox is found (for example, fax\gfi).
7. In **Gateway mail file name**, key in the name of the GFI FaxMaker mailbox (for example, mail\GFI FaxMaker.nsf).
8. Click **Save and close**.

Step 4: Modifying the GFI FaxMaker Notes mailbox views

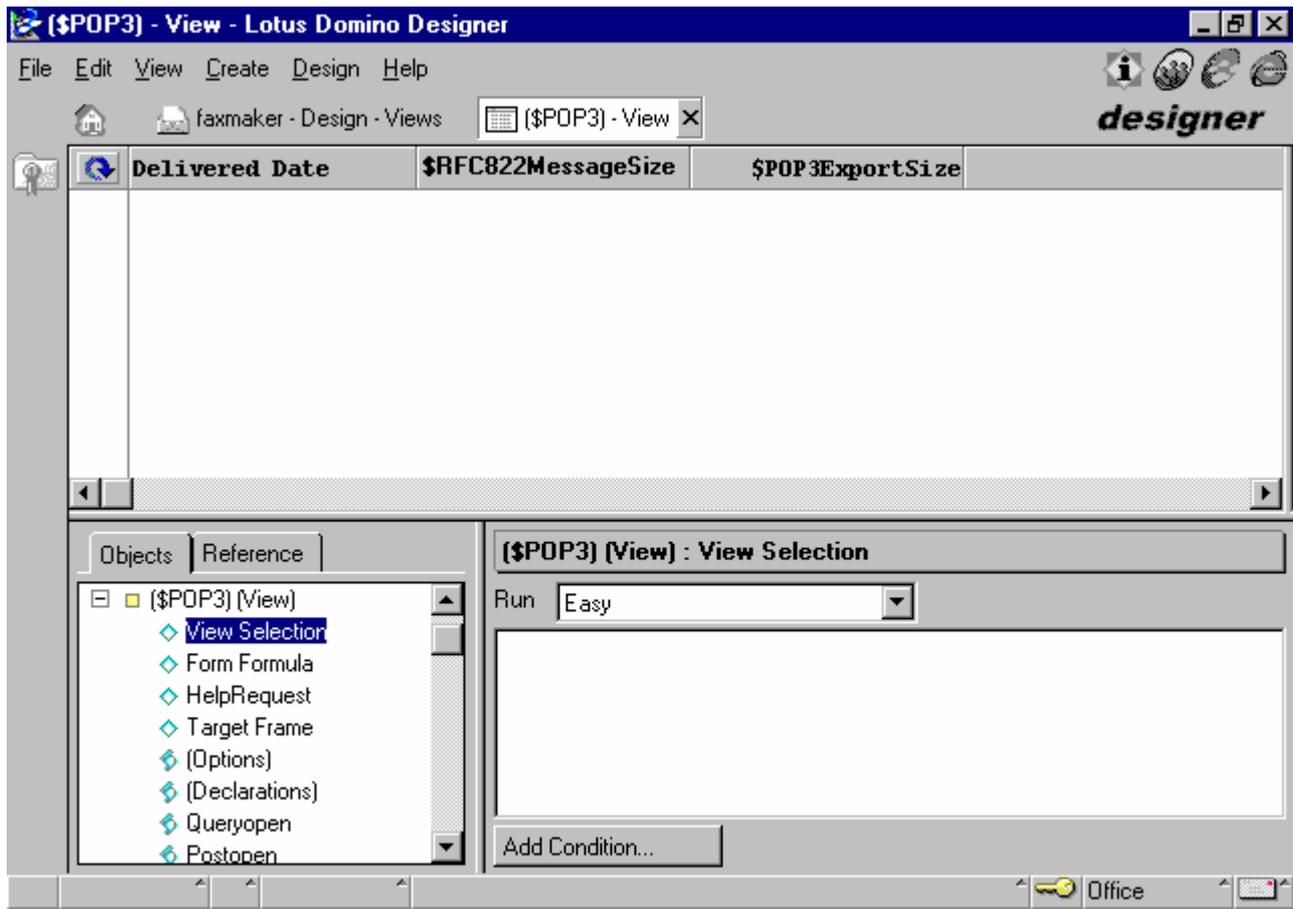
Set up the GFI FaxMaker mailbox views to allow the GFI FaxMaker MTA to see the forwarded mail.

1. Log on to the GFI FaxMaker mailbox client from a Notes client.
2. Select **Design > Views**.



Screenshot 8: Modifying the mailbox views

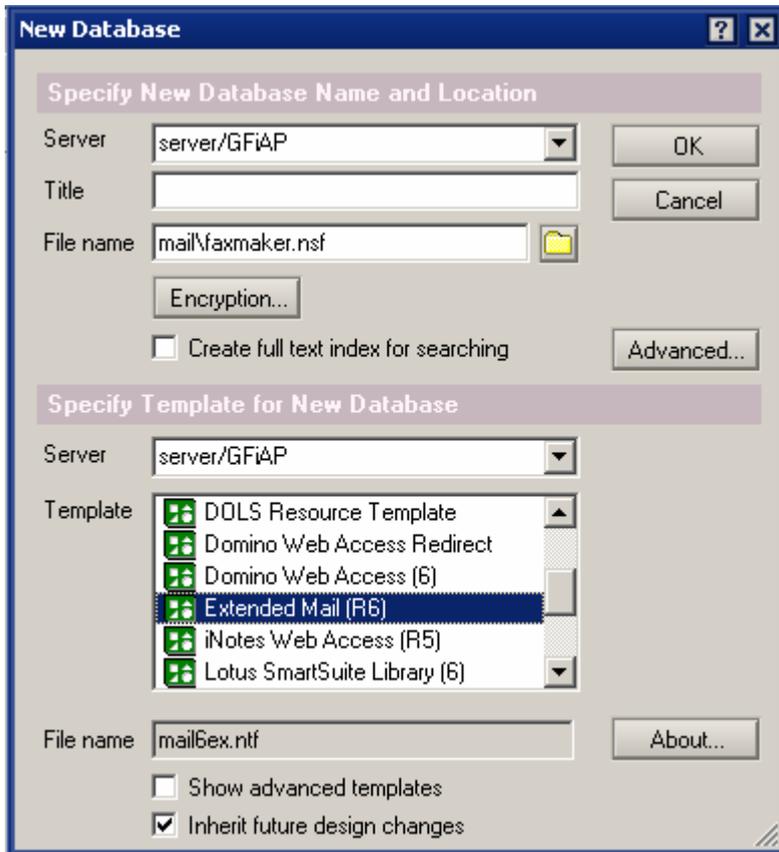
3. Double-click **(\$POP3)**.
4. Delete all the entries in the script windows (lower window).
5. Save and close.



Screenshot 9: The (\$POP3) view

3.2.3 Lotus Domino/Notes server 6

Step 1: Create a mailbox database on the Domino server

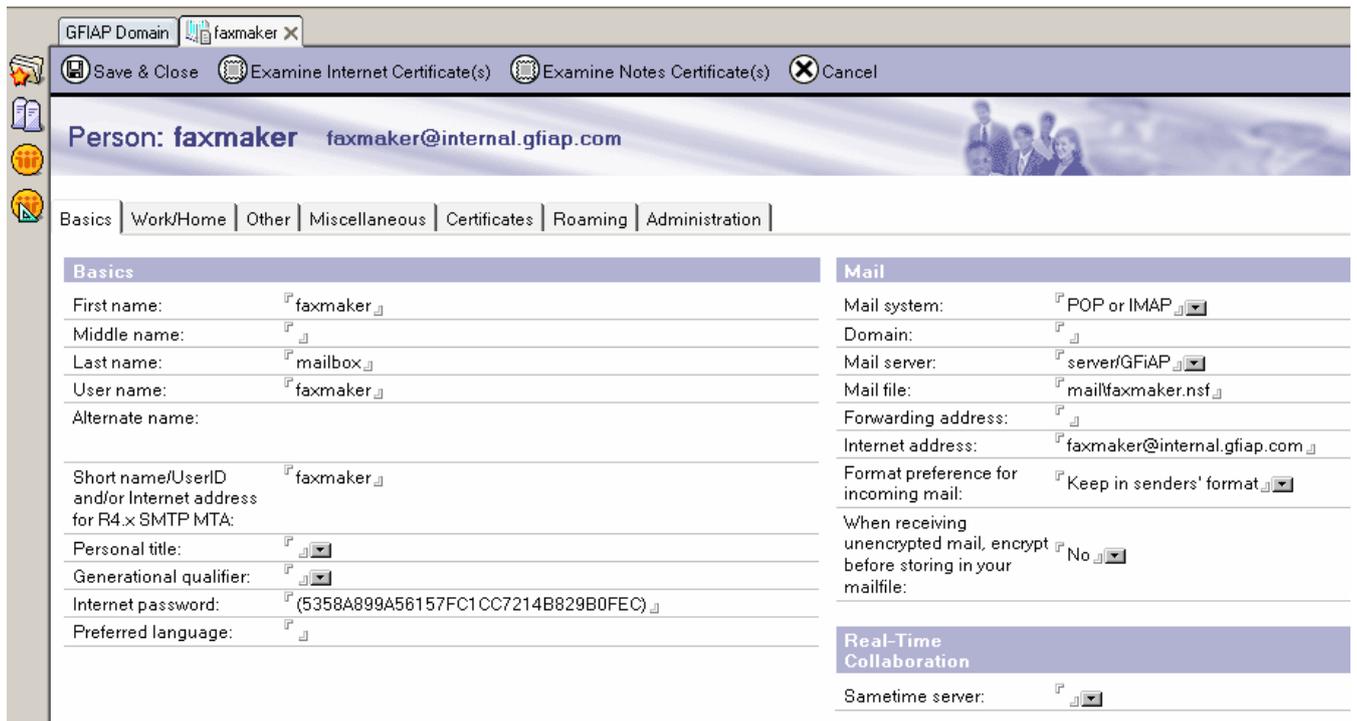


Screenshot 10: Creating a new database

1. From Domino Administrator menu bar, select **File > Database > New**.
2. Select your Domino Server. Choose mail directory and enter `GFI FaxMaker.nsf` as the filename.
3. Click **OK** to create the database.

Step 2: Configure the Person for the GFI FaxMaker Domino database

1. From Domino Administrator, click **Add Person**.



Screenshot 11: Add a person

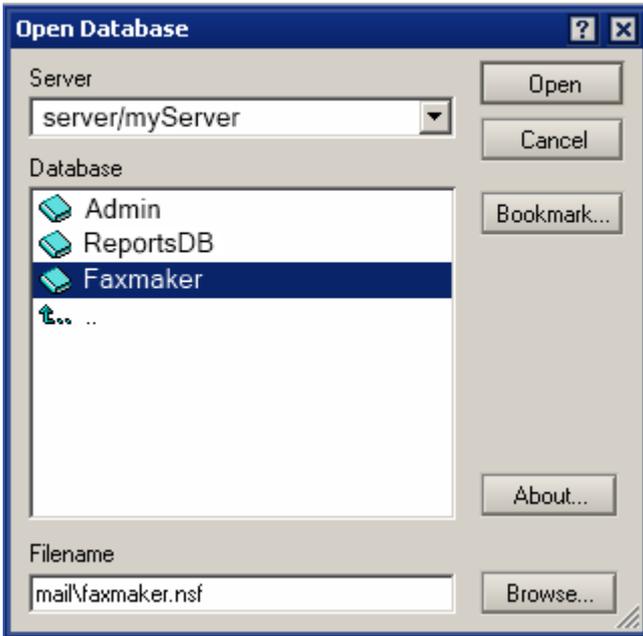
2. Fill in the following fields:

Option	Setting
First name	GFI FaxMaker
Last name	Mailbox
User name	GFI FaxMaker
Short name/User ID	GFI FaxMaker
Internet Password	Choose a POP3 password.
Mail System	POP or IMAP
Mail Server	Domino Server name
Internet Address	The email address which will be able to receive email on the server.

3. Click **Save** and **Close**.

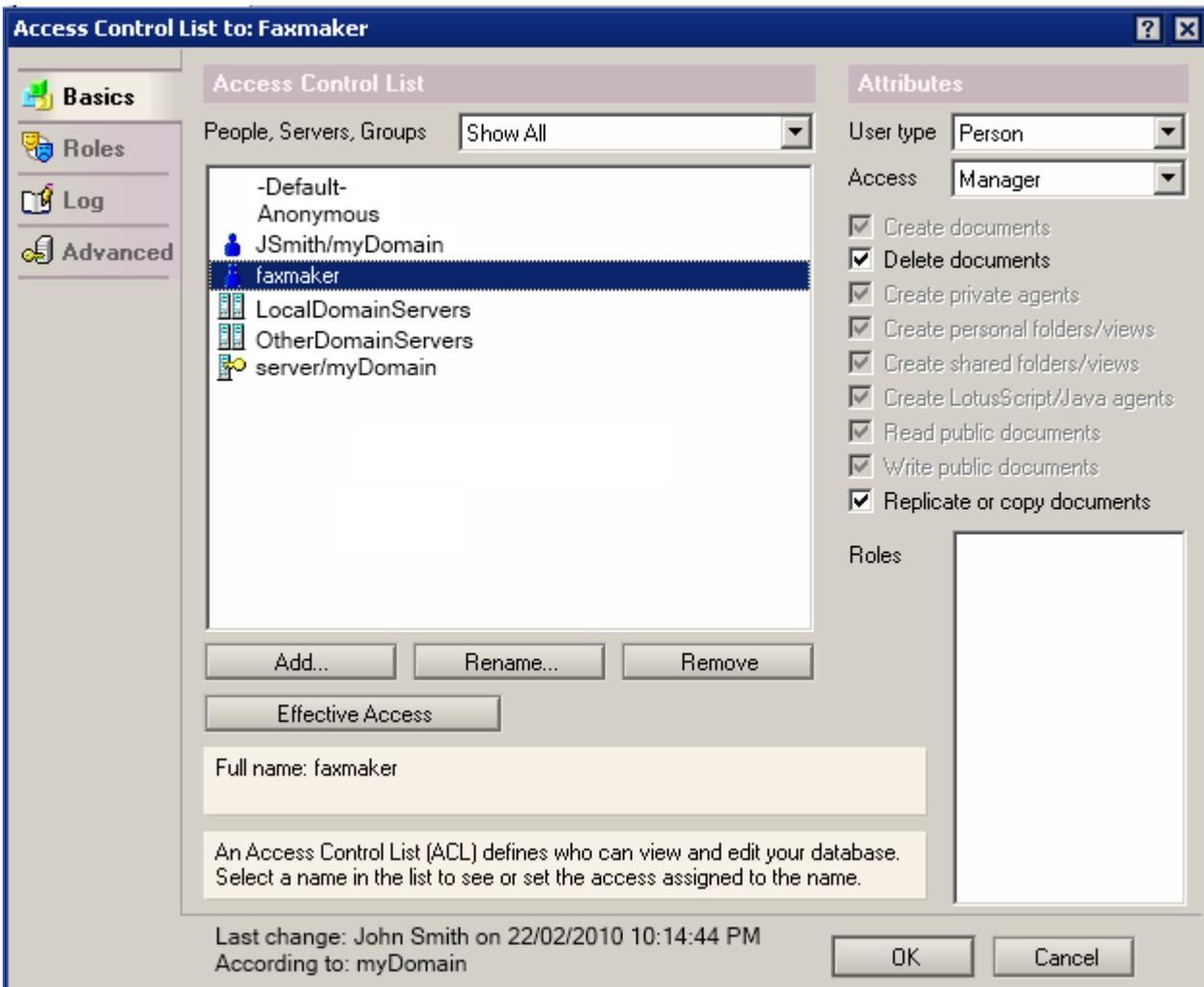
Step 3: Give the GFI FaxMaker Person permission on the GFI FaxMaker database

1. In the Domino Administrator, select **File > Database > Open** to open the GFI FaxMaker database.



Screenshot 12: Open the GFI FaxMaker database

2. Select server and browse to the GFI FaxMaker database. Click **Open**.
3. Navigate to **File > Database > Access Control**.

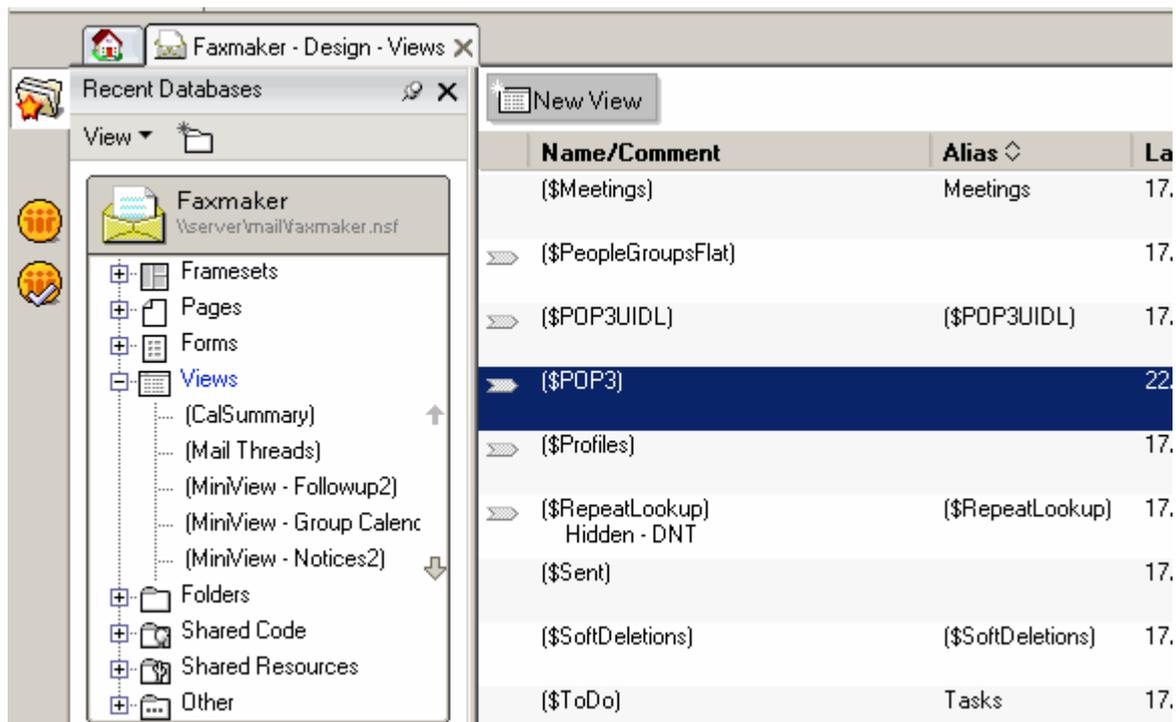


Screenshot 13: Configuring permissions

4. Click **Add** to add the GFI FaxMaker Person.
5. Select the GFI FaxMaker Person and from the **Attributes** section, select **User type: Person, Access: Manager**.
6. Select **Delete Documents**.
7. Click **OK**.

Step 4: Remove default \$POP3 View

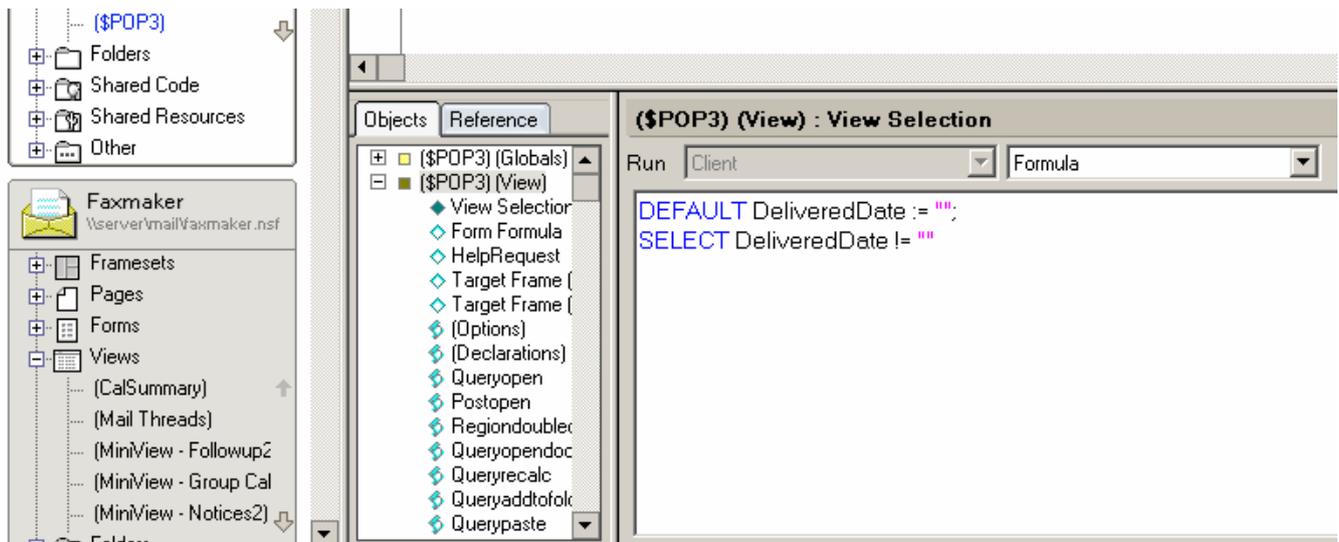
1. From Lotus Domino Designer, select **File > Database > Open**.
2. Select your Domino server, the mail directory and **GFIFaxMaker.nsf**.
3. From **Views** node, double-click **\$POP3**.



Screenshot 14: Removing the default POP3 view

4. Click **OK** to the warning prompt.
5. Select the following two lines and delete them from the \$POP view object.

```
DEFAULT DeliveredDate := "";
SELECT DeliveredDate != ""
```



Screenshot 15: Delete lines from \$POP view

6. Save and exit Domino Designer.

Step 5: Add the FAX Foreign Domain

1. Load Domino Administrator.
2. Select **Configuration** tab and select **Messaging\Domains**.
4. Click **Add Domain** and select **Foreign Domain**.
5. Enter `fax` as the Foreign Domain Name.
6. Select the **Mail Information** tab.
7. Enter the Domino server name as the **Gateway server name**.
8. Enter `mail\GFI FaxMaker.nsf` as the **Gateway Mail File Name**.

NOTE

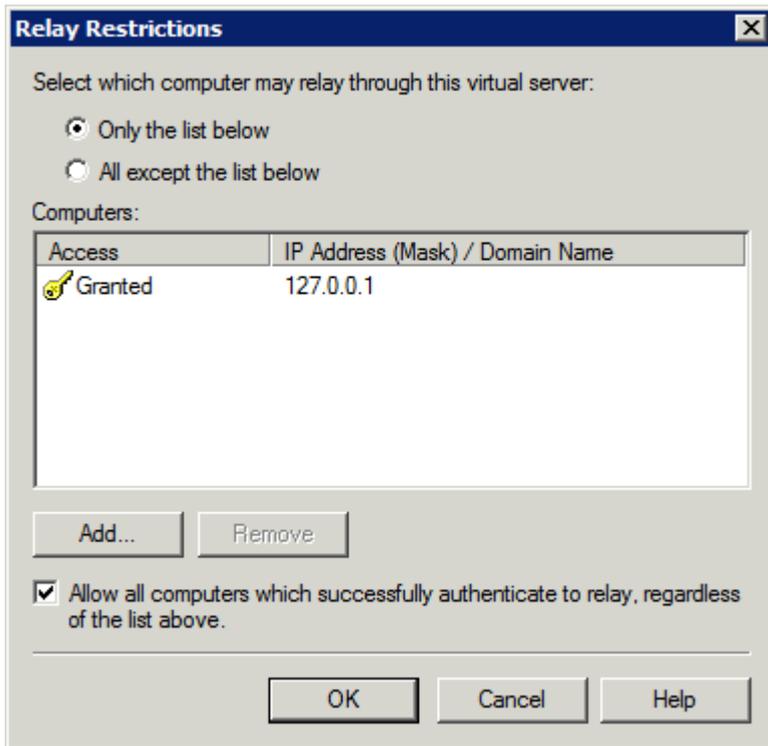
When RFC822 phrase handling is enabled on outbound email, the fax number appears twice when GFI FaxMaker sends the fax. To resolve this, perform the following from Notes Administrator:

1. From the **Configuration** tab, select **Messaging > Configurations**.
2. Click **Edit Configuration** on the server with the GFI FaxMaker mailbox.
3. Select the **MIME tab > Advanced Tab > Advanced Outbound Message Options** tab.
4. Set RFC822 Phrase Handling to **Do not add phrase**.

3.2.4 Lotus Domino/Notes server 6.5

Step 1: Allow mail relay from Lotus Domino/Notes server

1. From the GFI FaxMaker server, load the **Internet Information Services** console.
2. Right-click **Default SMTP Virtual Server** node and select **Properties**.
3. From **Access** tab, click **Relay...**

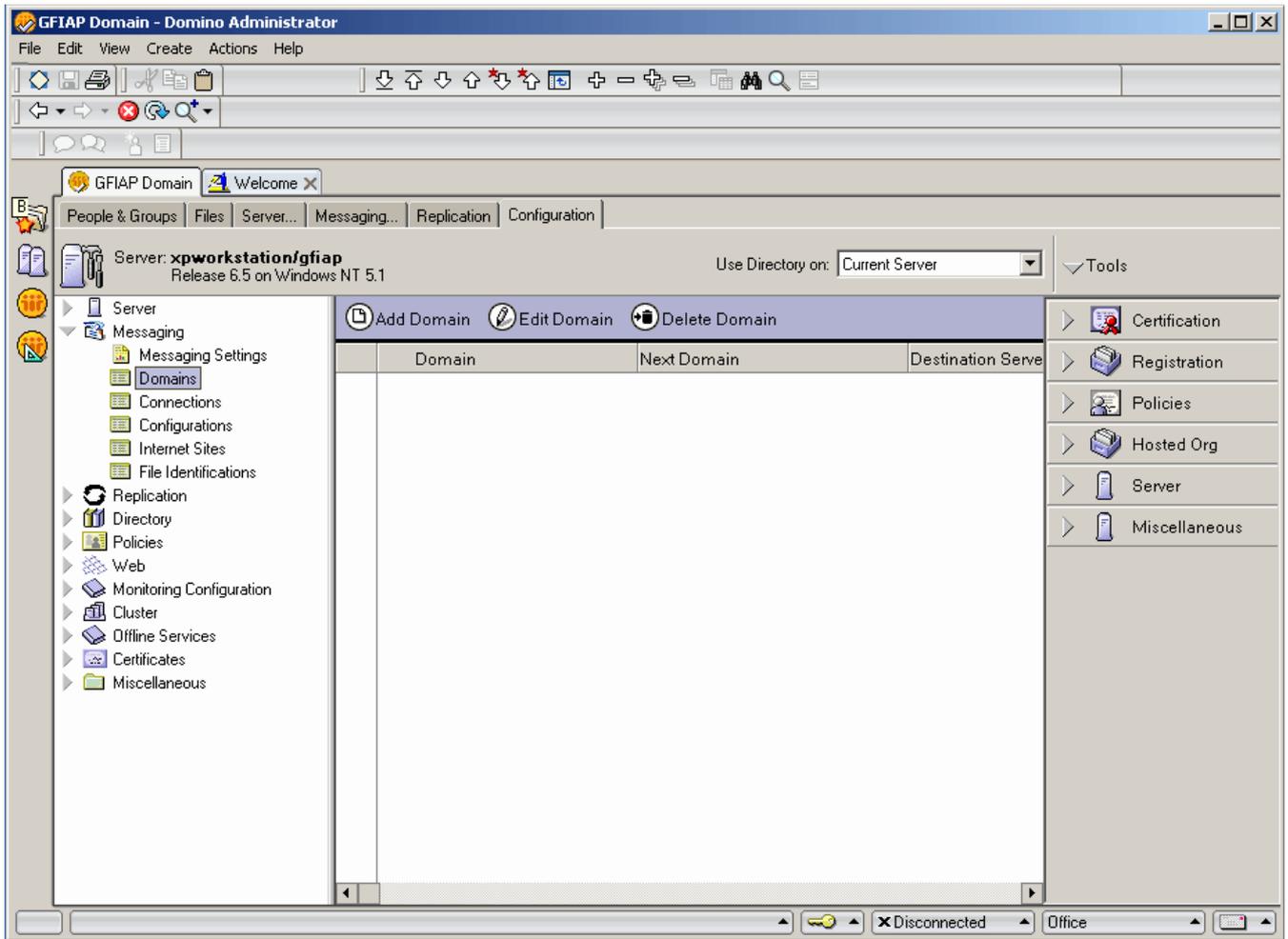


Screenshot 16: Relay restrictions dialog

4. Select **Only the list below** and click **Add...**
5. Select **Single computer** and in the **IP address** field specify the Lotus Domino/Notes Server IP address. Click **OK**.
6. Click **OK** in all dialogs to apply changes.

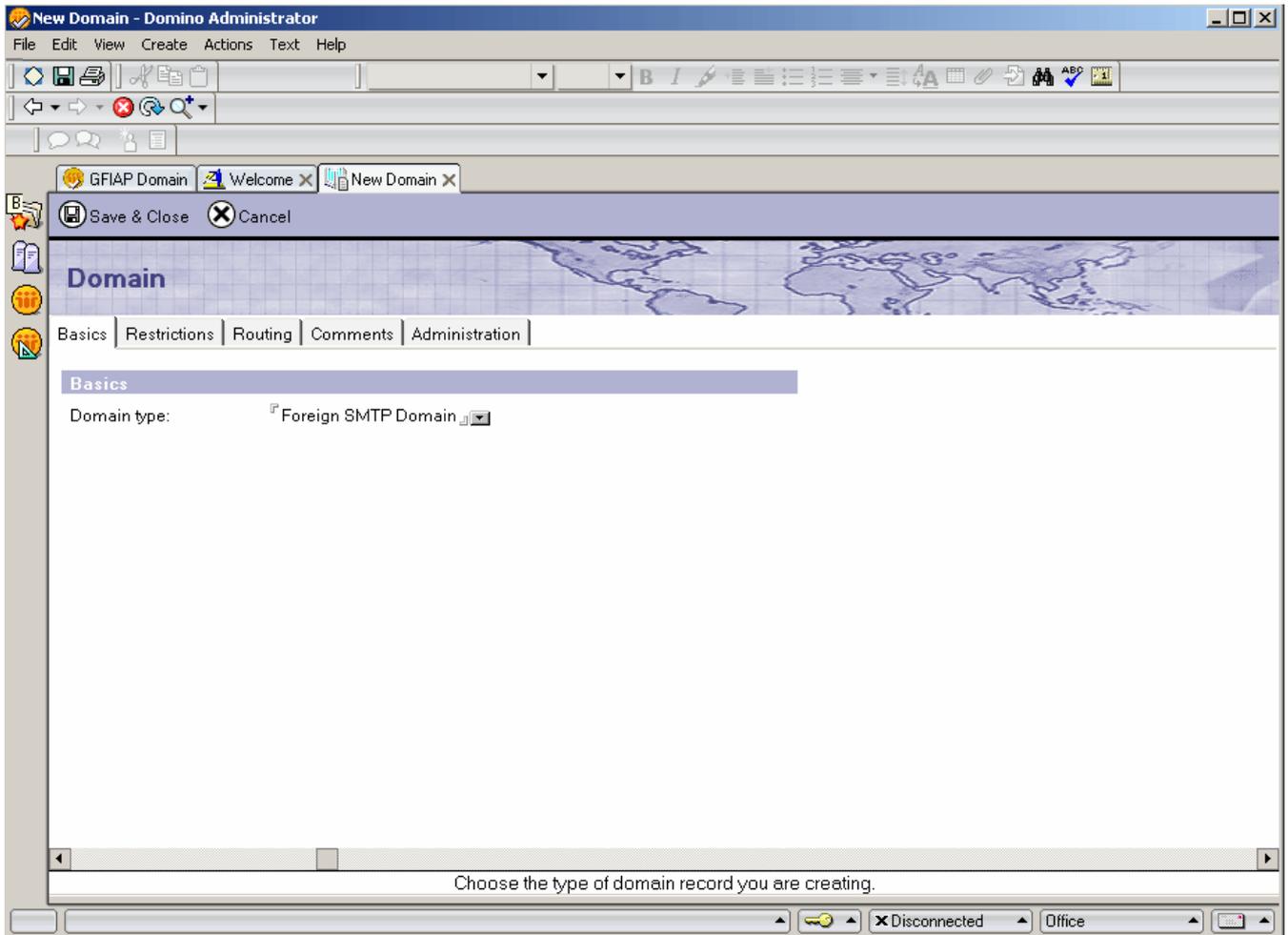
Step 2: Add a foreign SMTP domain on the Lotus server

1. From **Domino Administrator**, select **Configuration** tab.
2. Navigate to **Messaging > Domains** node.



Screenshot 17: Adding a new domain

3. Click **Add Domain**.

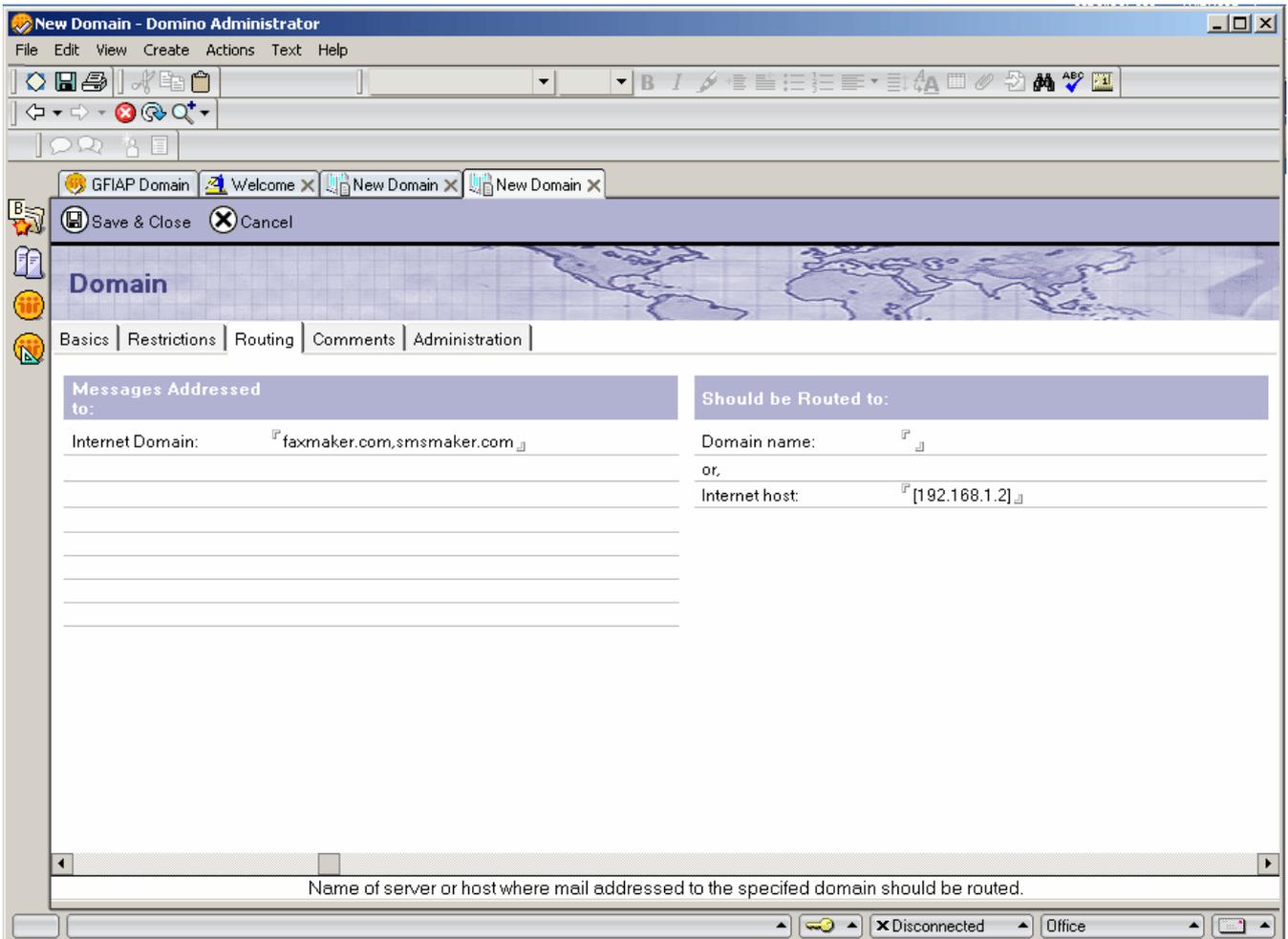


Screenshot 18: Configuring the domain type

4. From **New Domain** page, select **Basics** tab and set the **Domain type** to **Foreign SMTP Domain**.
5. Select **Routing** tab and from **Messages Addressed to**, set **Internet Domain** to:
`faxmaker.com, smsmaker.com`.

NOTE

The default fax (`faxmaker.com`) and SMS (`smsmaker.com`) domains can be customized by the GFI FaxMaker administrator. If using different domains, specify your custom domains. After installation, specify the domains in the GFI FaxMaker Configuration. For more information, refer to [Fax and SMS domain names](#) (page 105).



Screenshot 19: Configure the routing settings

6. Under **Should be Routed to** section, set **Internet host** to the IP address (enclosed in []) or name of the GFI FaxMaker server.

7. Save and close Foreign SMTP Domain entry.

8. Reload Domino router from the Domino server console with the following commands:

```
tell router stop
tell router start
```

3.3 Hosted email

When using an online hosted email service, create connectors that route fax and SMS to GFI FaxMaker.

Select your hosted email provider:

- » [Microsoft® Office 365™ Enterprise accounts](#)
- » [Microsoft® Office 365™ Email only accounts](#)
- » [Google Apps for Business - Gmail](#)
- » [Internet Service Provider](#)
- » [Other hosted email providers](#)

3.3.1 Microsoft® Office 365™ Enterprise accounts

Refer to the following steps to use GFI FaxMaker with Microsoft® Office 365™ Enterprise account types.

- » [Step 1: Install GFI FaxMaker and set mail server details](#)
- » [Step 2: Set Connectors](#)
- » [Step 3: Test functionality](#)

Step 1: Install GFI FaxMaker and set mail server details

Install GFI FaxMaker on a machine that meets or exceeds the GFI FaxMaker system requirements. For more information, refer to [System Requirements](#) (page 11).

Launch the GFI FaxMaker installer and follow the wizard to complete installation. For more information, refer to [Installation procedure](#) (page 48).

On install completion, the installer automatically launches the Configuration Wizard that assists you through the basic steps of configuration. Configure the following wizard steps:

1. In the Configuration Wizard welcome screen click **Next**.
2. Choose **My email server will forward faxes and SMSs to this GFI FaxMaker machine**. Click **Next**.

Option	Description
Mail server name or IP address	Key in <code>smtp.office365.com</code>
Port	Key in <code>587</code> .
Use Secure Connection	Select this option and choose TLS .
Use SMTP Authentication	Select this option and enter the credentials of a Microsoft® Office 365™ mailbox user. Key in the user's full email address in the Account name and the Password . Do not select Secure Password Authentication .

NOTE

If GFI FaxMaker is already installed, configure the above mail server details from **GFI FaxMaker Configuration > Email2FaxGateway**.

3. Proceed with wizard to finalize configuration. For more information, refer to [Run the GFI FaxMaker Configuration Wizard](#) (page 52).

NOTE

When sending emails to your organization users, for example when notifying administrators of system errors, GFI FaxMaker sends the email from the email address **fax@<fax domain>**, for example, **fax@faxmaker.com**. Ensure that GFI FaxMaker can send emails via your mail server from this email address.

Step 2: Set Connectors

NOTE

Connectors are not available with all Office 365 plans. If your plan does not support connectors, refer to [Microsoft® Office 365™ Email only accounts](#).

Configure fax and SMS connectors in Microsoft® Office 365 Exchange Admin Center to route outgoing fax/SMS emails from Microsoft® Office 365 to the GFI FaxMaker server.

Connectors must be configured such that when the recipient domain of an outgoing email matches the [fax or SMS domains](#), the email gets routed to GFI FaxMaker for fax/SMS transmission.

Create a connector using the following options:

- » From Office 365
- » To your organization's email server
- » Choose to use the connectors when email messages are sent to particular domains and add the fax & SMS domains
- » Specify the GFI FaxMaker server public IP address or Fully Qualified Domain Name as the Smart Host.

Configure the other connector settings depending on your organization's setup. For more information about Office 365 connectors refer to http://go.gfi.com/?pageid=FM_Office365Connector.

Your users should now be able to send faxes using the standard addressing format <fax number>@faxmaker.com (for example, 12345678@faxmaker.com).

Step 3: Test functionality

Test fax sending

Use a hosted email user to send a fax or SMS via email.

View the email being processed in the GFI FaxMaker Monitor and confirm that the fax is received by the recipient.

If you cannot see the fax email being processed in the GFI FaxMaker Monitor, troubleshoot the relaying of the email from the mail server to GFI FaxMaker.

Test fax receiving

From a test fax line, send a fax to a fax line connected and configured in GFI FaxMaker.

View the incoming fax status from GFI FaxMaker Monitor.

Unless Routing rules were previously configured, the fax is delivered through the Default Routers (Available from **GFI FaxMaker Configuration > Routing > Properties > Default Routers**). Ensure that the fax is successfully delivered to the Default Routers' mailbox.

3.3.2 Microsoft® Office 365™ Email only accounts

Refer to the following steps to use GFI FaxMaker with Microsoft® Office 365™ Email only account types or for other plans that do not include email connectors.

With the following setup, users cannot use `faxmaker.com` and `smsmaker.com` when sending faxes since connectors cannot be created. Instead, configure fax and SMS DNS records, such as `fax.mydomain.com` and `sms.mydomain.com`.

- » [Step 1: Install GFI FaxMaker and set mail server details](#)
- » [Step 2: Create alias records](#)
- » [Step 3: Configure GFI FaxMaker domains](#)
- » [Step 4: Test functionality](#)

Step 1: Install GFI FaxMaker and set mail server details

Install GFI FaxMaker on a machine that meets or exceeds the GFI FaxMaker system requirements. For more information, refer to [System Requirements](#) (page 11).

Launch the GFI FaxMaker installer and follow the wizard to complete installation. For more information, refer to [Installation procedure](#) (page 48).

On install completion, the installer automatically launches the Configuration Wizard that assists you through the basic steps of configuration. Configure the following wizard steps:

1. In the Configuration Wizard welcome screen click **Next**.
2. Choose **My email server will forward faxes and SMSs to this GFI FaxMaker machine**. Click **Next**.
3. Specify the mail server details where GFI FaxMaker forwards received emails.

Option	Description
Mail server name or IP address	Key in <code>smtp.office365.com</code> .
Port	Key in <code>587</code> .
Use Secure Connection	Select this option and choose TLS .
Use SMTP Authentication	Select this option and enter the credentials of a Microsoft® Office 365™ mailbox user. Key in the user's full email address in the Account name and the Password . Do not select Secure Password Authentication .

NOTE

If GFI FaxMaker is already installed, configure the above mail server details from **GFI FaxMaker Configuration > Email2FaxGateway**.

4. Proceed with wizard to finalize configuration. For more information, refer to [Run the GFI FaxMaker Configuration Wizard](#) (page 52).

NOTE

When sending emails to your organization users, for example when notifying administrators of system errors, GFI FaxMaker sends the email from the email address **fax@<fax domain>**, for example, *fax@faxmaker.com*. Ensure that GFI FaxMaker can send emails via your mail server from this email address.

Step 2: Create alias records

NOTE

If you are not familiar with DNS, contact your DNS hosting company to create these records.

Create two new alias records ("A" record) with your DNS hosting provider that are dedicated for the fax and SMS domains (for example, `fax.mydomain.com` and `sms.mydomain.com`).

Point the destination of these records to the public IP address of the GFI FaxMaker server.

When emails are addressed to these domains, the hosting provider's mail relay server routes the email to GFI FaxMaker.

NOTE

DNS changes can take up to 72 hours to take effect.

Step 3: Configure GFI FaxMaker domains

1. From GFI FaxMaker Configuration, right-click **Email2FAXGateway** node and select **Properties**.
2. From the **Fax/SMS domains** tab, specify custom **Fax domain name** and/or **SMS domain name** (for example, `fax.mydomain.com` and `sms.mydomain.com`).
3. Click **OK** to apply changes.

Step 4: Test functionality

Test fax sending

Use a hosted email user to send a fax or SMS via email.

View the email being processed in the GFI FaxMaker Monitor and confirm that the fax is received by the recipient.

If you cannot see the fax email being processed in the GFI FaxMaker Monitor, troubleshoot the relaying of the email from the mail server to GFI FaxMaker.

Test fax receiving

From a test fax line, send a fax to a fax line connected and configured in GFI FaxMaker.

View the incoming fax status from GFI FaxMaker Monitor.

Unless Routing rules were previously configured, the fax is delivered through the Default Routers (Available from **GFI FaxMaker Configuration > Routing > Properties > Default Routers**). Ensure that the fax is successfully delivered to the Default Routers' mailbox.

3.3.3 Google Apps for Business - Gmail

Refer to the following steps to use GFI FaxMaker with Gmail for Google Apps for Business.

With Google Apps, users cannot use `faxmaker.com` and `smsmaker.com` when sending faxes since connectors cannot be created. Instead, configure fax and SMS DNS records, such as `fax.mydomain.com` and `sms.mydomain.com`.

- » [Step 1: Install GFI FaxMaker and set mail server details](#)
- » [Step 2: Create alias records](#)
- » [Step 3: Configure GFI FaxMaker domains](#)
- » [Step 4: Test functionality](#)

Step 1: Install GFI FaxMaker and set mail server details

Install GFI FaxMaker on a machine that meets or exceeds the GFI FaxMaker system requirements. For more information, refer to [System Requirements](#) (page 11).

Launch the GFI FaxMaker installer and follow the wizard to complete installation. For more information, refer to [Installation procedure](#) (page 48).

On install completion, the installer automatically launches the Configuration Wizard that assists you through the basic steps of configuration. Configure the following wizard steps:

1. In the Configuration Wizard welcome screen click **Next**.
2. Choose **My email server will forward faxes and SMSs to this GFI FaxMaker machine**. Click **Next**.

3. Specify the mail server details where GFI FaxMaker forwards received emails.

Option	Description
Mail server name or IP address	Key in <code>smtp.gmail.com</code> .
Port	Use port 465 which requires SSL or port 587 which requires TLS.
Use Secure Connection	Select this option and choose SSL or TLS depending on the port chosen.
Use SMTP Authentication	Select this option and enter the credentials of a Google Apps mailbox user. Key in the user's full email address in the Account name and the Password . Do not select Secure Password Authentication .

NOTE

If GFI FaxMaker is already installed, configure the above mail server details from **GFI FaxMaker Configuration > Email2FaxGateway**.

4. Proceed with wizard to finalize configuration. For more information, refer to [Run the GFI FaxMaker Configuration Wizard](#) (page 52).

NOTE

When sending emails to your organization users, for example when notifying administrators of system errors, GFI FaxMaker sends the email from the email address **fax@<fax domain>**, for example, *fax@faxmaker.com*. Ensure that GFI FaxMaker can send emails via your mail server from this email address.

Step 2: Create alias records

NOTE

If you are not familiar with DNS, contact your DNS hosting company to create these records.

Create two new alias records ("A" record) with your DNS hosting provider that are dedicated for the fax and SMS domains (for example, *fax.mydomain.com* and *sms.mydomain.com*).

Point the destination of these records to the public IP address of the GFI FaxMaker server.

When emails are addressed to these domains, the hosting provider's mail relay server routes the email to GFI FaxMaker.

NOTE

DNS changes can take up to 72 hours to take effect.

Step 3: Configure GFI FaxMaker domains

1. From GFI FaxMaker Configuration, right-click **Email2FAXGateway** node and select **Properties**.
2. From the **Fax/SMS domains** tab, specify custom **Fax domain name** and/or **SMS domain name** (for example, *fax.mydomain.com* and *sms.mydomain.com*).
3. Click **OK** to apply changes.

Step 4: Test functionality

Test fax sending

Use a hosted email user to send a fax or SMS via email.

View the email being processed in the GFI FaxMaker Monitor and confirm that the fax is received by the recipient.

If you cannot see the fax email being processed in the GFI FaxMaker Monitor, troubleshoot the relaying of the email from the mail server to GFI FaxMaker.

Test fax receiving

From a test fax line, send a fax to a fax line connected and configured in GFI FaxMaker.

View the incoming fax status from GFI FaxMaker Monitor.

Unless Routing rules were previously configured, the fax is delivered through the Default Routers (Available from **GFI FaxMaker Configuration > Routing > Properties > Default Routers**). Ensure that the fax is successfully delivered to the Default Routers' mailbox.

3.3.4 Other hosted email

This topic explains how to setup an environment for fax server integration with a hosted mail server. Use your preferred hosted email service to forward fax emails designated to GFI FaxMaker.

Users typically send fax or SMS by sending an email to `number@faxmaker.com` and `number@smsmaker.com`. The mail server routes emails addressed to `*@faxmaker.com` and `*@smsmaker.com` to GFI FaxMaker. If your mail provider does not allow routing to domain, configure alias domains dedicated for fax and SMS, for example `fax.mydomain.com`.

NOTES

1. Your hosted mail server configuration procedure may differ than the instructions provided in this topic. For more information refer to the service provider's help.
2. These instructions apply to fax subdomains. Repeat procedure for SMS domain if required.

IMPORTANT

While editing and configuring A (Host) and MX records, ensure that you are setting the records for the fax and SMS subdomains only. Changes to the A (Host) and MX records for the primary domain can disrupt email/web traffic for that domain.

Requirements

Ensure that you have adequate permissions to create subdomain forwarding:

Domain Registrar Control Panel Access: Administrative access to the hosted email domain registrar control panel is needed to:

- » Create and register the fax subdomain
- » Create and register a new A record for the fax subdomain
- » Create and register a new MX record for the fax subdomain

Mail Host Control Panel Access: From the mail host control panel, register the fax subdomain to the mail host and determine the MX record information.

Step 1: Fax subdomain configuration

Log into your domain registrar control panel and open the **Forward Subdomains** configuration to create a new fax subdomain. Choose option to add a new subdomain.

Specify a new subdomain name, for example `fax`, and specify the public-facing IP address you intend to use with your fax domain.

Add subdomain:

FAX .MYDOMAIN.COM

Forward this subdomain to: [Preview](#)

http:// 198.51.100.8

[Advanced Options](#)

[Cancel](#)

Click preview to see forwarding web site.

Screenshot 20: Adding a subdomain

Return to your domain control panel and open **DNS Manager**.

Nameservers

Nameservers: (Last update 5/24/2012)

NS1.NAMESERVER.NET

NS2.NAMESERVER.NET

[Set Nameservers](#)

[Manage DS Records](#)

DNS Manager

DNS Manager: Available

A @ 198.51.100.7

A fax 198.51.100.8

CNAME e

CNAME email email.servername.com

CNAME ftp @

MX @ MX1.mailhost.com

MX @ MX2.mailhost.com

[Launch](#)

Screenshot 21: Creating a Host Record

In the DNS Manager, create a new A (Host) Record for your new subdomain, specifying the new subdomain name (for example, `fax`) and the public-facing IP address you intend to use with your fax domain.

Host	Points to
@	198.51.100.7
fax	198.51.100.8

Screenshot 22: Creating an MX record

Create a new MX Record for the new subdomain and set the priority to 1.

MX (Mail Exchanger) ?			
✓	Priority	Host	Points to
<input type="checkbox"/>	5	@	MX1.emailhost.com
<input type="checkbox"/>	10	@	MX2.emailhost.com
<input type="checkbox"/>	1	fax	MYDOMAIN.COM

[Quick Add](#)

Screenshot 23: The newly added record

It can take anywhere from 24 to 48 hours for the new subdomain changes to become active for use by your registrar. When the wait-time for propagation has passed, verify that the subdomain name is pointing to your public IP address by performing a Name Server lookup from command prompt, for example: `nslookup fax.mydomain.com`. Ensure that the resulting IP address is your public IP address.

NOTE

Ensure that SMTP port 25 on your local firewall is open and forwards to the internal IP address of your GFI FaxMaker server.

Step 2: GFI FaxMaker Domain Configuration

Configure GFI FaxMaker to convert emails addressed to your subdomain to fax. For more information, refer to [Fax and SMS domain names](#) (page 105).

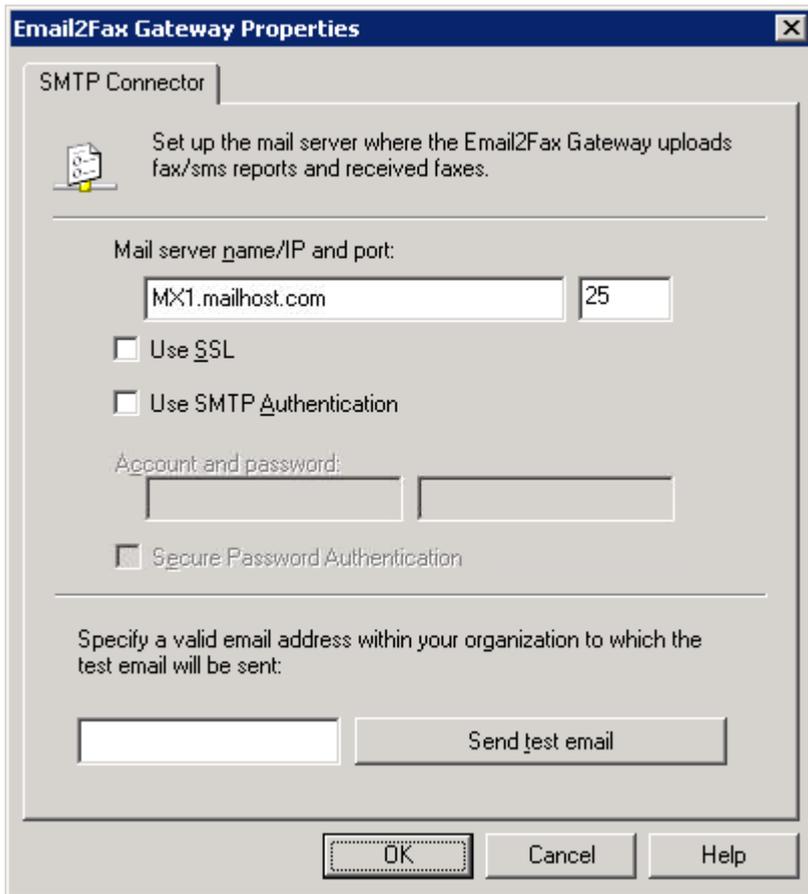
1. Open the GFI FaxMaker **Email2FaxGateway** properties and go to the **Fax/SMS domains** tab.
2. Key in the new fax subdomain, for example `fax.mydomain.com`.
3. Click **OK** and choose to restart your GFI FaxMaker services for changes to take effect.

Step 3: Specify the mail server details

MX (Mail Exchanger) ?			
✓	Priority	Host	Points to
<input type="checkbox"/>	5	@	MX2.emailhost.com
<input type="checkbox"/>	5	@	MX3.emailhost.com
<input type="checkbox"/>	1	@	MX1.emailhost.com

Screenshot 24: MX records

1. Locate the MX record specified for your primary domain in the control panel and copy it.
2. Open the GFI FaxMaker **Email2FaxGateway** properties.
3. In the **SMTP Connector** tab key in the MX record for your primary domain in the **Mail server name/IP and port** box.
4. In the test email area, key in a valid email address for a user in your domain and click **Send test email**. Ensure that the user receives a test email from GFI FaxMaker.



Screenshot 25: Email2Fax configuration

NOTE

When sending emails to your organization users, for example when notifying administrators of system errors, GFI FaxMaker sends the email from the email address **fax@<fax domain>**, for example, **fax@faxmaker.com**. Ensure that GFI FaxMaker can send emails via your mail server from this email address.

Step 4: Test functionality

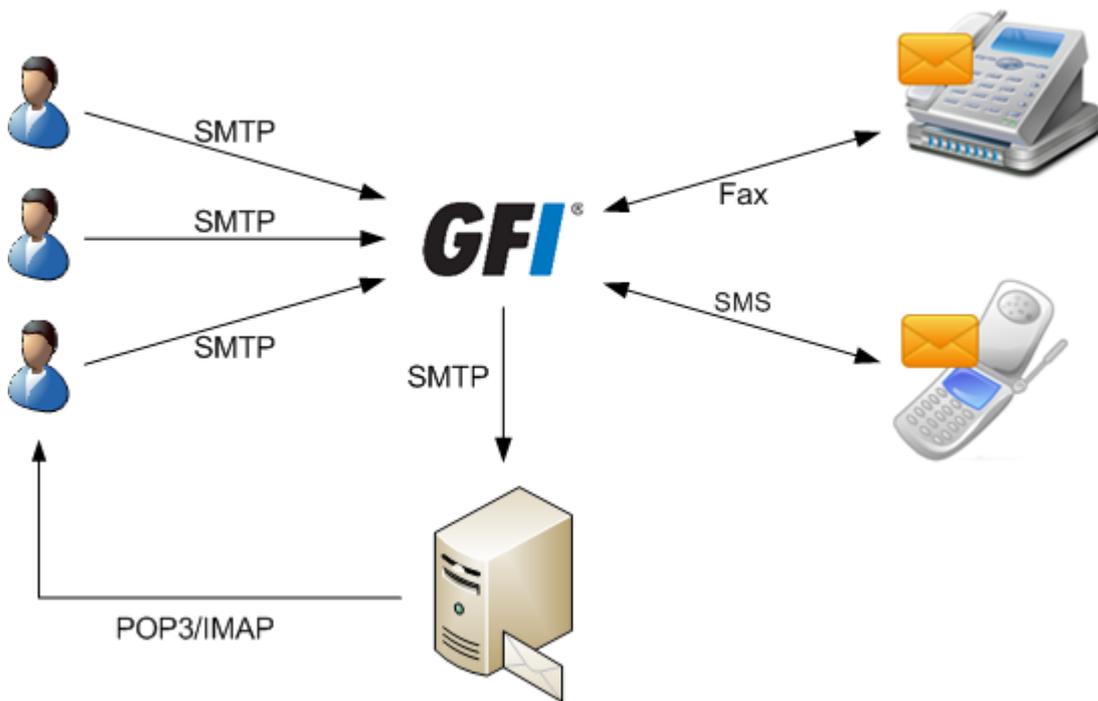
Ensure that fax emails are being forwarded to and processed by GFI FaxMaker.

To do this, open a new message form in your web email client and send a sample fax. Ensure that the recipient's domain is the configured subdomain. For example, send a fax to **+12345678@fax.mydomain.com**. Replace **+12345678** with a test fax number and **fax.mydomain.com** with your subdomain.

Ensure that the fax was forwarded to GFI FaxMaker successfully by checking the GFI FaxMaker Monitor. For more information, refer to [Monitoring GFI FaxMaker operation](#) (page 79).

3.3.5 ISP hosted

GFI FaxMaker can be installed in an environment where the mail service is provided by the ISP.



Process	Description
Client side	Users send faxes/SMS using the GFI FaxMaker Client - Fax Message Form to route directly to GFI FaxMaker server. NOTE: Users cannot use email client to send faxes/SMS.
Sending faxes/SMS	GFI FaxMaker clients route faxes/SMS directly to GFI FaxMaker via SMTP. NOTE: Install the IIS SMTP service on the GFI FaxMaker server.
Received faxes/SMS	After determining the users to forward incoming faxes/SMS to, GFI FaxMaker sends transmission report via SMTP to the hosted mail server.

3.4 Other mail environments

Other email server environments:

- » SMTP server
- » POP3 mailbox
- » Multiple Mail servers
- » SAP 4.7

3.4.1 SMTP server

GFI FaxMaker can be installed in an SMTP server environment such as MDAemon.

To do this:

1. Create a routing rule on your mail server that routes all messages sent to **faxmaker.com** and **sms-maker.com** domains to the GFI FaxMaker server.
2. Install the IIS SMTP service on the GFI FaxMaker server.
3. Install GFI FaxMaker. For more information, refer to [Installation procedure](#) (page 48).

NOTE

The default fax (faxmaker.com) and SMS (smsmaker.com) domains can be customized by the GFI FaxMaker administrator. Use the configured fax or SMS domain accordingly. For more information, refer to [Fax and SMS domain names](#) (page 105).

3.4.2 POP3 mailbox

GFI FaxMaker can retrieve faxes/SMS from a dedicated POP3 mailbox.

1. On the mail server, create a POP3 mailbox that is dedicated for GFI FaxMaker.
2. Install GFI FaxMaker on a separate machine than the mail server. For more information, refer to [Installation procedure](#) (page 48).
3. In the **Sending Options** screen of the post-installation configuration wizard, specify the details of this POP3 mailbox and proceed with the wizard.
4. Configure the GFI FaxMaker POP3 Downloader to retrieve emails stored in this mailbox. For more information, refer to [POP3 Downloader](#) (page 103).

When using a POP3 mailbox, the method of sending faxes/SMS via email is different than when routing emails via SMTP. For more information, refer to [Sending faxes/SMS via a POP3 Mailbox](#) (page 105).

3.4.3 Multiple mail servers

In a network where multiple mail servers are independent from each other, configure each email server individually to forward faxes to GFI FaxMaker. Use the same methods described for each type of mail server.

For more information, refer to [Mail server configuration](#) (page 15).

3.4.4 SAP 4.7

For more information how to configure SAP 4.7 to send faxes using GFI FaxMaker, refer to http://go.gfi.com/?pageid=FM_SAP47.

3.5 Using GFI FaxMaker without a mail server

GFI FaxMaker can be configured to work in environments without a mail server. There are, however, some limitations with certain features. For example, GFI FaxMaker users cannot send faxes and SMS via email when a mail server is not available.

Refer to the following sections for assistance on how to install, configure and use GFI FaxMaker in installations where a mail server is not available.

3.5.1 Sending faxes and SMS

In installations where there is no mail server available, use a method of sending faxes and SMS that does not require email:

- » [Sending faxes via web client](#)
- » [Printing content to GFI FaxMaker - NetPrintQueue2Fax](#)
- » [Via API](#)

NOTE

If using the GFI FaxMaker Client application, set the Client to connect directly to GFI FaxMaker via HTTP.

3.5.2 Receiving faxes

When a fax is received, GFI FaxMaker typically sends out an email to the recipient(s). Use other methods to view received faxes/SMS:

- » [Automatically print incoming faxes](#)
- » [Store incoming faxes to a network share](#)

Alternatively you may also consider using an online mail service for GFI FaxMaker to send out notifications. For more information, refer to [Using an online SMTP server](#) (page 46).

3.5.3 Receiving SMS

When an SMS is received, GFI FaxMaker sends out an email to the recipient(s).

To view received SMSs when a mail server is not available, refer to the SMS log files. For more information, refer to [SMS log files](#) (page 199).

Alternatively you may also consider using an online mail service for GFI FaxMaker to send out notifications. For more information, refer to [Using an online SMTP server](#) (page 46).

3.5.4 GFI FaxMaker system notifications

GFI FaxMaker uses a mail server to send various system notifications to administrators, such as system errors. When a mail server is not available, GFI FaxMaker cannot send out these notifications.

To monitor GFI FaxMaker operation when a mail server is not available, refer to the logs shown in the GFI FaxMaker [Monitor](#).

Alternatively you may also consider using an online mail service for GFI FaxMaker to send out notifications. For more information, refer to [Using an online SMTP server](#) (page 46).

3.5.5 Transmission reports

GFI FaxMaker uses a mail server to send [transmission reports](#) to your users when they send out a fax or SMS. When a mail server is not available, GFI FaxMaker cannot send out transmission reports.

In this scenario, the status of sent faxes can be manually monitored from the [Archive Viewer](#). Note that the Archive Viewer is only accessible from the GFI FaxMaker server machine itself, so your users may not have access to it.

Alternatively you may also consider using an online mail service for GFI FaxMaker to send out notifications. For more information, refer to [Using an online SMTP server](#) (page 46).

3.5.6 Using an online SMTP server

When a mail server is not available, you may consider using an online mail service that allows SMTP connections, such as Gmail or Yahoo! Mail. GFI FaxMaker connects to the service using your account credentials to send out notification emails.

To do this, create a dedicated mailbox on the chosen service and key in the SMTP and account settings in the GFI FaxMaker [mail server settings](#) screen. GFI FaxMaker uses this server to send out emails.

Important notes on choosing a mail server provider:

1. Certain SMTP providers restrict the number of emails that can be sent per day.
2. With this type of SMTP server you will not be able to [resend](#) sent or previewed faxes by replying to the GFI FaxMaker notification, since emails are not routed back from the mailbox to GFI FaxMaker.
3. Certain providers, such as Gmail, need to be configured to allow connections from third party applications. In Gmail, go to the account settings and from the security options, enable access for less secure apps.

4 Installing GFI FaxMaker for the first time

If you have an older version of GFI FaxMaker and wish to upgrade to the latest version, go to [Upgrading from earlier versions](#).

4.1 Installation procedure

4.1.1 Important notes

- » During upgrade, GFI FaxMaker services and operations are stopped. Ensure that there are no faxes in queue as these are permanently lost during upgrade.
- » Check that you are installing GFI FaxMaker on the machine that meets the [system and hardware requirements](#).
- » Log on as Administrator or use an account with administrative privileges.
- » GFI FaxMaker 19.2 and later offers two types of licensing services:
 - Using the GFI Account credentials. The username and password are retrieved from [GFI Accounts](#) and assigned to the user at the moment of the registration of the account.
 - Using a license key. When upgrading to a new major release you also need to upgrade your license key.
- » Save any pending work and close all open applications on the machine.
- » Disable anti-virus software on the server machine during the upgrade. Re-enable it once upgrade is complete.

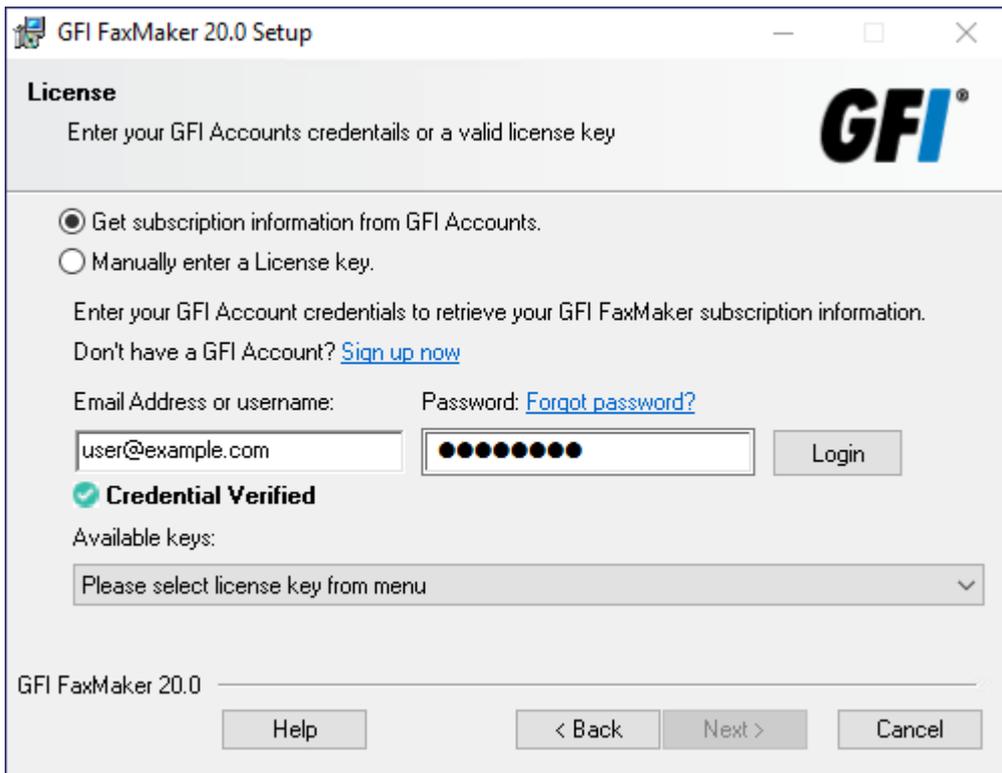
4.1.2 Start installation

1. Download the GFI FaxMaker installer. Go to <https://www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker/download>
2. Right-click the GFI FaxMaker installer and choose **Properties**. From the **General** tab, click **Unblock** and then **Apply**. This step is required to prevent the operating system from blocking certain actions by the installer.
3. Launch the GFI FaxMaker installer.
4. Select installation language and click **OK**.
5. In the welcome screen, click **Next**.
6. To check for a newer build other than the one being installed, select **Check for a newer build of GFI FaxMaker on the GFI web site** and click **Next**. Otherwise, select **Do not check for a new build** and click **Next**.

NOTE

An active Internet connection is required to check for newer build.

7. Read the license agreement and click **Agree** to accept and proceed.

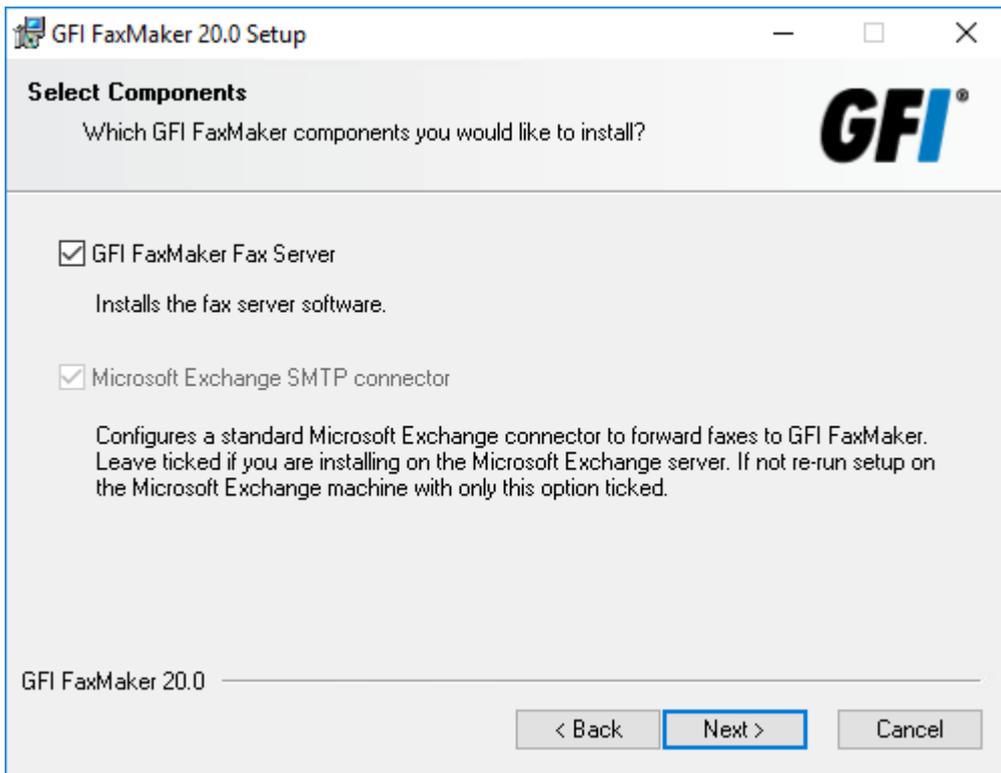


Screenshot 26: GFI FaxMaker license page wizard

8. Select a method to enter your subscription details. The options are:

Option	Description
Get subscription information from GFI Accounts	This option is selected by default. In the Email Address or username and Password fields, enter your GFI Accounts Portal credentials or the account used when signing up to download GFI FaxMaker. Click Login to retrieve the license keys registered to your account. Choose a key from the Available keys drop-down. If you do not have a GFI account yet, click Sign up now and fill in the registration form.
Manually enter a License key	Select this option the copy and paste a license key if you already have one at hand. Click OK to validate the license.

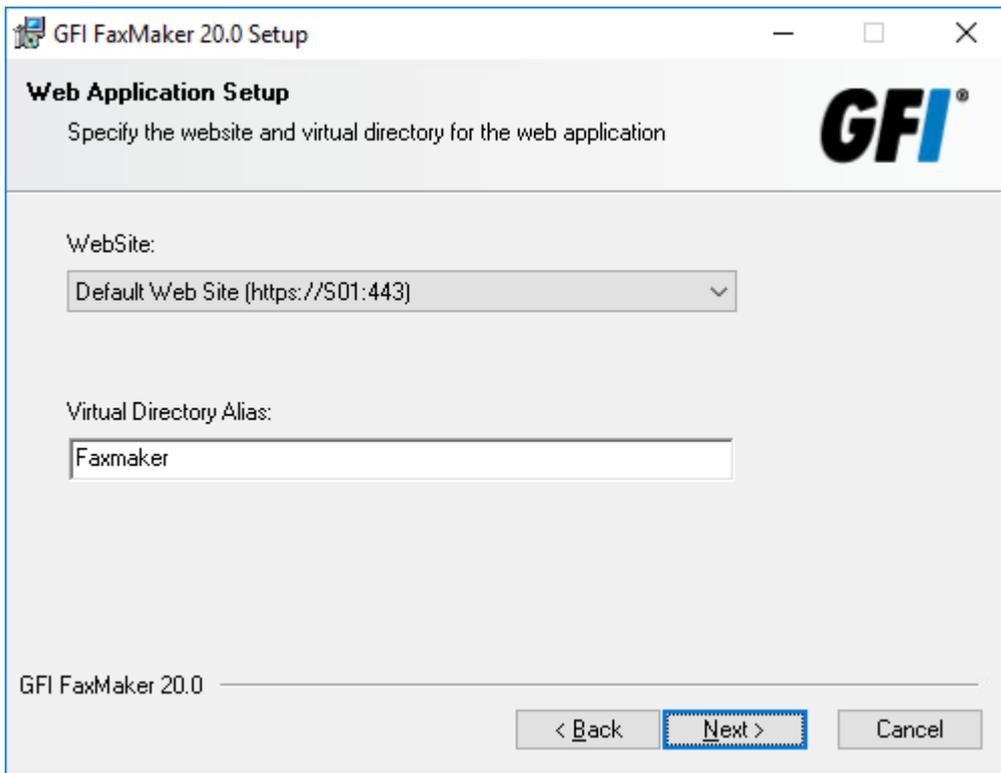
9. Click **Next**.



Screenshot 27: Selecting what components to install

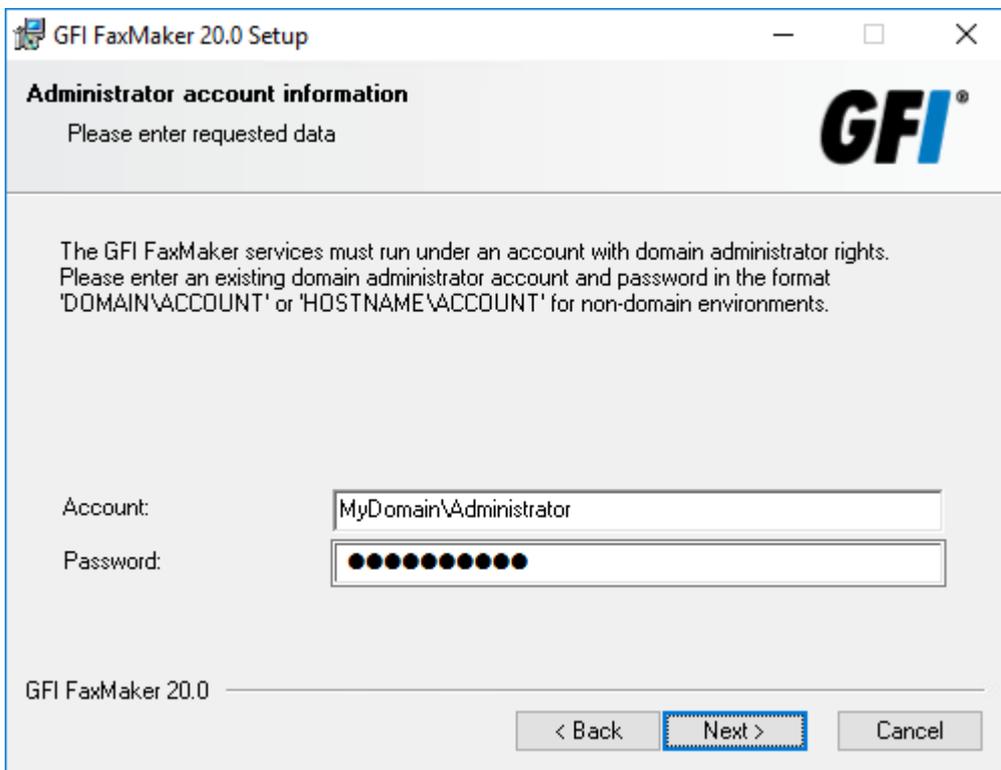
10. Select the component to install:

Component	Description
GFI FaxMaker Fax Server	Installs GFI FaxMaker on the machine.
Microsoft Exchange SMTP connector	Installs the GFI FaxMaker Microsoft® Exchange connectors only. Use this option when GFI FaxMaker is not installed on the Microsoft® Exchange server to automatically create the connectors. If choosing this option, in the next screen specify the IP address of the GFI FaxMaker server and proceed to install the connectors. NOTE: Do not select this option when running setup on a machine that is not the Microsoft® Exchange server or not using Microsoft® Exchange as your mail server.



Screenshot 28: Web application settings

11. Choose the IIS website where to host the GFI FaxMaker virtual directory and key in a name for the Virtual Directory, which by default is **Faxmaker**. For more information about how to use the web interface refer to [The GFI FaxMaker web interface](#). Click **Next**.



Screenshot 29: Account name for services

12. Provide credentials of an account with administrative privileges, used for GFI FaxMaker services management. Click **Next**.

NOTE

If changing the password after installing GFI FaxMaker, update the password for the GFI FaxMaker services from the Services applet. When GFI FaxMaker is installed in a domain, these credentials are also used to connect to Active Directory and retrieve the list of users.

13. Click **Next** to continue installing GFI FaxMaker to the default folder, or **Browse** to select a new installation path.

14. Click **Next** to install GFI FaxMaker. In certain environments, you may be prompted to restart the IIS SMTP service.

15. Click **Finish**.

After installation, the GFI FaxMaker Configuration Wizard is automatically launched to help you configure basic settings. For more information, refer to [Run the GFI FaxMaker Configuration Wizard](#) (page 52).

4.2 Run the GFI FaxMaker Configuration Wizard

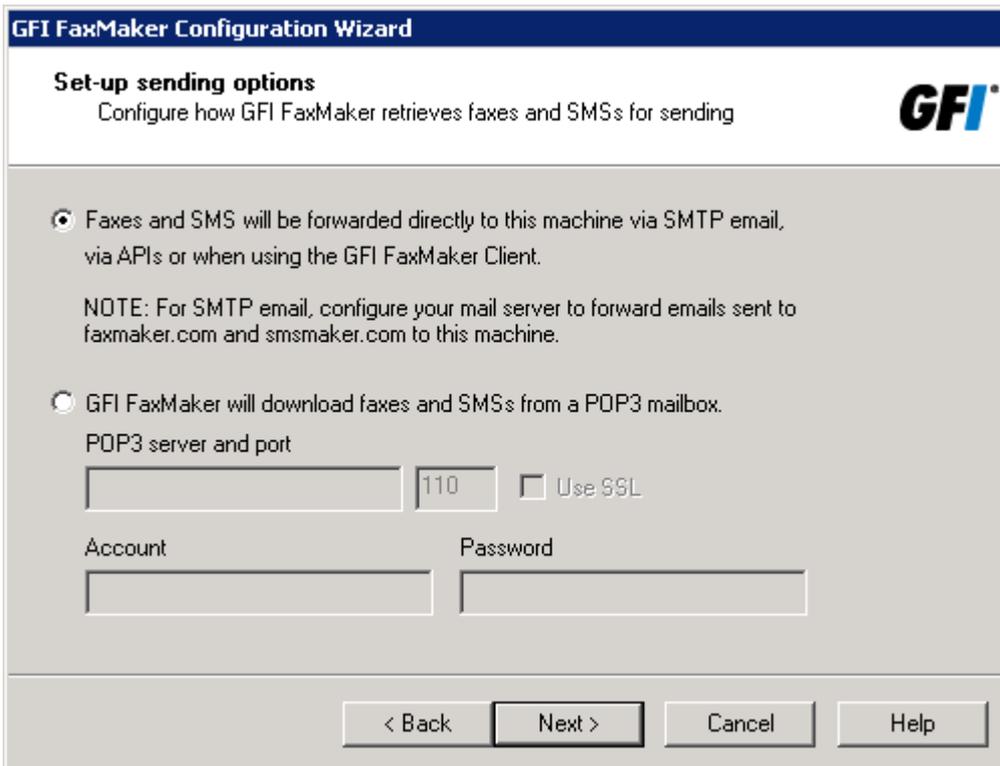
The GFI FaxMaker Configuration Wizard assists you through the basic steps of configuring GFI FaxMaker. The wizard runs automatically after installation or run it manually from **Start > Programs > GFI FaxMaker > GFI FaxMaker Configuration Wizard**.

1. Click **Next** in the welcome screen.

2. The GFI FaxMaker Client and other Web Services API applications connect to GFI FaxMaker over HTTP port 8555. If this port is not open, click **OK** to have GFI FaxMaker automatically open these ports. You can also open these ports manually. For more information go to: <http://go.gfi.com/?pageid=FM19help&lang=en#cshid=FirewallPorts>

NOTE

When GFI FaxMaker is installed on the Microsoft® Exchange server, skip to step 5.



Screenshot 30: Setting up the sending options

3. When GFI FaxMaker is not installed on the same machine running Microsoft® Exchange, configure the mail server options. Select how to forward faxes and SMSs to GFI FaxMaker.

Option	Description
Faxes and SMS will be forwarded directly to this machine via SMTP email, via APIs or when using the GFI FaxMaker Client.	<p>Select this option when using any of the following methods to send faxes:</p> <ul style="list-style-type: none"> » GFI FaxMaker Client » Web client » TextAPI, XMLAPI or Web Services API » Email such that your mail server is configured to forward all faxes and SMSs to GFI FaxMaker via SMTP. For more information, refer to Mail server configuration (page 15). <p>NOTE: Faxes & SMS cannot be sent via an SMTP mail server when GFI FaxMaker is installed on Windows 10, 8 or 7. For more information, refer to Installing GFI FaxMaker on Windows 10, 8 or 7 (page 63).</p>
GFI FaxMaker will download faxes and SMSs from a POP3 mailbox	<p>Select option if GFI FaxMaker downloads fax/SMS from a dedicated POP3 mailbox. For more information, refer to POP3 mailbox (page 45). Specify the details of the dedicated POP3 mailbox.</p> <p>IMPORTANT: Ensure that there are no emails in mailbox and that it is dedicated to GFI FaxMaker only. Any emails in mailbox are downloaded by GFI FaxMaker and permanently deleted.</p>

Click **Next** to continue.



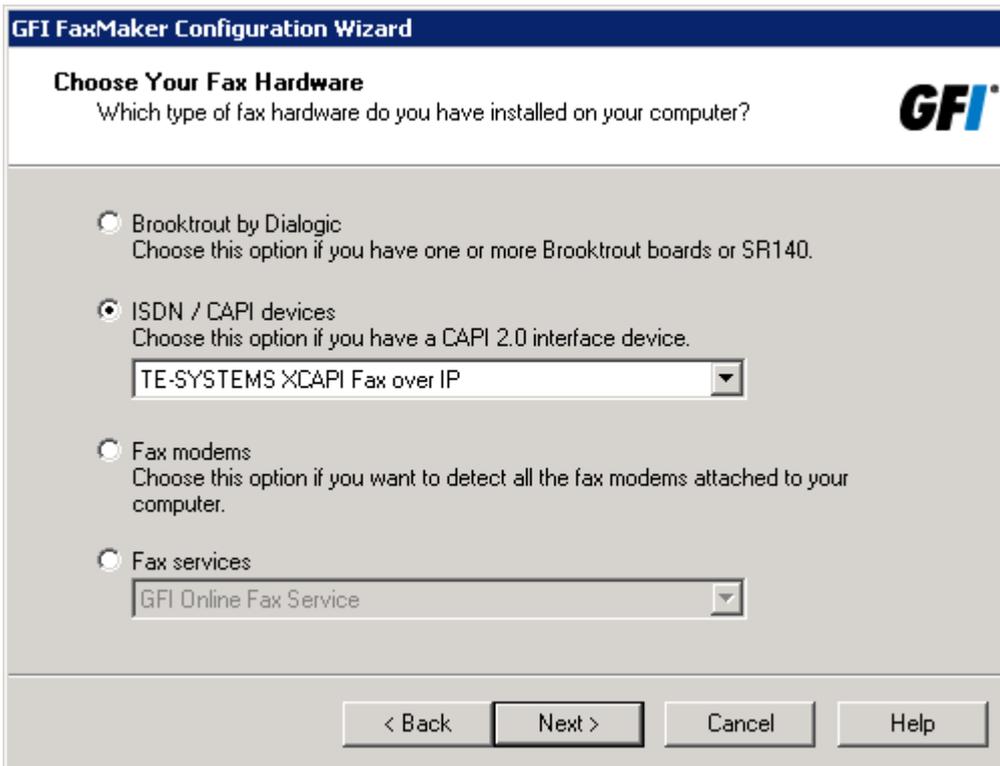
Screenshot 31: The wizard will prompt you for a mail server name

4. Specify mail server details where GFI FaxMaker forwards received emails.

Option	Description
Mail server name or IP address	Enter the name or IP address of the mail server where to upload received faxes.
Use Secure Connection	Choose this option when the mail server requires a secure connection. Choose the type of encryption required SSL or TLS .
Use SMTP Authentication	Instructs GFI FaxMaker to connect to the mail server using specific user credentials. Enter credentials in the Account and password text boxes. Select Secure Password Authentication if required by the mail server.

Click **Next** to continue.

5. Specify the **Country code** of the country where the fax lines are connected. This is used by GFI FaxMaker to determine the appropriate number to dial (for example, removes the country code for faxes within the same country). Click **Next**.



Screenshot 32: Selecting the type of fax hardware to be used with GFI FaxMaker

6. Select the fax devices to use with GFI FaxMaker.

Fax device	Description
Brooktrout by Dialogic	Select when using one or more Brooktrout devices or SR140 fax software. On clicking Next , click Yes to install driver software for the device, or click No to use other drivers.
ISDN /CAPI devices	Select: » TE-SYSTEMS XCAPI Fax over IP - Instructs GFI FaxMaker to use the TE-SYSTEMS XCAPI Fax over IP solution. Click Yes to install XCAPI software to integrate the system with Fax over IP or an ISDN controller, or click No to use other drivers. » Other devices - Instructs GFI FaxMaker to use a device that is not TE-SYSTEMS XCAPI Fax over IP.
Fax modems	Select to automatically detect fax modem drivers and click Next . GFI FaxMaker attempts to detect Microsoft® Fax drivers and other modems already installed on the machine.
Fax services	Select to use an online fax service. Click Next to enter the fax service details.

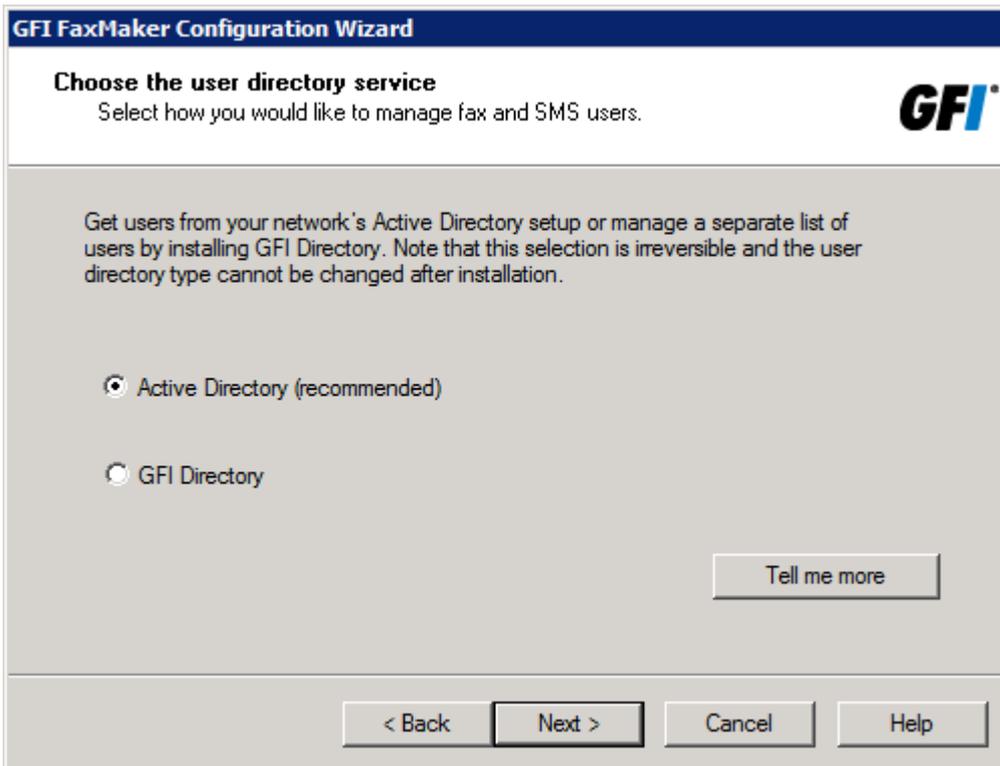
IMPORTANT

1. Ensure that devices are properly installed before proceeding.
2. For some devices, you may be prompted to configure the fax lines.

For more information go to: <http://go.gfi.com/?pageid=FM19help&lang=en#cshid=FDIManual>

Click **Next** to continue.

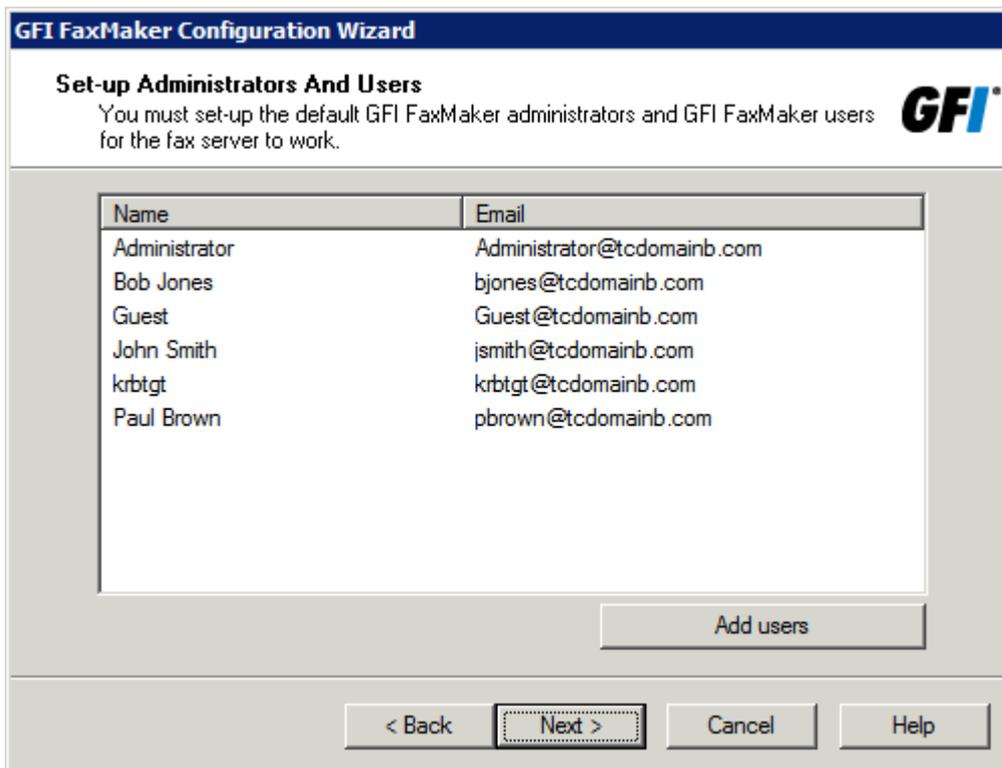
7. Set up your fax lines in GFI FaxMaker. Click **Configure lines...** to launch the **Add fax line** tool. Use this tool to add your fax lines. For more information, refer to [Adding new fax lines](#) (page 90).



Screenshot 33: Choosing a user directory service

8. When installing GFI FaxMaker for the first time on a server that is part of an Active Directory environment, choose the user directory service to use. Choose **Active Directory** to add users from Active Directory, or **GFI Directory** to install and manage users in GFI Directory. To help you choose, refer to [Choosing a user directory service](#). If GFI FaxMaker is NOT installed in an Active Directory environment, GFI Directory must be used and is automatically installed by the Configuration Wizard.

9. If Active Directory is not found or if GFI Directory is chosen and installed the first time, the wizard prompts to create the default administrator in GFI Directory. This user is added to GFI FaxMaker, set as an administrator and set as the default fax/SMS router. Key in the user details and click **Next**.



Screenshot 34: Specifying users

10. Specify the GFI FaxMaker users and administrators, depending on the user directory environment:

Environment	Description
Active Directory	GFI FaxMaker connects to Active Directory to enable you to choose users. If no fax administrators are configured, add the administrators from the Select Users or Groups dialog and click OK . After adding administrators, you may click Add users to add fax users, or click Next to proceed.
GFI Directory	When GFI Directory is installed the first time, the user specified in step 8 is automatically set as an administrator. Optionally you may click Add users to add more fax users. Use the Import Users tool to add users from GFI Directory or Windows® users. If GFI Directory was already installed before GFI FaxMaker was installed, choose the administrators and users to add to GFI FaxMaker using the Import Users tool.

11. Wizard will now test the mail server settings. Click **Test** to send a test email to the configured fax administrators. Click **Next** to continue.

NOTE

If the test fails, the error condition is displayed. Use the error to troubleshoot and resolve issues. For more information, refer to [Email2FaxGateway test fails](#) (page 203).

12. GFI FaxMaker now starts the services. Click **Next** to continue.

13. Click **Finish**.

4.3 Upgrading GFI FaxMaker

Choose your current GFI FaxMaker version for notes and instructions on how to upgrade to the latest version while retaining all settings:

- » GFI FaxMaker 19.1 or later
- » GFI FaxMaker 19
- » GFI FaxMaker 2015
- » GFI FaxMaker 2013 & 2014

To determine your current version number open the GFI FaxMaker Configuration and navigate to **General > Version Information > Properties**.

4.3.1 Upgrading from version 19.1 or later

This section describes how to upgrade a GFI FaxMaker 19.1 or later installation to the latest version while retaining all settings.

Important notes when upgrading

- » Upgrade is not reversible; you cannot downgrade to the last version.
- » GFI FaxMaker 20 works with a subscription model, where after the subscription expiration the product stops sending faxes and SMS. A renewal of the subscription is required to resume the service.
- » GFI FaxMaker 19.2 and later only support 64-bit installations. It is not possible to upgrade over a 32-bit instance and a new installation in a supported environment is required. For more information, refer to [How to move your GFI FaxMaker installation to a different server](#) (page 177).
- » Backup the GFI FaxMaker configuration before upgrade. For more information, refer to [How to backup GFI FaxMaker settings](#) (page 181). The backup may be useful to revert configuration when upgrade fails.
- » During upgrade, GFI FaxMaker services and operations are stopped. Ensure that there are no faxes in queue as these are permanently lost during upgrade.
- » Check that you are installing GFI FaxMaker on the machine that meets the [system and hardware requirements](#).
- » Log on as Administrator or use an account with administrative privileges.
- » GFI FaxMaker 19.2 and later offers two types of licensing services:
 - Using the GFI Account credentials. The username and password are retrieved from [GFI Accounts](#) and assigned to the user at the moment of the registration of the account.
 - Using a license key. When upgrading to a new major release you also need to upgrade your license key.
- » Save any pending work and close all open applications on the machine.
- » Disable anti-virus software on the server machine during the upgrade. Re-enable it once upgrade is complete.

Upgrade procedure

1. Download the latest build of GFI FaxMaker. Go to <https://www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker/download>
2. Right-click the newly downloaded installer and choose **Properties**. From the **General** tab, click **Unblock** and then **Apply**. This step is required to prevent the operating system from blocking certain actions by the installer.
3. Launch the newly downloaded installer on the server where GFI FaxMaker is currently installed. You are notified that an older version of GFI FaxMaker already exists. Click **Yes** to uninstall it.
4. When uninstall is complete, follow on-screen instructions to install the latest version.

5. Enter your GFI Account credentials or [upgrade your license](#) key and key in the new key. If you do not have your license key at hand, you can get it from the [GFI Customer Area](#).
6. When installation is complete, the setup automatically launches the GFI FaxMaker Configuration Wizard to restart the GFI FaxMaker services.
7. When using a Brooktrout TR1034 fax board, open the Brooktrout Configuration Tool to verify settings. Save and close. A restart of services may be required.
8. Go to the GFI FaxMaker Monitor and ensure that fax lines are present and initialized. If you encounter problems, refer to http://go.gfi.com/?pageid=FM_LineInitialize.
9. Test the functionality of GFI FaxMaker by sending and receiving a test fax. For more information, refer to [Testing your installation](#) (page 64).

4.3.2 Upgrading from version 19

This section describes how to upgrade a GFI FaxMaker 19 installation to the latest version while retaining all settings.

Important notes when upgrading

- » Upgrade is not reversible; you cannot downgrade to the last version.
- » GFI FaxMaker 20 works with a subscription model, where after the subscription expiration the product stops sending faxes and SMS. A renewal of the subscription is required to resume the service.
- » GFI FaxMaker 19.2 and later only support 64-bit installations. It is not possible to upgrade over a 32-bit instance and a new installation in a supported environment is required. For more information, refer to [How to move your GFI FaxMaker installation to a different server](#) (page 177).
- » Backup the GFI FaxMaker configuration before upgrade. For more information, refer to [How to backup GFI FaxMaker settings](#) (page 181). The backup may be useful to revert configuration when upgrade fails.
- » During upgrade, GFI FaxMaker services and operations are stopped. Ensure that there are no faxes in queue as these are permanently lost during upgrade.
- » Check that you are installing GFI FaxMaker on the machine that meets the [system and hardware requirements](#).
- » Log on as Administrator or use an account with administrative privileges.
- » GFI FaxMaker 19.2 and later offers two types of licensing services:
 - Using the GFI Account credentials. The username and password are retrieved from [GFI Accounts](#) and assigned to the user at the moment of the registration of the account.
 - Using a license key. When upgrading to a new major release you also need to upgrade your license key.
- » Save any pending work and close all open applications on the machine.
- » Disable anti-virus software on the server machine during the upgrade. Re-enable it once upgrade is complete.

Upgrade procedure

1. Download the latest build of GFI FaxMaker. Go to <https://www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker/download>
2. Right-click the newly downloaded installer and choose **Properties**. From the **General** tab, click **Unblock** and then **Apply**. This step is required to prevent the operating system from blocking certain actions by the installer.

3. Launch the newly downloaded installer on the server where GFI FaxMaker is currently installed. You are notified that an older version of GFI FaxMaker already exists. Click **Yes** to uninstall it.
4. When uninstall is complete, follow on-screen instructions to install the latest version.
5. Enter your GFI Account credentials or [upgrade your license](#) key and key in the new key. If you do not have your license key at hand, you can get it from the [GFI Customer Area](#).
6. When installation is complete, the setup automatically launches the GFI FaxMaker Configuration Wizard to restart the GFI FaxMaker services.
7. When using a Brooktrout TR1034 fax board, open the Brooktrout Configuration Tool to verify settings. Save and close. A restart of services may be required.
8. Go to the GFI FaxMaker Monitor and ensure that fax lines are present and initialized. If you encounter problems, refer to http://go.gfi.com/?pageid=FM_LineInitialize.
9. Test the functionality of GFI FaxMaker by sending and receiving a test fax. For more information, refer to [Testing your installation](#) (page 64).

4.3.3 Upgrading from version 2015

This section describes how to upgrade a GFI FaxMaker 2015 installation to the latest version while retaining all settings.

Important notes when upgrading

- » Upgrade is not reversible; you cannot downgrade to the last version.
- » GFI FaxMaker 20 works with a subscription model, where after the subscription expiration the product stops sending faxes and SMS. A renewal of the subscription is required to resume the service.
- » GFI FaxMaker 19.2 and later only support 64-bit installations. It is not possible to upgrade over a 32-bit instance and a new installation in a supported environment is required. For more information, refer to [How to move your GFI FaxMaker installation to a different server](#) (page 177).
- » Backup the GFI FaxMaker configuration before upgrade. For more information, refer to [How to backup GFI FaxMaker settings](#) (page 181). The backup may be useful to revert configuration when upgrade fails.
- » Log in to the [GFI Customer Area](#) to get a new license key. Click the blue key icon on the right and select **Upgrade License Key**, or click **Renewal** to extend your maintenance agreement.
- » During upgrade, GFI FaxMaker services and operations are stopped. Ensure that there are no faxes in queue as these are permanently lost during upgrade.
- » Check that you are installing GFI FaxMaker on the machine that meets the [system and hardware requirements](#).
- » Log on as Administrator or use an account with administrative privileges.
- » GFI FaxMaker 19.2 and later offers two types of licensing services:
 - Using the GFI Account credentials. The username and password are retrieved from [GFI Accounts](#) and assigned to the user at the moment of the registration of the account.
 - Using a license key. When upgrading to a new major release you also need to upgrade your license key.
- » Save any pending work and close all open applications on the machine.
- » Disable anti-virus software on the server machine during the upgrade. Re-enable it once upgrade is complete.

Upgrade procedure

1. Download the latest build of GFI FaxMaker. Go to <https://www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker/download>
2. Right-click the newly downloaded installer and choose **Properties**. From the **General** tab, click **Unblock** and then **Apply**. This step is required to prevent the operating system from blocking certain actions by the installer.
3. Launch the newly downloaded installer on the server where GFI FaxMaker is currently installed. You are notified that an older version of GFI FaxMaker already exists. Click **Yes** to uninstall it.
4. When uninstall is complete, follow on-screen instructions to install the latest version.
5. Use the license key obtained from the [GFI Customer Area](#).
6. When installation is complete, the setup automatically launches the GFI FaxMaker Configuration Wizard to restart the GFI FaxMaker services.
7. When using a Brooktrout TR1034 fax board, open the Brooktrout Configuration Tool to verify settings. Save and close. A restart of services may be required.
8. Go to the GFI FaxMaker Monitor and ensure that fax lines are present and initialized. If you encounter problems, refer to http://go.gfi.com/?pageid=FM_LineInitialize.
9. Test the functionality of GFI FaxMaker by sending and receiving a test fax. For more information, refer to [Testing your installation](#) (page 64).

4.3.4 Upgrading from version 2013/2014

This section describes how to upgrade a GFI FaxMaker 2013/2014 installation to the latest version while retaining all settings.

NOTE

Direct upgrades from version 2011 or earlier versions are not supported and it is recommended to uninstall and reconfigure GFI FaxMaker.

Important notes when upgrading

- » Upgrade is not reversible; you cannot downgrade to the last version.
- » GFI FaxMaker 20 works with a subscription model, where after the subscription expiration the product stops sending faxes and SMS. A renewal of the subscription is required to resume the service.
- » GFI FaxMaker 19.2 and later only support 64-bit installations. It is not possible to upgrade over a 32-bit instance and a new installation in a supported environment is required. For more information, refer to [How to move your GFI FaxMaker installation to a different server](#) (page 177).
- » Backup the GFI FaxMaker configuration before upgrade. For more information, refer to [How to backup GFI FaxMaker settings](#) (page 181). The backup may be useful to revert configuration when upgrade fails.
- » Log in to the [GFI Customer Area](#) to get a new license key. Click the blue key icon on the right and select **Upgrade License Key**, or click **Renewal** to extend your maintenance agreement.
- » GFI FaxMaker 2015 introduces GFI Directory as a new user management system when Active Directory is not available. When upgrading over an installation without Active Directory, run the Configuration Wizard after the installation to automatically install and import all users to GFI Directory.
- » When upgrading over an installation that uses a Microsoft Access archive database, GFI FaxMaker migrates archive data to a Firebird database. When using a Microsoft® SQL/MSDE database, GFI

FaxMaker upgrades the database schema. These database changes are automatically done in the background separate from the installation. It is recommended to take a backup of the database before starting the upgrade. This backup may be useful to re-import the database if upgrade fails.

- » During upgrade, GFI FaxMaker services and operations are stopped. Ensure that there are no faxes in queue as these are permanently lost during upgrade.
- » Check that you are installing GFI FaxMaker on the machine that meets the [system and hardware requirements](#).
- » Log on as Administrator or use an account with administrative privileges.
- » GFI FaxMaker 19.2 and later offers two types of licensing services:
 - Using the GFI Account credentials. The username and password are retrieved from [GFI Accounts](#) and assigned to the user at the moment of the registration of the account.
 - Using a license key. When upgrading to a new major release you also need to upgrade your license key.
- » Save any pending work and close all open applications on the machine.
- » Disable anti-virus software on the server machine during the upgrade. Re-enable it once upgrade is complete.

Upgrade procedure

1. Download the latest build of GFI FaxMaker. Go to <https://www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker/download>
2. Right-click the newly downloaded installer and choose **Properties**. From the **General** tab, click **Unblock** and then **Apply**. This step is required to prevent the operating system from blocking certain actions by the installer.
3. Launch the newly downloaded installer on the server where GFI FaxMaker is currently installed. You are notified that an older version of GFI FaxMaker already exists. Click **Yes** to uninstall it.
4. When uninstall is complete, follow on-screen instructions to install the latest version.
5. Use the license key obtained from the [GFI Customer Area](#).
6. When installation is complete, the setup automatically launches the GFI FaxMaker Configuration Wizard to restart the GFI FaxMaker services.
7. When using a Brooktrout TR1034 fax board, open the Brooktrout Configuration Tool to verify settings. Save and close. A restart of services may be required.
8. Go to the GFI FaxMaker Monitor and ensure that fax lines are present and initialized. If you encounter problems, refer to http://go.gfi.com/?pageid=FM_LineInitialize.
9. Test the functionality of GFI FaxMaker by sending and receiving a test fax. For more information, refer to [Testing your installation](#) (page 64).

4.4 Choosing a user directory service

GFI FaxMaker can get users and groups from one of two supported user directory services, Active Directory and GFI Directory.

NOTES:

1. If GFI FaxMaker server is not connected to a domain, Active Directory cannot be used as a user directory service and GFI Directory is required.
2. Evaluate your preferred service before installation since the directory chosen cannot be changed after installation.

Refer to the sections below for information on when and how to use these services.

GFI Directory

GFI Directory is a directory of users and groups that integrates with GFI FaxMaker and other GFI products.

If this user directory service is chosen, GFI FaxMaker automatically installs and configures GFI Directory on the server during the Configuration Wizard. If GFI Directory is already installed on the machine where you are installing GFI FaxMaker, for example when another GFI product is utilizing this service, GFI FaxMaker setup automatically connects to the local GFI Directory service.

Users and groups can be automatically created and managed from the [Licensed Users](#) node of GFI FaxMaker. On user creation, use the [Welcome email](#) feature to send an email to users, containing a link to set their account password. This is required to authenticate to GFI FaxMaker, for example, when logging in to the web console or when sending faxes using the GFI FaxMaker Client.

GFI Directory can also be managed separately from GFI FaxMaker, in its own web-based management console. In a web browser, go to:

```
http://[server name/IP]/GFIDirectory
```

For example, <http://myfaxserver.mydomain.com/GFIDirectory>

For more information about GFI Directory refer to: http://go.gfi.com/?pageid=DIR_Help_En

Active Directory

GFI FaxMaker server can get use the directory services of Active Directory when it is connected to a domain.

Administrators can grant fax and SMS access to Active Directory users and groups. Administrators and users authenticate to GFI FaxMaker using their Active Directory credentials, for example, when logging in to the web console or when sending faxes using the GFI FaxMaker Client.

It is recommended to use Active Directory when it is available so that user management is done from a central location. No additional configuration is required when using this service.

4.5 Installing GFI FaxMaker on Windows 10, 8 or 7

Microsoft® Windows® 10, 8 (including 8.1) and 7 do not include the Microsoft® IIS SMTP server that is used when the mail server routes fax/SMS emails to GFI FaxMaker.

Consequently when installing GFI FaxMaker on these operating systems, faxes and SMS cannot be sent via email using the domains `@faxmaker.com` and `@smsmaker.com`.

There are two main methods of sending faxes/SMS that can be used instead:

- » [Sending faxes via web client](#) - users login to GFI FaxMaker using a web browser and compose faxes using the web client.
- » [Use email via a POP3 mailbox](#) - Users send fax/SMS emails to a dedicated POP3 mailbox. GFI FaxMaker picks up the emails from this mailbox and prepares the content for transmission. This method is

more difficult to use since it requires TextAPI parameters to be included in the email body when composing fax/SMS emails. For more information, refer to [Sending faxes/SMS via a POP3 Mailbox](#) (page 105).

Alternatively when installing GFI FaxMaker on Windows 10, 8 or 7, you may use other methods to send faxes and SMS. These methods do not require the IIS SMTP service:

- » [Sending faxes via web client](#)
- » [Printing content to GFI FaxMaker - NetPrintQueue2Fax](#)
- » [Via API](#)

4.6 Testing your installation

Follow the steps in this topic to ensure that your GFI FaxMaker installation is processing sent and received faxes successfully.

4.6.1 Send a test fax

1. From the email client of a user listed as a Licensed user, create an email, in the following format:

Field	Configuration
To	Enter recipient in the following format <code>number@faxmaker.com</code> . Replace <code>number</code> with the recipient's fax number. For example, <code>12345678@faxmaker.com</code> . NOTE: The default fax (<code>faxmaker.com</code>) and SMS (<code>smsmaker.com</code>) domains can be customized by the GFI FaxMaker administrator. Use the configured fax domain. For more information, refer to Fax and SMS domain names (page 105).
Subject	Key in <code>Test fax</code> .
Email body	Key in some text.
Attachment	Attach a one page PDF document containing some test content, such as text and graphics.

2. Click **Send**.
3. View the outgoing fax status from the [GFI FaxMaker Monitor](#).
4. Ensure that the sender receives a [transmission report](#) for the sent fax, to confirm that GFI FaxMaker can send notifications over the configured [mail server](#).
5. Confirm that the fax is received by the recipient and confirm that all settings, such as coverpage and headers/footers, are applied.

4.6.2 Receiving a test fax

1. From a test fax line, send a fax to a fax line connected and configured in GFI FaxMaker.
2. View the incoming fax status from [GFI FaxMaker Monitor](#).
3. The fax should be routed depending on the configured [Routing rules](#). If no routing rule is matched or routing rules are not configured, the fax is routed to a [Default Router](#). The fax should also be routed to users configured to [receive all faxes](#).

5 Using GFI FaxMaker

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5.1 How users send faxes

There are various ways how users can send faxes:

Fax method	Description
Web client	Access the GFI FaxMaker web interface from a supported web browser and compose faxes from the web client. For more information, refer to Sending faxes via web client (page 67).
Email	Users can send faxes directly from their favorite email client, such as Microsoft® Outlook®. Address the email to <i>faxnumber@faxmaker.com</i> , where <i>faxnumber</i> is replaced by the recipient's fax number. The email body gets added to the coverpage and add any attachments to transmit via fax. For more information, refer to Sending faxes via email (page 66).

Fax method	Description
NetPrintQueue2Fax	To send faxes, users print content to the NetPrintQueue2Fax printer driver. The fax recipient number is keyed in within the document in a customizable format, for example Fax: 12345678. This enables fax sending in any format that allows printing of content (without installing application on GFI FaxMaker machine). For more information, refer to NetPrintQueue2FAX (page 153).
APIs	Use third-party tools to automatically generate APIs containing the information about the faxes to send and automate the fax sending process. Store TextAPIs or XMLAPIs to a central location and GFI FaxMaker automatically processes files located in this folder. Or use Visual Studio to develop Web Service APIs which you can use to automatically send and receive faxes. For more information, refer to GFI FaxMaker APIs (page 157).

5.1.1 Sending faxes via email

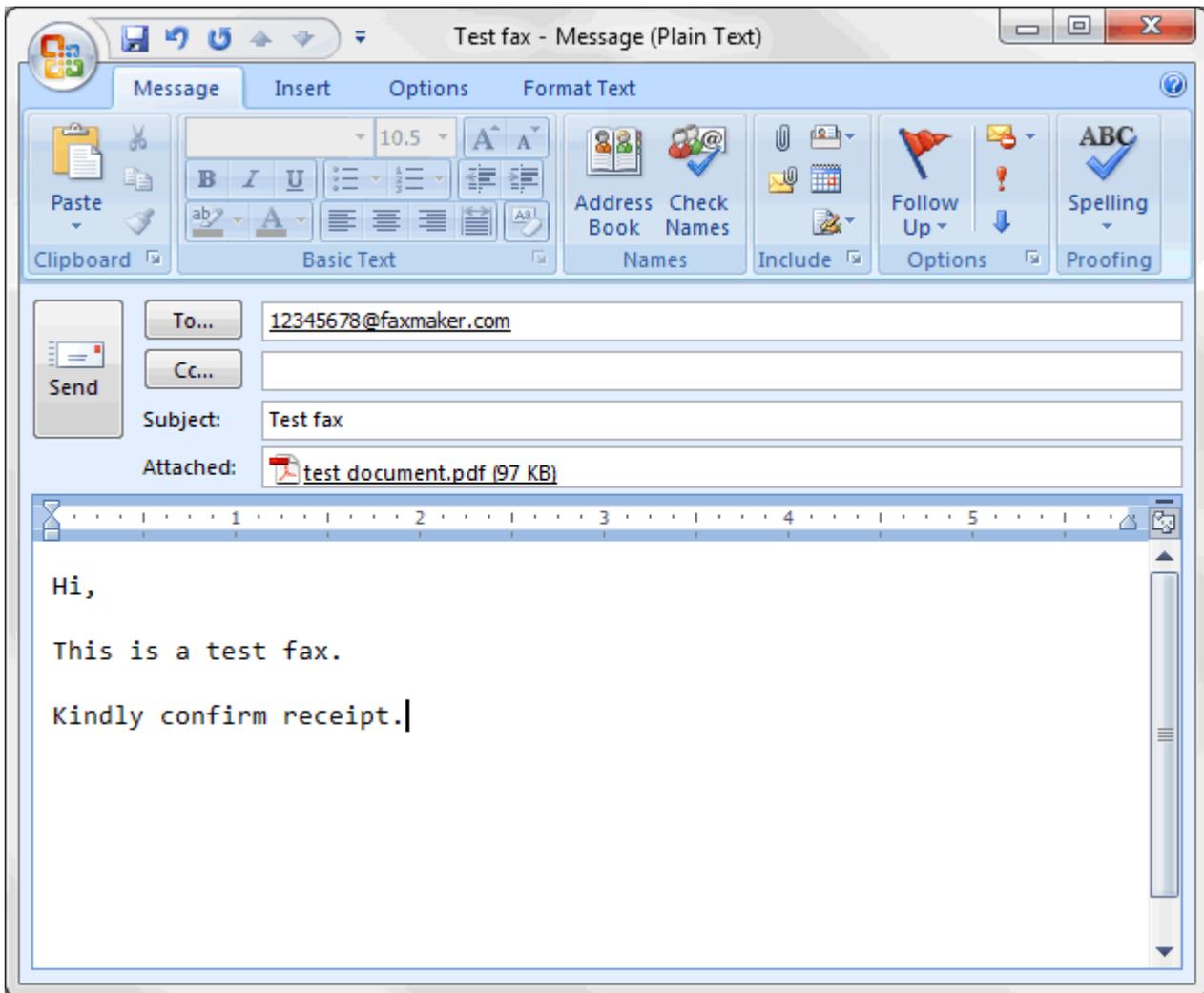
Licensed users can send faxes directly from their email client:

- » Use the Microsoft® Outlook® address book for recipients that have a fax number configured. Address the email to [FAX: *faxnumber*], where *faxnumber* is replaced by the Outlook® contact's fax number.
- » Address an email to *faxnumber@faxmaker.com*, where *faxnumber* is replaced by the recipient's fax number. For example: +441273123456@faxmaker.com
- » The same fax can also be sent to multiple fax numbers, using the same format for each and separated with a semi-colon (;). For example: +441273123456@faxmaker.com; +420313414515@-faxmaker.com;

NOTE

The default fax (*faxmaker.com*) and SMS (*smsmaker.com*) domains can be customized by the GFI FaxMaker administrator. Use the configured fax domain accordingly.

The first page of the fax contains the recipient's name, sender's name, email subject and email body. If the email includes attachments, these are included in subsequent pages of the fax.



Screenshot 35: Sending a fax using the email client

This method is available for all email users, with no installation of other software or custom configurations required.

To use this method:

- » Add the users allowed to send fax in the **Licensed Users** list. For more information, refer to [Licensed users](#) (page 98).
- » Configure mail servers to forward emails addressed to `*@faxmaker.com`, `*@smsmaker.com`, `Fax: *` and `SMS: *` (or your custom domains) to GFI FaxMaker. For more information, refer to [Mail server configuration](#) (page 15).

NOTE

This method is only applicable when routing emails via SMTP. This is not applicable when using the GFI FaxMaker POP3 Downloader to poll faxes from a POP3 Mailbox. For more information, refer to [Sending faxes/SMS via a POP3 Mailbox](#) (page 105).

5.1.2 Sending faxes via web client

Licensed users can send faxes by accessing the GFI FaxMaker web client from a supported web browser. This method is available for all GFI FaxMaker users, with no additional software on users' machines.

To access the web client, [login](#) to the GFI FaxMaker web console and click the **Client** tab. From the left pane, click **Compose** under **Fax**.

Screenshot 36: Sending a fax using the GFI FaxMaker web client

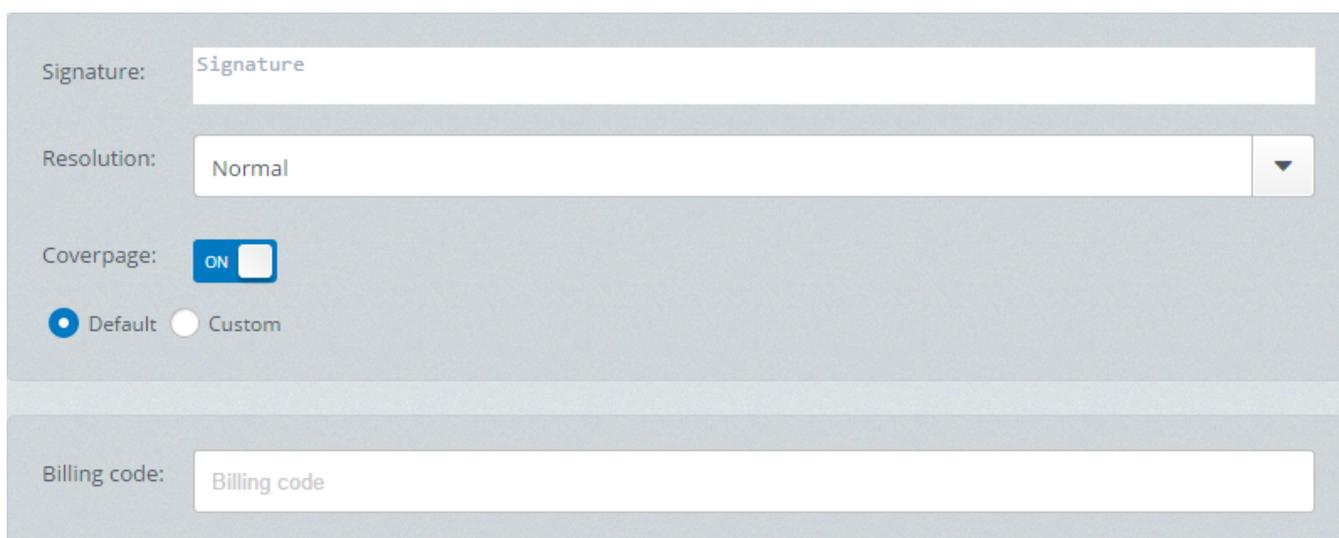
To send a fax, fill in the fax message form as follows:

Fax parameter	Description
Subject	Key in a fax subject in the Enter message subject field.
Recipients	Enter the numbers of all the recipients to receive the fax. Separate multiple recipients using a comma ',' or a semi-colon ';'. Click To... to load the address book and select recipients from the address book. For more information, refer to Web client address book (page 74).
Message body	Key in a fax body that will be displayed in the fax coverpage. Your personal signature is automatically displayed in the bottom. For more information, refer to Web Client settings and personal preferences (page 69).

Fax parameter	Description
Attachments	<p>Drag and drop files to fax in the message body area, or click Add attachment to select files to fax. In case of multiple attachments, GFI FaxMaker faxes attachments in the order shown. To arrange the order of how attachments are faxed, drag and drop attachments to sort in the order required.</p> <p>Default file formats File formats supported by the GFI FaxMaker web client:</p> <ul style="list-style-type: none"> » Plain text: .txt » Rich text: .rtf » Portable document: .pdf » Images: .gif, .jpeg, .jpg, .fax, .tif, .tiff » MIME HTML: .mht » Microsoft Word: .doc, .docx » Microsoft Excel: .xls, .xlsx » Microsoft PowerPoint: .ppt, .pptx » Microsoft Visio: .vsd, .vsdx <p>NOTE: A licensed version of Microsoft® Office® is required on the GFI FaxMaker server to convert Microsoft® Office® file formats.</p> <p>Other file formats Use the Web Printer to send other file formats that are not supported by default by GFI FaxMaker. The Web Printer converts files on clients machines. For more information, refer to Web Client Printer Driver (page 72).</p>
Priority	Select the priority of the fax. When there are multiple faxes to be sent by GFI FaxMaker, faxes with higher priority get faxed first, while faxes with lower priority get faxed after the other faxes.
Resolution	The quality of the fax image. High resolution (fine) faxes have better quality but take longer to get faxed than normal resolution.
Delivery	<p>Choose whether to deliver the fax immediately or send it at a particular date and time.</p> <p>NOTE: The actual transmission process may be different than configured depending on the number of faxes in the GFI FaxMaker queue and when a fax line is available.</p>

Web Client settings and personal preferences

Personal client settings are applied by default on all messages composed in the web client. From the top menu bar, click  to open the settings screen and select **Client** from the left pane.



The screenshot shows a settings interface with the following elements:

- Signature:** A text input field containing the placeholder text "Signature".
- Resolution:** A dropdown menu currently set to "Normal".
- Coveragepage:** A toggle switch that is currently turned "ON".
- Radio buttons:** Two radio buttons labeled "Default" (which is selected) and "Custom".
- Billing code:** A text input field containing the placeholder text "Billing code".

Screenshot 37: Configuring web client references

Configure the following web client options:

Fax parameter	Description
Signature	Compose your signature. This text is automatically added to the fax message body.
Resolution	Configure the default quality of fax images. High resolution (fine) faxes have better quality but take longer to get faxed than normal resolution. This setting can be overridden when composing a fax.
Coverpage	Choose whether to add a coverpage to your fax messages. If adding a coverpage, choose the coverpage to add: <ul style="list-style-type: none"> » Default: your default coverpage is added to fax messages as configured by your GFI FaxMaker administrator. » Custom: key in the name of a custom coverpage as configured in GFI FaxMaker. Contact your administrator for a list of coverpages available.
Billing code	If applicable, enter your billing code as instructed by your GFI FaxMaker administrator. Leave this field empty if a billing code is not required by your organization.

NOTE

These settings are applied only when sending faxes from the web client and not when sending faxes using other methods.

5.1.3 Resending a fax

When GFI FaxMaker sends out a fax, an email is sent to the sender containing important fax job information - a transmission report. If a fax fails or you wish to forward the same fax to a different recipient, use the transmission report to resend the fax.

To resend a fax to the original recipient, reply to the transmission report and do not change any of the email fields. GFI FaxMaker does not include the transmission report in the fax, but re-sends the original fax message.

To resend the fax to a different recipient, reply to the transmission report, changing the **To** field to the new recipient's fax number, in this format: <faxnumber>@faxmaker.com. For example, +420313414515@faxmaker.com. Do not change any other message field and click **Send**. GFI FaxMaker re-sends the original fax content, updating recipient-related coverpage fields to match those of the new recipient.

Important notes:

1. The subject field of the transmission report contains a `::resend` API command and a job ID that enable GFI FaxMaker to find the original fax job when resending a fax. If these details are modified, GFI FaxMaker will not be able to identify the fax to be resent, resulting either in an error or sends out a fax containing the transmission report.
2. By default, GFI FaxMaker stores sent faxes for 2 days and failed faxes for 1 week. Users cannot resend faxes after these periods.
3. The administrator may disable fax resending by not storing faxes. For more information, refer to [Storing faxes](#) (page 123).
4. The default fax (faxmaker.com) and SMS (smsmaker.com) domains can be customized by the GFI FaxMaker administrator. Use the configured fax domain accordingly.

5.2 How users view received faxes

Received faxes are forwarded to the user via email. The email will contain a fax report and the fax file included with the email as an attachment. Faxes can be attached in several formats, such as PDF.

Configure routing options for GFI FaxMaker to route received faxes to the correct recipient. For more information, refer to [Fax routing](#) (page 162).

Fax received from 123456789
123456789@faxmaker.com [123456789@faxmaker.com]

Sent: 25 June 2015 12:59
To: Administrator
Attachments: [20150625_115926_00006.fax \(23 KB\)](#)

GFI FaxMaker

✓ **Fax Received**

You have successfully received a fax via GFI FaxMaker. Fax information is listed below. Fax image is attached.

Fax details:

- Date and time: 25/06/2015 11:59:27
- Subject: Fax received from 123456789
- Line speed:14400 bps
- Total connection time: 00:23
- Pages: 1
- Resolution: Fine
- Remote fax ID:
- Line number: 0
- DTMF/DID number:

Regards,
GFI FaxMaker

Fax OCR

This is a test fax message from 123456789 to Administrator.

Copyright © 2015 GFI Software

Screenshot 38: Email notification confirming receipt of a new fax

Received faxes can also be automatically [printed](#) and/or [stored to a folder on disk](#).

NOTE

If a received fax is to be routed to a Web API user, the fax does not get delivered to the user via email, but must be picked up using the Web Service API.

5.3 Logging in to the GFI FaxMaker web interface

GFI FaxMaker users can log in to the web interface to access the web client to send faxes and SMS. Administrators can use the web interface to generate reports and monitor GFI FaxMaker operation.

To access the GFI FaxMaker interface from your browser, key in the following URL:

`http://<GFI FaxMaker host name>/FaxMaker`

For example: `http://myfax.mydomain.com/FaxMaker`

Key in your credentials to login to GFI FaxMaker depending on the user mode:

- » **Active Directory:** Key in your Active Directory username and password. Typically these are the same credentials used to login to Windows®.
- » **GFI Directory:** When GFI FaxMaker is installed in GFI Directory mode, key in your GFI Directory credentials. Ensure that users are assigned a GFI Directory password to be able to authenticate and login to the web interface. If users do not have a password, send them a Welcome email that enables them to set a password. From the Licensed Users configuration screen, select the users or groups to send the Welcome email to and click **Send welcome instructions**.

NOTE

Only licensed users can login to the web interface. Ensure that all users allowed to access the web client are added to the GFI FaxMaker Licensed Users screen. For more information, refer to [Licensed users](#) (page 98).

For information on how to use the web interface, refer to the following topics:

- » [Sending faxes via web client](#)
- » [Sending SMS via web client](#)
- » [Using the Web Printer to send faxes via web client](#)
- » [Monitoring operation](#)
- » [Monitoring system notifications](#)
- » [Working with reports](#)
- » [Configuring system updates](#)
- » [Changing the web interface language](#)
- » [Resetting the user password](#)
- » [Enforcing SSL](#)

5.3.1 Web Client Printer Driver

The GFI FaxMaker Web Client Printer enables users to print documents on their machines before sending the fax using the Web Client. This ensures that file conversion processing on the GFI FaxMaker server is minimized. This also enables users to use native applications to print documents which cannot be converted on the GFI FaxMaker server. For example, users that have Adobe InDesign installed on their machines, can fax Adobe InDesign documents by printing documents to the GFI FaxMaker Web Printer.

How the Web Printer works

Install the Web Printer driver on client machine. To send a fax using the Web Printer:

1. Print a document or file to the Web Printer, named **FAXmaker**.
2. On completion, the printed content is uploaded to GFI FaxMaker and the GFI FaxMaker web interface is automatically loaded in a new browser window.
3. Log in to the GFI FaxMaker web interface in the automatically loaded window.
4. The Client is automatically launched with the printed document pre-populated in the attachments area. The attachment name is **PreUploaded File**.
5. Proceed to fill in the message form and hit **Send** to transmit the fax.

Installing the Web Printer

NOTE

The Web Printer cannot be installed on a machine where the GFI FaxMaker Client is already installed.

To download and install the Web Printer:

1. [Login](#) to the GFI FaxMaker Web Interface.
2. From the top menu bar, click  to open the settings screen and select **Client** from the left pane.
3. Under **Web Printer Installer**, read the terms and conditions, and if you agree choose **I agree with the Web Printer Terms and Conditions**. The Web Printer cannot be downloaded if you do not accept the terms and conditions.
4. Click **Download** to start the download.
5. On download completion launch the installer.
6. Key in the **GFI FaxMaker Server URL**. This value is the same as the address used to access the web interface login page. For example, `https://fax.mydomain.com/FaxMaker`. Click **Test** to verify.
7. Click **Install** to start installation.
8. Click **Finish** on install completion.

A new printer **FAXmaker** is now added to your list of printer devices.

5.3.2 User's web profile settings

Changing the GFI FaxMaker web interface language

To change the language of the GFI FaxMaker web interface:

1. From the top menu bar, hover over the profile icon  and click **Profile**.
2. In the **Display language** area, choose your preferred language and click **Save**.

Resetting the password

To change your web interface login password:

1. From the top menu bar, hover over the profile icon  and click **Profile**.
2. In the **Reset Password** area, click **Change Password**.
3. Key in your current password, your new password and re-confirm your new password.
4. Click **Save password**.

NOTE

This option is not available when using your domain credentials (Active Directory) to login to GFI FaxMaker.

5.3.3 Web client address book

The GFI FaxMaker web client address book enables you to store and manage lists of recipients, contact details and their particulars. Contacts in the address book may be shared with all GFI FaxMaker users or stored as private, accessible only by the user who created the contact. When GFI FaxMaker is installed in a Microsoft Exchange environment, the address book may also retrieve the user account's personal contacts.

When composing a fax or SMS, click **To** next to the field where recipients are specified, to load the address book.

The screenshot displays the 'Select Recipients' dialog in the GFI FaxMaker web client. At the top right, there is a '+ New contact' link. Below the title, there is a dropdown menu currently set to 'All' and a search input field with a magnifying glass icon and the text 'Search'. The main area contains a list of contacts, grouped by their first letter. The 'B' group includes one contact: Bob Jones, with phone number 12345678 and fax number 98765432, and a checked checkbox. The 'J' group includes two contacts: Jane Smith (phone 99887766, fax 66778899, checked checkbox) and John Doe (phone 11223344, fax 44332211, unchecked checkbox). At the bottom of the dialog, there are three buttons: 'Delete Contact', 'Cancel', and 'Add recipients'.

Initial	Name	Phone	Fax	Share Status
B	Bob Jones	12345678	98765432	Public
J	Jane Smith	99887766	66778899	Public
J	John Doe	11223344	44332211	Private

Screenshot 39: Web client address book

Choose the actions to do in the web client address book:

Choose fax/SMS recipients

Open the address book and choose fax or SMS recipients.

The displayed list of recipients includes:

- » All personal contacts that were added by the user.
- » Contacts added by other users that were set as public.

» List of personal contacts from the user's Microsoft Exchange account. These are available only in Microsoft Exchange environments when GFI FaxMaker has access to the user's personal contacts list.

Use the **Search** bar to find particular contacts using their name, surname, fax or mobile numbers.

Click **Add recipients** to close the address book and add the selected contacts to the fax/SMS recipients box.

Adding new contacts

1. To create a contact, click **New contact**.

2. Choose whether to make the contact accessible by all GFI FaxMaker users. Choose **Private** to make the contact accessible only to yourself or **Public** to allow all GFI FaxMaker to use the contact. Contacts that are made public can only be modified or deleted by the user creating the contact or by GFI FaxMaker administrators. Other users cannot delete or modify public contacts.

3. Specify the contact's personal and contact details. These details are used to populate fields in the coverage page. For example if the coverage page includes a recipient's company field, this gets automatically populated by the company name specified. The **First name** and a **Fax** or **Mobile** numbers are required. All other details are optional.

4. Click **Save contact** to add the new contact to the address book.

Changing contact details

Click on a contact to launch the contact's details. Apply the required changes and click **Update contact**.

Contact details can only be changed by the user that created the contact or by GFI FaxMaker administrators. Other users can only view the contact details. Microsoft Exchange contacts cannot be modified from GFI FaxMaker.

Delete one or more contacts

Choose the contacts to delete and click **Delete Contact**. Click **OK** to confirm deletion.

A contact can only be deleted by the user that created it or by GFI FaxMaker administrators. Microsoft Exchange contacts cannot be deleted from GFI FaxMaker.

IMPORTANT

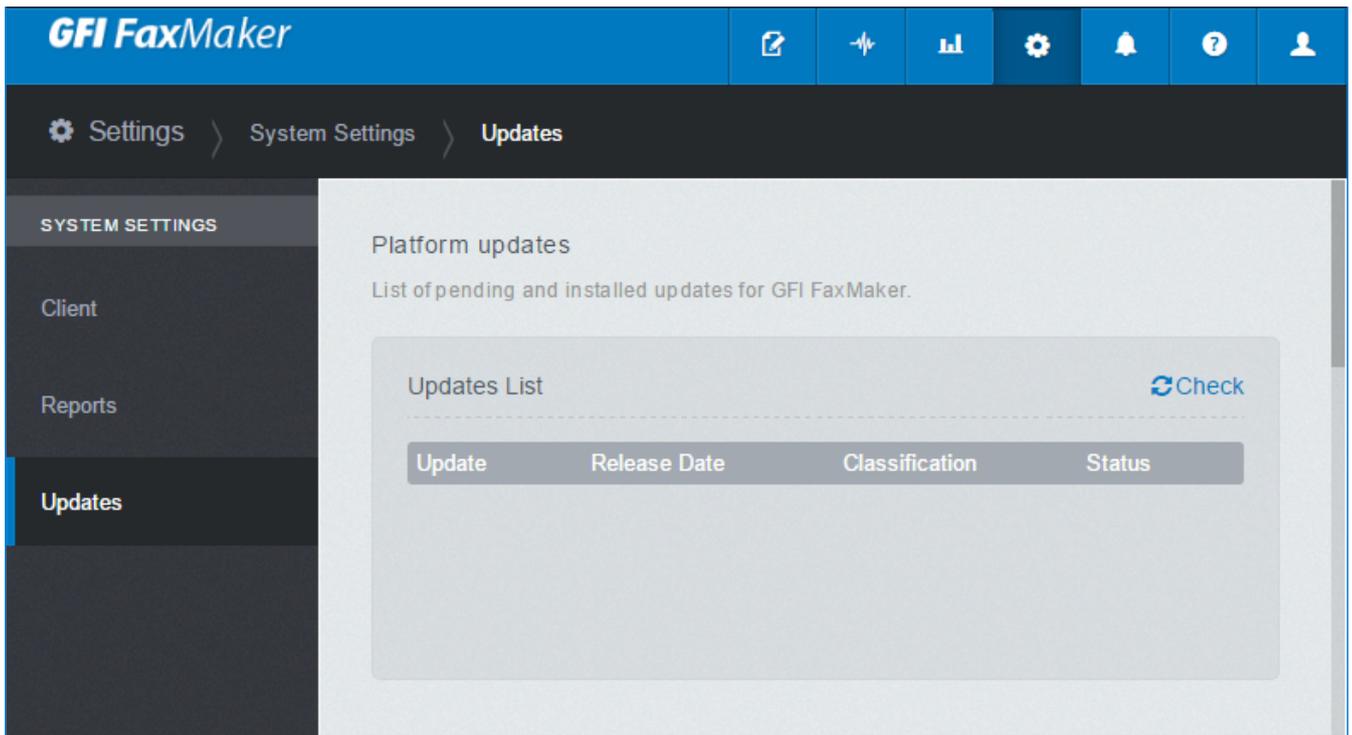
Deleted contacts are permanently removed and cannot be recovered after deletion.

5.3.4 Monitoring GFI FaxMaker updates

Monitor and configure how GFI FaxMaker downloads and installs updates issued by GFI Software.

1. [Log in](#) to the GFI FaxMaker web interface and from the top menu bar, click **Settings** .

2. From the left pane choose **Updates**.



Screenshot 40: Updates settings

3. Configure the following options:

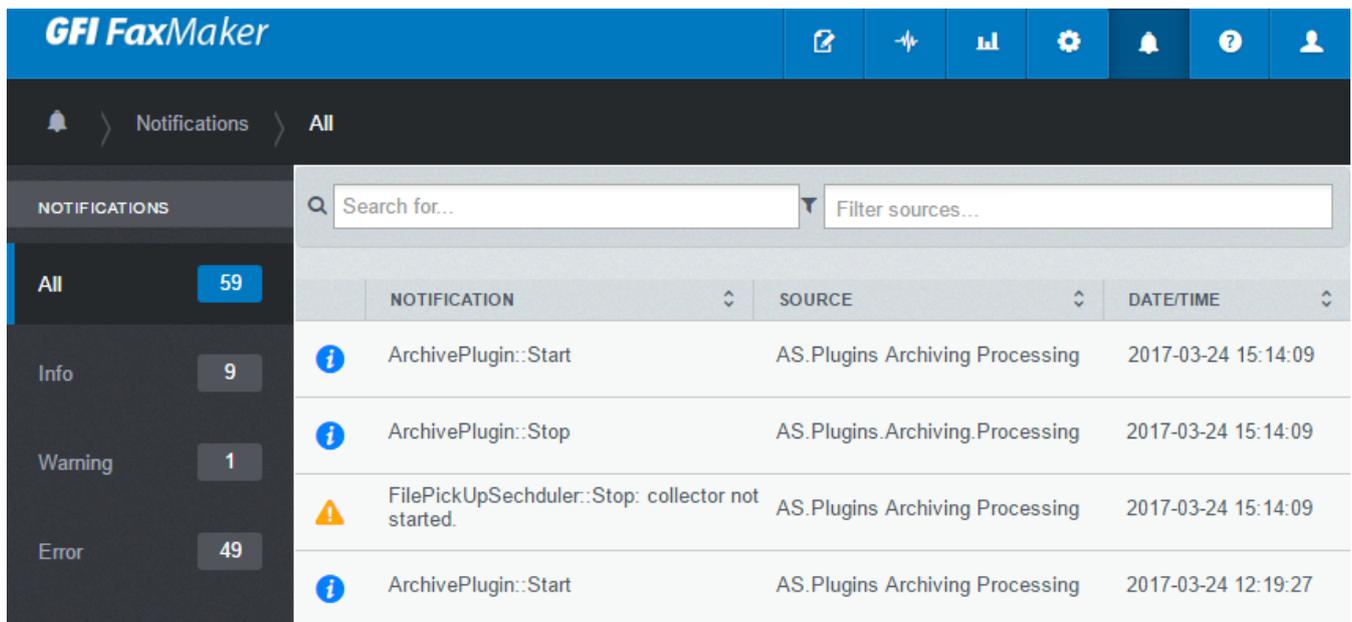
Option	Description
Platform Updates	Displays a list of pending and installed updates for the GFI FaxMaker server. Click any entry in the list to view additional information. Click Check to verify if any new updates are available.
Auto updates	Choose whether to automatically install updates when these are available. If enabling this setting, specify a schedule for when to install updates. It is recommended to install updates at off-peak hours. Check Apply major platform updates immediately to immediately install important updates as soon as these are available.
Notifications	Enable this option to receive email notifications when updates are available or installed. When enabling, you can check any of the following options: <ul style="list-style-type: none"> » New updates are available - to send email notifications whenever GFI FaxMaker finds new updates. » Platform update was successfully installed - to send email notifications whenever updates are successfully installed. Note that GFI FaxMaker always sends a notification when an update fails to install. » Notify all administrators - to notify all fax administrators about the updates. Un-check this option to manually enter a list of email addresses that will receive these notifications.

4. Click **Save** to apply changes.

5.3.5 Server notifications

In the notifications area you can view system events generated by GFI FaxMaker services. Use the notifications to monitor the functionality and operation of GFI FaxMaker.

To access the notifications, from the top navigation menu of the GFI FaxMaker web interface, click .



Screenshot 41: The Notifications area

Perform the following actions:

Action	Description
Filter events by type	Use the menu on the left to filter notifications by type. Available filters: All , Info , Warning or Error . When a type is chosen, only events matching the selected type are shown in the main viewing pane.
Search and filter events	Use the Search for and Filter sources fields to locate specific events.
View additional information	Click any notification icon to view detailed information about the event.

5.3.6 Securing Access to the web interface with SSL

You can use HTTPS certificates to secure access to the web interface of GFI FaxMaker. Configure IIS to use HTTPS to provide a secure connection when network users access the GFI FaxMaker web interface.

This feature is especially recommended when the GFI FaxMaker web interface is accessed from external networks so that all communications are encrypted.

To enable HTTPS for the GFI FaxMaker web interface:

Step 1: Configure an HTTPS certificate

Configure your IIS web server to use a certificate.

To create or import a certificate:

1. Open **Internet Information Services (IIS) Manager**.
2. Select **Server**.
3. In the left pane, under **IIS** click **Server Certificates**.
4. Under **Action**, you can import an existing certificate or create a self-signed certificate.

NOTE

The certificate created or imported in IIS needs to be distributed to the machines from where the GFI FaxMaker web interface needs to be accessed.

Step 2: Configure HTTPS binding

Ensure that HTTPS bindings is enabled for the web server hosting the GFI FaxMaker web site:

1. Open **Internet Information Services (IIS) Manager**.
2. Go to **Server > Sites**.
3. Right-click on **Default Web Site** and select **Edit Bindings**.
4. Click **Add...** and select **HTTPS**.
5. The default port is set to 443. If another port needs to be used it can be changed here.
6. Under **SSL certificate**, select the certificate imported or created in the previous step.
7. Click **OK** twice.
8. Click **Close** to complete the process.

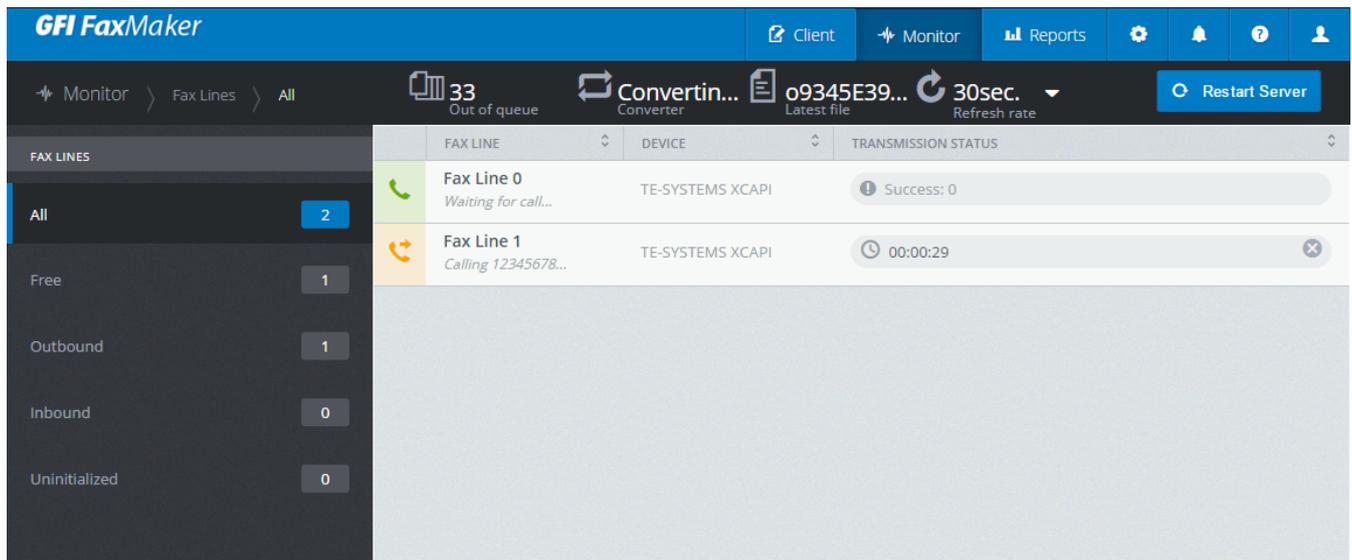
Step 3: Enforce the use of SSL

Enforce the use of SSL to ensure that HTTPS is required for users to access the GFI FaxMaker web interface:

1. Open **Internet Information Services (IIS) Manager**.
2. Go to **Server > Sites > Default Web Site**.
3. Select the GFI FaxMaker virtual directory. (Default is **Faxmaker**.)
4. In the left pane, under **IIS** click **SSL Settings**.
5. Select **Require SSL**.
6. In the **Client Certificate** options, select **Require**.
7. Click **Apply**.

After completing the steps above on your favorite browser access `https://servername/Faxmaker`.

5.4 Monitoring GFI FaxMaker operation



Screenshot 42: The GFI FaxMaker web monitor

Use the **GFI FaxMaker Monitor** to track and manage GFI FaxMaker fax and SMS transmission and queue operations.

To access the Monitor, [login](#) to the GFI FaxMaker web console and click the required dashboard from the **Monitor** tab in the top menu bar.

NOTE

Only fax administrators have access to the Monitor. For more information, refer to [Fax administrators](#) (page 101).

Use the following topics for information on how to use the GFI FaxMaker Monitor:

5.4.1 Monitoring Fax Lines	79
5.4.2 Monitoring Faxes in Queue	80
5.4.3 Monitoring SMS Devices and Queue	81

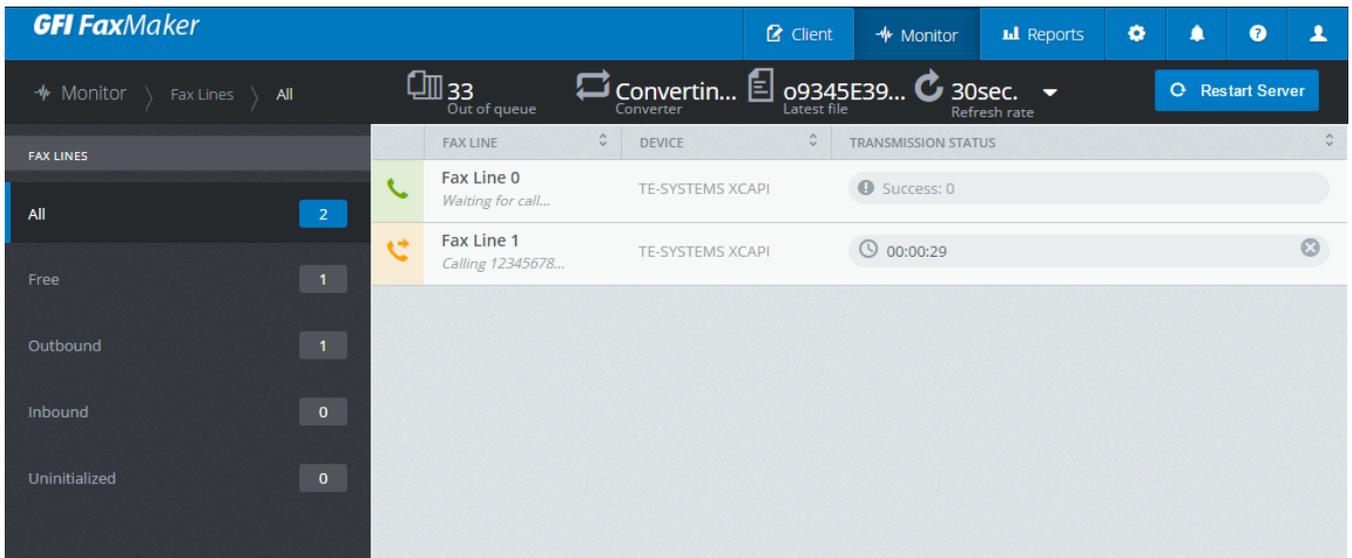
5.4.1 Monitoring Fax Lines

Use the GFI FaxMaker Monitor to track the activity of [fax lines and devices](#) in real-time. The **Fax Lines** dashboard displays all the configured fax devices and their current transmission state.

To access the Monitor, [login](#) to the GFI FaxMaker web console and click the required dashboard from the **Monitor** tab in the top menu bar.

NOTE

Only fax administrators have access to the Monitor. For more information, refer to [Fax administrators](#) (page 101).



Screenshot 43: Monitoring Fax Lines

Use the left pane on the dashboard, to filter fax lines by their current status.

Administrators can also take various actions to manage fax lines:

Action	Description
Change Refresh Rate	Set the time interval to refresh the data on the fax lines page.
Restart Server	Click to restart the GFI FaxMaker Fax Server service. Restarting the service is useful when encountering issues with fax lines or fax transmission. This service also requires a restart when applying changes to the faxing medium of choice (for example, after applying changes to the XCAPi configuration).
Initialize Fax Lines	On the left pane, click Uninitialized tab and locate the fax devices to initialize. This action is available for certain types of lines only.
Halt Fax Progress	To terminate the fax transmission on a particular line, click  in the Transmission Status column of that fax device. Click OK to confirm.

The **Fax Lines** monitor also displays information on:

Feature	Description
Out of queue	The number of faxes still pending to be processed and added in queue for transmission.
Converter	Displays the current activity of email to fax converter.
Latest File	The latest attachment processed by the fax service.
Refresh Rate	The time interval configured to refresh the content on the page.

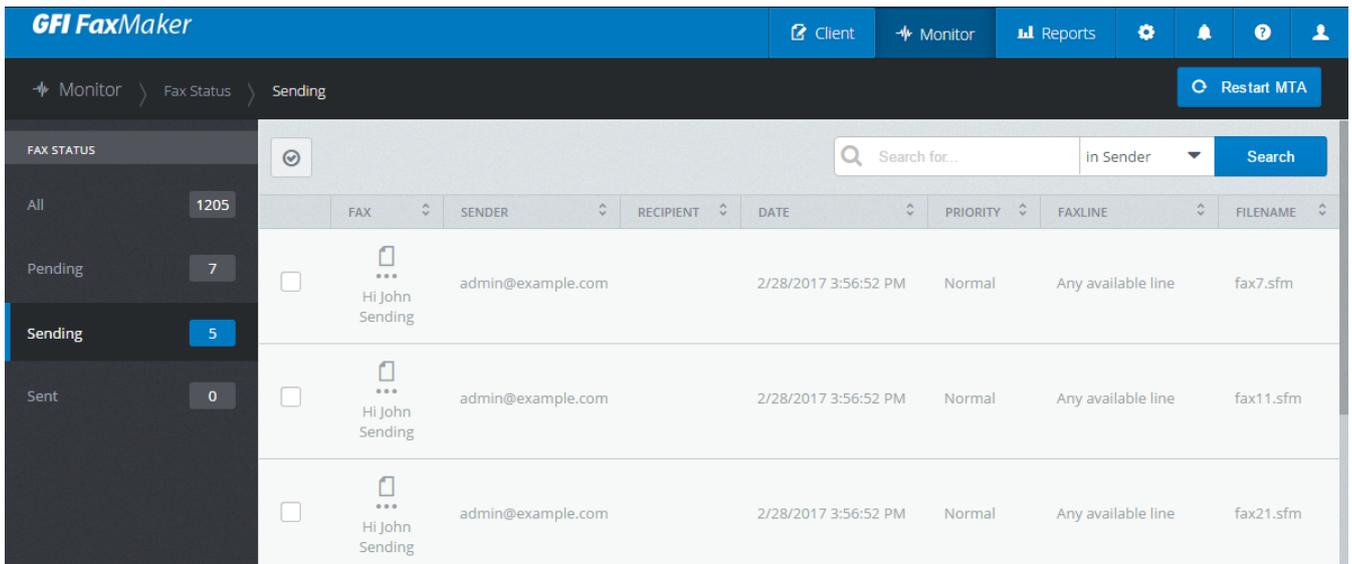
5.4.2 Monitoring Faxes in Queue

Use the GFI FaxMaker Monitor to track faxes that are in queue, ready to be transmitted.

To access the Monitor, [login](#) to the GFI FaxMaker web console and click the required dashboard from the **Monitor** tab in the top menu bar.

NOTE

Only fax administrators have access to the Monitor. For more information, refer to [Fax administrators](#) (page 101).



Screenshot 44: Monitoring Queued Faxes

Use the left pane on the dashboard, to filter faxes in the queue by their current status.

Administrators can use the **Queued Faxes** dashboard to:

Action	Description
Search faxes in the queue	Key in a word to search faxes in the Sender , Recipient or Priority fields in the queue.
View fax information	Double-click any fax in the queue to view more detailed information about that particular fax.
Remove a fax from the queue	Select one or more faxes to remove from the queue. You can also click  to select all displayed faxes. Click Delete and click OK to confirm deletion.
Restart MTA	Click to restart the GFI FaxMaker Message Transfer Agent service, when required.

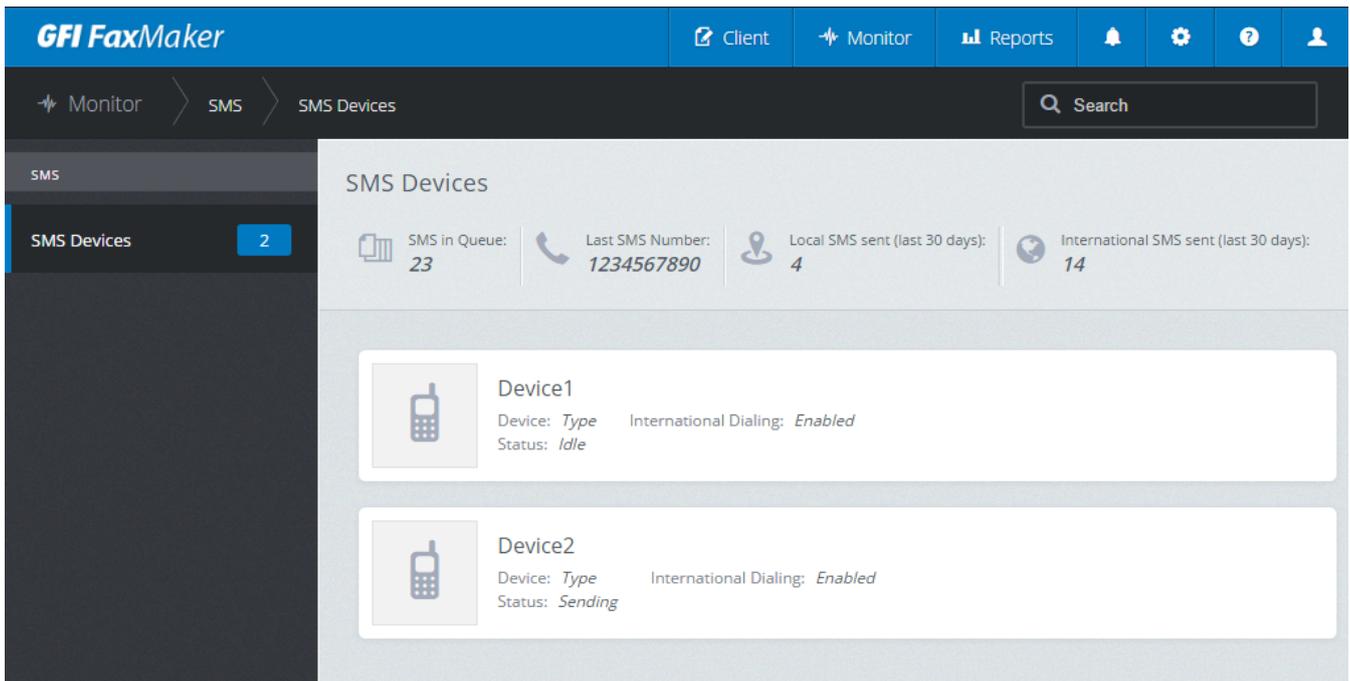
5.4.3 Monitoring SMS Devices and Queue

Use the GFI FaxMaker Monitor to track the activity of **SMS** devices and SMS transmission.

To access the Monitor, [login](#) to the GFI FaxMaker web console and click the required dashboard from the **Monitor** tab in the top menu bar.

NOTE

Only fax administrators have access to the Monitor. For more information, refer to [Fax administrators](#) (page 101).



Screenshot 45: Monitoring SMS

The **SMS** dashboard displays the list of SMS devices and their current transmission status and properties. The dashboard also contains information on:

Feature	Description
SMS in queue	The total number of SMS in queue to be sent to devices for transmission.
Last SMS Number	The last phone number on which the SMS was sent.
Local SMS sent (last 30 days)	The number of local SMS sent in last 30 days.
International SMS sent (last 30 days)	The number of international SMS sent in last 30 days.

5.5 Reports

GFI FaxMaker enables administrators to access and generate reports that provide insight on fax and SMS usage.

Reports are based on data logged to the GFI FaxMaker Firebird or Microsoft® SQL/MSDE [archiving database](#). Ensure that the database contains all the GFI FaxMaker data to be reported upon. For example, when changing the database backend from Firebird to Microsoft® SQL/MSDE, run the [Migration Tool](#) to migrate historical data from the Firebird database to the new database. This ensures that historical data is included in all reports that are generated.

To access reports, [log in](#) to the GFI FaxMaker web console and click the **Reports** tab from the top menu bar. Only GFI FaxMaker [administrators](#) have access to this screen and it is not shown to regular users that login to the web console.

Use the left pane of the **Reports** screen to filter between reports. In the **Default Reports** section, choose **All** to show all the default reports or click **Fax** or **SMS** to show default reports related to fax or SMS usage respectively. In the **Corporate** section, access your [Custom](#) or [Scheduled](#) reports.

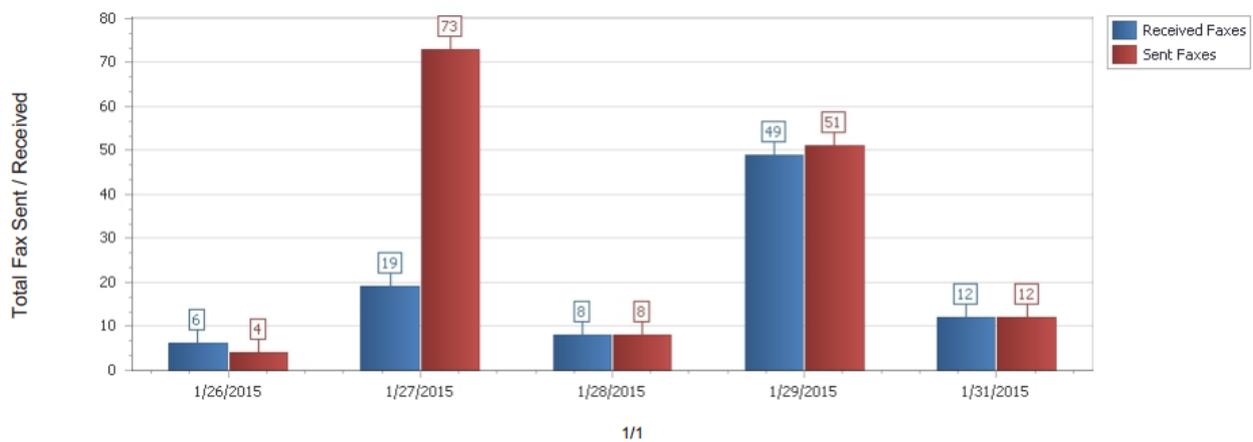


Fax Usage report (graphical)

Generated On: 2/2/2015 3:14 PM

REPORT PARAMETERS

Date Range: 1/26/2015 - 2/2/2015
 Host Name: N/A
 Billing Code: N/A
 User Email: N/A
 Fax Line Number: N/A
 Status: N/A



Screenshot 46: A sample graphical fax usage report

5.5.1 Generating reports

Reports can be downloaded immediately from the GFI FaxMaker web console or sent via email to a custom list of recipients.

1. Log in to the GFI FaxMaker web console and choose the **Reports** tab.
2. Use the left pane of the **Reports** screen to filter between reports. In the **Default Reports** section, choose **All** to show all the default reports or click **Fax** or **SMS** to show default reports related to fax or SMS usage respectively. In the **Corporate** section, access your **Custom** or **Scheduled** reports.
3. To generate and download a report without customizing settings, hover on report and click **Download now**. Alternatively click **Customize** to generate to open the report settings.
4. From the **General** tab, configure report options. The options available may vary between different report types. The following are the basic, most common options across reports.

Option	Description
Scope	The time period that the report data covers. Choose either a relative time period with respect to the date when the report is generated, for example, choose Last 7 days to show data for a week prior to the date when report is generated. Alternatively, choose a Custom date range with custom from and to dates.

Option	Description
Report for	Choose to show report data that has a particular property, such as the Status which allows you to filter reports depending on the transmission status of the message. In the Add filters text field, key in or choose the data to filter for. Click + to apply the filter. Repeat the process to add any different filters as applicable. For example, to show faxes transmitted over line 23 that failed, choose Fax Line , add filter 23 and click + . Then choose Status , select Failed and click + .
Group by	Defines how report data is grouped. Choose All to have different sections within the report grouped by all the possible groupings. Alternatively group data by a particular property, for example, choose Day to show total usage during each day within the scope.
Format	Choose the format of the report when it is generated.

5. When all report data is configured, choose how to generate the report:

- » **Save as Custom** - Click this button to save the report as a custom report before generating it, enabling you to save the report settings and re-generate the report without re-configuring the settings. For more information, refer to [Custom reports](#) (page 84).
- » **Download now** - Click this button to download the report as configured.
- » **Send Now** - Go to this tab to send the report via email. Specify the recipients of the report and click **Send**.
- » **Send via email periodically** - Go to the **Schedule** tab to send this report via email every couple of days. For more information, refer to [Scheduled reports](#) (page 85).

5.5.2 Custom reports

Custom reports are pre-configured reports with custom data filters that are readily available whenever required.

To open the list of custom reports, from the left pane go to **Corporate > Custom**.

Creating a custom report

1. Hover over a default report that will serve as the basis of your custom report and click **Customize**.
2. Specify a custom report name by clicking on the report name at the top and keying in the custom name. Report names must be unique.
3. Click on the report description underneath the name and key in a friendly description of the report to help you understand the aim of the report.
4. From the **General** tab, configure report options. The options available may vary between different report types. The following are the basic, most common options across reports.

Option	Description
Scope	The time period that the report data covers. Choose either a relative time period with respect to the date when the report is generated, for example, choose Last 7 days to show data for a week prior to the date when report is generated. Alternatively, choose a Custom date range with custom from and to dates.
Report for	Choose to show report data that has a particular property, such as the Status which allows you to filter reports depending on the transmission status of the message. In the Add filters text field, key in or choose the data to filter for. Click + to apply the filter. Repeat the process to add any different filters as applicable. For example, to show faxes transmitted over line 23 that failed, choose Fax Line , add filter 23 and click + . Then choose Status , select Failed and click + .

Option	Description
Group by	Defines how report data is grouped. Choose All to have different sections within the report grouped by all the possible groupings. Alternatively group data by a particular property, for example, choose Day to show total usage during each day within the scope.
Format	Choose the format of the report when it is generated.

5. Click **Save as Custom** to save the custom report. The report is stored and is accessible from the left pane tab **Corporate > Custom**.

Generating custom reports

To generate a custom report, from the left pane go to **Corporate > Custom**. Choose how you would like the report delivered to you:

- » **Download immediately**: hover over the report and click **Download now**.
- » **Send report via email**: Click on **Customize** and go to the **Send Now** tab. Specify the recipients of the report and click **Send**.
- » **Send via email periodically** - Click on **Customize** and go to the **Schedule** tab to send this report via email every couple of days. For more information, refer to [Scheduled reports](#) (page 85).

Modifying a custom report

To change the settings of a custom report, from the left pane go to **Corporate > Custom**. Hover over the report to modify and click **Customize**. Apply the required changes and click **Save**.

Deleting custom reports

Custom reports can be deleted one-by-one or by deleting multiple reports at once. To delete custom reports, from the left pane go to **Corporate > Custom**.

- » To delete multiple reports at one go, click on the check sign  in the top right corner of the reports to delete. When all reports to delete are selected, click  in the top left corner of the view. When prompted to confirm deletion, click **OK**.
- » To delete one report, hover over the report to delete and click the cross symbol  in the top left corner. When prompted to confirm deletion, click **OK**.

5.5.3 Scheduled reports

GFI FaxMaker reports enable you to generate reports on a pre-defined schedule to automate the generation of reports that are required on regular basis. Scheduled reports are sent via email to a custom list of email addresses at a particular frequency.

To open the list of scheduled reports, from the left pane go to **Corporate > Scheduled**.

Creating a scheduled report

1. Hover over a default or a custom report that will serve as the basis of your scheduled report and click **Customize**.
2. Specify a report name by clicking on the report name at the top and keying in the custom name. Report names must be unique.

3. Click on the report description underneath the name and key in a friendly description of the report to help you understand the aim of the report.
4. From the **General** tab, configure report options. The options available may vary between different report types. The following are the basic, most common options across reports.

Option	Description
Scope	The time period that the report data covers. Choose either a relative time period with respect to the date when the report is generated, for example, choose Last 7 days to show data for a week prior to the date when report is generated. Alternatively, choose a Custom date range with custom from and to dates.
Report for	Choose to show report data that has a particular property, such as the Status which allows you to filter reports depending on the transmission status of the message. In the Add filters text field, key in or choose the data to filter for. Click + to apply the filter. Repeat the process to add any different filters as applicable. For example, to show faxes transmitted over line 23 that failed, choose Fax Line , add filter 23 and click + . Then choose Status , select Failed and click + .
Group by	Defines how report data is grouped. Choose All to have different sections within the report grouped by all the possible groupings. Alternatively group data by a particular property, for example, choose Day to show total usage during each day within the scope.
Format	Choose the format of the report when it is generated.

5. Go to the **Schedule** tab and configure the schedule settings:

Option	Description
Send to	Add all the email addresses to receive the scheduled report. Separate multiple recipients using a comma (,) or semi-colon (;) symbols.
Start On	Choose the date and time when the schedule is to start being sent.
Frequency	Choose how frequent the scheduled email is to be sent.

6. Click **Schedule** to save the schedule settings. The report is stored and is accessible from the left pane tab **Corporate > Scheduled**.

Modifying a scheduled report

To change the settings of a scheduled report, from the left pane go to **Corporate > Scheduled**. Hover over the report to modify and click **Customize**.

- » To change the data shown in the report, apply the required changes in the **General** tab. Click **Save** to store changes.
- » To change the schedule when reports are sent, go the **Schedule** tab and apply the necessary changes. Click **Reschedule** to apply changes.

Deleting scheduled reports

Scheduled reports can be deleted one-by-one or by deleting multiple reports at once. To delete scheduled reports, from the left pane go to **Corporate > Scheduled**.

- » To delete multiple reports at one go, click on the check sign  in the top right corner of the reports to delete. When all reports to delete are selected, click  in the top left corner of the view. When prompted to confirm deletion, click **OK**.

» To delete one report, hover over the report to delete and click the cross symbol  in the top left corner. When prompted to confirm deletion, click **OK**.

5.5.4 Exporting activity data to a CSV

Export fax and SMS activity in a custom date range to a comma separated file. This is useful to track fax and SMS usage in a separate tool, for example, to create pivot charts using GFI FaxMaker data in spreadsheets.

To export activity data, [login](#) to the GFI FaxMaker web interface and go to the **Reports** tab. From the left pane under Categories, select the node to export data for:

- » **All** - export activity for both fax and SMS
- » **Fax** - export fax activity only
- » **SMS** - export SMS activity only

In the main pane, click on **Export Data**. Select the date range for the data to export and click **Export to CSV** to start the download.

NOTE

Alternatively you can also use the **Fax Archive data** report which provides more customization, scheduling and filtering.

The exported CSV contains the following columns:

Column	Description
Type	Defines whether the message is a fax or an SMS.
Direction	Defines if message is inbound (received) or outbound (sent).
Date	The complete date of transmission.
Day	The day number of transmission.
Month	The month number of transmission.
Year	The year of transmission.
Time	The full time of transmission.
Hour	The hour of transmission in 24-hour format.
Minute	The minutes of transmission.
Host Name	The name of the GFI FaxMaker server where transmission occurred.
Method Submitted / Routing Mechanism	The value of this column depends on the direction of the message: <ul style="list-style-type: none"> » Outbound messages: The method used by users to send the message. » Inbound message: Routing rules matched to deliver message to internal users.
Billing Code	The billing code value of outbound faxes if specified.
Sender Number	The Caller Line Identity Presentation (CLIP) or Caller ID of the fax sender if available.
Sender	The value of this column depends on the direction of the message: <ul style="list-style-type: none"> » Outbound messages: The email address of the user sending the message. » Inbound message: The sender's CSID if known.

Column	Description
Recipient Number	The message recipient's number.
Recipient Name	The recipient's name for outbound faxes. Note that this value is not always retrievable by GFI FaxMaker. For example, it can be determined if sending a fax from the web client using the web client address book (if a name is specified), but not retrievable if sending a fax from Microsoft Outlook using the Microsoft Outlook local contacts.
Recipient Company	The recipient's company name for outbound faxes. Note that this value is not always retrievable by GFI FaxMaker. For example, it can be determined if sending a fax from the web client using the web client address book (if a company name is specified), but not retrievable if sending a fax from Microsoft Outlook using the Microsoft Outlook local contacts.
Line	The GFI FaxMaker fax line used to transmit the message.
Fax Pages excluding coveragepage	Number of pages excluding the coveragepage for outbound faxes.
Fax Pages including coveragepage	Total number of fax pages sent or received.
Total Pages/SMS	Total number of fax pages or total number of SMS messages transmitted.
Resolution	The quality of fax resolution.
Speed	Fax transmission speed.
Retries	Number of times that GFI FaxMaker tried to send the fax. Value is 0 if sent fax is successfully transmitted on the first attempt.
Call duration (seconds)	Fax call duration in seconds.
Status	The transmission result: <code>Success</code> or <code>Failed</code> .

6 General configuration settings

This topic contains information about:

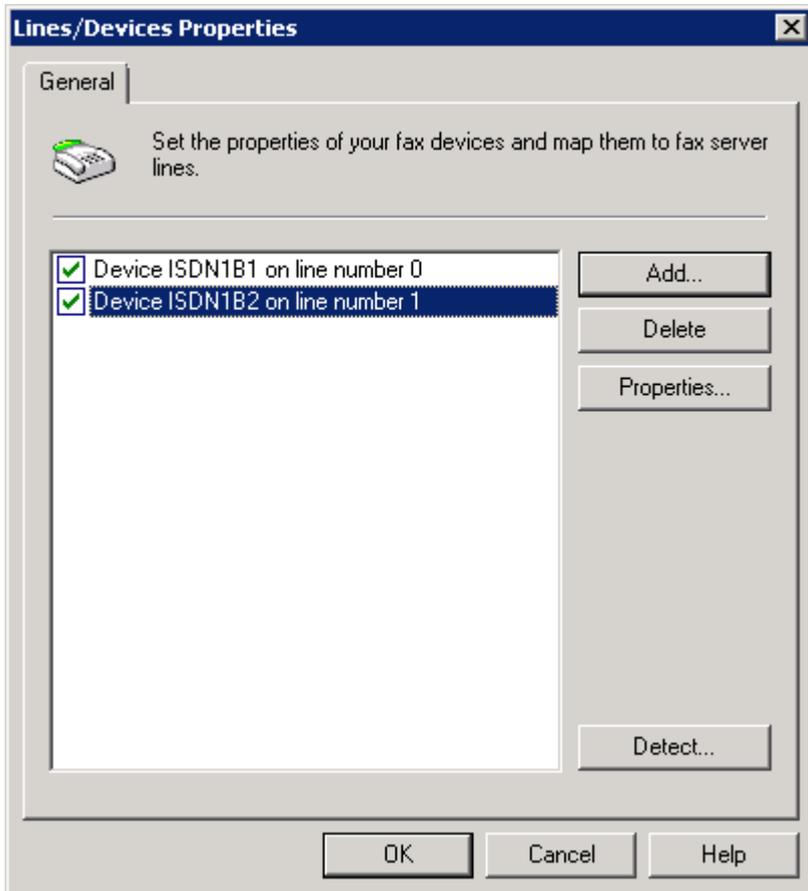
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See also:

- » [Settings for sending faxes](#)
- » [Settings when receiving faxes](#)

6.1 Fax Lines

A fax line is a physical telephone line assigned to a fax device (modem or ISDN/fax card). Depending on the device type, fax devices may support multiple lines. GFI FaxMaker enables you to configure different options per fax line.



Screenshot 47: The Line/Devices dialog

Fax lines are configurable from **GFI FaxMaker Configuration > Lines/Devices > Properties**.

For more information, refer to:

- » [Adding new fax lines](#)
- » [Editing fax lines](#)
- » [Deleting fax lines](#)
- » [Fax modem properties](#)
- » [Custom Modem Properties](#)

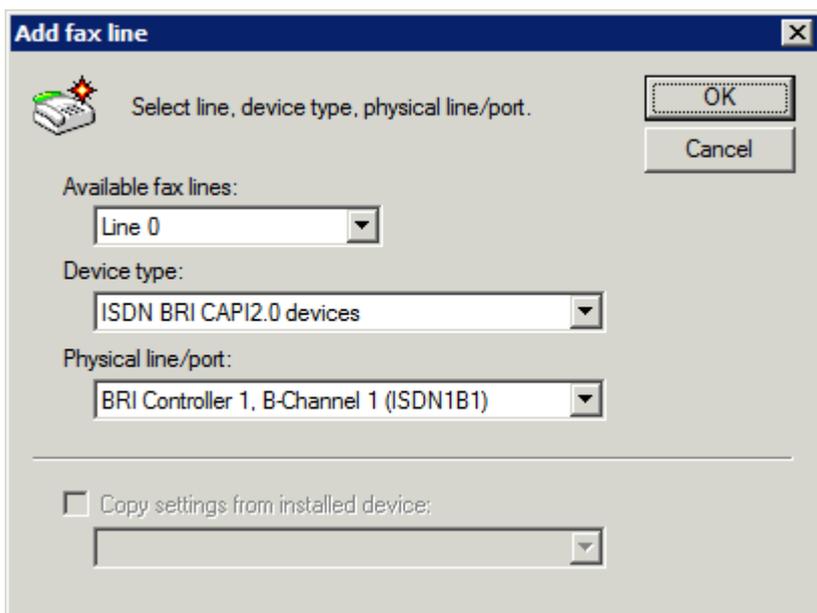
6.1.1 Adding new fax lines

NOTE

You can add the maximum number of lines supported by your fax device, up to the GFI FaxMaker limit of 128 lines.

1. Navigate to **GFI FaxMaker Configuration > Lines/Devices > Properties** and click **Add...**

2. When adding new fax modems after installing GFI FaxMaker, click **Detect** in the **Lines/Devices** dialog to attempt automatic detection and add them to the list of devices.



Screenshot 48: Adding an ISDN channel

3. Specify the following details:

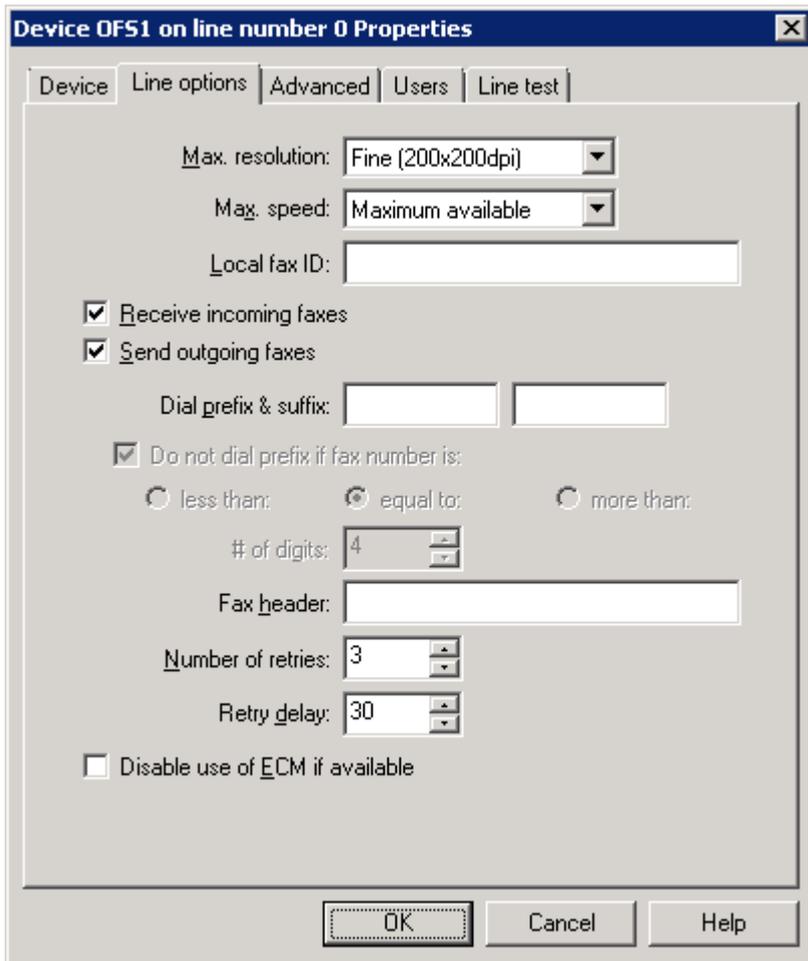
Setting	Configuration
Available fax lines	Select one of the available fax line numbers. This is used as a reference to that particular line.
Device type	Specify the type of fax device used.
Physical line/port	Select the channel or port to configure.
Copy settings from installed device	To copy the settings of a previously configured fax line, select this option and specify the fax line to copy settings from.

Click **OK**.

4. From the **Device** tab in the line properties dialog, configure:

Device Type	Settings
ISDN ISDN BRI CAPI2.0 devices ISDN PRI/IP CAPI2.0 devices ANALOG CAPI2.0 devices Gateway devices	<ul style="list-style-type: none"> » ISDN type - Select the ISDN device type. » MSN numbers - Enter the number to answer incoming calls for. Key in a full number entry (for example, 82733099) or a prefix number (for example, 82733 to answer all numbers in the range 82733000-8273099). » Answer All - Click to answer all incoming calls received on the ISDN channel.
Brooktrout	<ul style="list-style-type: none"> » Card type - Select the Brooktrout device type » Line capabilities - depending on the properties of your fax device, select the appropriate type, None, DTMF or DID/ISDN. » Tone dialling - If supported, select for faster dialling. If disabled, pulse dialling is used. » Wait for dialtone - Starts dialling only when a dial tone is established. » Rings until answer - Configure the number of rings before answering incoming calls.

Device Type	Settings
GFI Fax Modem Driver	<ul style="list-style-type: none"> » Modem type - Select the fax modem type. » Advanced Modem Options - GFI FaxMaker ships with a number of pre-configured devices. Click to create new devices or manually configure device options. For more information, refer to Fax modem properties (page 97). » Initialization string - Displays the string used by the modem driver to initialize the modem. » Rings until answer - Configure the number of rings before answering incoming calls. » Tone dialling - If supported, select this option for faster dialling. If disabled, pulse dialling is used. » Wait for dialtone - Starts dialling only when a dial tone is established. » Check for busy tone - Checks if line is busy before sending fax. » Speaker mode - Configure speaker settings: Always Off, Until Connected or Always On. » Speaker volume - Set the appropriate volume.
Microsoft® Fax Modem Driver	<ul style="list-style-type: none"> » Type - Select the Fax type. » Rings until Answer - Configure the number of rings before answering incoming calls. <p>NOTE: Ensure that the Fax Server role is installed and the Fax service is running from the Services applet.</p>
Fax Services	<p>Displays settings for the selected Fax Service line. To send faxes through an online fax provider, specify your account details in the Fax Services node. For more information, refer to Fax services (page 116).</p> <p>To associate a line with a DID, choose the DID number from the list. This option requires that the Fax service account is validated in the Fax services node.</p> <p>IMPORTANT</p> <p>Online fax services require the full recipient number, including the international dial symbol "+", the country and area codes. Do not use hyphens, spaces or dashes between any parts of the fax number.</p> <p>The full recipient number is also required when sending faxes locally.</p>

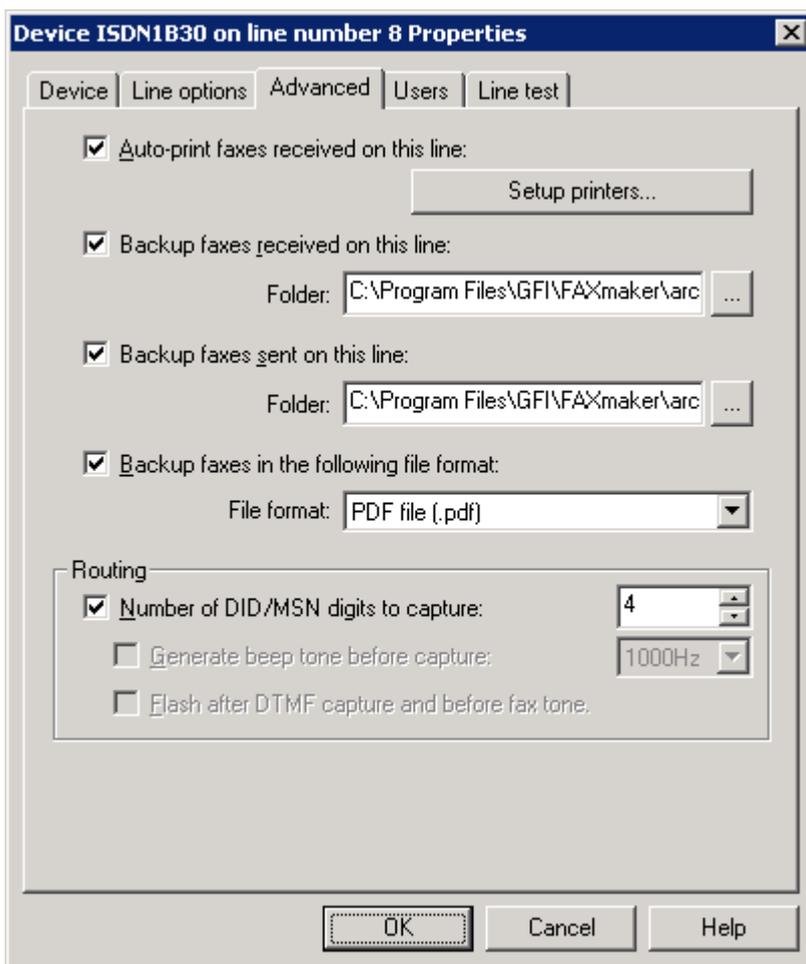


Screenshot 49: The line options tab

5. From the **Line options** tab, configure:

Option	Configuration
Max. resolution	Set the maximum resolution for faxes sent and received on this line.
Max. speed	Set the maximum speed for faxes sent and received on this line. A lower speed limit will increase call duration but on an analog line, it helps to avoid loss of quality when there is noise in the telephone line.
Local fax ID	Specify the TSID value sent to recipients when sending faxes over this line. This is usually set as the line's fax number. For more information, refer to Customizing the caller ID and TSID of outbound faxes (page 149). NOTE: Some PABX devices or telecommunications service providers do not accept a custom TSID when making outbound calls. In this case it is recommended to leave this field empty.
Receive incoming faxes	Allow receiving faxes on this fax line.
Send outgoing faxes	Allow transmission of faxes on this fax line.
Dial prefix & suffix	If your lines are located behind a PBX, you can specify a dial prefix or suffix.

Option	Configuration
Do not dial prefix if fax number is	Exclude dialling of prefix when the fax number is less than, equal to or more than a certain number of digits. This can be useful when using different providers for local, national or international faxes.
Fax header	Key in the text to show at the very top of a fax, for example the company name.
Number of retries	Sets the number of times GFI FaxMaker will try to re-send a fax.
Retry delay	Set a delay between retries, in seconds.
Disable use of ECM if available	By default, GFI FaxMaker automatically corrects errors caused by noise that interferes with the transmission of a fax. Select this option to disable automatic correction.

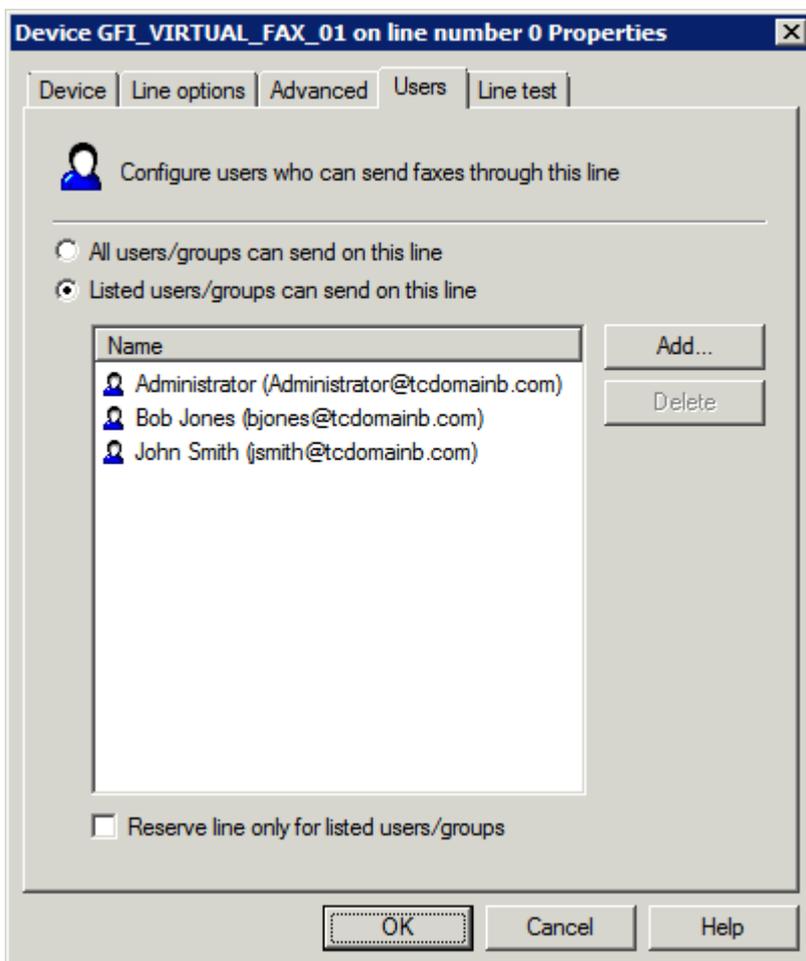


Screenshot 50: The advanced line/device options

6. From the **Advanced** tab, configure:

Option	Configuration
Auto-print faxes received on this line	Automatically print faxes received on this line. <ol style="list-style-type: none"> 1. Click Setup printers... to configure printing settings. 2. In the Incoming faxes auto-print setup, configure how to size faxes for printing or select Nearest size to automatically detect the appropriate size to use. 3. Click Print setup... to select the printer to print for that particular paper size. 4. Click OK.

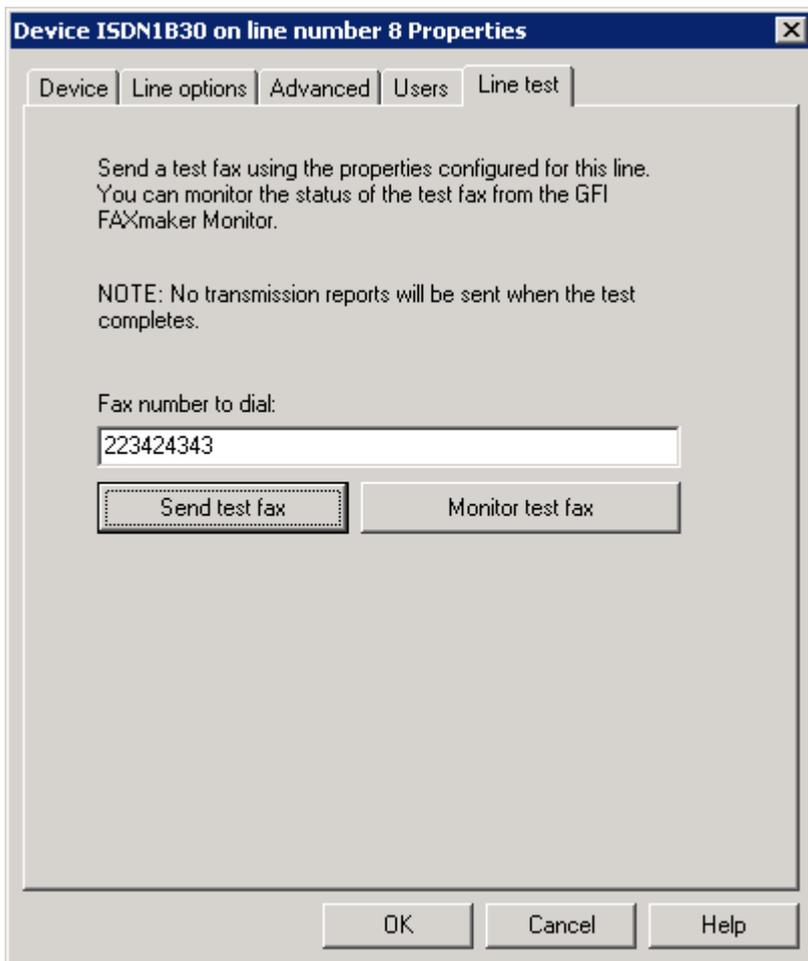
Option	Configuration
Backup faxes received on this line	Stores a copy of all incoming faxes in a folder. Key in the folder where to store received faxes.
Backup faxes sent on this line	Stores a copy of all outgoing faxes in a folder. Key in the folder where to store received faxes.
Backup faxes in the following file format	Select the format to use when backing up faxes.
Number of DID digits to capture	Routes faxes to individual users based on the DID number. Set the number of digits to capture. For example, use 2 to capture from 00 to 99.
Generate beep tone before capture	Fax device gives a beep when answering a call as a signal to the user to enter the DTMF number. If available, it is recommended that this option is always selected. From the drop down list select the tone of the beep.
Flash after DTMF capture and before fax tone	Only used for Multitech modems. Select this option so that after successfully detecting a tone, the fax server goes 500ms on hook (flash).



Screenshot 51: The users tab

7. From the **Users** tab, select the users allowed to send faxes using this line. Configure:

Option	Description
All users/groups can send on this line	Allows all licensed users to send faxes on this line.
Listed users/groups can send on this line	Limits the users that can send faxes on this line.
Add...	Specify users/groups allowed to send faxes on this line.
Delete	Deletes selected users/groups from the list of allowed users.
Reserve line only for listed users/groups	Sets the line exclusively reserved for the selected users/groups



Screenshot 52: Line test tab

8. From the **Line test** tab, you can send a fax to test the line settings. Key in a fax number where to send the test fax in **Fax number to dial** and click **Send test fax**. Click **Monitor test fax** to launch the GFI FaxMaker Monitor in a web browser and monitor the status of the test fax. For more information, refer to [Monitoring GFI FaxMaker operation](#) (page 79).

9. Click **OK** to save settings.

10. When changing settings for any lines/devices, it is necessary to restart the **GFI FaxMaker Fax Server** service for changes to take effect. Click **Yes** to restart.

6.1.2 Editing fax lines

1. Navigate to **GFI FaxMaker Configuration > Lines/Devices > Properties**.
2. Select the device line to edit and click **Properties**.
3. Perform the required changes in the rule properties and click **OK** to save changes.

4. When changing settings for any lines/devices, it is necessary to restart the **GFI FaxMaker Fax Server** service for changes to take effect. Click **Yes** to restart.

6.1.3 Deleting fax lines

1. Navigate to **GFI FaxMaker Configuration > Lines/Devices Properties**.

2. Select the device line to remove and click **Delete**.

3. Click **OK** to save settings.

4. When changing settings for any lines/devices, it is necessary to restart the **GFI FaxMaker Fax Server** service for changes to take effect. Click **Yes** to restart.

6.1.4 Fax modem properties

GFI FaxMaker can send and receive faxes using a wide range of fax modems connected to the server's Communications ports.

To send faxes using these devices:

1. In the **Lines/Devices** list, add the modem as a **GFI Fax Modem Driver**.

2. In the device properties dialog, select the **Modem type** by model name and number, or select a **Generic class** that best matches device's properties.

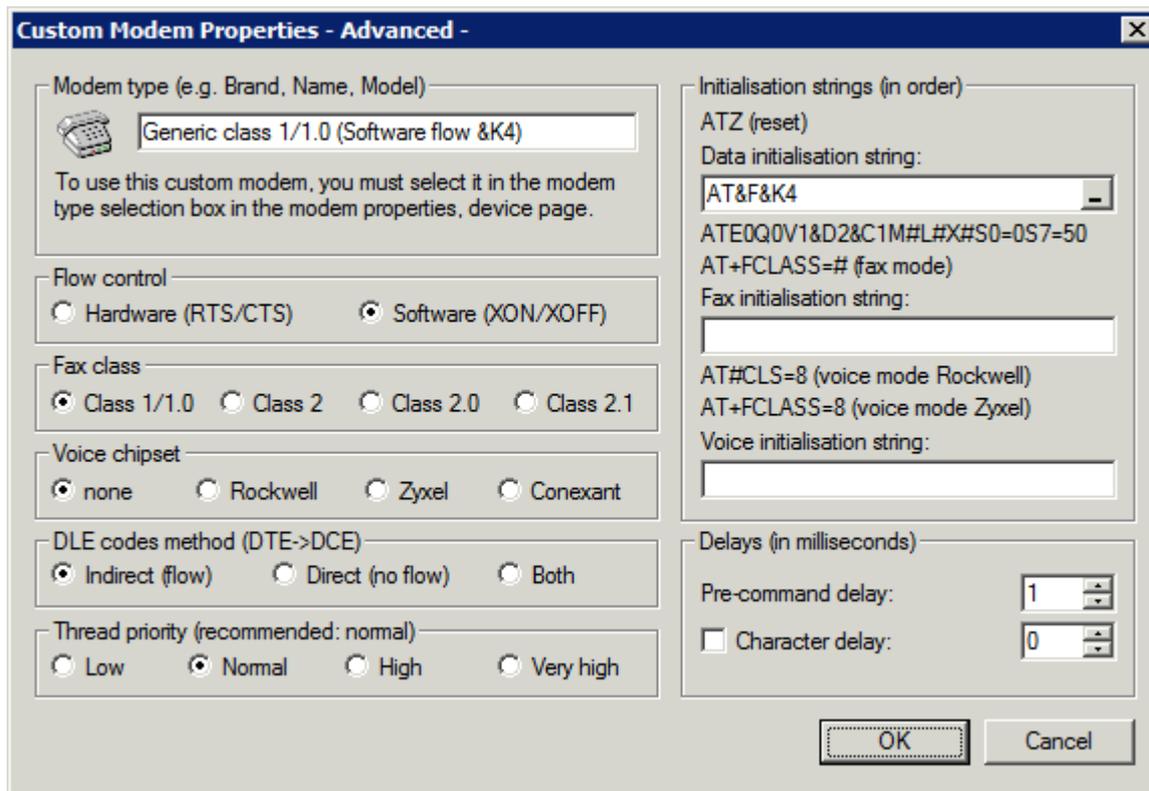
3. Click **Advanced modem options...** and select:

Table 1: Manage fax modems

Option	Description
New modem (current modem as template)...	Adds a new modem to modems lists. Initial properties are based on selected modem type. For more information, refer to Custom modem properties (page 98).
Edit modem...	Loads the modem properties. For more information, refer to Custom modem properties (page 98).
Delete modem	Removes selected modem from list.
Reset all modem drivers to default	Resets all modems properties to default.

4. Configure the other device/line options and click **OK**.

Custom modem properties



Screenshot 53: Custom modem properties dialog

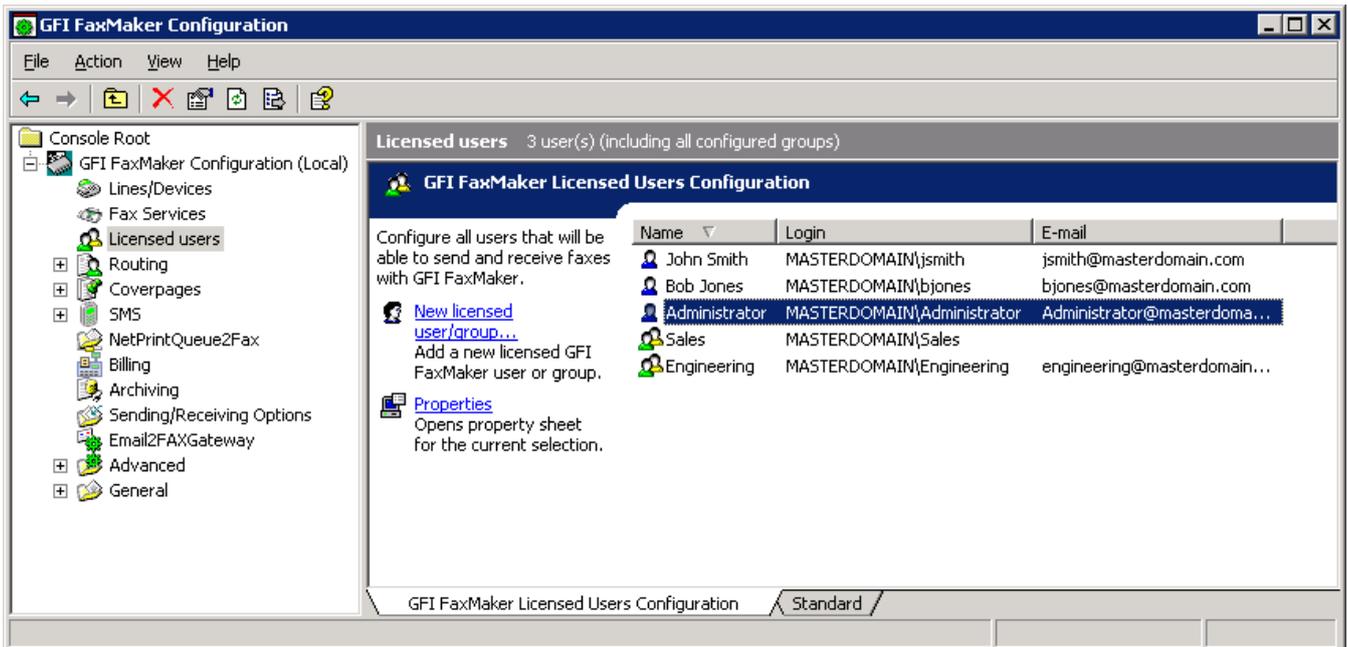
Customize the following options, based on fax modem specifications:

Option	Description
Modem type	Key in a user friendly name for the modem type, such as the device brand, name or model number.
<ul style="list-style-type: none"> » Flow control » Fax class » Voice chipset » DLE codes method » Thread priority » Data initialization string » Fax initialization string » Voice initialization string » Pre-command delay » Character delay 	Provide settings based on device specifications.

Click **OK** to apply settings.

6.2 Licensed users

The list of users who can send or receive faxes must be configured in GFI FaxMaker.



Screenshot 54: List of GFI FaxMaker users and groups

The list of licensed users is available from **GFI FaxMaker Configuration > Licensed Users** node.

Managing users/groups	Description
Adding users or groups	<ul style="list-style-type: none"> » Active Directory: Click New licensed user/group.... Use the Active Directory user and group picker to choose the users and groups to add. » GFI Directory: To create new users, click New licensed user/group... and specify the user details. Alternatively, add users that already exist in GFI Directory or add Windows users, from the User Import tool. Right-click Licensed users and choose Import users.... For more information, refer to Importing users to GFI FaxMaker (page 100).
Welcome email	<ul style="list-style-type: none"> » Active Directory: The Welcome email provides high-level instructions to users on how to use GFI FaxMaker. » GFI Directory: Use the Welcome email to send instructions to your new users to set an account password . Your users use this password to login to the web client. This feature may also be used when users need to reset their existing password. <p>To send a Welcome email, select the users or groups to send the Welcome email to and click Send welcome instructions. The Welcome email can also be sent to individual members of a group. Open the group properties and select the Welcome Email tab. Select the users to send the Welcome email to and click Send.</p>
Reset user password	<ul style="list-style-type: none"> » Active Directory: Reset user passwords and manage other user account settings directly in Active Directory. » GFI Directory: Right-click the user whose password you want to reset and click Reset Password. GFI FaxMaker sends an email to the user containing a link to the GFI FaxMaker web interface with a unique reset password token which can only be used one time. The user must follow the link and create a new password.
User/Group properties	<p>Right-click a user/group and click Properties to show user properties.</p> <ul style="list-style-type: none"> » Active Directory: User properties are retrieved from Active Directory » GFI Directory: User properties are retrieved from GFI Directory. User details can be customized directly from the Properties screen. On clicking OK, changes are applied in GFI Directory. For Web Service API users, password reset can be done directly in the GFI FaxMaker Configuration.

Managing users/groups	Description
Web Service API users	<p>Register users that will make use of the GFI FaxMaker Web Service API functionality. Right-click user to register and from the Web API Service tab select Web Service API User. For more information refer to the GFI FaxMaker API manual.</p> <p>NOTE: Received faxes that are routed to users registered for Web Service API are stored in the Web Service API queue and not forwarded to the user via email.</p> <p>To remove a user from the Web API register, right-click user and from the Web API Service tab uncheck Web Service API User. Click OK.</p> <p>NOTE: When unregistering users from the Web API Service, all faxes in their name that are in the service queue are permanently deleted. Unregister users with caution.</p>
Removing users/groups	<p>Right-click a user/group to delete and click Delete. Click OK to confirm.</p> <p>Users are removed from GFI FaxMaker but not removed from Active Directory or GFI Directory.</p>

NOTE

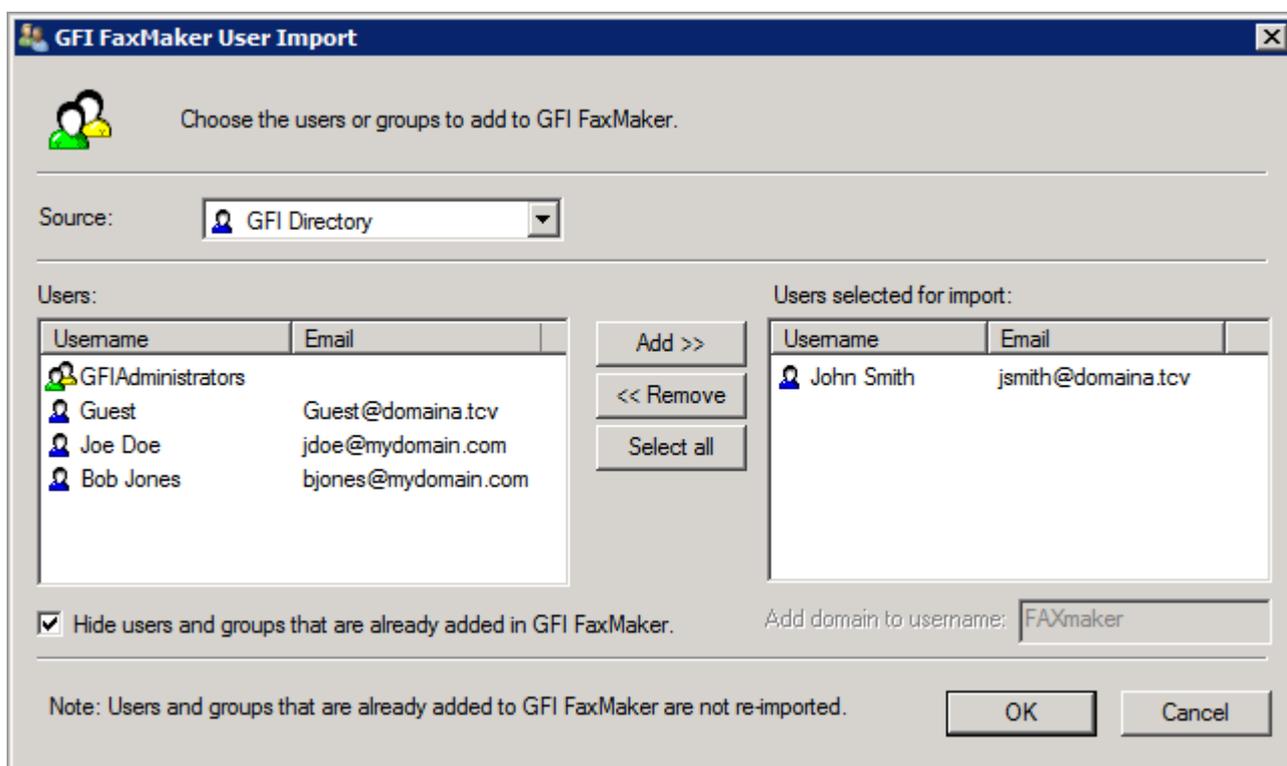
You can also create a dedicated Active Directory group (for example, **GFI FaxMaker users**) so that you can manage all GFI FaxMaker users directly in Active Directory.

6.2.1 Importing users to GFI FaxMaker

The user import feature enables the addition of users to GFI FaxMaker from GFI Directory or from Windows®.

NOTES

1. This feature is only available when GFI FaxMaker uses GFI Directory as a user directory service.
2. To import users from a CSV, first import the CSV in GFI Directory and then use this tool to import the users to GFI FaxMaker. For more information on how to import users from a CSV in GFI Directory refer to <https://manuals.gfi.com/en/dir2015v2/#topics/importusersbulk.htm>



Screenshot 55: Importing users from GFI Directory

Right-click **Licensed users** and select **Import users....** From **Source**, choose from where to get the users to import.

Source	Description
GFI Directory	Add users from GFI Directory. Select the users to import and click Add .
Local machine	Import Windows® user accounts from the GFI FaxMaker server. Select the users to import and click Add . NOTE: Since Windows account users do not have an email address available, one needs to be configured. To use the account name and append a domain to it, specify the email domain in the Add domain to username field. For example if the username is JohnSmith and the domain is mydomain.com, the generated email address is JohnSmith@mydomain.com. If the email address is different, you can change the email address later from Licensed users screen.
Remote machine	Import Windows® user accounts from a separate server. Key in the remote server name or IP address and click List users . Select the users to import and click Add . NOTE: Since Windows account users do not have an email address available, one needs to be configured. To use the account name and append a domain to it, specify the email domain in the Add domain to username field. For example if the username is JohnSmith and the domain is mydomain.com, the generated email address is JohnSmith@mydomain.com. If the email address is different, you can change the email address later from Licensed users screen.

On selecting all users to add, click **OK**. Users are now included in the Licensed Users screen and can start using GFI FaxMaker.

For users to login and send faxes/SMS using the web client, send them a Welcome email so that they can set an account password. Select the added users and click **Send welcome instructions**.

6.2.2 Unlimited Users license - Types of users

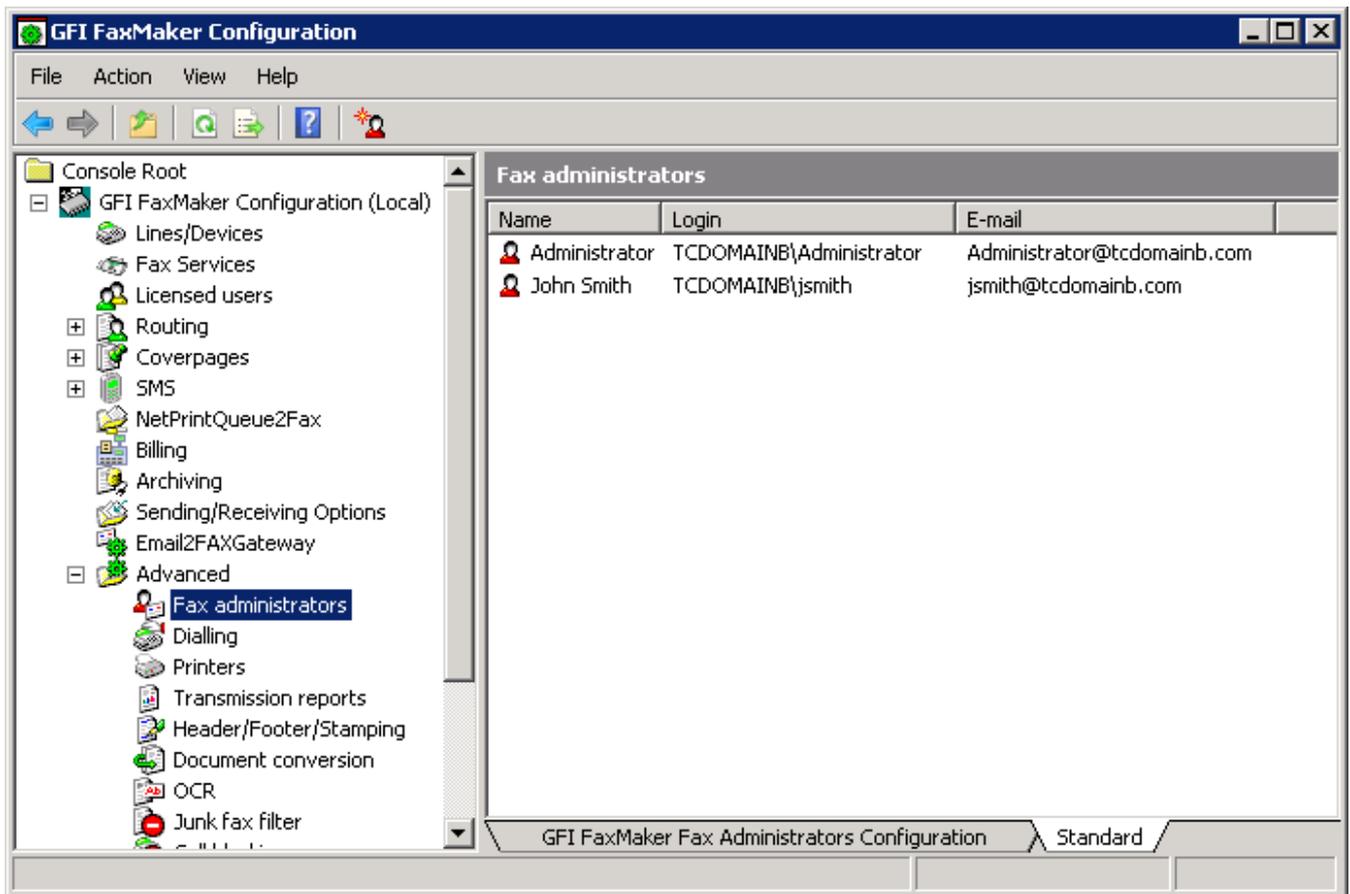
This feature is only applicable to the GFI FaxMaker Unlimited Users license.

Configure the types of users allowed to send/receive faxes using GFI FaxMaker. Navigate to **GFI FaxMaker Configuration > Advanced > Miscellaneous** node:

- » **Allow non-AD users to send faxes** - Allows all faxes/SMS to be processed by GFI FaxMaker, even if user is not in Active Directory.
- » **Only allow users in the Licensed user list to send faxes** - allows a user to send faxes/SMS only if included in the **Licensed User** list.

6.3 Fax administrators

A fax administrator's primary role is to monitor and manage GFI FaxMaker operation. Administrators are also notified via email when critical conditions occur and have access to the **Monitor** and **Reports** screen in the GFI FaxMaker web interface.



Screenshot 56: List of Fax administrators

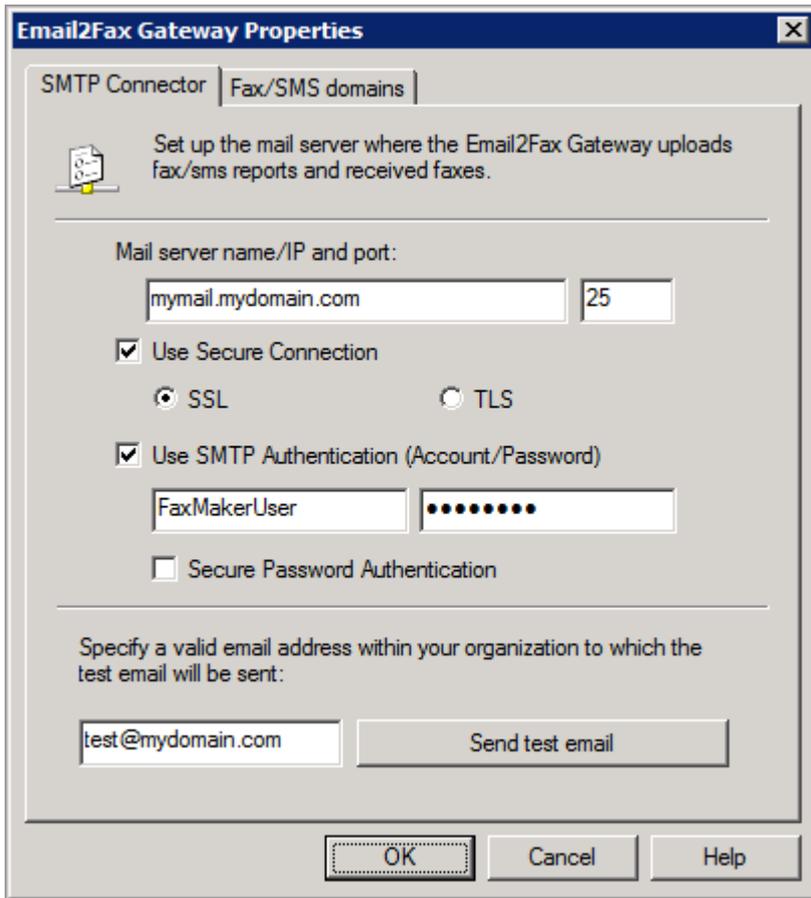
To manage the list of Fax administrator, from GFI FaxMaker Configuration navigate to **Advanced > Fax administrators**.

Function	Description
Add administrators	Click New... to select the users to set as administrators. » Active Directory: Choose the Active Directory objects to set as administrators. When using Active Directory, a fax administrator does not have to be added as a Licensed User. » GFI Directory: Select the users that you would like to set as administrators. Only users that were previously added to the Licensed Users screen can be set as administrators.
Edit administrator properties	Right-click administrator and select Properties .
Remove administrators	Right-click administrator and select Delete .

6.4 Mail server settings

Configure the mail server to use when GFI FaxMaker sends emails:

1. From GFI FaxMaker Configuration, right-click **Email2FaxGateway** and select **Properties**.



Screenshot 57: Email2Fax Gateway setup

2. From the **SMTP Connector** tab, configure the following options:

Option	Description
Mail server name/IP and port	Enter the name or IP address of the mail server and the port number.
Use Secure Connection	Choose this option when the mail server requires a secure connection. Choose the type of encryption required SSL or TLS .
Use SMTP Authentication	Instructs GFI FaxMaker to connect to the mail server using a particular user credentials. Enter credentials in the Account and password text boxes.
Secure Password Authentication	Select this option if Secure Password Authentication is required by the mail server.

3. To ensure that GFI FaxMaker can send email through the configured mail server, enter an email address and click **Send test email**. Ensure that the test email is received in the mailbox. If the test fails, troubleshoot setup and configuration. For more information, refer to [Email2FaxGateway test fails](#) (page 203).

4. Click **OK**.

6.5 POP3 Downloader

GFI FaxMaker can be configured to retrieve faxes and SMS for transmission from a POP3 mailbox. Configure the POP3 Connector to poll and download faxes from a dedicated GFI FaxMaker POP3 mailbox.

IMPORTANT NOTES

1. This option is not available if mail server is configured to route faxes and SMS to GFI FaxMaker via SMTP.
2. Ensure that the POP3 mailbox is dedicated exclusively to GFI FaxMaker. GFI FaxMaker downloads all emails contained in this mailbox for processing and emails are permanently deleted from the mailbox after download.
3. The method of sending fax/SMS via email when using POP3 is different than SMTP. For more information, refer to [Sending faxes/SMS via a POP3 Mailbox](#) (page 105).

Configure POP3 mailbox settings:

1. From GFI FaxMaker Configuration, right-click **Email2FaxGateway** and select **Properties**.

The screenshot shows the 'Email2Fax Gateway Properties' dialog box with the 'POP3 Downloader' tab selected. The dialog contains the following fields and options:

- SMTP Connector** and **POP3 Downloader** tabs.
- Instruction: 'Set up the mailbox from where fax/sms messages are downloaded for sending.'
- Enable POP3 downloader**
- Mail server name/IP and port:** Text box containing 'POP3Server' and a port box containing '110'.
- Mailbox account and password:** Text box containing 'administrator' and a password box with 10 dots.
- Full email address of mailbox specified above:** Text box containing 'fax@faxmaker.com'.
- Use SSL**
- Time interval to check for new faxes (in minutes):** Spin box set to '1'.
- Buttons: **OK**, **Cancel**, **Help**.

Screenshot 58: The POP3 connector

2. From the **POP3 Downloader** tab, configure the following options:

Option	Description
Enable POP3 downloader	Enable downloading of faxes from a POP3 mailbox.
Mail server name/IP and port	Enter the name or IP address of the mail server and the port number.
Mailbox account and password	Key in credentials to access mailbox.
Full email address of mailbox specified above	The email address of the POP3 mailbox.

Option	Description
Use SSL	Instructs GFI FaxMaker to connect and communicate with the mail server using SSL.
Time interval to check for new faxes	Key in the frequency for GFI FaxMaker to check for new faxes in the GFI FaxMaker mailbox.

3. Click **OK**.

6.5.1 Sending faxes/SMS via a POP3 Mailbox

When using the GFI FaxMaker POP3 Downloader to poll fax/SMS emails from a dedicated POP3 mailbox, the method of sending via email is different than when using SMTP.

Sending faxes via a POP3 mailbox

Licensed users can use their preferred email client and compose fax emails as follows:

Parameter	Description
Email recipient	In the To field, enter the POP3 mailbox email address. For example, <code>fax-makermailbox@mydomain.com</code> .
Email subject	The email subject is used as the fax subject and shown, if configured, in the fax coverage page.
First line of email body	Key in the fax recipient's fax number in the first line of the email body in the following format: <code>::fax number</code> For example: <code>::+441273123456</code>
Email body	The rest of the email body is shown in the fax coverage page.
Attachment	Include any attachments to include in the fax.

Sending SMS via a POP3 mailbox

Licensed SMS users can use their preferred email client and compose SMS emails as follows:

Parameter	Description
Email recipient	In the To field, enter the POP3 mailbox email address. For example, <code>fax-makermailbox@mydomain.com</code> .
Email subject	The email subject is ignored.
Email body	<ul style="list-style-type: none"> » First line: key in <code>::SMS</code> to declare that the email is an SMS. » Second line: key in the recipient's SMS number in the following format: <code>::SMS number</code> » Third line: key in the short message text. For example: <code>::SMS</code> <code>::+44123456789</code> Hello John, how are you?
Attachment	Attachments are ignored.

6.6 Fax and SMS domain names

When installing GFI FaxMaker, connectors are configured on the mail server (either automatically or manually) to route all emails addressed to particular domains to GFI FaxMaker. The default fax and SMS domains are `*@faxmaker.com` and `*@smsmaker.com`.

When domain users send emails to these domains, the mail server routes these emails to GFI FaxMaker which converts and transmits them over fax or SMS.

For example, with the default fax domain, users can send a fax to number 123456 by composing an email addressed to `123456@faxmaker.com`.

6.6.1 Modifying the default fax and SMS domain names

IMPORTANT - Use this feature with caution.

Failing to complete the steps described in this topic will hinder mail flow and consequently fax transmission.

It is recommended to only modify the domain names when constraints in the mail environment do not allow using the default domain names. For example, when using Microsoft® Office 365™ Email only account types.

GFI FaxMaker enables modification of the default fax and SMS domain names. When these are modified, users send an email addressed to the custom domain name.

For example, when modifying the fax domain name to `fax.mydomain.com`, users can send a fax to number 123456 by composing an email addressed to `123456@fax.mydomain.com`.

Step 1: Configure connectors on mail server

NOTE

When GFI FaxMaker is installed on the Microsoft® Exchange Server, the connectors are modified automatically in [Step 2](#).

Create new or modify existing connectors on the mail server using the new domain names. Connectors should route all emails addressed to the fax and SMS domain names to the GFI FaxMaker server.

For example, to use `fax.mydomain.com` as your fax domain name, on your mail server create a connector that routes all emails addressed to `fax.mydomain.com` to GFI FaxMaker.

IMPORTANT

If the connectors on the mail server are not modified, emails addressed to the custom fax & SMS domains are sent over the Internet, probably resulting in an NDR.

For more information how to configure connectors in your environment, refer to [Mail Servers](#).

Step 2: Change domain names from GFI FaxMaker Configuration



Screenshot 59: Customizing the fax and SMS domain names

1. From GFI FaxMaker Configuration, right-click **Email2FAXGateway** node and select **Properties**.
2. From the **Fax/SMS domains** tab, specify custom **Fax domain name** and/or **SMS domain name** (for example, `fax.mydomain.com` and `sms.mydomain.com`).
3. Click **OK** to apply changes.

NOTE

To restore the default `faxmaker.com` and `smsmaker.com` domains, click **Reset to default** and click **OK**.

Step 3: Test the new settings

When completed, it is recommended to test this functionality by sending a test fax from an email account to the new domain names. Check that the email is received by GFI FaxMaker in the [GFI FaxMaker Monitor](#).

6.7 Fax archiving

GFI FaxMaker can archive all inbound and outbound faxes to a central location. This enables the recording all fax communications and the retrieval of old faxes.

There are 2 methods of archiving:

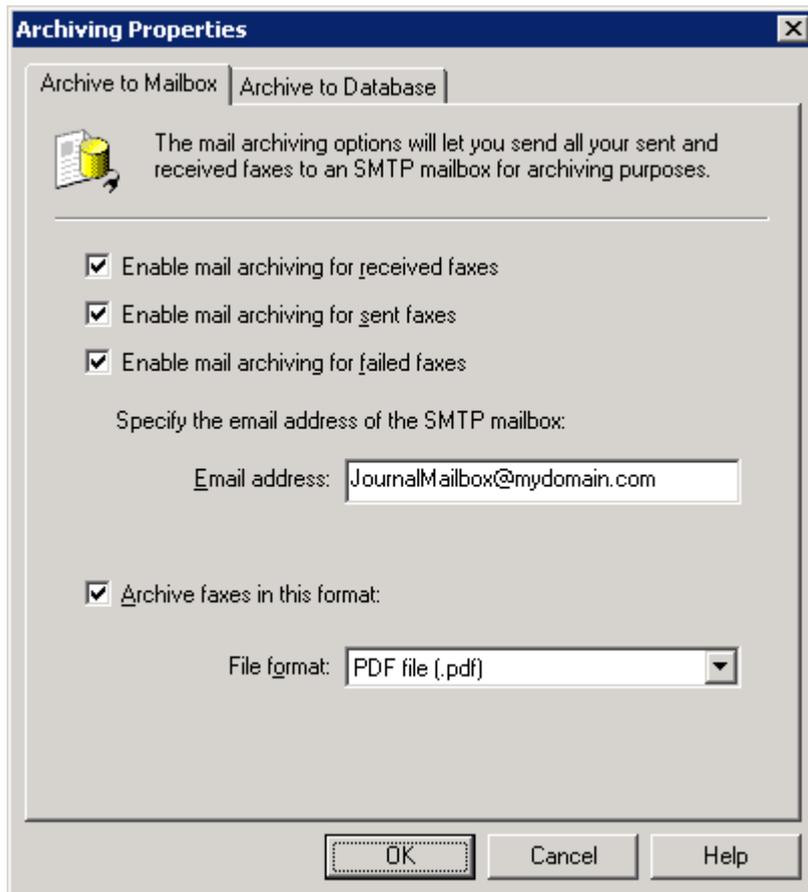
» **Send fax copies to an email address** - copies of transmitted, received and/or failed faxes are sent via email to a mailbox. You can then use an email archiving solution, such as GFI Archiver, to archive the mailbox. For more information, refer to [Archive to mailbox](#) (page 108).

» **Archive to a database** - Store all faxes in a Firebird or a Microsoft® SQL/MSDE database. For more information, refer to [Archive faxes to database](#) (page 109).

6.7.1 Archive to mailbox

Use this option to send a copy of incoming, outgoing and/or failed faxes to an email address. This includes transmission reports and the fax as attachment.

1. From GFI FaxMaker Configuration, right-click **Archiving** node and select **Properties**.



Screenshot 60: Archiving to an email archiving package

2. In the **Archive to Mailbox** tab, select the type of faxes to archive:

Option	Description
Enable mail archiving for received faxes	Enable received faxes archival.
Enable mail archiving for sent faxes	Enable sent faxes archival.
Enable mail archiving for failed faxes	Enable failed faxes archival.
Email address	Specify the email address where to forward archived faxes. NOTE: Email address must be included in the Licensed users list of GFI FaxMaker.
Archive faxes in this format	By default, GFI FaxMaker archives faxes in .fax format. To archive in a different format (for example PDF) enable and select the format.

3. Click **OK**.

6.7.2 Archive faxes to database

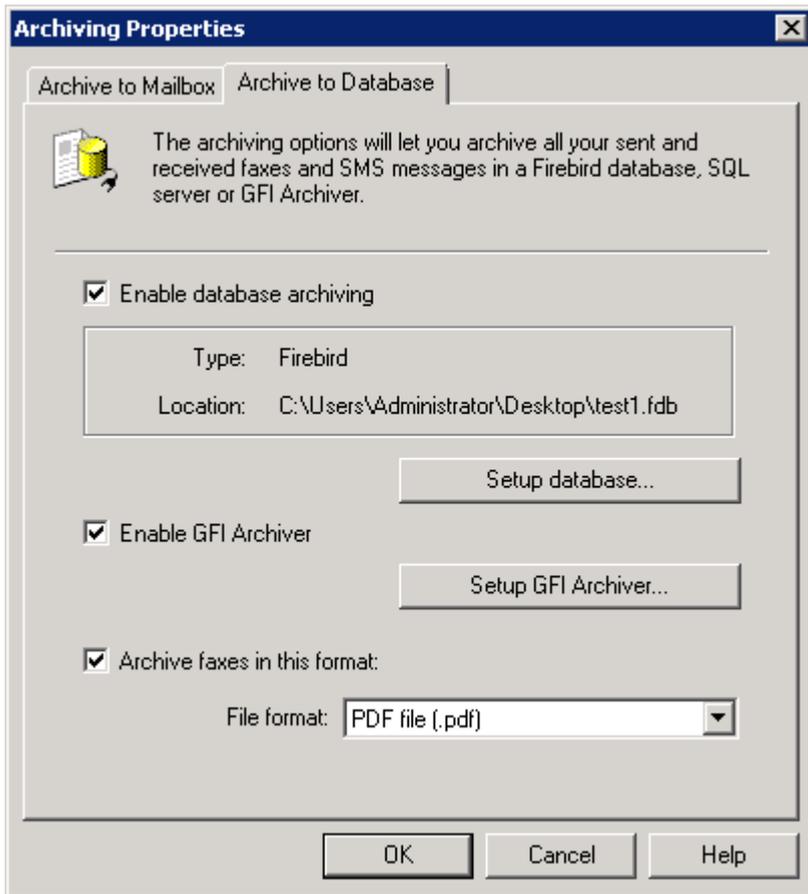
GFI FaxMaker can archive all faxes and SMS to a Firebird or a Microsoft® SQL/MSDE database. The database is used by the GFI FaxMaker [Reports](#) and the [Archive Viewer](#) to show reports and information about sent and received faxes and SMS.

Choosing a database

Database type	Description
Firebird	Firebird is a free and open source database format. When chosen, GFI FaxMaker automatically creates and configures a Firebird database using the specified database location and filename. No further configuration is required. This database is used to store fax images. Fax metadata is always stored in a separate Firebird database and is used in Reports and Archive Viewer. A Firebird database has a size limit of 10GB. When the database reaches 10GB, GFI FaxMaker does not continue to archive faxes. Before this occurs, it is recommended to switch to and migrate data to Microsoft® SQL/MSDE.
Microsoft® SQL/MSDE	A Microsoft® SQL/MSDE database typically does not have size limitations, unless limitations are imposed by the database administrator. GFI FaxMaker stores all metadata and fax images in the database configured. Configure a Microsoft® SQL/MSDE server and specify the server details as per instructions below. GFI FaxMaker can either create a new database or use a pre-created database dedicated for GFI FaxMaker data. NOTE: Archive data stored on a Microsoft® SQL/MSDE server cannot be migrated back to Firebird.

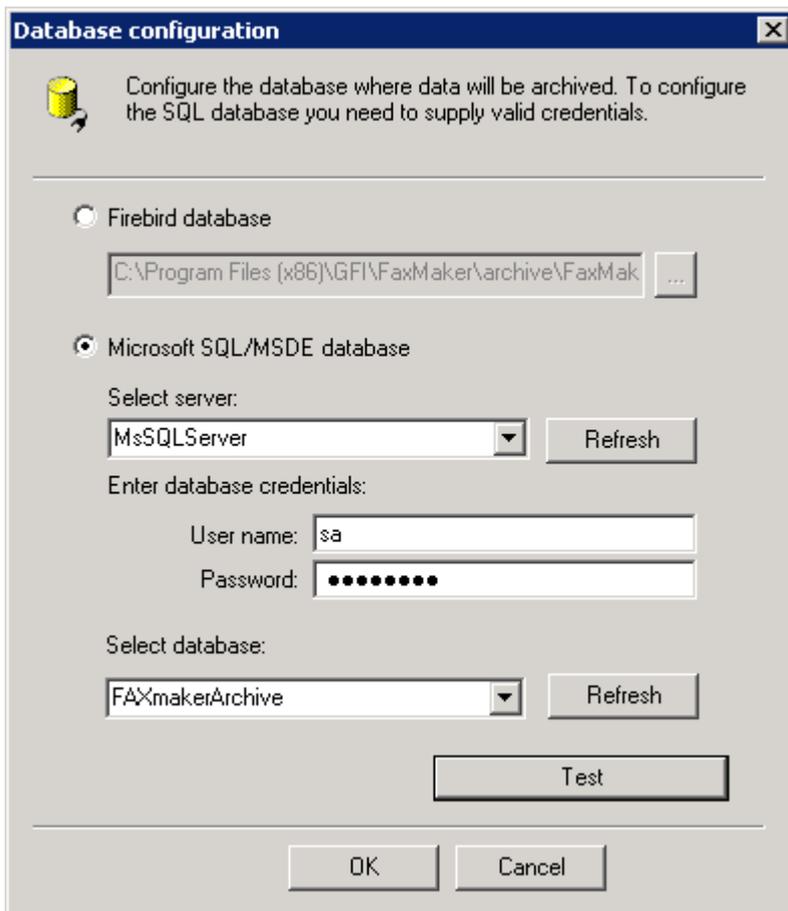
How to enable fax archiving

1. From GFI FaxMaker Configuration, right-click **Archiving** node and select **Properties**.



Screenshot 61: Archiving properties

2. In the **Archive to Database** tab, select **Enable database archiving**.



Screenshot 62: Database configuration

3. Click **Setup Database** to configure the database where to store faxes:

Option	Description
Firebird database	Enable archiving to a Firebird database. Key in or browse to the location where to store the database file and specify the database name in .FDB format. A Firebird database has a size limit of 10GB. When the database reaches 10GB, GFI FaxMaker does not continue to archive faxes.
Microsoft® SQL/MSDE database	Archive to a Microsoft® SQL Server® or MSDE database. Key in the server name/IP or select from the list of automatically detected servers. Enter credentials to connect to the server. In Select database , specify the database to archive to. Choose one of the detected databases from the list or archive to a new database called FAXmakerArchive that is automatically created by GFI FaxMaker. NOTES: <ul style="list-style-type: none"> » GFI FaxMaker archiving requires mixed mode authentication to be enabled on the SQL Server®. » The database name cannot contain any spaces or special characters.. » Some databases may have size limitations. Ensure that this limit is not exceeded.

4. Click **Test** to verify settings and click **OK**.

5. To archive faxes and SMS to GFI Archiver, select Enable GFI Archiver and configure settings. For more information, refer to [Archive faxes to GFI Archiver](#) (page 112).

6. By default, GFI FaxMaker archives faxes in .TIFF format. To archive in a different format, for example PDF, select **Archive faxes in this format** and specify custom format required.

7. Click **OK**.

NOTE

GFI FaxMaker [Reports](#) and the [Archive Viewer](#) read the data from the current active database as configured above. When changing the database type, for example from Firebird to Microsoft® SQL, data in the older database is not shown in reports and in the Archive Viewer. Use the Migration Tool to migrate data from the old database to the new database so that old data is shown. For more information, refer to [Migrating archive data between databases](#) (page 115).

6.7.3 Archive faxes to GFI Archiver

Sent and received faxes and SMS can be archived to GFI Archiver. With this feature enabled, faxes and SMS can be easily identified, searched and retrieved using GFI Archiver, ensuring that communications history is secure, accessible and meet a number of compliance and eDiscovery regulations.

Requirements

Before using this feature, ensure that:

- » GFI Archiver is installed, properly configured and functional.
- » GFI Archiver is accessible from the GFI FaxMaker server. To confirm this, try to login to GFI Archiver via a web browser from the GFI FaxMaker server.
- » If inclusion or exclusion lists are used in GFI Archiver, ensure that these are properly configured so that GFI FaxMaker users are not blocked by these lists.
- » For compliance purposes, ensure that GFI Archiver configuration meets your legal requirements. For example, retention policies maybe configured to automatically delete archived items, in breach of your fax retention requirements.

Enable archiving to GFI Archiver

1. From GFI FaxMaker Configuration, right-click **Archiving** node and select **Properties**.
2. In the **Archive to Database** tab, select **Enable GFI Archiver** and click **Setup GFI Archiver....**



Screenshot 63: Configuring GFI Archiver connection settings

3. Specify the GFI Archiver connection details:

Option	Description
GFI Archiver URL	Key in the URL used to launch GFI Archiver. This is the same URL used when load GFI Archiver from a web browser. Ensure that this location is accessible from the GFI FaxMaker server. If the GFI Archiver URL is secure (HTTPS), GFI FaxMaker validates the SSL certificate to ensure that the certificate is valid. For more information refer to Other notes section below.
GFI Archiver administrator credentials	Key in the credentials of a user with GFI Archiver administrative privileges.

4. Click **Test** to verify connection and authentication with GFI Archiver. If the test fails ensure that the GFI Archiver address is accessible form the GFI FaxMaker server and that the credentials entered are correct.

5. Click **OK**.

6. In the **Archive to Database** tab, choose the format to archive fax images in.

7. Click **OK** to apply settings and start archiving to GFI Archiver.

Other notes

» When enabling the above settings, GFI FaxMaker starts archiving faxes and SMS that it processes to GFI Archiver, but it does not add old and historical archive data. Use the Migration Tool to copy old GFI FaxMaker data to GFI Archiver. For more information, refer to [Migrating archive data between databases](#) (page 115).

» When connection with GFI Archiver cannot be established, faxes and SMS are temporarily stored in a folder until connection is re-established. Items are temporarily stored in the following location: <GFI

FaxMaker installation folder>\archive\DBCACHE. GFI FaxMaker attempts to re-archive items every 60 minutes.

» If the GFI Archiver URL is secure (HTTPS), by default GFI FaxMaker does not accept invalid or untrusted certificates. To ignore untrusted certificates, create the following registry key and restart the GFI FaxMaker Attendant service:

Registry Location	<ul style="list-style-type: none"> » 64-bit servers: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\GFI Fax & Voice\FAX-maker\Config » 32-bit servers: HKEY_LOCAL_MACHINE\SOFTWARE\GFI Fax & Voice\FAXmaker\Config
Key Value Name	IgnoreSSLPolicyErrors
Key Value Type	REG_DWORD (32bit)
Key Value Data	1

For more information, refer to the GFI Archiver documentation from http://go.gfi.com/?pageid=MAR_DownloadDocumentation.

6.7.4 Viewing faxes archived to a database

The GFI FaxMaker Archive Viewer enables users to view sent and received faxes. If [database archiving](#) is enabled, the tool can also be used to view fax images.

NOTE

As an alternative to this tool, you can also use the [Fax Archive data report](#) to download archive data to a CSV file. Fax image previews, however, can only be done via the Archive Viewer.

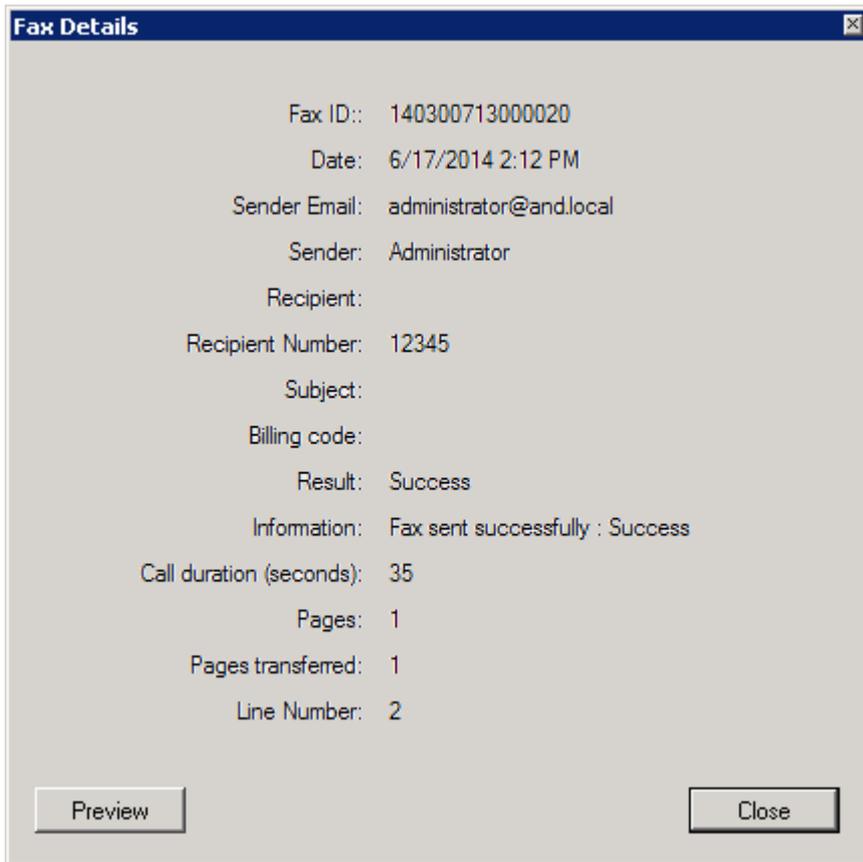
To access the Archive Viewer, go to the GFI FaxMaker installation folder and open the **ArchiveViewer** folder. Load **GFI.FaxMaker.ArchiveViewer.exe**.

	Direction	Date	Sender	Recipient / Routed To	Subject	Pages	Result
▶	Out	04/06/2010 18:52	John Doe			2	✓
	Out	12/06/2010 18:52	Bob Jones			1	✓
	Out	22/06/2010 18:52	Bob Johnson			2	✓
	Out	02/07/2010 18:52	Joe Bloggs			2	✓
	Out	22/07/2010 18:52	John Smith			1	✓
	In	22/06/2014 18:52	44444444	johnson@mydomain.com	Fax received from 44444444 (4...	1	✓
	In	22/06/2014 18:52	33333333	bloggs@mydomain.com	Fax received from 33333333 (3...	1	✓
	In	22/06/2014 18:52	22222222	cameron@mydomain.com	Fax received from 22222222 (2...	1	✓
	In	23/06/2014 18:52	11111111	bob@mydomain.com	Fax received from 11111111 (1...	1	✓
	In	22/07/2014 18:52	123456789	john.smith@mydomain.com	fax received from 123456789 (3...	1	✓

Screenshot 64: The GFI FaxMaker Archive Viewer

The list of archived faxes is displayed, showing the most important information.

Click on a fax to show more detailed information.



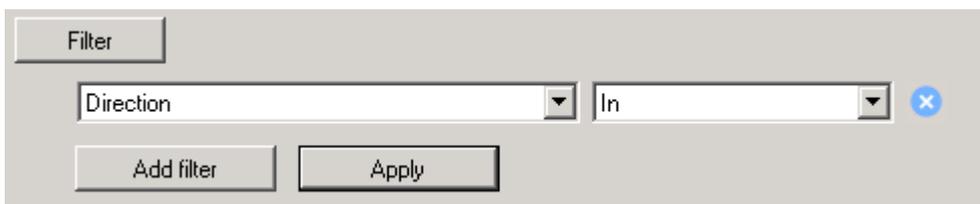
Screenshot 65: Viewing fax details in the GFI FaxMaker Archive Viewer

When viewing the detailed fax information you can also:

- » Click **Preview** to open the fax in the archived format.
- » (Outbound faxes only) Click **Resend** to resend the fax.

Searching archived faxes

To search through the list of archived faxes, click **Filter** to show the filtering pane.



Screenshot 66: Filtering faxes in Archive Viewer

Select a filtering parameter and key in or choose the data to filter. You can also:

- » Click **Add filter** to add more filters.
- » Click  next to a filter to remove it.

When all the required filtering parameters are configured, click **Apply** to filter the results. The Archive Viewer shows faxes that match all the specified filters.

6.7.5 Migrating archive data between databases

GFI FaxMaker includes a tool to export archived data from one database format to another.

This tool is useful in various scenarios, including:

- » When using a Microsoft Access archive database with GFI FaxMaker version 2014 or earlier, and upgrading to version 2015 or later to use a Firebird database.
- » Changing your database format, for example, upgrade from Firebird to Microsoft SQL.
- » Copy all GFI FaxMaker archived data to GFI Archiver.

Archive data can be copied between the following database formats:

Source database type	Destination database type
Microsoft Access	Firebird
Microsoft Access	Microsoft SQL
Microsoft Access	GFI Archiver
Firebird	Microsoft SQL
Firebird	GFI Archiver
Microsoft SQL	Microsoft SQL
Microsoft SQL	GFI Archiver

Important notes:

- » GFI FaxMaker [Reports](#) and [Archive Viewer](#) use the currently active archive database as configured in the GFI FaxMaker Configuration. Use the Migration tool to ensure that all archive data is included in the active database,
- » The Migration tool copies the archive data from the source database to the destination, so the data in the source database is retained.
- » Migration of data can take a long time depending on various factors such as the size of the data to migrate, disc read and write speeds and network bandwidth when migrating data to remote servers.
- » When a migration process is run and then run again using the same source and destination databases, data is not duplicated on the destination database if the source database is not altered in any way. If source database is renamed, content altered or the re-migration run on a different server, data may become duplicated on the destination database..

Using the Database Migrator tool

1. From the GFI FaxMaker Configuration, select the **Archiving** node.
2. From the right pane, click **Migration Tool** to open the GFI FaxMaker Database Migrator and click **Next**.
3. Select a source database to copy GFI FaxMaker data from. Choose the database type and specify the source database details. Click **Next**.
4. Select the destination database where data from the source database will be copied. Choose the database type and specify the destination database details. Click **Next**.
5. Click **Next** to start migration. On completion click **Close**.

6.8 Fax services

GFI FaxMaker can send and receive faxes through supported online fax providers. To use this feature, GFI FaxMaker requires an internet connection and a subscription with a supported online fax service provider:

- » [GFI Online Fax Service](#)
- » [etherFAX fax service](#)

With Fax Services, GFI FaxMaker does not require a faxing device, enabling GFI FaxMaker to be installed in a virtual environment such as Microsoft Hyper-V, Microsoft Virtual Server, Microsoft Virtual PC or VMware.

When sending a fax via Fax Services, GFI FaxMaker sends the fax via a secure HTTPS connection to the service provider. The provider transmits the fax to the recipient and sends back a confirmation to GFI FaxMaker which then delivers the transmission report to the sender.

If your provider assigns dedicated fax numbers to your subscription, faxes received on these numbers are sent to GFI FaxMaker via a secure HTTPS connection. GFI FaxMaker then processes and delivers the fax to the intended recipients.

For more information go to http://go.gfi.com/?pageid=FM_FaxServices.

6.8.1 Specifying the fax number

Online fax services require the full recipient number, including the international dial symbol "+", the country and area codes. Do not use hyphens, spaces or dashes between any parts of the fax number.

The full recipient number is also required when sending faxes locally.

Example 1: When sending a fax to Czech Republic number 313-414-515 use `+420313414515@faxmaker.com`. Where:

- » + is the international dial prefix
- » 420 is the Czech Republic country code
- » 313414515 is the fax number

Example 2: Sending a fax to a UK number, with area code 01273, and number 123-456. In this case use `+441273123456@faxmaker.com`. Where:

- » + is the international dial prefix
- » 44 is the UK country code
- » 1273 is the area code (in the case of the UK the preceding 0 is dropped when using the international dial number)
- » 123456 is the fax number

6.8.2 Configuring a GFI Online Fax Service account

When a GFI Online Fax Service account is available, specify the account details in GFI FaxMaker:

1. From GFI FaxMaker Configuration, right-click **Fax Services** node and select **New fax service account**.
2. Select **GFI Online Fax Service** and click **OK**.

Screenshot 67: New GFI Online Fax Service account

3. Configure the following options:

Option	Description
Account name	Key in a friendly account name which will be used to identify this service.
User ID	Enter your GFI Online Fax Service user ID. This usually starts with MBX.
Password	Key in you GFI Online Fax Service account password.

4. Click **Validate Account** to check if GFI FaxMaker can access the service using the details provided.

5. In **Receive poll interval in minutes** specify the frequency for GFI FaxMaker to check for new faxes.

6. Click **OK**.

Next, configure a fax line for the fax service so that GFI FaxMaker can start sending/receiving faxes from this service. For more information, refer to [Fax Lines](#) (page 90).

6.8.3 Configuring an etherFAX fax service

When an etherFAX account is available, specify the account details in GFI FaxMaker:

1. From GFI FaxMaker Configuration, right-click **Fax Services** node and select **New fax service account**.
2. Select **etherFAX** and click **OK**.

Screenshot 68: New etherFAX account

3. Configure the following options:

Option	Description
Account name	Key in a friendly account name which will be used to identify this service.
etherFAX Account	Enter your etherFAX account. This usually starts with EFAX- .
etherFAX Server	Choose your preferred etherFAX server location.
User ID	Your etherFAX username specified when signing up to the service.
Password	Key in you GFI Online Fax Service account password.

4. Click **Validate Account** to check if GFI FaxMaker can access the service using the details provided.

5. In **Receive poll interval in minutes** specify the frequency for GFI FaxMaker to check for new faxes.

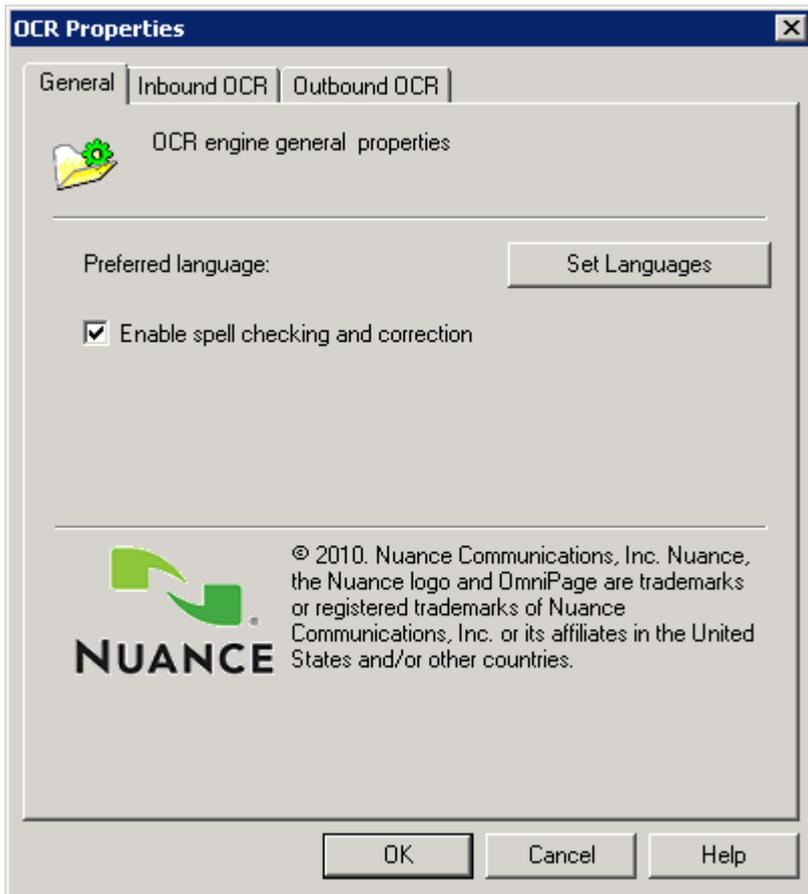
6. Click **OK**.

Next, configure a fax line for the fax service so that GFI FaxMaker can start sending/receiving faxes from this service. For more information, refer to [Fax Lines](#) (page 90).

6.9 OCR

Optical Character Recognition (OCR) converts received and sent fax content to text. Due to the nature of fax technology, the content of sent and received is not usable by the system. By converting faxes to text, the fax content is more usable, for example, by enabling users and administrators to search through the fax content.

1. From GFI FaxMaker Configuration right-click **Advanced > OCR** and select **Properties**.



Screenshot 69: OCR properties

2. Configure the following options:

Option	Description
Set Languages	Click to select the languages to use during OCR analysis. NOTE: The languages available depend on license type.
Enable spell checking and correction	By enabling this option, the OCR engine checks and corrects spelling problems.

3. From the **Inbound OCR** tab, configure OCR options for received faxes:

Option	Description
Append OCR output text below fax report	Insert the OCR text in the body of the transmission report email. This enables searching through faxes using the email client's search function.
Attach OCR output text file with fax report	Store the OCR text in a text file and attach it in the transmission report.
Maximum pages to convert	Set the maximum number of pages to convert to text.

4. From the **Outbound OCR** tab, configure OCR options for sent faxes:

Option	Description
Enable OCR on sent faxes	Select this option to run OCR on outgoing faxes.
Directory	Specify a folder where to store the OCR content. The text is stored in a plain text file.
Maximum pages to convert	The maximum number of pages that GFI FaxMaker converts per fax sent.

5. Click **OK**.

6.10 Log files

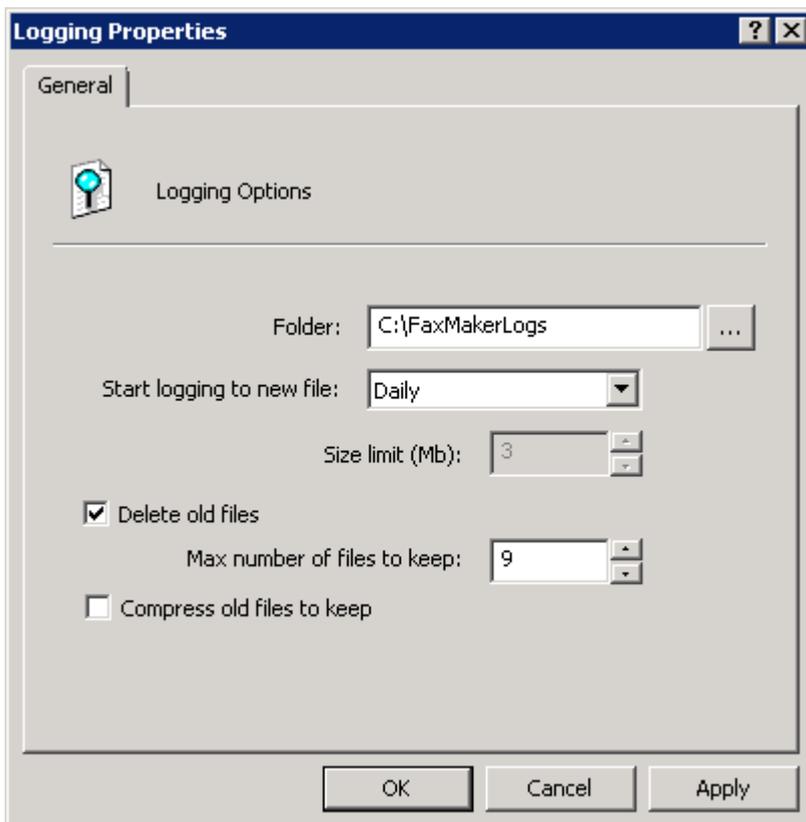
Log files enable administrators to review the activity of GFI FaxMaker.

6.10.1 Managing log files

NOTE

The following settings apply to the log files described in [List of log files](#).

1. From the GFI FaxMaker Configuration, right-click **Advanced > Logging** node and select **Properties**.



Screenshot 70: Logging settings

2. Configure the following options:

Option	Description
Folder	The folder where to store the log files.
Start logging to new file	Select the condition when to start logging to new log files. Old log files are stored in the same folder, extension is changed to BAK format (can be opened in text editor) and renamed as follows: <log name><date>.fmlogger.bak For example: sendlog20150815.fmlogger.bak
Size limit (Mb)	When selecting to start using new log files when a particular size is reached, specify the file size in megabytes. GFI FaxMaker starts logging to a new log file when the current log file reaches this file size.

Option	Description
Delete old files	Choose whether to keep or discard old log files. If enabled, GFI FaxMaker keeps only the number of log files configured in Max number of files to keep . Older log files are automatically deleted. NOTE: Deleted log files are permanently removed and not recoverable.
Compress old files to keep	Log files are compressed to ZIP format.

3. Click **OK**.

6.10.2 List of GFI FaxMaker log files

Log file	Description
sendlog.fmlogger.txt	Contains a log of sent faxes in the following format: Date, Time, SenderEmail, SenderName, BillingCode, RemoteId, RecipientName, RecipientCompany, RecipientNumber, CallDuration, PagesTransferred, Result, Info, Port, FilesInArchiveDir For example: "7/1/2018", "2:16:48 AM", "jsmith@mydomain.com", "John", "", "888888888", "Bob", "Company", "999999999", "05:30", "3", "SUCCESS", "Fax has been sent successfully", "COM2", "C:\Sent\20110701_015642_00001.pdf"
rcvlog.fmlogger.txt	Contains a log of received faxes in the following format: Date, Time, RemoteID, CallDuration, PagesReceived, Result, Info, Port, FileInArchiveDir, RoutedTo For example: "6/30/2018", "8:47:01 AM", "+557(833)343-3948", "03:30", "2", "SUCCESS", "Fax received from +557(833)343-3948", "Line0", "C:\Received Faxes\20110630_084657_00003.pdf", "jsmith@mydomain.com"
smtpin.fmlogger.txt	A log of emails generated by GFI FaxMaker that are sent to local users. The log is in the following format: Date, Time, Subject, Sender, Recipient, Status For example: 2018-06-29, 08-34, Success: Test fax (Fax sent to 123456) [:resend=s3030be58], '+123456789' <'+123456789@faxmaker.com>, jsmith@mydomain.com, Success - Message uploaded.
smtpout.fmlogger.txt	A log of emails sent by fax users to GFI FaxMaker. The log is in the following format: Date, Time, Subject, Sender, Recipient For example: 2018-06-29, 08-42-40, Test fax subject, jsmith@mydomain.com, +123456789@faxmaker.com
smsout.fmlogger.txt	A log of sent SMS in the following format: Date, Time, Subject, Sender, Recipient For example: 2018-06-29, 09-21-05, This is subject, jsmith@mydomain.com, +123456789@smsmaker.com
smsin.fmlogger.txt	A log of received SMS in the following format: Date, Time, Sender, Recipient, Status, Message, Details For example: "09/05/2018", "09:06:32", "+123456789", "jsmith@mydomain.com", "Success", "This is SMS message text", "Success. SMS received."

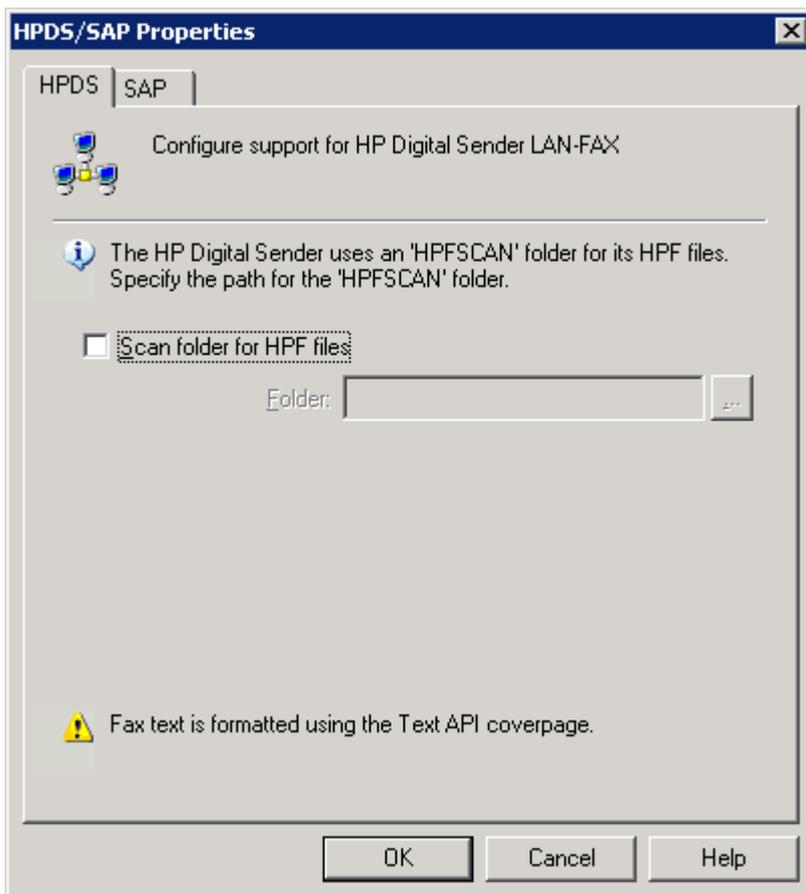
6.11 HP Digital Sender integration

GFI FaxMaker supports HP Digital sender scanner/copier. This enables you to send faxes directly from the Digital sender device, by entering the document in the tray and dialling recipient fax number. Faxes are sent

via GFI FaxMaker and the user will receive a confirmation in his mailbox. For the latest list of supported HP Digital Sender devices, refer to http://go.gfi.com/?pageid=FM_HPDDigitalSender.

To send faxes from an HP Digital sender:

1. From the HP Digital Sender link applet, select **Inbox** tab.
2. Select **Enable receive**.
3. In **Path to receive inbox**, provide a directory where the HP Digital Sender will pick up the fax information files.
4. From GFI FaxMaker Configuration, right-click **HPDS/SAP** node and select **Properties**.



Screenshot 71: HP Digital sender set-up

5. From the **HPDS** tab, select **Scan folder for HPF files**. Key in or browse to the directory specified in the HP Digital Sender app and select the **HPFSCAN** folder.
6. Click **OK**.
7. From the HP Digital sender JetAdmin utility, modify your HP Digital Sender to enable fax. Choose **Other vendors with notification support** as Network Fax Server.

6.12 Storing faxes

By default, GFI FaxMaker stores copies of fax attachments on the GFI FaxMaker server for a number of days:

- » **Sent faxes** - A copy is stored for 2 days.
- » **Failed faxes** - A copy is stored for 1 week.

These are stored in <GFI FaxMaker installation folder>\data\attachments folder. This allows resending of fax attachments.

To disable storage of fax attachments and consequently disable option to resend faxes:

1. From GFI FaxMaker Configuration, right-click **Advanced > Miscellaneous** node and select **Properties**.
2. From **Fax server options** area, configure:

Option	Description
Do not store sent fax attachments for resending	Select option to NOT store sent fax attachments.
Do not store failed fax attachments for resending	Select option to NOT store failed fax attachments.

3. Click **OK**.

6.13 Licensing information

During the GFI FaxMaker installation, you are requested to key in your GFI account or a license key.

NOTE

GFI FaxMaker stops sending faxes and SMS once the subscription expires. Renew the subscription to unblock the fax queue.

To review and modify licensing details, from GFI FaxMaker Configuration, right-click **General > Licensing** and select **License product...**

Alternatively, you can [log in](#) to the GFI FaxMaker website and go to **Settings > System Settings > Licensing**.

License Type
Specify the license type and details that will be use to validate this product

Email/Username [Change Account](#)

License Key [Edit](#)

License Key Information
This section show the subscription information and attributes of your GFIFaxMaker license key

Installed License [Refresh](#)

Subscription Status	 08 April 2018 (30 days remaining)
Licensed User Limit	Unlimited
Current User Count	14
Licensed user SMS limit	Unlimited
Current Fax Lines Count	4
OCR	Enabled

Screenshot 72: Viewing current licensing information

Use this node to view current licensing information or to enter your License key number.

» Under the **License Key Information**, the following data is available:

Field	Description
Subscription Status	Expiration data and the number of remaining days of subscription.
Licensed User Limit	Maximum number of users allowed by the subscription.
Current User Count	Actual number of users listed as fax users. For more information, refer to Licensed users (page 98).
Licensed user SMS Limit	The maximum number of users allowed to use SMS. For more information, refer to SMS (page 185).
Current Fax Lines Count	Number of lines configured in GFI FaxMaker. For more information, refer to Fax Lines (page 90).

Field	Description
OCR	If the OCR module is enabled or not in the GFI subscription. For more information, refer to OCR (page 119).

» Click **Change Account** to use another GFI Account or click **Edit** to edit your license key.

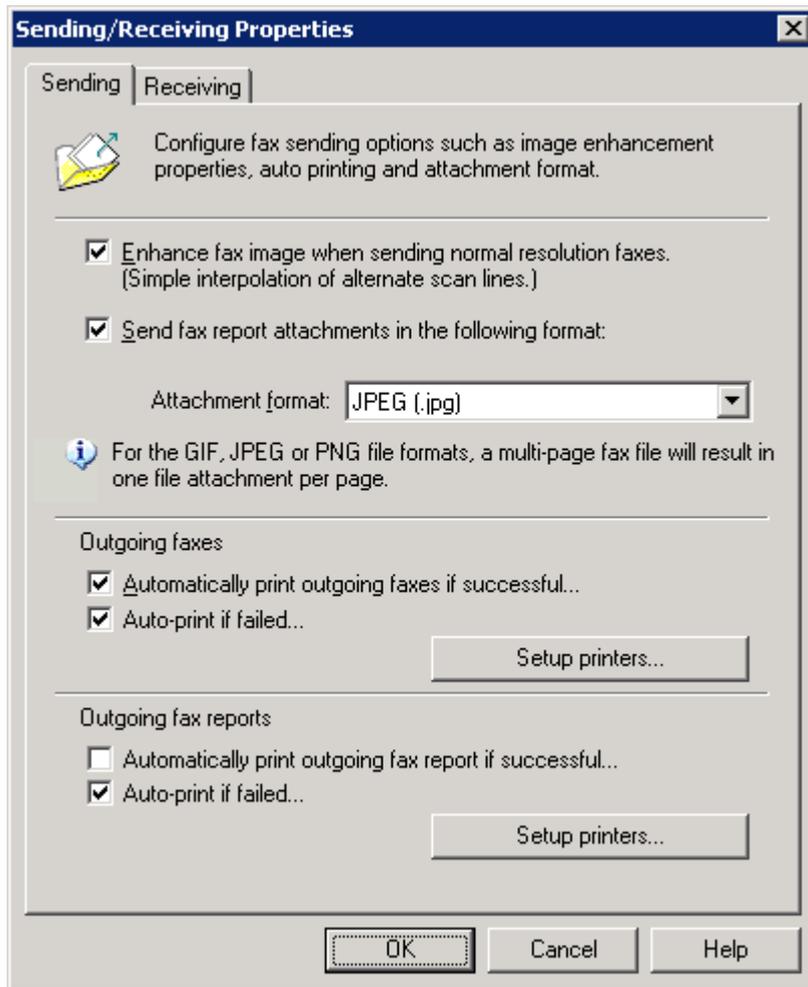
7 Configuration - Sending faxes

This topic contains information about:

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7.1 Sending options

1. From GFI FaxMaker Configuration, right-click **Sending/Receiving Options** and select **Properties**.



Screenshot 73: Sending options

2. Select **Sending** tab and configure the following options:

Option	Description
Enhance fax image when sending normal resolution faxes	Improves the quality of low-resolution faxes.
Send fax report attachments in the following format	By default GFI FaxMaker attaches incoming fax in .FAX format. Select this option to customize the attachment format, for example attach the fax in PDF format.
Automatically print outgoing faxes if successful	Automatically print all outgoing faxes that are sent successfully. Click Setup printers... to configure printer options.
Auto print if failed	Automatically print all outgoing faxes that fail. Click Setup printers... to configure printer options.
Automatically print outgoing fax report if successful	Automatically print transmission report after successfully sending a fax. GFI FaxMaker will also print 6 fax pages on one printer page. Click Setup printers... to configure printer options, including how many pages of the report to print.

Option	Description
Auto print report if failed	Automatically print all transmission reports for outgoing faxes that fail. Click Setup printers... to configure printer options.

3. Click **OK**.

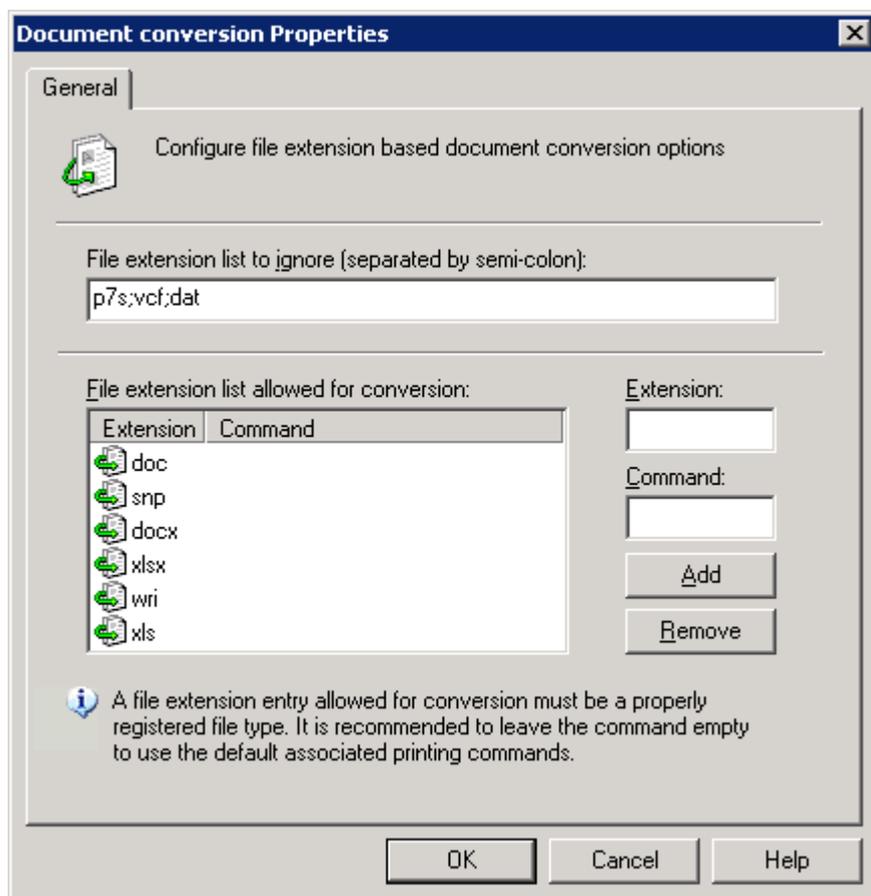
7.2 Document Conversion

GFI FaxMaker enables users to send faxes by attaching content to an email. GFI FaxMaker automatically converts the attachment to fax. For this purpose, a built-in conversion engine is included for PDF, HTML, PNG, GIF, JPG, RTF and TXT files.

NOTE

Microsoft® Office® 2007 or higher is required on the GFI FaxMaker server to convert Microsoft® Office® files, such as DOCX and XLSX files.

1. From GFI FaxMaker Configuration, right-click **Advanced > Document conversion** and select **Properties**.



Screenshot 74: Document conversion options

2. Configure the following options:

Option	Description
File extension list to ignore	Enter the extensions to ignore, separated by semi-colons - ;

Option	Description
File extension list allowed for conversion	List of extensions that can be converted by GFI FaxMaker.
Add	To add new file formats for conversion, key in the Extension to add. In Command text box, key in the Application Command that prints the file in Windows® Explorer (Usually this is <code>Print</code>). Click Add . NOTE: To verify whether GFI FaxMaker can convert a file extension, from Windows® Explorer, right-click a file in that format and select Print . The file must print successfully.
Remove	Click to delete a selected file extension.

3. Click **OK**.

7.3 Transmission reports

GFI FaxMaker notifies the user about the status of sent faxes/SMS by sending a transmission report. The report contains details of the fax/SMS transmission. Optionally you can configure to include the fax content and fax body.

Success: Test fax (Fax sent to 123456789) [::resend=s55e6011d]
123456789 ["123456789"@faxmaker.com]

Sent: Monday, March 16, 2015 4:18 PM
To: John Smith
Attachments:  [20150316_161818_00003.fax \(29 KB\)](#)

GFI FaxMaker

✓ Fax Sent

A fax has been successfully sent to number: 123456789. Fax details are listed below. Fax image is attached.

Fax details:

- Date and time: 16/03/2015 16:18:56
- Subject: Success: Test fax (Fax sent to 123456789)
- Sender name: John Smith
- Sender email: jsmith@domaina.tcv
- Line speed:14400 bps
- Connection time: 00:36
- Pages: 1
- Resolution: Fine
- Remote fax ID:
- Line number: 1
- Retries: 0

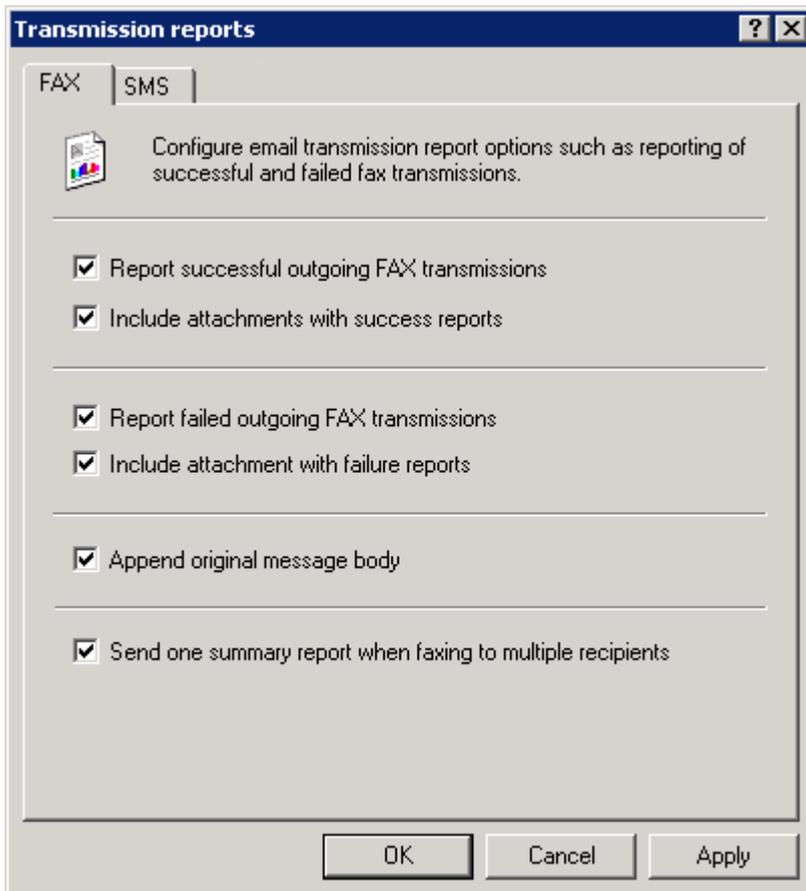
Regards,
GFI FaxMaker

Copyright © 2015 GFI Software

Screenshot 75: A sample fax transmission report

7.3.1 Configuring fax transmission reports

1. From GFI FaxMaker Configuration, right-click **Advanced > Transmission reports** and select **Properties**.



Screenshot 76: Fax transmission report options

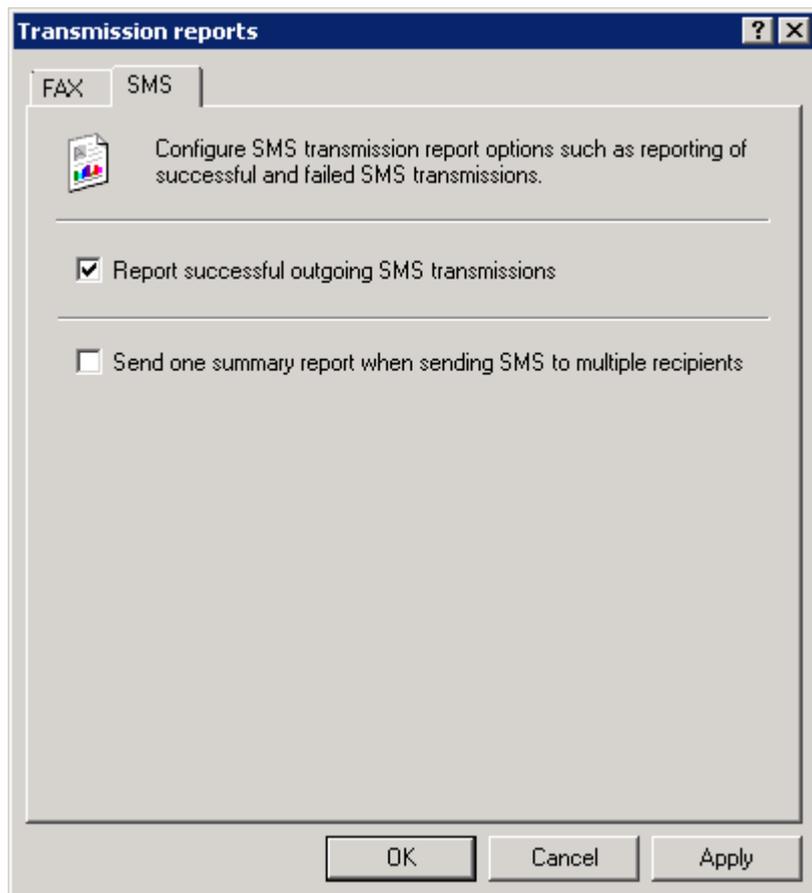
2. Configure the following options:

Option	Description
Report successful outgoing FAX transmissions	Send a transmission report when a fax is sent successfully.
Include attachments with success reports	Includes the transmitted fax with successful transmission reports.
Report failed outgoing FAX transmissions	Send a transmission report when a fax fails.
Include attachments with failure reports	Includes the fax content with failed transmission reports.
Append original message body	Include the original fax message body in the transmission report, below the report text. Using this option allows users to re-submit faxes and find sent faxes.
Send one summary report when faxing to multiple recipients	When sending a fax to multiple recipients, GFI FaxMaker sends the fax to each recipient individually. Select this option to group transmission reports in one summary report. When unselected, a transmission report is sent for each fax recipient.

3. Click **OK**.

7.3.2 Configuring SMS transmission reports

1. From GFI FaxMaker Configuration, right-click **Advanced** > **Transmission reports** and select **Properties**.



Screenshot 77: SMS transmission report options

2. From the **SMS** tab, configure:

Option	Description
Report successful outgoing SMS transmissions	Send a transmission report when an SMS is sent successfully.
Send one summary report when sending SMS to multiple recipients	When sending an SMS to multiple recipients, GFI FaxMaker sends the SMS to each recipient individually. Select this option to group transmission reports in one summary report. When unselected, a transmission report is sent for each SMS recipient.

NOTE

A report is always sent if transmission of SMS fails.

3. Click **OK**.

7.3.3 Customizing transmission reports

The template of transmission reports can be customized. To do this:

1. Navigate to `<GFI FaxMaker installation folder>\data\reports`.
2. Open the template to edit in Notepad:

Report template	Description
error.fbt	Transmission report for failed faxes
recv.fbt	Fax report for received faxes
sent.fbt	Fax report for sent faxes
smserror.fbt	Transmission report for failed SMS
smsrecv.fbt	Fax report for received SMS
smssent.fbt	Fax report for sent SMS
summarysent.fbt	Summarized transmission report when a fax is sent to multiple recipients.
summarysent_details.fbt	The details of failed fax transmissions. This section is appended to summarysent.fbt for each failed transmission.

3. Modify the file using the following fields. Some fields may not be applicable for certain reports.

NOTE

Reports starting with **html** prefix (for example, **htmlrecv.fbt**), are the equivalent reports in HTML format. In this case use square brackets [and] for fields instead of angled brackets.

Field	Description
<status>	Transmission status
<date>	Transmission date
<time>	Transmission time
<date_time>	Shows both transmission date and time
<speed>	Transmission speed
<connection_time>	Duration of transmission
<pages>	Number of pages sent
<total_pages>	Total number of pages requested to be sent
<resolution>	The fax resolution.
<remote_id>	Recipient's line number
<local_id>	Local line number
<line>	GFI FaxMaker line number.
<retries>	Number of retries that GFI FaxMaker tried to establish connection with recipient.
<description>	A description of the status of fax transmission.
<dtmf_did>	The DTMF/DID number.
<subject>	The subject of the email requesting the fax transmission.
<billing_code>	The billing code.
<r_last_name>	Recipient's last name
<r_first_name>	Recipient's first name
<r_name>	Recipient's display name

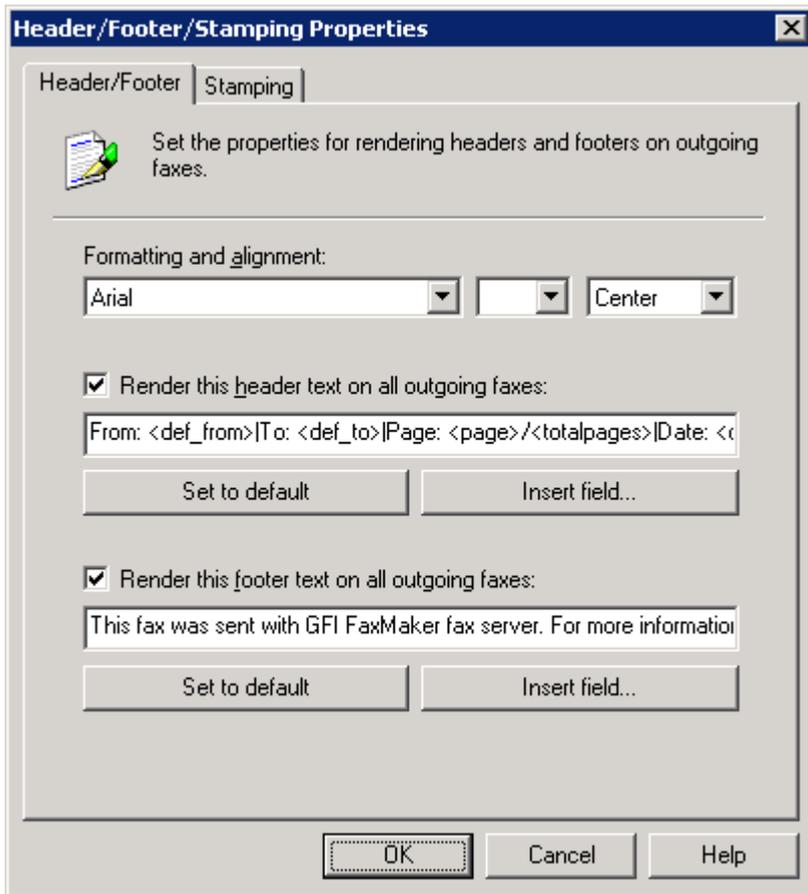
Field	Description
<r_company>	Recipient's company name
<r_department>	Recipient's department
<r_email>	Recipient's email address
<r_fax>	Recipient's fax number
<r_voice>	Recipient's phone number
<s_last_name>	Sender's last name
<s_first_name>	Sender's first name
<s_name>	Sender's name
<s_company>	Sender's company name
<s_department>	Sender's department
<s_email>	Sender's email address
<s_fax>	Sender's fax number
<s_voice>	Sender's phone number
<total_faxes>	Total number of faxes (summary reports only)
<succeeded_sendings>	Number of faxes sent successfully (summary reports only)
<failed_sendings>	Number of faxes that failed transmission (summary reports only)

7.4 Header/Footer options

GFI FaxMaker enables you to customize the header and footer text for all outgoing and incoming faxes.

7.4.1 Outgoing faxes

1. From GFI FaxMaker Configuration, right-click **Advanced > Header/Footer/Stamping** and select **Properties**.



Screenshot 78: Header/Footer options for outgoing faxes

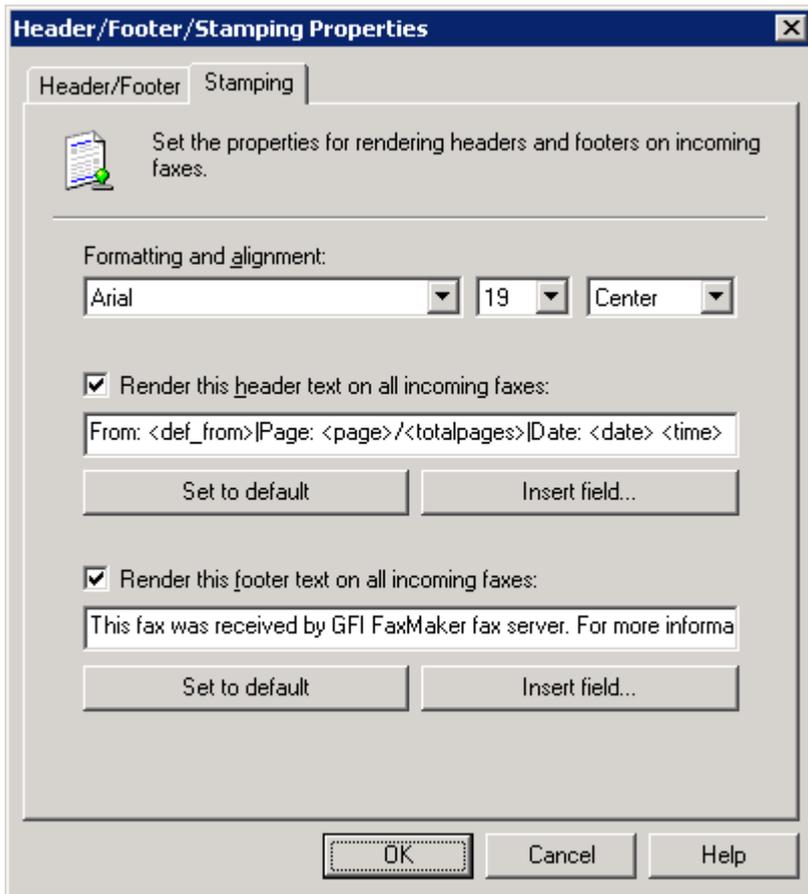
2. From the **Header/Footer** tab, configure:

Option	Description
Formatting and alignment	Configure font, font size and alignment. NOTE: During configuration, select the header and footer fields configuring to apply different formatting.
Render this header text on all outgoing faxes	Select to add a header on all outgoing faxes. Key in the text to display. » Set to default - Click to reset text to default. » Insert field... - Select custom field to add where there is the cursor.
Render this footer text on all outgoing faxes	Select to add a footer to all outgoing fax. Key in the text to display. » Set to default - Click to reset text to default. » Insert field... - Select custom field to add where there is the cursor.

3. Click **OK**.

7.4.2 Incoming faxes

1. From GFI FaxMaker Configuration, right-click **Advanced > Header/Footer/Stamping** and select **Properties**.



Screenshot 79: Stamping options for incoming faxes

2. From the **Stamping** tab, configure:

Option	Description
Formatting and alignment	Configure font, font size and alignment. NOTE: During configuration, select the header and footer fields configuring to apply different formatting.
Render this header text on all incoming faxes	Select to add a header on all incoming faxes. Key in the text to render. » Set to default - Click to reset text to default. » Insert field... - Select custom field to add where there is the cursor.
Render this footer text on all incoming faxes	Select to add a footer on all incoming faxes. Key in the text to render. » Set to default - Click to reset text to default. » Insert field... - Select custom field to add where there is the cursor.

3. Click **OK**.

7.5 Coverpages

GFI FaxMaker enables you to include a front page to your fax content that includes custom information and design. This page is attached and sent as the first page of a fax.

The coverpage typically includes important fax details (such as recipient and sender's information) and the message text (email body when user sends email via email client or fax message form).

By default, GFI FaxMaker includes a number of built-in coverpages. To access the list of coverpages, from GFI FaxMaker Configuration navigate to **Coverpages** node and select **Coverpages** or **Front Covernotes**.

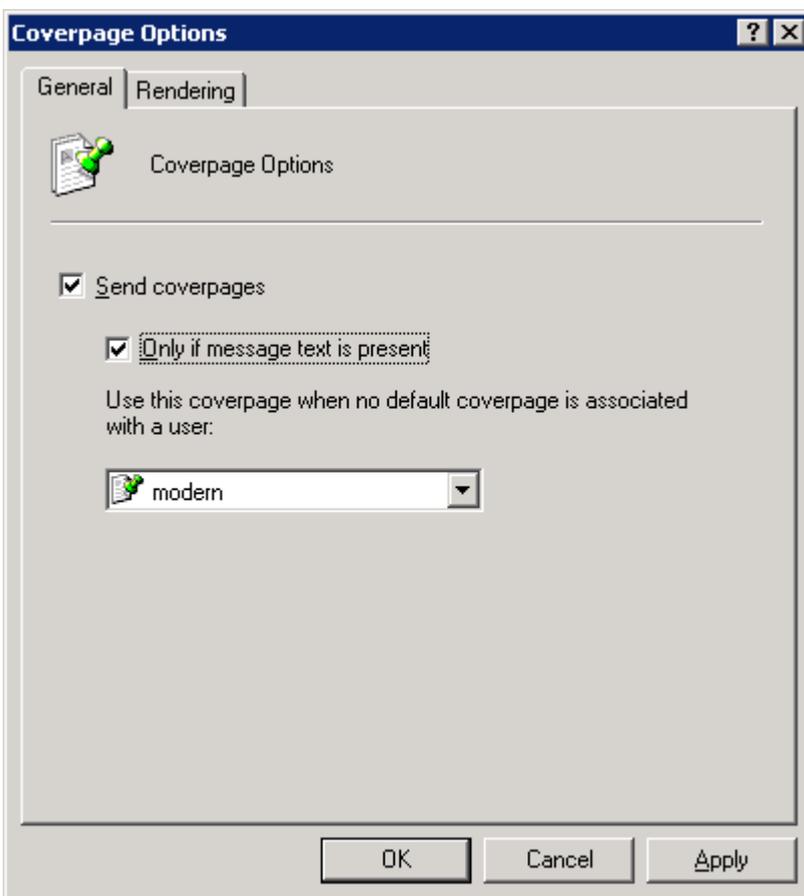
Configuring coverpage settings:

- » [General coveragepage options](#) - enable/disable coveragepages and conditions when to send a coveragepage.
- » [Adding new coveragepages](#) - add new and custom coveragepages.
- » [Default coveragepage](#) - the coveragepage applied for all users that have no other coveragepage configured.
- » [Custom user coveragepages](#) - use different coveragepages for different users or user groups.
- » [Editing built-in coveragepages](#) - how to modify built-in coveragepages.
- » [Preview built-in coveragepage](#) - preview built-in coveragepages in web browser or editor.
- » [Coveragepage merge-fields](#) - list of supported fields used to display useful fax information.

A Front Covernote complements a coveragepage and is aimed to add a brief message before the coveragepage (similar to a 'With Compliments' note). For more information, refer to [Front Covernotes](#) (page 142).

General coveragepage options

1. From GFI FaxMaker Configuration, right-click **Coverpages > Coverpages** and select **Properties**.



Screenshot 80: Coveragepage options

2. Configure the following options:

Option	Description
Send coveragepages	Enable or disable coveragepages. NOTE: Disabling coveragepages from the Coveragepages properties dialog box also disables Front Covernotes.

Option	Description
Only if message text is present	Include a coverpage only when sending a fax that contains a message body (for example, when sending a fax as an attachment via email and the email also contains an email body).
Use this coverpage when no default coverpage is associated with a user	Select the default coverpage to use when a user does not have a custom coverpage configured.

3. From the **Rendering** tab set the coverpage margins (in Inches).
4. Click **OK**.

Adding new coverpages

Step 1: Create coverpage

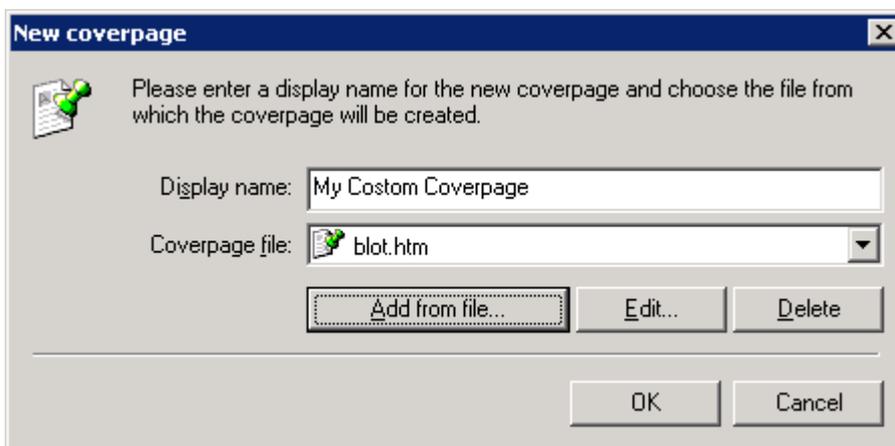
You can create custom coverpages in HTML, RTF or MHT format, using custom designs, text and fields. Use your preferred editor to create the page.

NOTE

1. You can use fields to display useful information. For more information, refer to [Supported merge-fields](#) (page 140).
2. Use UTF-8 encoding for HTML coverpages.

Step 2: Add coverpage to GFI FaxMaker

1. From GFI FaxMaker Configuration, navigate to **Coverpages > Coverpages**.



Screenshot 81: Creating a new coverpage

2. Click **New...**
3. Key in a **Display name**.
4. Click **Add from file...**, browse to the newly created coverpage and click **Open**.
5. Click **OK**.
6. Add any particular users to apply this coverpage for.
7. Click **OK**.

Default coveragepage

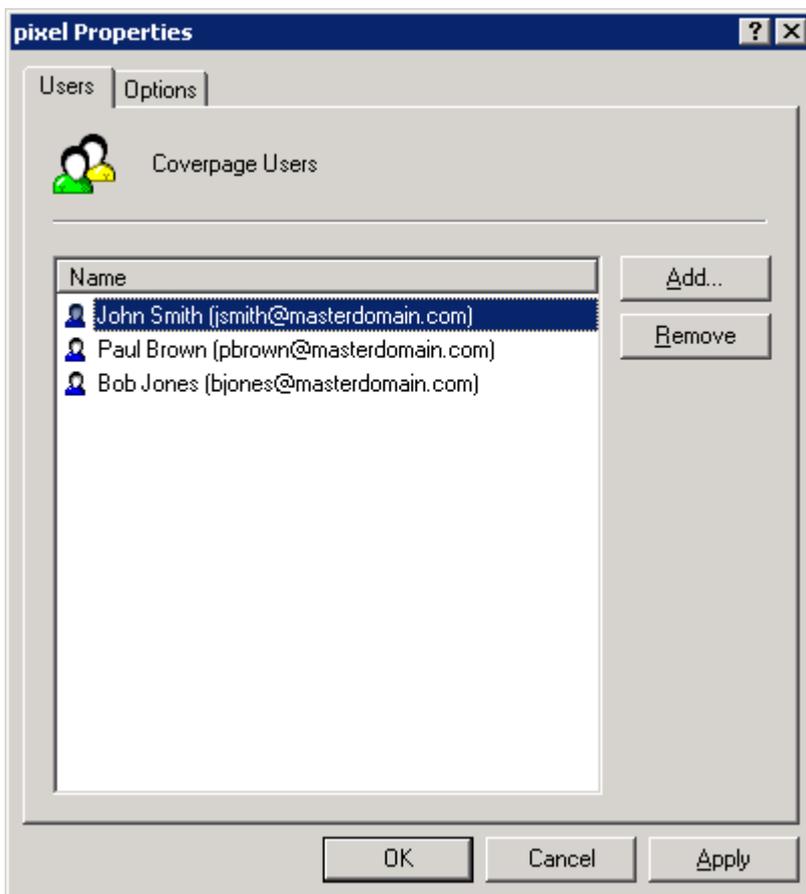
The default coveragepage is the coveragepage applied for all users that have no other coveragepage configured. To specify a default coveragepage:

1. From GFI FaxMaker Configuration navigate to **Coverpages > Coverpages**.
2. Right-click the coveragepage and select **Set as default global coveragepage**.

Using a custom coveragepage for a list of users

GFI FaxMaker can use different coveragepages for different users or user groups. To apply a custom coveragepage for a particular user or user group:

1. From GFI FaxMaker Configuration, navigate to **Coverpages > Coverpages**.
2. Right-click the coveragepage to associate custom user for and select **Properties**.

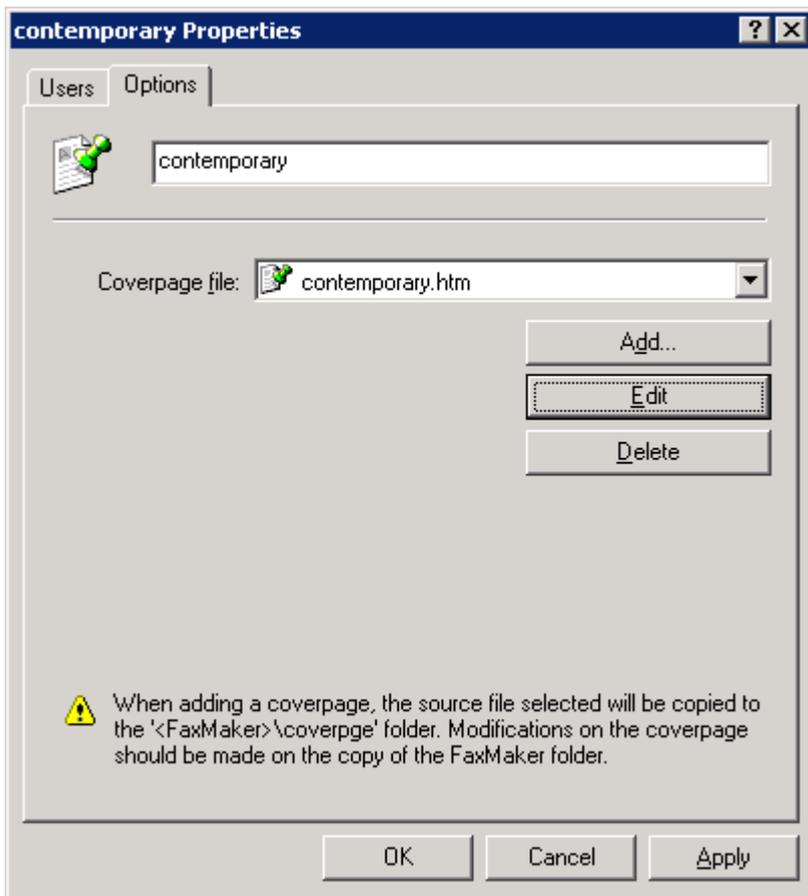


Screenshot 82: Coverage users

3. From the **Users** tab add the users for which to apply the coveragepage.
4. Click **OK**.

Editing built-in coveragepages

1. From GFI FaxMaker Configuration navigate to **Coverpages > Coverpages**.
2. Right-click the coveragepage to edit and select **Properties**.



Screenshot 83: Coverage options tab

3. From the **Options** tab, click **Edit**. Coverage is loaded in text editor.
4. Edit the page as required.

NOTE

When editing coverpages, you can use fields to show custom information. For more information, refer to [Supported merge-fields](#) (page 140).

5. Save and exit when complete.
6. Click **OK**.

Previewing built-in coverpages

To preview coverpages, navigate to **<GFI FaxMaker installation folder>\coverpage**. Double-click coverage to preview in web browser (HTML or MHT format) or word editor (RTF format).

7.5.1 Supported merge-fields

The following fields are used in coverpages and front covernotes to display useful fax information.

NOTE

All fields must be in lower case.

Sender's details

Table 2: Coverage merge fields - sender's details

Field	Description
[s_last_name]	Sender's last name
[s_first_name]	Sender's first name
[s_name_fl]	Sender's first & last name
[s_name_lf]	Sender's last & first name
[s_company]	Sender's company name
[s_department]	Sender's department name
[s_fax]	Sender's Fax number
[s_voice]	Sender's telephone number
[s_e-mail]	Sender's email address

Recipient's details

Table 3: Coverage merge fields - recipient's details

Field	Description
[r_company]	Recipient's company name
[r_department]	Recipient's department name
[r_first_name]	Recipient's first name
[r_last_name]	Recipient's last name
[r_name_fl]	Recipient's first & last name
[r_name_lf]	Recipient's last & first name
[r_fax]	Recipient's Fax number
[r_voice]	Recipient's telephone number
[r_e-mail]	Recipient's email address

Other fields

Table 4: Coverage merge fields

Field	Description
[message]	Show the email body text. NOTE 1: Ensure enough space is allocated to fit in the email body. NOTE 2: Emails normally include plain text and HTML formats for backward compatibility. By default, GFI FaxMaker shows the HTML version. To choose the preferred format, right-click Coverpages node in GFI FaxMaker and select the preferred format.
[time]	Fax transmission time
[date]	Fax transmission date
[longdate]	Fax transmission date and time.
[subject]	Shows the email subject

Field	Description
[total_pages]	Total number of fax pages, including the coverpage.

7.6 Front Covernotes

A front covernotes are aimed to contain less details than a Coverpage, Front covernotes serve to add a brief message before the coverpage (similar to a 'With Compliments' note).

By default, GFI FaxMaker includes a number of built-in front covernotes. To access the list of front covernotes, from GFI FaxMaker Configuration navigate to **Coverpages** node and select **Front Covernotes**.

NOTE

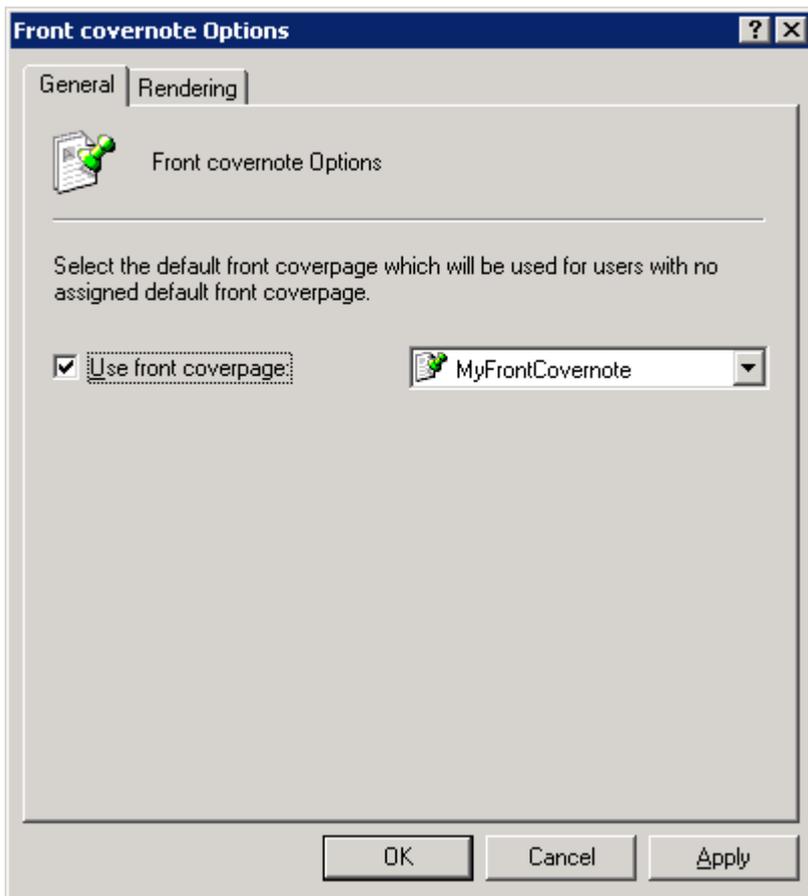
Front covernotes are aimed to compliment coverpages. Disabling Coverpages, disables also Front covernotes.

Configuring front covernote settings:

- » [General front covernote options](#) - enable/disable front covernotes and set covernote margins.
- » [Adding new front covernote](#) - add new and custom front covernotes.
- » [Default front covernote](#) - the front covernote applied for all users that have no other front covernote configured.
- » [Custom user front covernotes](#) - use different front covernotes for different users or user groups.
- » [Front covernote merge-fields](#) - list of supported fields used to display useful fax information.

General front covernotes options

1. From GFI FaxMaker Configuration, right-click **Coverpages > Front covernotes** and select **Properties**.



Screenshot 84: Front covernote options

2. Configure the following options:

Option	Description
Use front coverpage	Select this option to always send a front covernote for emails sent by all users. Specify the Front covernote to use when the user does not have a custom associated front covernote configured. By disabling this option, GFI FaxMaker only sends a covernote for faxes originating from users who have a Front covernote configured.

3. From the **Rendering** tab set the covernote margins (in Inches).

4. Click **OK**.

Adding new Front covernotes

Step 1: Create Front covernote

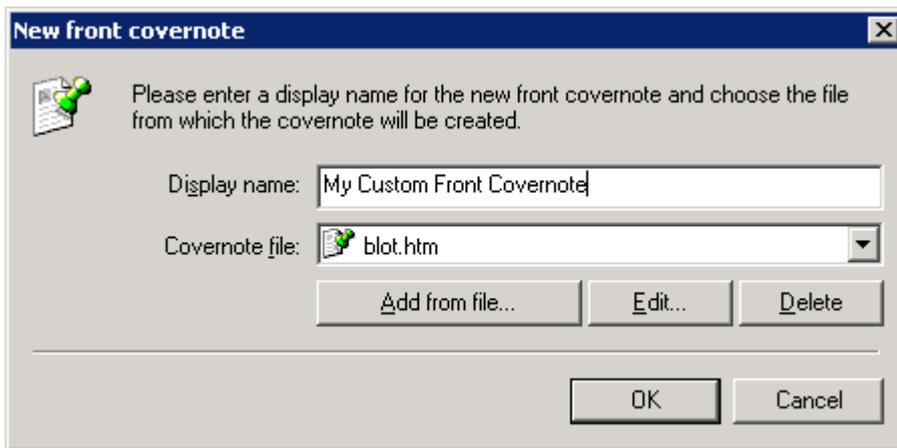
You can create custom Front covernotes in HTML, RTF or MHT format, using custom designs, text and fields. Use your preferred editor to create the page.

NOTE

1. You can use fields to display useful information. For more information, refer to [Supported merge-fields](#) (page 140).
2. Use UTF-8 encoding for HTML Front covernotes.

Step 2: Add covernote to GFI FaxMaker

1. From GFI FaxMaker Configuration navigate to **Coverpages > Front covernotes**.



Screenshot 85: Creating a new front covernote

2. Click **New**....
3. Key in a **Display name** for the covernote.
4. Click **Add from file**..., browse to the newly created coveragepage and click **Open**.
5. Click **OK**.
6. Add any particular users to apply this covernote for.
7. Click **OK**.

Default Front covernote

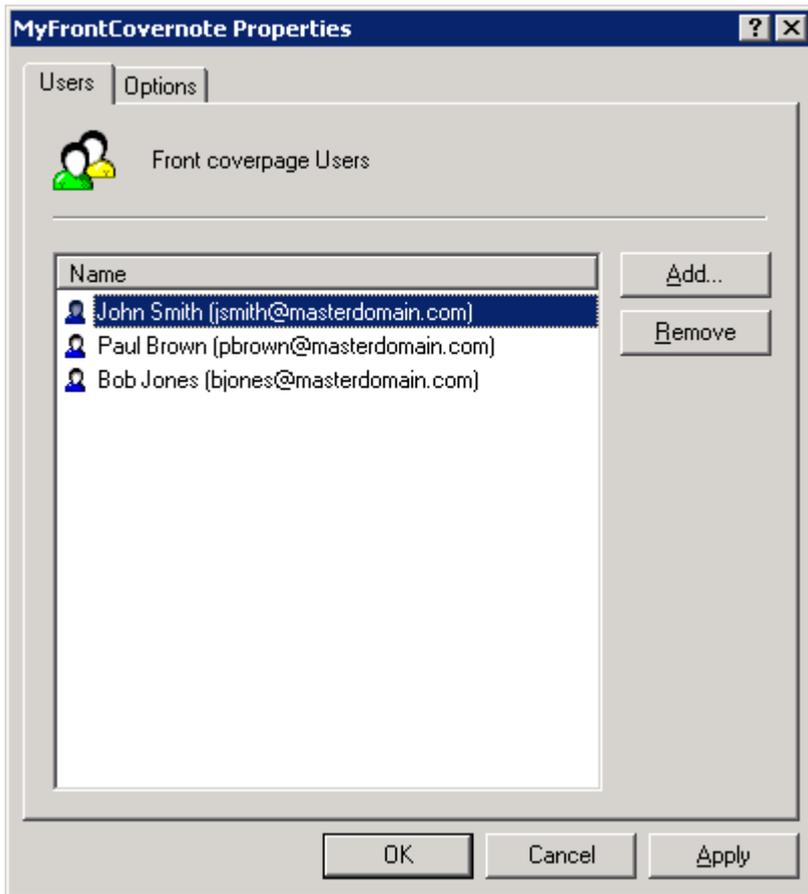
The default Front covernote is the covernote applied for all users that have no other covernote configured. To select a different default covernote:

1. From GFI FaxMaker Configuration navigate to **Coverpages > Front covernotes**.
2. Right-click the covernote and select **Set as default global front covernote**.

Using a custom Front covernote for a list of users

GFI FaxMaker can use different Front covernotes for different users or user groups. To apply a custom front covernote for a particular user or user group:

1. From GFI FaxMaker Configuration navigate to **Coverpages > Front covernote**.
2. Right-click the covernote to associate custom user for and select **Properties**.



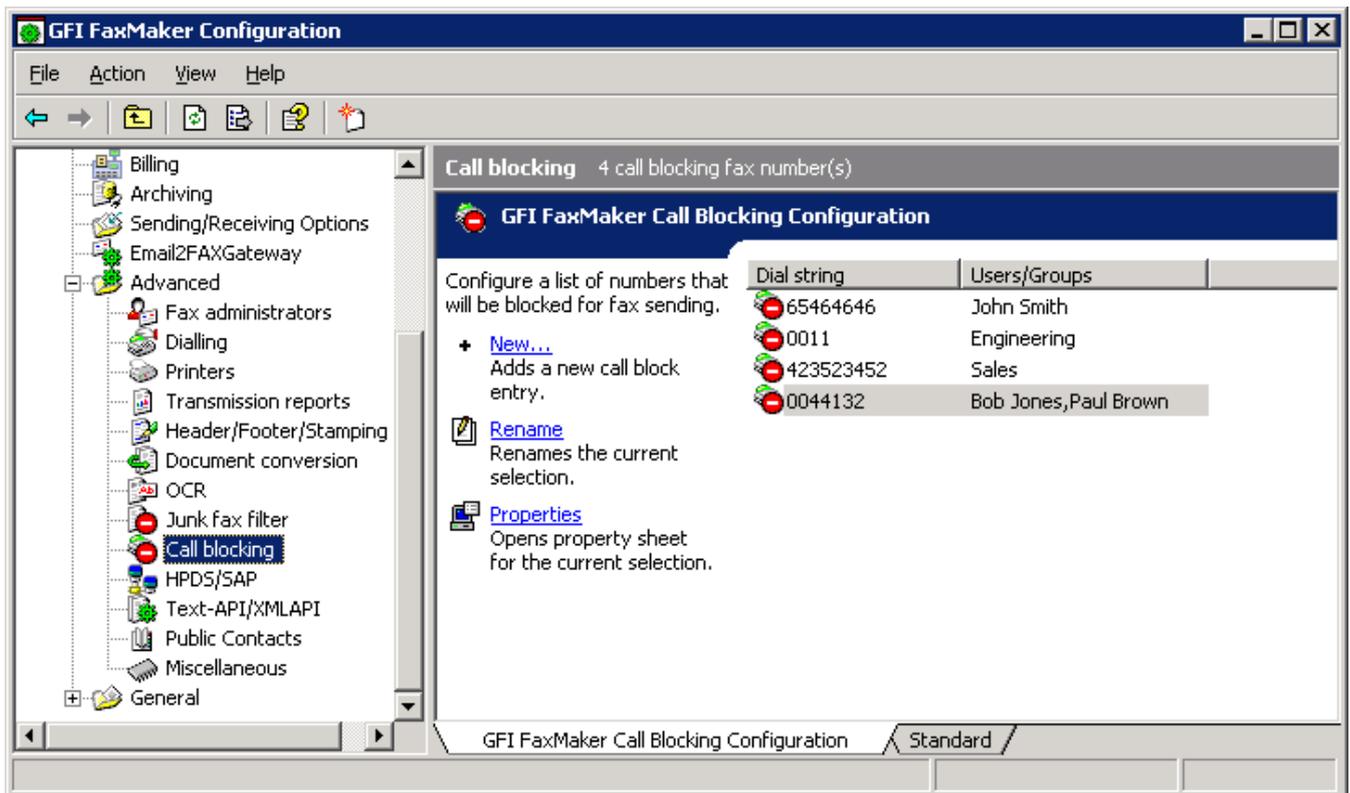
Screenshot 86: Front covernote users

3. From the **Users** tab add the users to apply the covernote for.
4. Click **OK**.

7.7 Call blocking

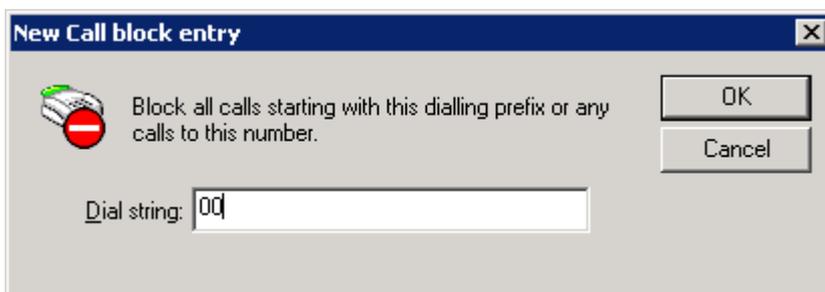
Call blocking enables you to control the fax numbers to which users can send faxes. GFI FaxMaker checks the call block rules before fax transmission to block faxes sent to numbers starting with matching entries.

For example, to block specific users from sending faxes to international numbers, add a call blocking rule to your international dial prefix (example, 00 or 011).



Screenshot 87: Call blocking rules

1. From GFI FaxMaker Configuration, navigate to **Advanced > Call blocking** node.
2. Click **New...**



Screenshot 88: New call block entry

3. Key in the number to block and click **OK**.
4. Assign users to the configured Call block or leave empty to apply the rule to every user.
5. Click **OK**.

7.8 Dialling Options

Dialling options enable you to configure area codes and other special dialling procedures. This ensures that GFI FaxMaker processes the fax number in a structured manner and dials numbers in the correct format for the phone system.

NOTE

1. GFI FaxMaker can only apply dialling configurations for fax numbers that are entered in the following format: **+<country code> (<area code>) <fax number>**. For example, +44 (0) 555 5555, +1 (151) 5555 5555, +356 2555 5555
2. Dialling options are not applied when sending faxes through online fax services.

To configure dialling options, from GFI FaxMaker Configuration right-click **Advanced > Dialling > Properties**.

Dialling Properties

General

Set the properties for the dialling logic used by the fax server when using fax numbers in canonical form.

My country code is: 1

My area code is: 275

International dialling (identified with a '+')

If dial string starts with my country code, strip it off:

Add prefix: []

If dial string does not start with my country code:

Add prefix: []

National dialling (area codes must be enclosed in brackets)

If dial string contains my area code, strip it off:

Add prefix: 212

If dial string does not contain my area code:

Add prefix: 275

Exceptions...

OK Cancel Help

Screenshot 89: Dialling options

IMPORTANT

Customize options for your country's telephone dialling system. Failure to do so may cause fax transmission to fail.

Configure the following options:

Option	Description
My country code is	Key in your country telephone code, excluding the international dial prefix (the dial prefix is usually defined as +). For example, for the United States the country code is 1. NOTE: The dial prefix is the number that a user must dial to place an international call. The country code is the number identifying the country to call to.
My area code is	Key in your area code.

Option	Description
International dialling	<p>Configure dialling options for sending faxes to international recipients. GFI FaxMaker identifies a call as international when the number contains a + (dial prefix) in front of the number. Configure the following options:</p> <ul style="list-style-type: none"> » If dial string starts with my country code, strip it off - select this option to automatically remove the country code from the number when dialling a number containing the local country code. If numbers match this condition, a custom prefix can be added to the number. » If dial string does not start with my country code - select this option to replace the + symbol with the international dial prefix, that is, the number required to place an international call from your country/area/telephone service provider, for example 00, 010, 0011, 011, etc...
National dialling	<p>Configure dialling options when sending faxes within the same country but to a different area. GFI FaxMaker identifies a call as national when an area code is included in a number in round parenthesis, for example, (234)-56789012. Configure the following options:</p> <ul style="list-style-type: none"> » If dial string contains my area code, strip it off - select to automatically remove area code from the number when dialling a number containing the local area code. If numbers match this condition, a custom prefix can be added to the number. » If dial string does not contain my area code - select to add a custom prefix when dialling a national number. <p>NOTE: The area code in the fax number must be included in round parentheses for the fax server to determine which part of the number is the area code.</p>
Exceptions	<p>Some national dialling procedures can be more complex and some exceptions may be required, for example to handle multiple local area codes. Exceptions allow you to add a prefix and/or exclude an area code when a number matches a particular combination.</p> <ol style="list-style-type: none"> 1. Click Exceptions. 2. Key in the Area code for which to apply an exception. 3. If exception is required for a particular exchange number (number right after the area code), key in the Exchange number, or key in * to apply for all numbers in that area code. 4. To add a prefix before the area code, select Dial prefix before the area code and key in the prefix. 5. To not dial the area code, select Do not dial the area code. 6. Click Add. 7. Repeat procedure for all exceptions. <p>NOTE: Use commas to add a delay between numbers, if required. Each comma represents approximately a two second delay.</p>

7.9 Customizing the caller ID and TSID of outbound faxes

When sending faxes, GFI FaxMaker sets the caller ID (CLIP) to the sender's fax number as configured in Active Directory or GFI Directory, and the TSID value to the Local Fax ID specified in the [fax line settings](#). GFI FaxMaker enables administrators to change these default values.

- » [Setting CLIP/TSID to sender's fax number](#)
- » [Appending a custom domain to the CLIP value of outbound faxes](#)
- » [Setting CLIP to the local fax line ID](#)

NOTES

- » Before applying any changes, it is recommended to check how your PABX and your telecommunications service providers handle custom CLIP and TSID values. Certain telephony systems or providers may override or block custom CLIP and TSID values.
- » These customizations require changes to Windows registry. Problems may occur if you modify the registry incorrectly. Do not edit the Windows registry unless you are confident about doing so.

7.9.1 Setting CLIP/TSID to sender's fax number

This topic describes how to change the CLIP or TSID values of outbound faxes to the sender's fax number as configured in Active Directory.

NOTES

- » Before applying any changes, it is recommended to check how your PABX and your telecommunications service providers handle custom CLIP and TSID values. Certain telephony systems or providers may override or block custom CLIP and TSID values.
- » These customizations require changes to Windows registry. Problems may occur if you modify the registry incorrectly. Do not edit the Windows registry unless you are confident about doing so.

To customize TSID and caller ID values of outbound faxes:

1. Open the Registry Editor on the GFI FaxMaker server.
2. Navigate to the following folder:
 - 32-bit: HKEY_LOCAL_MACHINE\SOFTWARE\GFI Fax & Voice\FAXmaker\Config
 - 64-bit: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\GFI Fax & Voice\FAXmaker\Config
3. Create a DWORD value in this location called `UseSenderFaxNumber`.
4. Change the value of the newly created `UseSenderFaxNumber` DWORD as follows:

DWORD value	Description
0	<ul style="list-style-type: none">» CLIP: Not set» TSID: Local Fax ID as configured in the fax line settings screen.
1	<ul style="list-style-type: none">» CLIP: Sender's fax number as configured in Active Directory or GFI Directory.» TSID: Local Fax ID as configured in the fax line settings screen. <p>NOTE: This is the default configuration if the <code>UseSenderFaxNumber</code> key is not set.</p>

DWORD value	Description
2	<ul style="list-style-type: none"> » CLIP: Not set » TSID: Sender's fax number as configured in Active Directory or GFI Directory
3	<ul style="list-style-type: none"> » CLIP: Sender's fax number as configured in Active Directory or GFI Directory. » TSID: Sender's fax number as configured in Active Directory or GFI Directory.
6	<ul style="list-style-type: none"> » CLIP: Not set » TSID: Sender's fax number as configured in Active Directory or GFI Directory, without any spaces.
7	<ul style="list-style-type: none"> » CLIP: Sender's fax number as configured in Active Directory or GFI Directory, without any spaces. » TSID: Sender's fax number as configured in Active Directory or GFI Directory, without any spaces.

NOTE

When using options 2, 3, 6 or 7 but a fax number is not set in Active Directory or GFI Directory, the TSID value is set to the Local Fax ID as configured in the [fax line settings](#) screen.

5. Close the Registry Editor.
6. Restart the **Fax Server** service from the Services applet to apply changes.

7.9.2 Appending a domain to CLIP

This topic describes how to append a custom domain name to the CLIP value of outbound faxes. This is sometimes required by certain FoIP systems.

NOTES

- » Before applying any changes, it is recommended to check how your PABX and your telecommunications service providers handle custom CLIP and TSID values. Certain telephony systems or providers may override or block custom CLIP and TSID values.
- » These customizations require changes to Windows registry. Problems may occur if you modify the registry incorrectly. Do not edit the Windows registry unless you are confident about doing so.

To appending a domain to the CLIP value of outbound faxes:

1. Open the Registry Editor on the GFI FaxMaker server.
2. Navigate to the following folder:
 - 32-bit: HKEY_LOCAL_MACHINE\SOFTWARE\GFI Fax & Voice\FAXmaker\Config
 - 64-bit: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\GFI Fax & Voice\FAXmaker\Config
3. Create a STRING value in this location called `AppendDomainToClip`.
4. Change the value of the newly created `AppendDomainToClip` registry key to the domain that needs to be appended with outbound fax CLIP numbers. For example, if the value is set to `example.com` then the CLIP of outbound faxes is set to `123456@example.com`. The @ symbol is automatically added by GFI FaxMaker.
5. Close the Registry Editor.
6. Restart the **Fax Server** service from the Services applet to apply changes.

7.9.3 Setting CLIP to the local fax line ID

This topic describes how to change the CLIP values of outbound faxes to the **Local Fax ID** as configured in the [fax line settings](#) screen.

IMPORTANT

If key `UseSenderFaxNumber` is set, then the `UseLocalIdForClip` key is ignored, since `UseSenderFaxNumber` takes precedence. For more information, refer to [Setting CLIP/TSID to sender's fax number](#) (page 149).

NOTES

- » Before applying any changes, it is recommended to check how your PABX and your telecommunications service providers handle custom CLIP and TSID values. Certain telephony systems or providers may override or block custom CLIP and TSID values.
- » These customizations require changes to Windows registry. Problems may occur if you modify the registry incorrectly. Do not edit the Windows registry unless you are confident about doing so.

To set the CLIP to the local fax ID of the line used to transmit the fax:

1. Open the Registry Editor on the GFI FaxMaker server.
2. Navigate to the following folder:
 - 32-bit: HKEY_LOCAL_MACHINE\SOFTWARE\GFI Fax & Voice\FAXmaker\Config
 - 64-bit: HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\GFI Fax & Voice\FAXmaker\Config
3. Create a DWORD value in this location called `UseLocalIdForClip`.
4. Change the value of the newly created `UseLocalIdForClip` DWORD to:

DWORD value	Description
0 (Default)	This is the default configuration, where the CLIP value is set to sender's fax number as configured in Active Directory or GFI Directory.
1	When set to 1, the CLIP value is set to the Local Fax ID as configured in the fax line settings screen.

5. Close the Registry Editor.
6. Restart the **Fax Server** service from the Services applet to apply changes.

7.10 Public contacts

Configure Public Contacts to enable GFI FaxMaker to retrieve the recipient information in Microsoft Exchange environments.

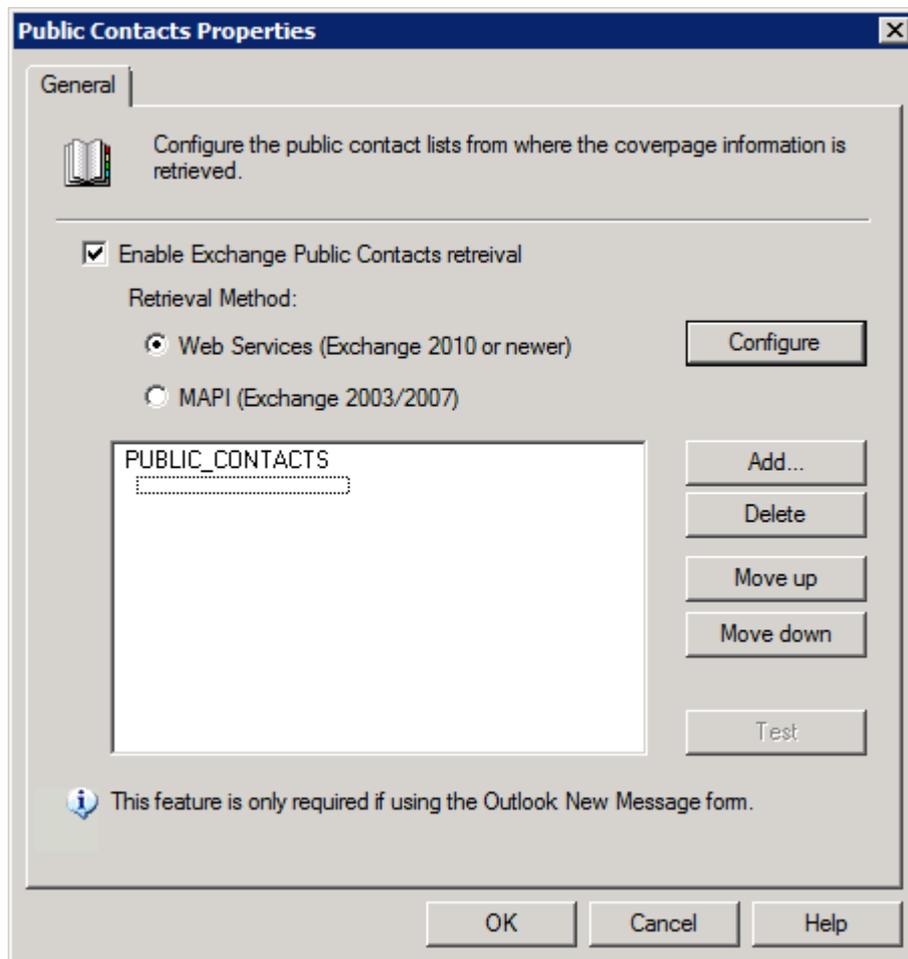
NOTE

Configure Public Contacts when showing recipient information on cover pages or when using the email client to send faxes. If none of these are required, Public Contacts does not have to be configured.

Configure Public Contacts depending on your Microsoft Exchange version:

Microsoft Exchange 2010/2013/2016

1. Ensure that you have a working profile, configured as the default profile, to connect to your Microsoft Exchange Server.
2. From GFI FaxMaker Configuration, right-click **Advanced > Public Contacts** and select **Properties**.



Screenshot 90: Public contacts node

3. Select **Enable Exchange Public Contacts retrieval**.
4. Select **Web Services**.
5. Choose how to discover and connect to Microsoft Exchange:
 - **Auto-discover Exchange Server:** Attempt to automatically detect and connect to Microsoft Exchange. Key in a valid email address and click **Discover**.
 - **Enter server details automatically:** Specify the Microsoft Exchange information manually. Key in the server fully qualified domain name or IP address. Also specify a valid username or email address and password. Click **Test** to ensure that GFI FaxMaker can connect to the specified server using the details entered.
6. Click **OK**.
7. Select the public contacts list from where to retrieve company information and click **OK**.
8. Click **Add** to add more public contacts lists.

9. Click **Test** to ensure that GFI FaxMaker can query the listed public contacts folders.
10. Click **OK**.

NOTE

When adding multiple lists, arrange the list order using **Move up** and **Move down** buttons. GFI FaxMaker queries lists in the displayed order when matching contacts.

7.11 NetPrintQueue2FAX

NetPrintQueue2FAX is a printer driver installed on user machines. This enables users to print content to transmit by fax, directly from any application that supports printing.

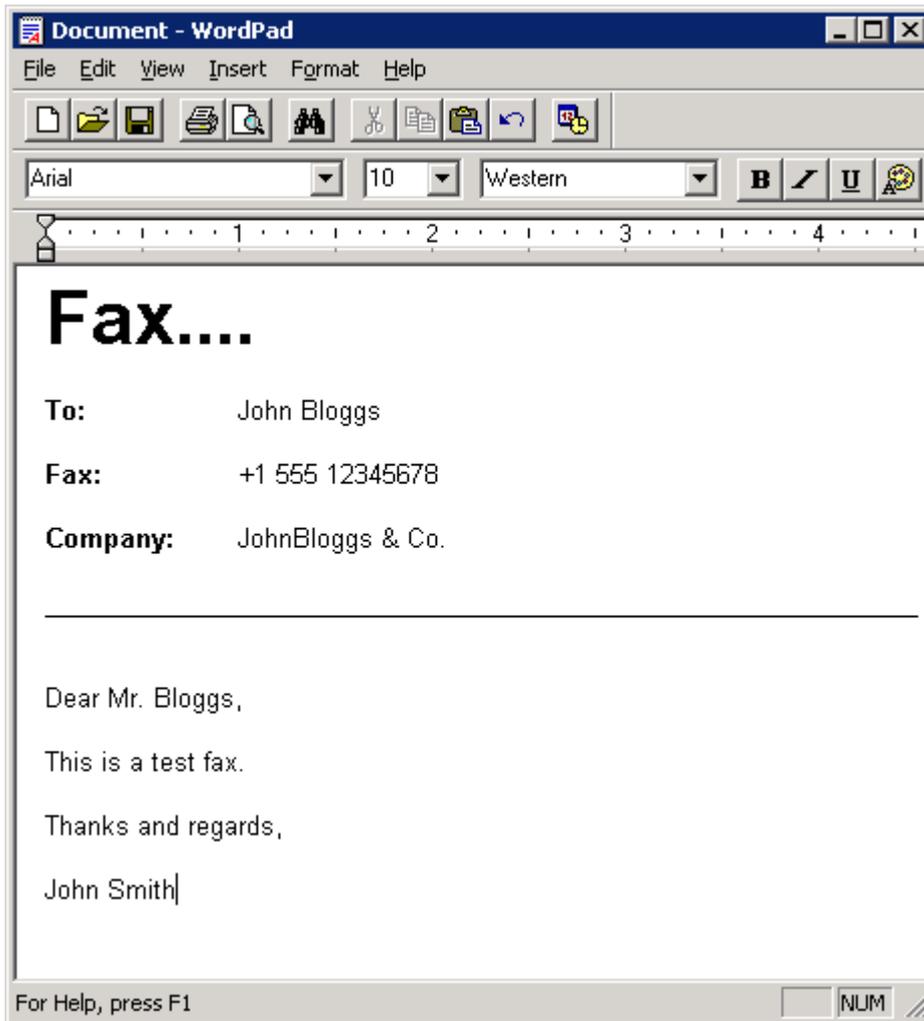
For more information about which file types can be used with NetPrintQueue2FAX refer to http://go.gfi.com/?pageid=FM_NPQ2FFileFormats

How it works

1. Users prepare content to fax using a third-party application (for example, Microsoft® Word® or an invoicing software). The fax recipient details - number, name and company - must be embedded in the content.
2. Users print content to the NetPrintQueue2FAX printer driver. Ensure that the NetPrintQueue2FAX printer drivers are installed on user machines. For more information, refer to [Installing NetPrintQueue2FAX printer driver on clients' machines](#) (page 156).
3. NetPrintQueue2FAX sends content to GFI FaxMaker.
4. GFI FaxMaker analyzes the content to determine fax recipient details. For more information, refer to [Configuring NetPrintQueue2FAX options](#) (page 154).
5. GFI FaxMaker sends fax.

HINT

You can use this method to automatically send a custom fax to a number of recipients. For example, through Microsoft® Word® Mail Merge feature you can send a personalized fax to a large number of recipients. For more information, refer to [Sending faxes using Microsoft Word Mail Merge](#) (page 156).



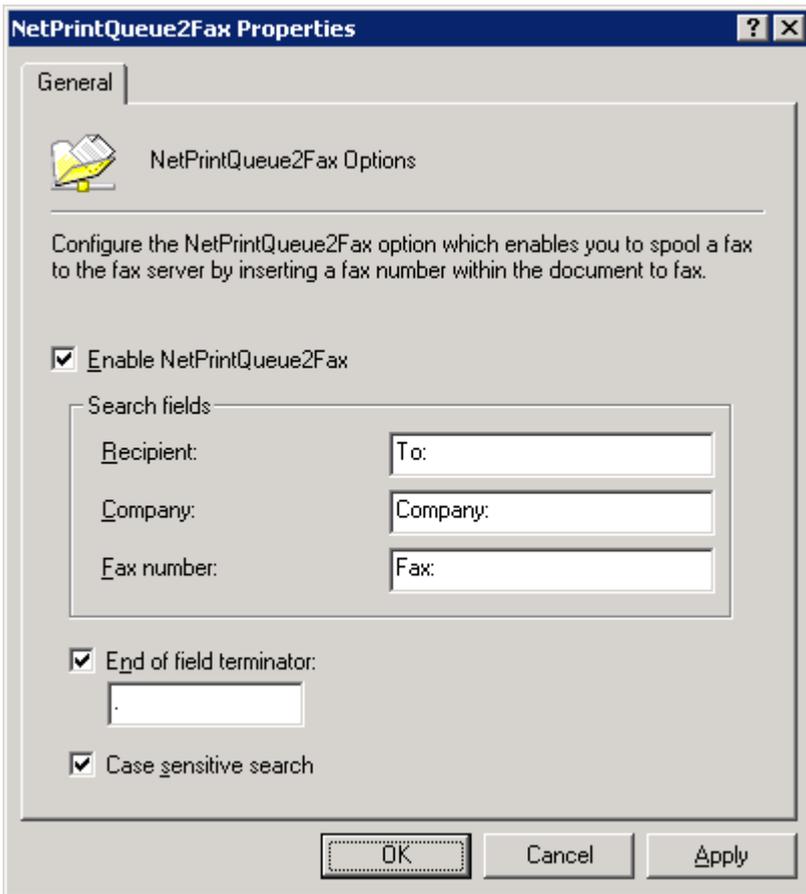
Screenshot 91: A document ready to be printed to NetPrintQueue2FAX

7.11.1 Configuring NetPrintQueue2FAX options

GFI FaxMaker needs to be configured to determine the identifiers for recipient details. For example, configure GFI FaxMaker so that the text following the string `Fax :` is the recipient's fax number.

To configure recipient identifiers:

1. From GFI FaxMaker Configuration, right-click **NetPrintQueue2FAX** and select **Properties**.



Screenshot 92: NetPrintQueue2FAX configuration

2. Configure the following options:

Option	Description
Enable NetPrintQueue2FAX	Enable/Disable NetPrintQueue2FAX feature
Recipient	Key in the text that identifies recipient's name. Default value is <code>To:.</code>
Company	Key in the text that identifies recipient's company name. Default value is <code>Company:.</code>
Fax number	Key in the text that identifies recipient's fax number. Default value is <code>Fax:.</code>
End of field terminator	After GFI FaxMaker finds a search field and retrieves the string that comes after the search string, it needs to identify the end of the search string. To do this, either do not put more text following that line or use a special character to determine the end of the field. To use a field terminator, select this option and key in a terminator.
Case sensitive search	Use this option to choose whether to match the case of field identifiers.

3. Click **OK**.

NOTE

If GFI FaxMaker fails to find the search fields in the document, the fax is not sent and GFI FaxMaker sends an error report to the user.

5. Type or add any text and graphics to include in your fax. You may insert more merge fields in the content.
6. In a new line at the end of the document, add the characters @#. These 2 characters are referred to as the fax separator characters, and are required to indicate to GFI FaxMaker that the next page is a new fax.

Step 2: Preview the fax

In Microsoft Word choose to preview the results. When this option is switched on, the merge fields in the document are populated with real data from your data source. Toggle through each record and verify that the fields are properly populated.

Step 3: Send the fax

When you are sure that the fax broadcast is ready to be sent, choose to finish and print the merged documents. Select the **NetPrintQueue2Fax** printer driver and click **Print**.

NetPrintQueue2Fax submits the print job to GFI FaxMaker, which in turn prepares the documents for transmission. Track the status of the submitted faxes from the [GFI FaxMaker Monitor](#) and from email notifications.

7.11.4 Using Text API commands in NetPrintQueue2Fax

In addition to embedding recipient information in the document, further commands can be embedded at the top of a document to be sent using NetPrintQueue2Fax. Amongst others, this enables scheduling a fax and specifying fax resolution.

To do this, enter commands at the top of the document, for example

```
: :priority=high,billingcode=1234
```

GFI FaxMaker automatically removes these commands on detection.

For more information regarding the Text API commands refer to the GFI FaxMaker API manual available from: <http://go.gfi.com/?pageid=FM19help&lang=en#cs hid=API manual>.

7.12 GFI FaxMaker APIs

With APIs you can integrate your third party software with GFI FaxMaker.

This process automation can be used for a wide variety of industries and applications, such as healthcare, retail and banking.

For example, use XMLAPI with your invoicing software to create an XML report template for account statements and balances. Periodically, generate this report for each client that owes money and store it to the XMLAPI pickup folder. GFI FaxMaker automatically transmits the statements to their intended recipients.

Types of APIs available in GFI FaxMaker:

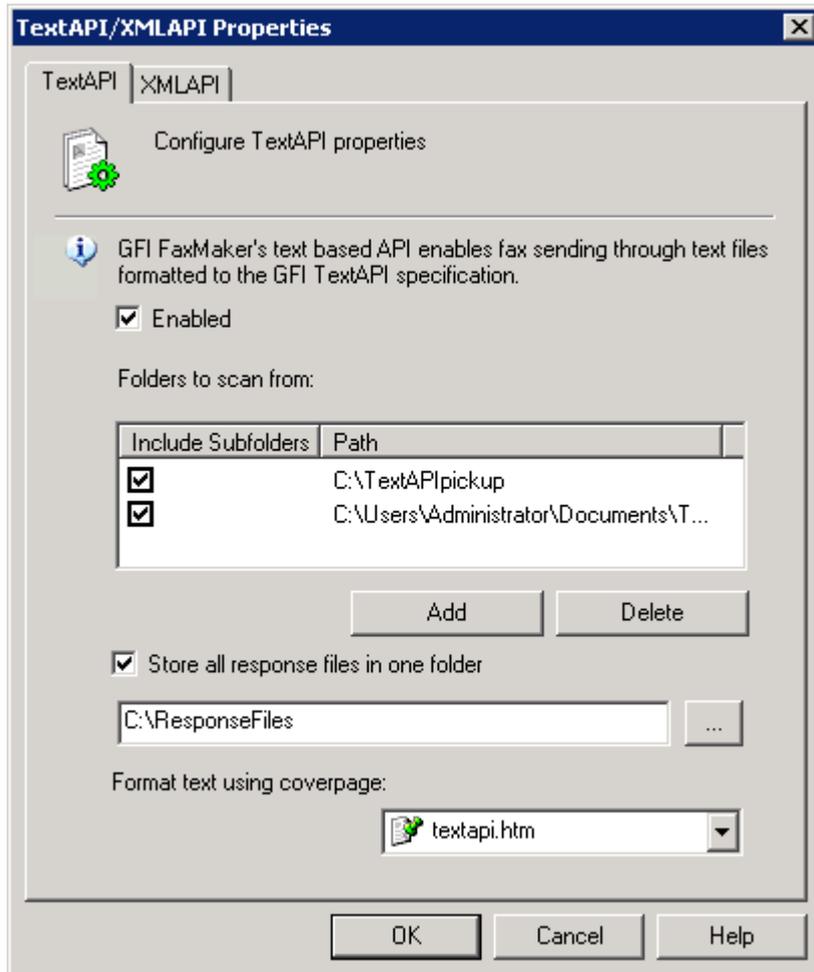
XMLAPI	Send faxes or SMS using XML files. You can configure third party software to generate APIs automatically and transmit faxes in bulk. GFI FaxMaker picks up and transmits all xml files stored in a custom XMLAPI pickup folder. XMLAPIs must be formatted to a standard convention, using fields and parameters which GFI FaxMaker can use to process faxes and SMS. For more information refer to the GFI FaxMaker API Manual.
TextAPI	Send faxes using plain text files. You can configure third party software to generate APIs automatically and transmit faxes in bulk. GFI FaxMaker picks up and transmits all text files stored in a custom TextAPI pickup folder. TextAPIs must be formatted to a standard convention, using fields and parameters which GFI FaxMaker can use to process faxes and SMS. For more information refer to the GFI FaxMaker API Manual.

Web Service API The GFI FaxMaker Web Service API enables you to develop your own applications that can connect directly with GFI FaxMaker. You can then send and receive faxes directly from your application. For more information refer to the GFI FaxMaker API Manual.

7.12.1 Enabling TextAPI

To enable and configure TextAPI:

1. From GFI FaxMaker Configuration, right-click **Advanced > Text-API/XMLAPI** node and select **Properties**.



Screenshot 93: Enabling TextAPI

2. From **TextAPI** tab, configure the following options:

Option	Description
Enabled	Enables TextAPI.
Folders to scan	Specify the folders where Text APIs will be stored for GFI FaxMaker to process. Click Add to select folders. To run recursive TextAPIs scanning on sub-folders, select Include Subfolders .
Store all response files in one folder	After processing a TextAPI which does not have the FROM parameter specified, GFI FaxMaker creates a response file. By default, GFI FaxMaker stores response files in the pickup folders. To store all response files in one location, select this option and specify a location.
Format text using coverage	Select the coveragepage to use for TextAPI faxes. For more information, refer to Coveragepages (page 136).

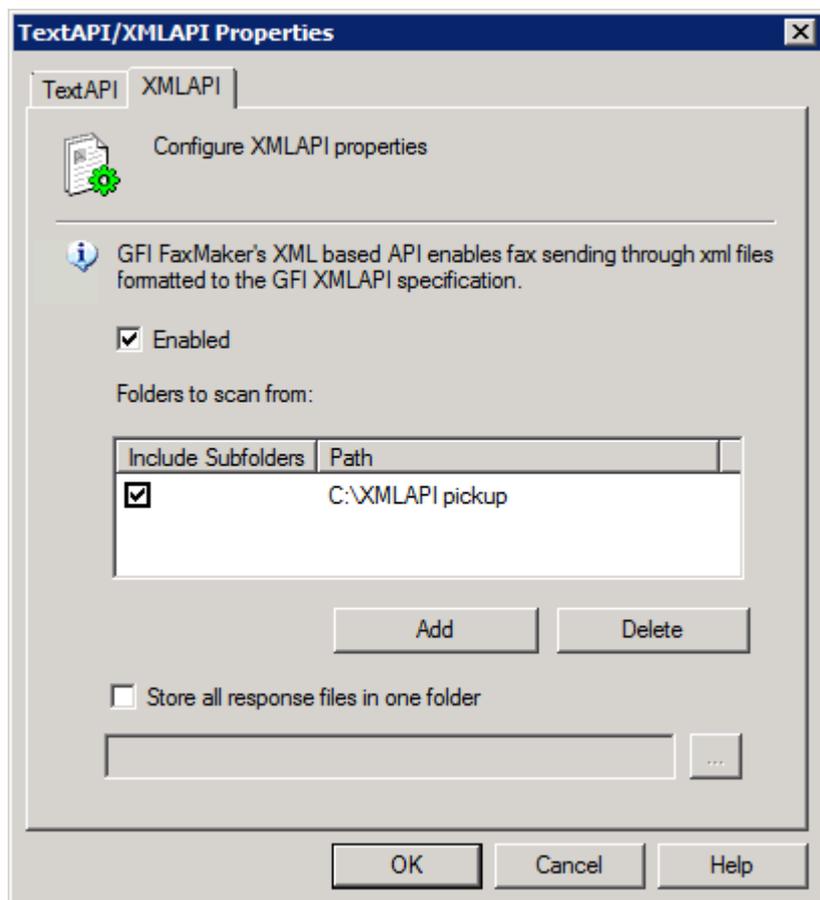
3. Click **OK**.

Next step: Start creating TextAPIs. For more information refer to the GFI FaxMaker API Manual.

7.12.2 Enabling XMLAPI

To enable and configure XMLAPI:

1. From GFI FaxMaker Configuration, right-click **Advanced > Text-API/XMLAPI** node and select **Properties**.



Screenshot 94: Enabling XMLAPI

2. From **XMLAPI** tab, click **Enabled** to switch on XMLAPI.

3. Click **Add** to select the folders where XMLAPIs will be stored. To also check sub-folders for XMLAPIs, select **Include Subfolders**.

4. After processing an XMLAPI, GFI FaxMaker creates a response file (*.status extension). By default, GFI FaxMaker stores response files in the pickup folders. To store all response files in one location, select **Store all response files in one folder** and specify a location.

5. Click **OK**.

Next step: Start creating XML APIs. For more information refer to the GFI FaxMaker API Manual.

7.13 Billing

GFI FaxMaker enables you to enforce the use of billing codes when sending faxes. Users or groups of users use a particular billing code to send faxes. This allows the administrator to monitor fax usage by codes.

To use billing codes, when sending faxes, users add the following API command to the fax:

::b=<billing number> or ::billingcode=<billing number>

Replace <billing number> with the billing number assigned to the user. For example:

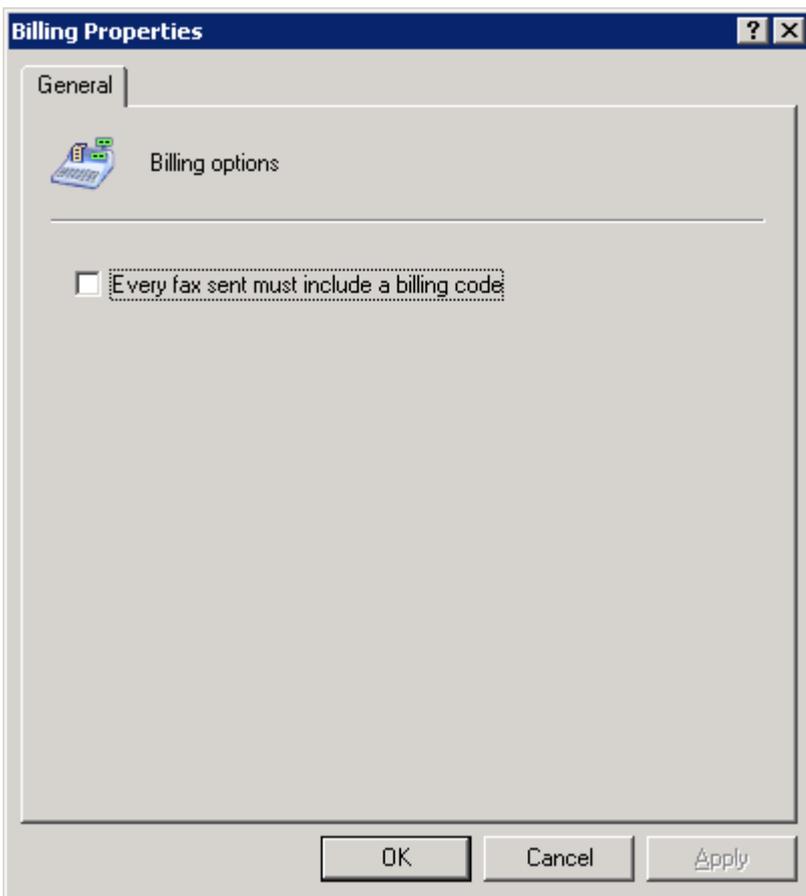
::b=22343

NOTE

1. Faxes without billing codes are not sent if this feature is enabled.
2. When sending faxes via email, billing codes can be included in the email subject. Key in the command enclosed in square brackets. For example, [: :b=123456].

To enforce use of billing codes:

1. From GFI FaxMaker Configuration, right-click **Billing** and select **Properties**.



Screenshot 95: Enforcing billing options

2. Select **Every fax sent must include a billing code**.
3. Click **OK**.

8 Configuration - Receiving faxes

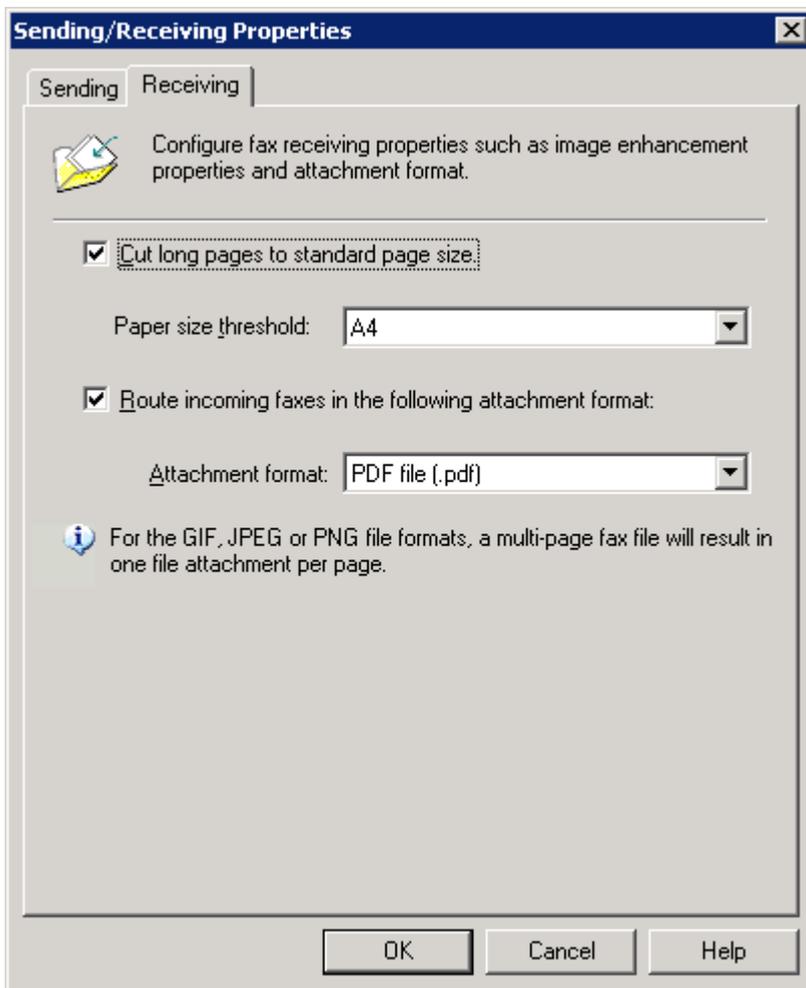
This topic contains information about:

8.1 Receiving Options	161
8.2 Fax routing	162
8.3 Printers	174
8.4 Junk Fax filter	176

8.1 Receiving Options

To configure fax receiving options:

1. From GFI FaxMaker Configuration, right-click **Sending/Receiving Options** and select **Properties**.



Screenshot 96: Receiving options

2. From the **Receiving** tab, configure the following options:

Option	Description
Cut long pages to standard page size	If a received page is longer than 1.5 times the selected page size, page is cut to the selected size.
Paper size threshold	Select the paper size for the received faxes. Incoming faxes more than 1.5 times the paper size, are automatically cut to the selected size.
Route incoming faxes in the following attachment format	Select the format in which received fax files are stored and forwarded to recipients.

3. Click **OK**.

8.2 Fax routing

Fax routing enables GFI FaxMaker to determine the correct recipient of an incoming fax. When a fax is received, GFI FaxMaker routes the fax to its intended recipient.

GFI FaxMaker provides several methods for this, each with its advantages and disadvantages. Typically, DID routing is recommended for larger installations, while MSN and Line routing are recommended for smaller installations.

Select the type of routing to use:

Routing method	Description
DID/DTMF Routing (ISDN/Analog/Digital)	Through DID routing, the telecommunications provider assigns you a range of virtual numbers that enable individual users/printers/public folders to have their own fax numbers, without the need of a physical fax line for each. For more information, refer to DID/DTMF Routing (ISDN/Analog/Digital) (page 162).
MSN Routing (ISDN only)	Route received faxes based on the line MSN number. For more information, refer to MSN routing (page 164).
OCR Routing	Route incoming faxes depending on the fax's text content. Fax pages are converted to text using OCR technology and text is searched for the user's first and last name and/or other configurable text phrases. For more information, refer to OCR routing (page 164).
Line Routing	Route faxes based on the fax line that the fax was received on. For more information, refer to Line routing (page 166).
CSID Routing	Caller Sender Identification routing uses the sender's fax machine ID to route faxes to particular users. For more information, refer to CSID routing (page 167).

8.2.1 DID/DTMF Routing (ISDN/Analog/Digital)

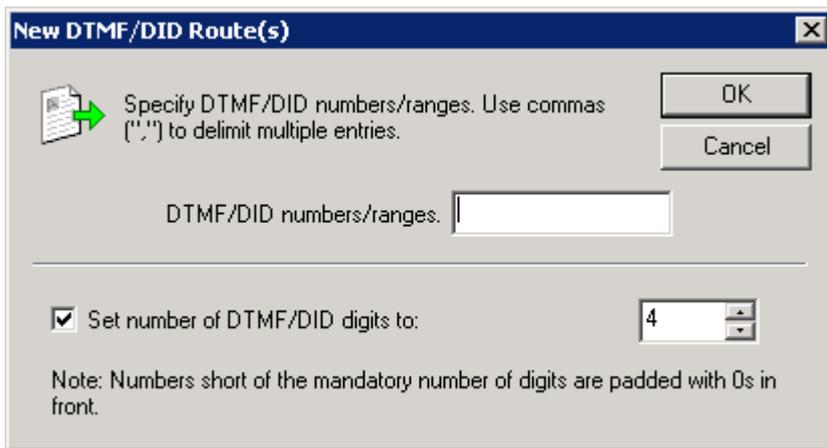
Through DID routing, the telecommunications provider assigns you a range of virtual numbers that enable individual users/printers/public folders to have their own fax numbers, without the need of a physical fax line for each. If you already have ISDN you can use available lines from your PBX. On answering the fax call, the ISDN protocol passes the number on which the call is being answered to GFI FaxMaker.

Pre-requisites

Configure the number of DID/DTMF digits to capture from the GFI FaxMaker device settings. From GFI FaxMaker **Lines/Devices** node, open the properties of the DID/DTMF device. Navigate to the **Advanced** tab and configure the **Number of DTMF/DID digits to capture**.

Adding DID/DTMF routes one-by-one

1. From GFI FaxMaker Configuration, right-click **Routing > DTMF/DID** and select **New...**



Screenshot 97: Creating a new DID route

2. Configure the following options:

Option	Description
DTMF/DID numbers/ranges	Key in the users' routing number (or virtual fax number). For example, for a 4 digit DID, enter the last 4 numbers.
Set number of DTMF/DID digits to	Select this option to set the minimum number of digits for each number. For example, if this value is 4 digits, number 1 is noted as 0001.

3. Click **OK** and repeat for all DTMF/DID numbers/ranges.

For each rule created, configure how to process the received faxes:

- » [Routing rule recipients](#)
- » [Automatically print incoming faxes](#)
- » [Backing up received faxes](#)
- » [Excluding routing rule from archiving](#)

Importing a range of DID routes

GFI FaxMaker can import a large number of DTMF/DID numbers and associated users from a CSV or TXT file in the following format:

"DTMF/DID number", "user1", "user2", "user3", ...

For example: "1234", "John Doe", "Bill Smith", "Roger Brown", "Joe Bloggs"

NOTE

Specify the user name as either the Active Directory display name or the SMTP email address. Ensure that all user names specified are included in the Licensed Users list.

To import a list of DID numbers:

1. From GFI FaxMaker Configuration, right-click **Routing > DTMF/DID** and select **Import DTMF/DID range**.
2. Select the CSV or TXT file containing the data to be imported.
3. Click **Open**.

Exporting a range of DID routes

To export the list of DID numbers and associated user names in CSV format:

1. From GFI FaxMaker Configuration, right-click **Routing > DTMF/DID** and select **Export DTMF/DID range**.
2. Select the location where to export the list and specify a file name.
3. Click **Save**.

The list is exported in the following format:

"DTMF/DID number", "user1", "user2", "user3", ...

For example: "1234", "John Doe", "Bill Smith", "Roger Brown", "Joe Bloggs"

8.2.2 MSN routing

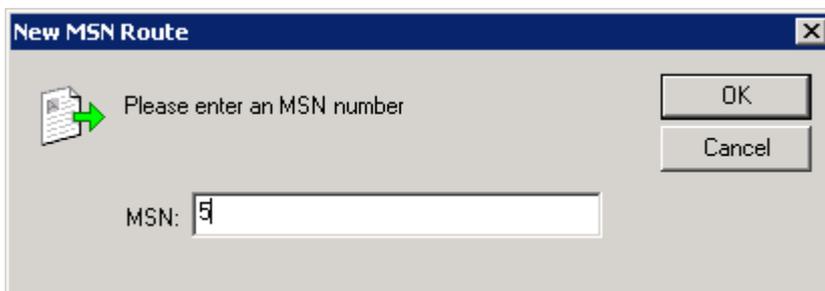
While similar to DID routing this method uses the available Multiple Subscriber Numbering (MSN) numbers instead of dedicated DID numbers (ISDN only). Each ISDN line has 1 or more MSN numbers (usually 9) assigned to it. If your ISDN line has 9 MSN numbers, you can have 9 different routes for a fax.

Pre-requisites

Before adding MSN routes, enter the MSN numbers in the ISDN card Device options. From GFI FaxMaker **Lines/Devices** node, open the properties of the DID/DTMF device. Navigate to the **Device** tab and enter all the MSN numbers to answer.

Adding MSN routes

1. From GFI FaxMaker Configuration, right-click **Routing > MSN** and select **New....**



Screenshot 98: Creating a new MSN route

2. Key in an **MSN** number for which to customize routing options.
3. Click **OK** and repeat for all MSN numbers.

For each rule created, configure how to process the received faxes:

- » [Routing rule recipients](#)
- » [Automatically print incoming faxes](#)
- » [Backing up received faxes](#)
- » [Excluding routing rule from archiving](#)

8.2.3 OCR routing

Optical Character Recognition (OCR) converts received faxes to text and routes faxes to:

- » Users assigned a custom set of phrases (OCR route). When a custom phrase is matched, GFI FaxMaker routes the fax to its configured set of users. For example, route faxes containing text “Attention: Sales” to the sales department.
- » Text matching user names within the Licensed users list. For example, GFI FaxMaker forwards a fax containing text “John Smith” to licensed user John Smith.

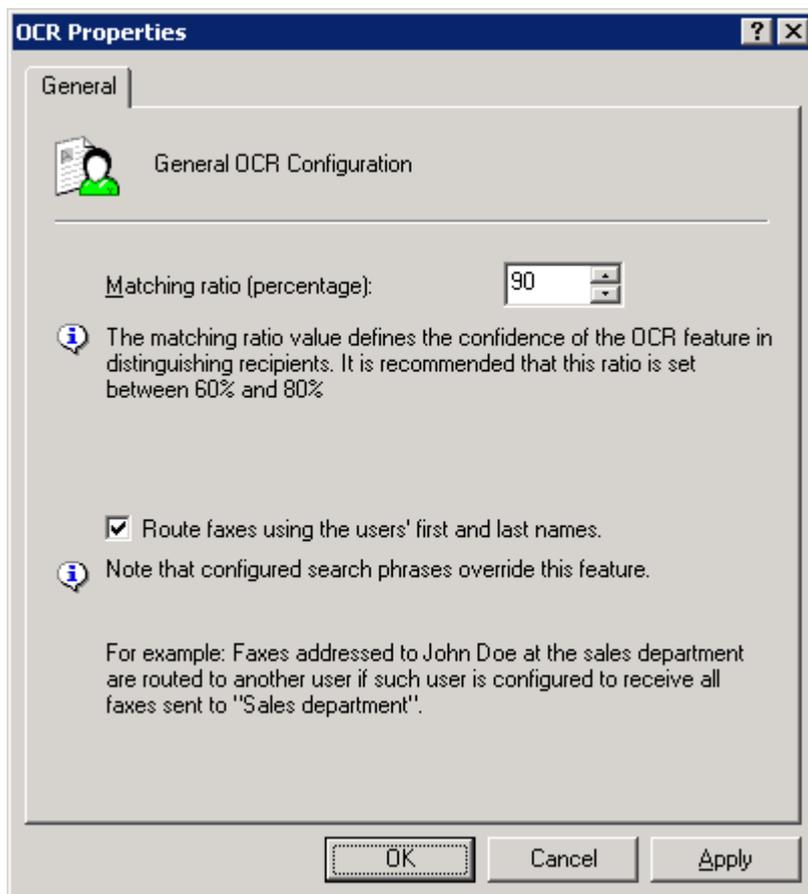
NOTE

For more information, refer to [OCR](#) (page 119).

OCR routing properties

Configure OCR settings to use while processing faxes for routing.

1. From GFI FaxMaker Configuration, right-click **Routing > OCR** and select **Properties**.



Screenshot 99: OCR routing properties

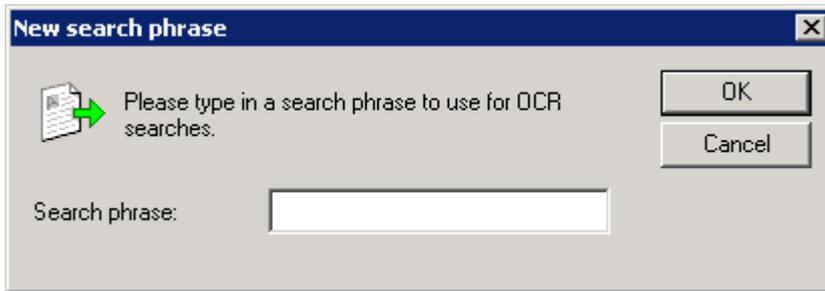
2. Configure the following options:

Option	Description
Matching ratio percentage	The matching ratio is the confidence that GFI FaxMaker needs to have before matching a keyword or name to a routing rule. NOTE: The recommended matching ratio is between 60% and 80% since this is dependent on the fax quality. Poor quality faxes cause OCR to not recognize all the letters and may result in faxes routed to the wrong users.
Route faxes using the users' first and last names	Automatically routes faxes to users if OCR matches a name with the list of Licensed users. NOTE: When both a user name and a custom search phrase (OCR route) are found, the custom search phrase routing overrides the matching user routing.

3. Click **OK**.

Adding an OCR route

1. From GFI FaxMaker Configuration, right-click **Routing > OCR** and select **New...**



Screenshot 100: New search phrase - Creating a new OCR search phrase

2. Key in a phrase to search for.

3. Click **OK** and repeat for all OCR phrases.

For each rule created, configure how to process the received faxes:

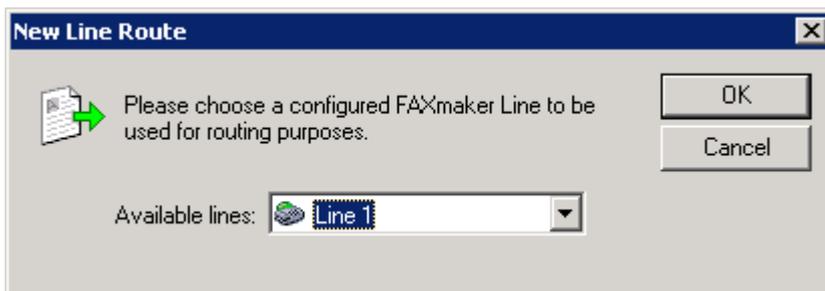
- » [Routing rule recipients](#)
- » [Automatically print incoming faxes](#)
- » [Backing up received faxes](#)
- » [Excluding routing rule from archiving](#)

8.2.4 Line routing

Line routing enables fax routing based on the fax line (**Lines/Devices** node) that the fax was received.

Adding a line route

1. From GFI FaxMaker Configuration, right-click **Routing > Line** and select **New...**



Screenshot 101: Creating a new Line route

2. Select a fax line.

3. Click **OK** and repeat for all fax lines.

For each rule created, configure how to process the received faxes:

- » [Routing rule recipients](#)
- » [Automatically print incoming faxes](#)
- » [Backing up received faxes](#)
- » [Excluding routing rule from archiving](#)

8.2.5 CSID routing

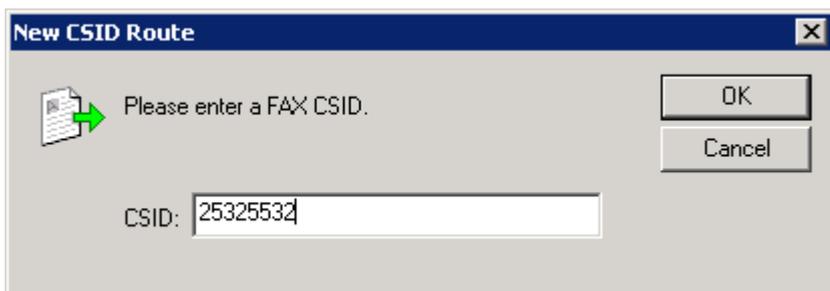
Call Subscriber Identification (CSID) routing routes faxes based on the FAX ID of the sender (the number that the sender's FAX machine/FAX card displays when sending a fax).

NOTE

This method is not recommended since fax senders may hide the CSID.

Adding CSID routes

1. From GFI FaxMaker Configuration, right-click **Routing > CSID**, and select **New...**



Screenshot 102: Creating a new CSID route

2. Key in the **CSID**.

3. Click **OK** and repeat for all CSID numbers.

For each rule created, configure how to process the received faxes:

- » [Routing rule recipients](#)
- » [Automatically print incoming faxes](#)
- » [Backing up received faxes](#)
- » [Excluding routing rule from archiving](#)

Importing a range of CSID routes

GFI FaxMaker can import a high number of CSID numbers and associated users from a CSV or TXT file in the following format:

```
"CSID", "user1", "user2", "user3", ...
```

For example: "1234", "John Doe", "Bill Smith", "Roger Brown", "Joe Bloggs"

NOTE

Specify the user name as either the Active Directory display name or the SMTP email address. Ensure that all user names specified are included in the Licensed Users list.

To import a list of CSID routes:

1. From GFI FaxMaker Configuration, right-click **Routing > CSID** and select **Import CSID...**
2. Select the CSV or TXT file containing data to import.
3. Click **Open**.

Exporting a range of CSID routes

To export the list of CSID numbers and associated user names in CSV format:

1. From GFI FaxMaker Configuration, right-click **Routing > CSID** and select **Export CSID...**
2. Select the location where to export the list and specify a file name.
3. Click **Save**.

The list is exported in the following format:

"CSID", "user1", "user2", "user3", ...

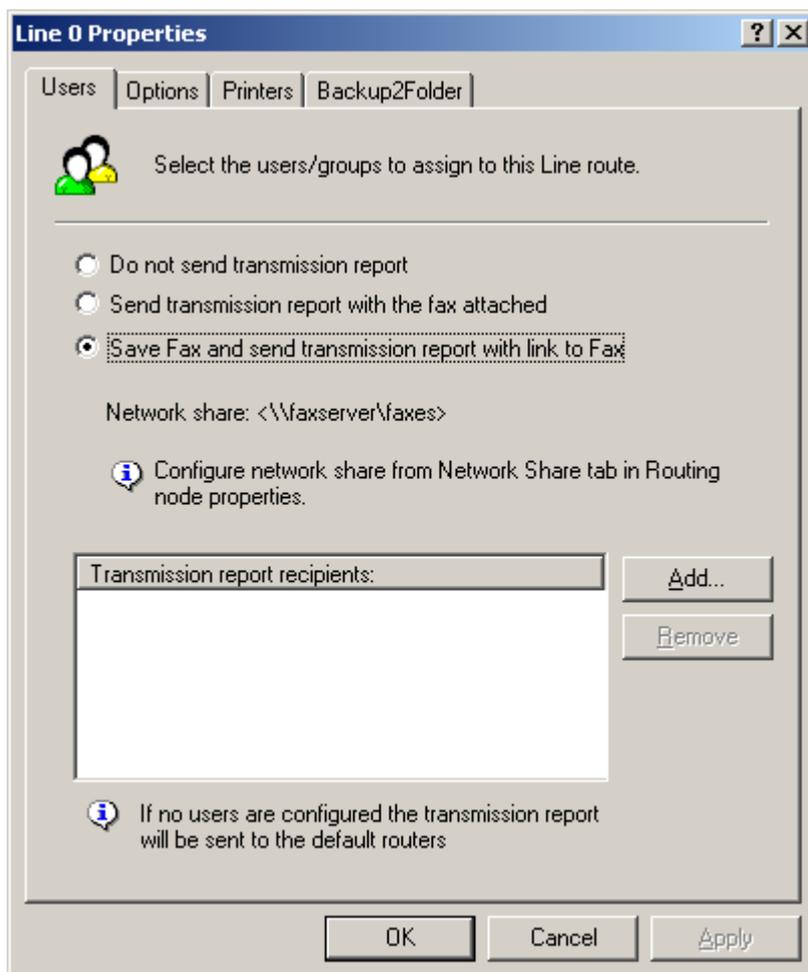
For example: "1234", "John Doe", "Bill Smith", "Roger Brown", "Joe Bloggs"

8.2.6 Received fax recipients

Routing rule transmission reports are sent by GFI FaxMaker to users configured to receive faxes that match a particular [routing rule](#). Transmission reports provide users with the received fax data, using one of the following methods:

- » Fax attached to transmission report
- » Link to the fax stored in a network share. For more information, refer to [Store incoming faxes to a network share](#) (page 171).

For each routing rule created, configure the list of users and the method to deliver the fax data:



Screenshot 103: Users to route incoming faxes to

1. From the routing rule properties **Users** tab, select one of the following options:

Option	Description
Do not send transmission report	A transmission report is not sent to users.
Send transmission report with the fax attached	A transmission report is emailed to the list of users, with the fax attached to the report.
Save fax and send transmission report with link to fax	A transmission report is emailed to the list of users, containing a link of the fax stored on a network share. For more information, refer to Store incoming faxes to a network share (page 171).

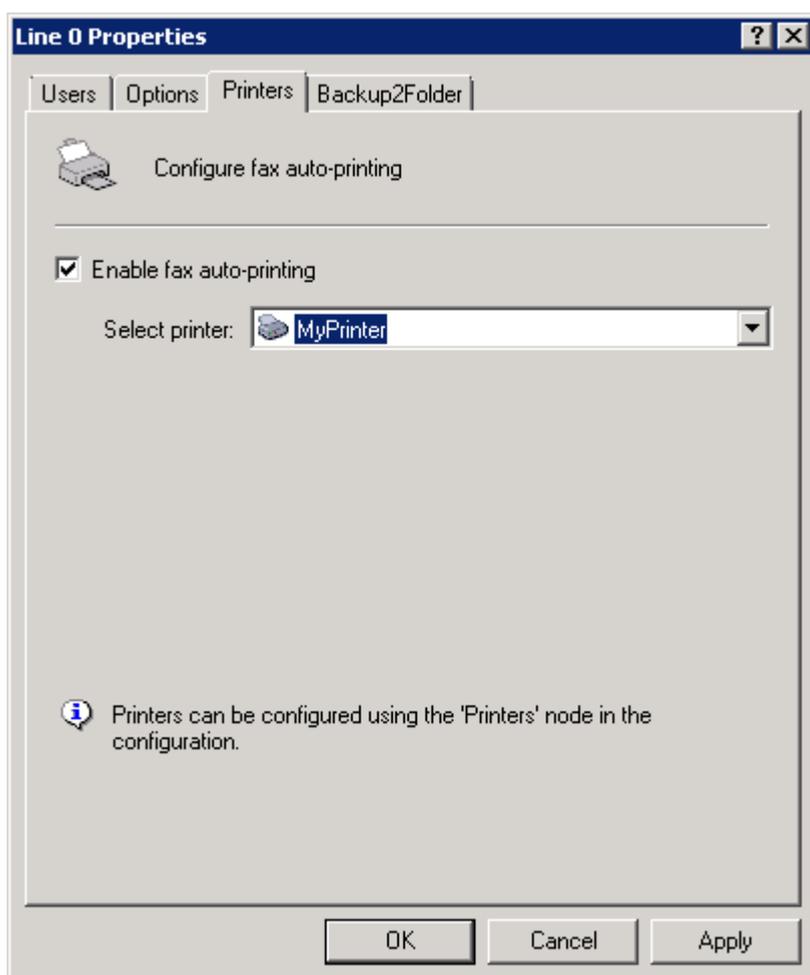
- When sending transmission reports, click **Add** to specify the list of users to whom to send the report to.
- Click **Apply**.

8.2.7 Automatically print incoming faxes

Faxes received on particular [routing rules](#) can be automatically printed on receipt.

NOTE

Configure printers before using this option. For more information, refer to [Printers](#) (page 174).



Screenshot 104: Automatically print fax

- From the routing rule properties dialog, select the **Printers** tab.
- Select **Enable fax auto-printing**.

3. From the **Select printer** list, select the printer.
4. Click **Apply**.

8.2.8 Backing up received faxes

Faxes received on particular **routing rules** can be backed up to a folder.

NOTE

1. The file name of each fax backed up contains the fax delivery time-stamp.
2. GFI FaxMaker does not create duplicates for faxes that match two or more routing rules and that have the same Backup2Folder destination.
3. This feature requires that the target folder can handle 'long file names'. Hard-disk partition formats that handle long file names include NTFS and FAT32.



Screenshot 105: Automatically backup faxes

1. From the routing rule properties dialog, select the **Backup2Folder** tab.
2. Select **Automatically backup faxes to folder** and specify where to backup faxes.
3. Select **Backup faxes in this format** and select the format in which to store faxes.
4. Click **Apply**.

8.2.9 Modifying routing rule name/number

To change a CSID, DID/DTMF or OCR route name or number:

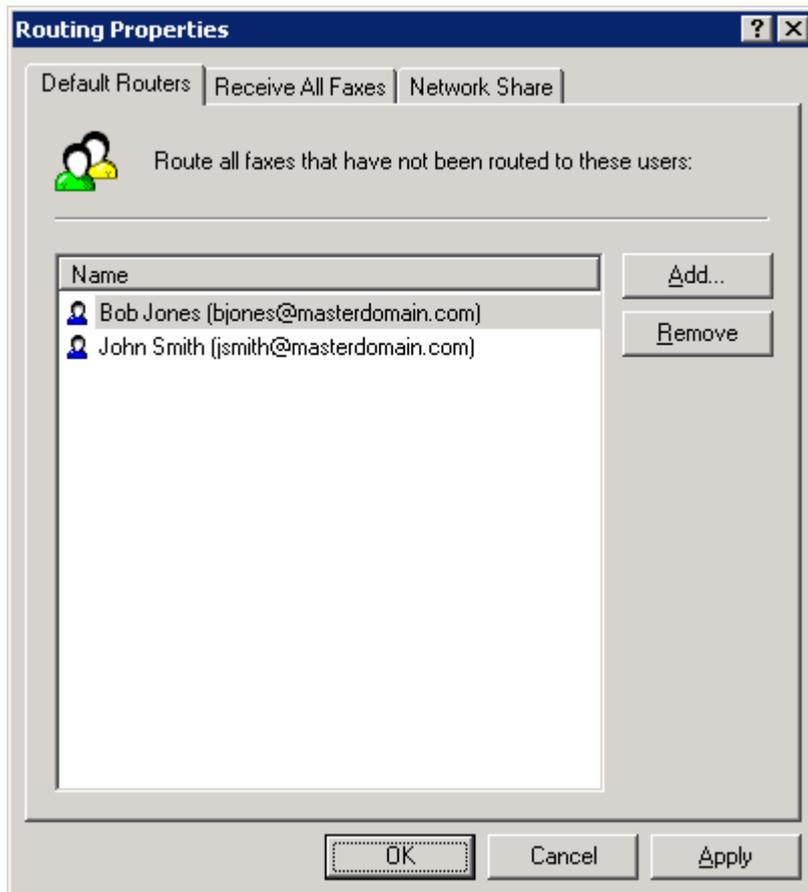
1. From the routing rule properties dialog, select the **Options** tab.
2. Change the name or number of the routing rule.
3. Click **Apply**.

8.2.10 Received faxes that match no routing rule

When a fax matches no routing rule, it is routed to the list of Default Routers.

To configure Default Routers:

1. From GFI FaxMaker Configuration, right-click **Routing**, and select **Properties**.



Screenshot 106: Default fax routers

2. Select the **Default Routers** tab.
3. Click **Add** and specify the user/mailbox where to deliver faxes not routed.
4. Click **OK**.

8.2.11 Store incoming faxes to a network share

Received faxes can be stored in a shared folder. An email with a link to the saved fax is sent to the configured routers.

When receiving a fax on a routing rule that uses this option, GFI FaxMaker creates a sub-folder in the share as follows:

<network share path configured>\yyyy_mm\ddd

Where:

- » **<network share path configured>** - the shared folder where received faxes are stored
- » **yyyy** - year
- » **mm** - month
- » **dd** - day

Step 1: Create network share

Create a shared folder with:

- » Full access to the GFI FaxMaker account (user credentials specified during installation) in order to be able to save faxes.
- » Read permissions to all users that will be accessing faxes on this share.

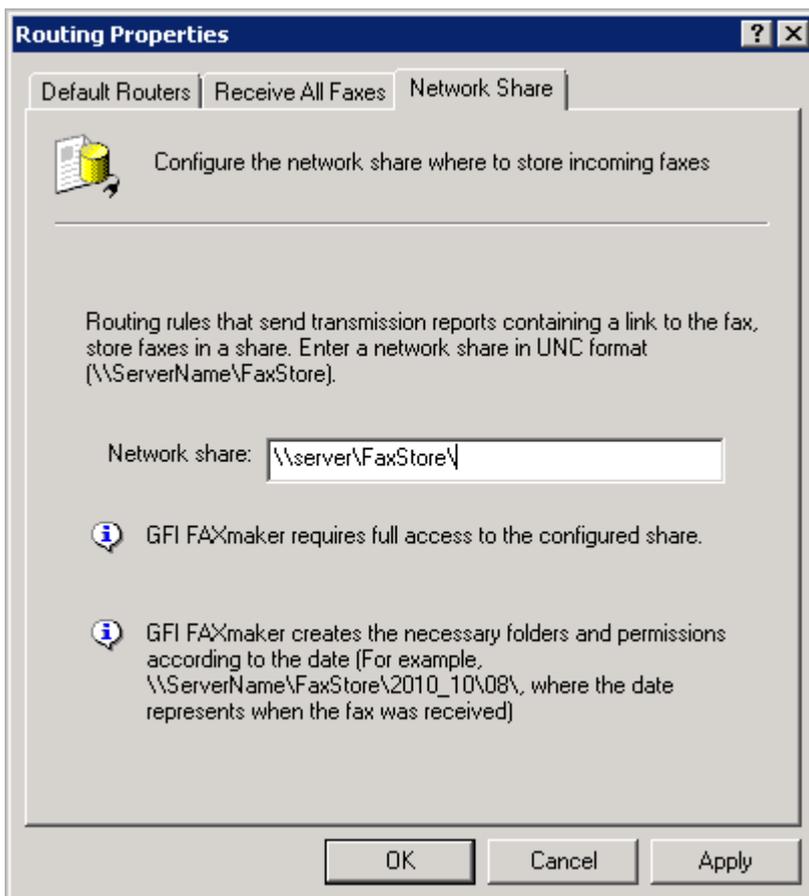
NOTE

For security reasons, only fax recipients can access stored faxes. For example faxes routed to John Doe, are only accessible by John Doe.

Step 2: Configure GFI FaxMaker

Specify the network share where routing rules with network sharing enabled store faxes.

1. In GFI FaxMaker Configuration, right-click **Routing** and select **Properties**.



Screenshot 107: Configuring the Network Share path

2. Select the **Network Share** tab.
3. Specify the network share path (for example, `\\MyServer\MyFaxes`).

NOTE

Enter share in UNC format so that users can access it through the network.

4. Click **Apply**.

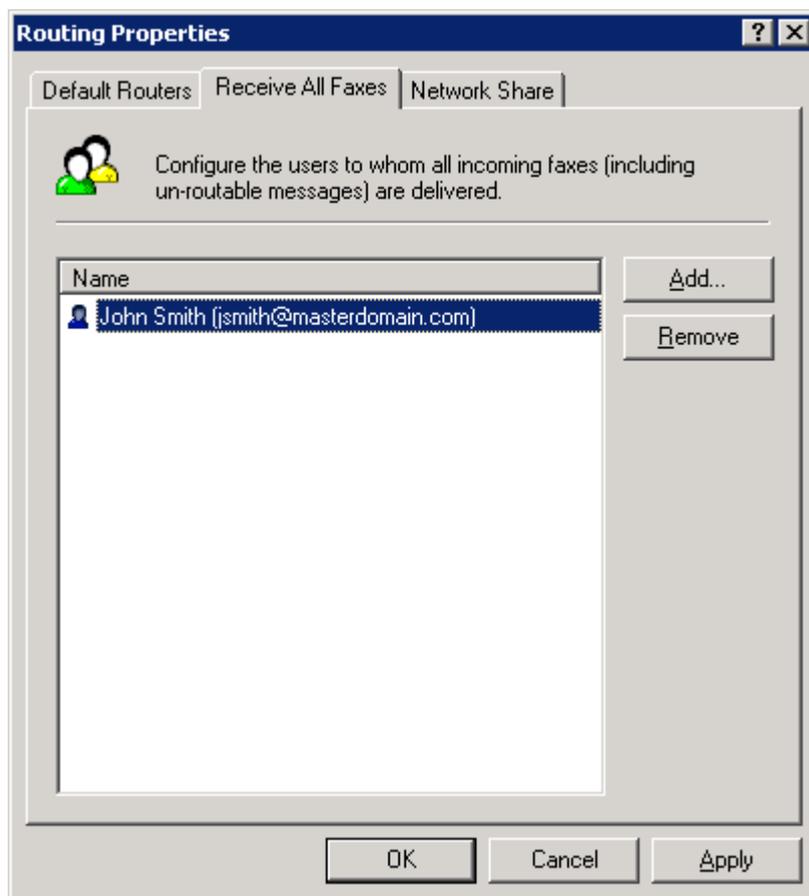
8.2.12 Users that receive all incoming faxes

Specify users that should receive all incoming faxes.

NOTE

Use this feature to store all incoming faxes to an exchange store or a public mailbox.

1. From GFI FaxMaker Configuration, right-click **Routing** and select **Properties**.



Screenshot 108: Routing properties - users that receive all incoming faxes

2. Select the **Receive all faxes** tab.

3. Click **Add** and specify the user/mailbox that should receive all faxes.

4. Click **OK**.

8.2.13 Routing to a public folder in Microsoft® Exchange

GFI FaxMaker can route received faxes to a Microsoft® Exchange public folder so that these are accessible to everyone or a particular group of users.

For example, route all faxes related to sales to a public folder dedicated to all sales communications and accessible by all representatives.

To do this:

1. Create a mail-enabled public folder on your mail server.

NOTE

A dedicated user mailbox may need to be created and configured to forward all faxes to the mailbox.

2. Configure GFI FaxMaker routing options:

Fax routing to public folder	Description
Faxes that match a particular routing rule	Add the public folder mailbox (or the dedicated user mailbox) email address to the routing rules' users lists. For more information, refer to Transmission reports (page 130).
Route all received faxes to public folder	Add the public folder mailbox (or the dedicated user mailbox) email address to the Receive all faxes list. For more information, refer to Users that receive all incoming faxes (page 173).

8.2.14 Excluding routing rules from archiving

You can exclude faxes received on particular [routing rules](#) from being archived.

1. From the routing rule properties dialog, select the **Options** tab.
2. Select **Exclude this number/phrase/line from all archiving options**.
3. Click **Apply**.

NOTE

This setting overrides other fax archiving settings. For more information, refer to [Fax archiving](#) (page 107).

8.3 Printers

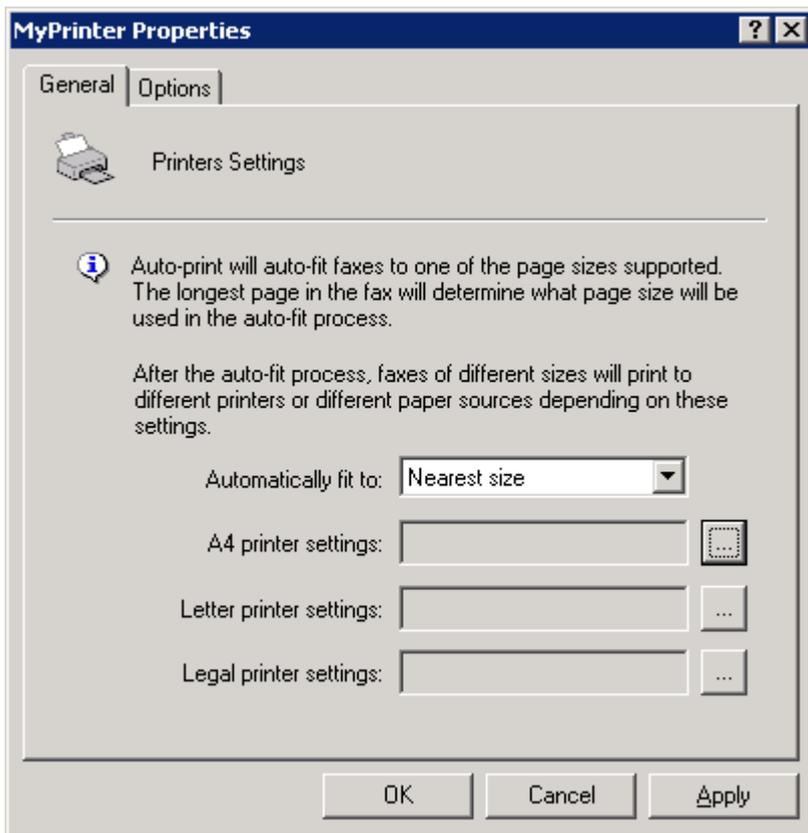
To automatically print incoming faxes, first configure printers and print settings. Then configure routing options to print to particular printers.

NOTE

Printers must be first added and pre-configured in the operating system's printers list.

To add printers in GFI FaxMaker:

1. From GFI FaxMaker Configuration, right-click **Advanced > Printers** and select **New...**
2. Key in a name for the printer.



Screenshot 109: Configuring printers

3. From the **General** tab, specify how GFI FaxMaker should resize incoming faxes and the printers to use for each paper size.

Option	Description
Automatically fit to	Select how to resize received faxes. Select from: » Nearest size - Resizes fax to the size nearest to the content received. » A4 only - Resize to A4 paper size » Letter only - Resize to Letter paper size » Legal only - Resize to Legal paper size
A4 printer settings	Click ... to select printer for A4 paper size.
Letter printer settings	Click ... to select printer for Letter paper size.
Legal printer settings	Click ... to select printer for Legal paper size.

4. Click **OK**.

8.3.1 Auto-print options

GFI FaxMaker can be configured to never resize incoming faxes and to always print in the same size that a fax is received.

NOTE

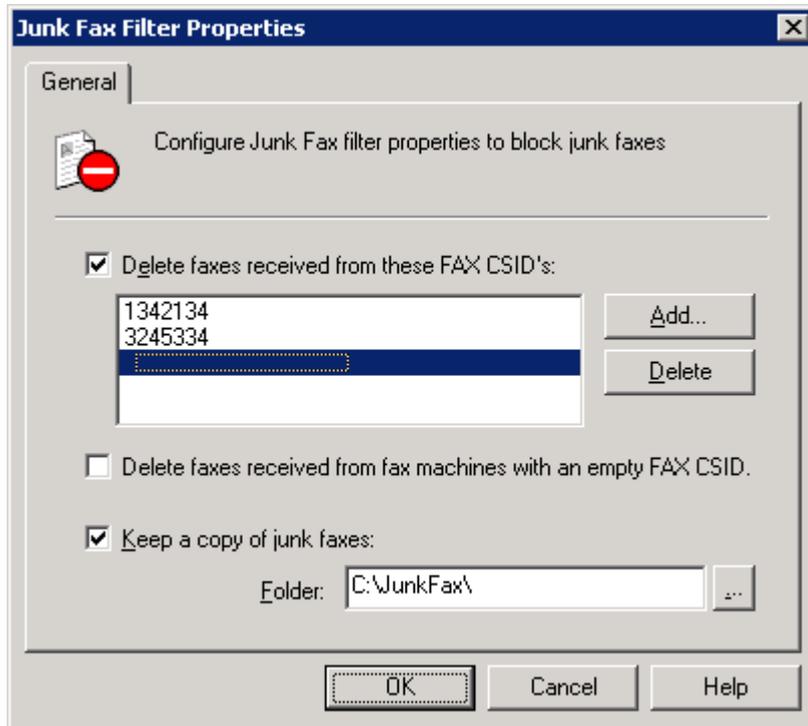
If this option is enabled, faxes larger than the printer's paper size will not fit and some areas may not be printed.

1. From GFI FaxMaker Configuration, right-click **Advanced > Miscellaneous** and select **Properties**.
2. From the **General** tab, select **Force 1:1 printing**.

3. Click **OK**.

8.4 Junk Fax filter

GFI FaxMaker enables automatic deletion of faxes received from certain fax IDs.



Screenshot 110: The junk fax filter options

To block a fax ID:

1. From GFI FaxMaker Configuration, right-click **Advanced > Junk Fax filter** and select **Properties**.
2. Configure the following options:

Table 5: Junk fax filter options

Option	Description
Delete faxes received from these FAX CSID's	Enables Junk Fax Filter. Add CSIDs of fax senders to block.
Delete faxes received from fax machines with an empty CSID	Deletes faxes received from senders with no CSID. NOTE: Use with caution since some senders can choose to hide CSID.
Keep a copy of junk faxes	Store all junk faxes to a folder. Use this option to reviewed blocked faxes before deletion (Recommended).

3. Click **OK**.

9 Maintenance

This topic contains information about how to maintain your GFI FaxMaker installation:

9.1 How to move your GFI FaxMaker installation to a different server	177
9.2 Moving GFI Directory user list to a different server	180
9.3 How to backup GFI FaxMaker settings	181
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9.5 Product Patches	184

9.1 How to move your GFI FaxMaker installation to a different server

This topic describes how to move your existing GFI FaxMaker installation to a new server while retaining your current settings.

WARNING

Moving a GFI FaxMaker installation and settings to another server requires a considerable amount of manual work, fax service downtime, third-party software re-configuration and extensive testing. It is highly recommended to review the information in this topic and plan ahead before undertaking this task.

9.1.1 Important notes

- » Certain features in GFI FaxMaker use system resources such as locations on disk, printer drivers and third-party software. GFI FaxMaker has no control over these resources and must therefore be manually reconfigured. For example, OCR may be configured to store a copy of OCR content on disk. This folder must be re-created on the new server or a new directory reconfigured in GFI FaxMaker. Refer to [Step 7: Update feature settings](#) in this topic.
- » This procedure is applicable for the latest version of GFI FaxMaker only.
- » The old instance of GFI FaxMaker must be running the latest version of GFI FaxMaker and the same version used to install the new instance.
- » If GFI FaxMaker is currently installed in Active Directory, the new installation should be in the same Active Directory structure, referencing the same Active Directory domain.
- » When moving Brooktrout SR140 FoIP software, a rehosting of the license key is required since the license is tied to the host machine. For more information refer to http://go.gfi.com/?pageid=FM_SR140re-hostlicense

9.1.2 Step 1: Upgrade old server to the latest version

Before moving your installation, ensure that you are running the latest version of GFI FaxMaker on the old server. If an upgrade is required, upgrade the old GFI FaxMaker installation. For more information, refer to [Upgrading GFI FaxMaker](#) (page 57).

9.1.3 Step 2: Migrate GFI Directory (if applicable)

When using GFI Directory, migrate the directory service and data BEFORE proceeding with the GFI

FaxMaker move. For more information, refer to [Moving GFI Directory user list to a different server](#) (page 180).

9.1.4 Step 3: Copy the old configuration files

On the old server, stop the following services:

- » GFI FaxMaker Fax Server
- » GFI FaxMaker Message Transfer Agent
- » GFI FaxMaker Attendant
- » IIS Admin

Copy the following files and folders that reside in the GFI FaxMaker installation folder.

Unless modified manually during installation, by default, GFI FaxMaker installs to the following path:

C:\Program Files (x86)\GFI\FaxMaker\

Files and folders to copy:

Folder\Files	Type	Notes
All files with extension FST	File	For example: fmdb_rul.fst and fmdevcfg.fst.
fmdb_rul.mdb	File	
File config.mdb	File	
fmsmscomms.xml	File	
doccvt.ini	File	
remclient.ini	File	
modems.dev	File	
rcvlog.txt	File	
sendlog.txt	File	
File capi.dev	File	If available.
options.ini	File	If available.
mobiles.dev	File	If available.
logs\rcvlog.fmlogger.txt	File	This is the default location of log files . If you changed the default location, copy the file from that folder.
logs\sendlog.fmlogger.txt	File	This is the default location of log files . If you changed the default location, copy the file from that folder.
coverpge	Folder	Include all folder contents.
data	Folder	Include all folder contents.
archive	Folder	Include all folder contents. This is the default location of the Firebird database fax archive feature. If you changed the default location, backup that folder as well.

9.1.5 Step 4: Install GFI FaxMaker

Ensure that the new server meets or exceeds the GFI FaxMaker [system requirements](#). If using a fax

modem, install the modem on the new server.

Save and close any open applications and run the GFI FaxMaker installer using an account with administrative privileges. Apply the settings below when prompted during the installation wizard:

- » When asked to choose the installation path, select the same installation path as the old instance.
- » Key in your existing license key to activate the product.

Important

Do NOT run the post-install configuration wizard. Click **Cancel** to stop and close the post-install wizard. If you proceed with the wizard, your old settings will be overwritten.

9.1.6 Step 5: Move configuration files

On the new server, stop the following GFI FaxMaker services from the Services applet:

- » GFI FaxMaker Fax Server
- » GFI FaxMaker Message Transfer Agent
- » GFI FaxMaker Attendant
- » IIS Admin

Move the files copied in step 3 to the GFI FaxMaker installation folder on the new server, overriding existing files.

Start the GFI FaxMaker services that were stopped.

9.1.7 Step 6: Reconfigure mail server connectors

Adjust your mail server connectors to route fax and SMS emails to the new GFI FaxMaker server. Change the connectors IP address to the address of the new GFI FaxMaker server. For more information, refer to [Mail server configuration](#) (page 15).

9.1.8 Step 7: Update feature settings

Various features in GFI FaxMaker utilize system resources. These settings are imported on to the new server as previously configured on the old installation. Consequently these old settings require manual reconfiguration to be adapted to the new server.

Examples:

» [XMLAPI](#) and [TextAPI](#) pick up APIs from a folder on disk. After migration, the new installation is still configured to pick up APIs from the directory configured on the old server. This path may, however, not exist on the new server. Re-configure the TextAPI and XMLAPI pickup folders to new paths on the new server. Third-party applications that automatically generate APIs for faxing will also require re-configuration to deploy APIs to the new pickup location.

» [Fax lines](#) may have been configured to backup sent/received faxes to a folder on disk. Re-configure the folder where to backup faxes to a new location on the new server. Fax lines may also be configured to automatically print received faxes. In this case re-configure the fax line to print on another printer.

The below table lists some features and settings that may require reconfiguration. Various other tweaks and re-configurations may be required depending on your deployment scenario and environment.

Feature	Notes
Fax archiving to database	<ul style="list-style-type: none"> » Microsoft® SQL/MSDE: ensure that the new server has access to the database server. » Firebird: re-configure path to database.
OCR	Directory where OCR content is stored.
Log files	Log files custom folder.
HP Digital Sender and SAP	Directories where the HP Digital Sender and/or SAP pick up the fax information files.
Fax lines	Locations where lines store copies of sent/received faxes and printer drivers.
Sending options	Revise printer options.
Document conversion	Install any software that is used to convert attachments to fax format.
NetPrintQueue2Fax	May require re-installation of printer driver on client machines when moving from a 32-bit server to a 64-bit server.
Printers	Install the old printer driver on the new server or re-configure new printers. When re-configuring new printers, ensure that features using old printers are adjusted accordingly.
Junk fax filter	Directory where junk faxes are stored.
SMS	Install GSM modems (if applicable) on the new server.

9.1.9 Step 8: Test the new faxing setup

Ensure that the new fax setup is properly configured and fully functional.

Send test faxes to check fax transmission. For more information, refer to [Testing your installation](#) (page 64).

It is also recommended to test individual features to ensure that the configuration is migrated successfully.

9.2 Moving GFI Directory user list to a different server

This topic describes how to move your existing GFI Directory installation to a new server while retaining your current user list. Run this process before migrating

9.2.1 Important notes

- » This procedure is applicable for the latest versions of GFI FaxMaker and GFI Directory only.
- » Both the old instance and the new instance of GFI Directory must be running the latest version which is available with the latest version of GFI FaxMaker. For more information, refer to [Upgrading GFI FaxMaker](#) (page 57).
- » This information is not applicable when GFI FaxMaker is currently installed in Active Directory mode.

9.2.2 Step 1: Upgrade old server to the latest version

Before moving your installation, ensure that you are running the latest version of GFI FaxMaker on the old server. If an upgrade is required, upgrade the old GFI FaxMaker installation. For more information, refer to [Upgrading GFI FaxMaker](#) (page 57).

9.2.3 Step 2: Run backup of the GFI Directory data

Open an elevated command line window and run the following commands in the sequence shown, hitting

carriage return after each command:

1. dsdbutil
2. activate instance GFIDirectoryDataStore
3. ifm
4. create full GFIDirectoryDataStoreBackup

On completion, take note of the backup location. The data files are stored in this location.

9.2.4 Step 3: Copy the data files

Copy the backup files generated in step 2 above:

1. Open the backup file location in Windows Explorer. This is usually stored in this folder: c:\windows\system32\GFIDirectoryDataStoreBackup\
2. Copy the file **adamntds.dit**.

9.2.5 Step 4: Install GFI Directory

Ensure that the new server meets or exceeds the GFI FaxMaker [system requirements](#).

Retrieve the GFI Directory installer from the current GFI FaxMaker installation. Go to *<GFI FaxMaker installation folder>\GFIDS* and copy *gfidirectory.exe* to the new server.

Run the installer on the new server to install GFI Directory.

9.2.6 Step 5: Move the data file

After installing GFI Directory, copy the user data to the new server:

1. Stop the following GFI Directory services from the Services applet:
 - GFI Directory Services
 - GFIDirectoryDataStore
2. Open the folder: *<GFI Directory installation folder>\GFIinstance\data*
3. Delete all files in this folder.
4. Move the file **adamntds.dit** copied in step 2 to this folder.
5. Start the services that were previously stopped.

9.2.7 Step 6: Test and confirm user migration

Ensure that the existing GFI FaxMaker users are present in the new instance of GFI Directory.

1. In an internet browser, go to `http://[server name]/GFIDirectory`.
2. Go to **Manage > Users** to view the list of users.
3. Ensure that users and user information was migrated successfully.

You may now proceed to continue migration of GFI FaxMaker. For more information, refer to [How to move your GFI FaxMaker installation to a different server](#) (page 177).

9.3 How to backup GFI FaxMaker settings

This topic describes how to backup your GFI FaxMaker configuration.

NOTES

1. These instructions apply to the latest version of GFI FaxMaker only.
2. Log on to the GFI FaxMaker server using an account with administrative privileges.
3. GFI FaxMaker services are stopped during backup. Consequently fax transmission is also stopped and no faxes are sent or received.
4. When GFI FaxMaker machine is virtualized, it is recommended to create a snapshot of the virtualized machine. This allows to restore previous GFI FaxMaker version easily.

9.3.1 Step 1: Stop GFI FaxMaker services

GFI FaxMaker services must be stopped when backing up the configuration. When using a backup software to automate the backup, ensure that the selected backup software stops these services before the backup job starts. If services or files are open and/or running, the backup may be unusable. If this is the case, a manual backup is recommended.

When stopping services manually, use either the Services applet or create a batch file using the `net stop` command.

GFI FaxMaker services to stop:

- » `GFI FaxMaker Fax Server`
- » `GFI FaxMaker Message Transfer Agent`
- » `GFI FaxMaker Attendant`

When using a Brooktrout device or SR140 also stop:

`Brooktrout Boston Host Service`

NOTES

1. Older versions of GFI FaxMaker utilize different service names. In this case, stop all services with a name that start with `GFI FaxMaker` or `FAXmaker`.
2. When services are stopped, no faxes or SMS are sent or received.

9.3.2 Step 2: Backup files

Copy the following files and folders that reside in the GFI FaxMaker installation folder.

Unless modified manually during installation, by default, GFI FaxMaker installs to the following path:

`C:\Program Files (x86)\GFI\FaxMaker\`

It is recommended to take note of the installation path since if the backup needs to be used, the files need to be deployed to the same path (either on the same or on a different server).

Files and folders to backup:

Folder\Files	Type	Notes
All files with extension FST	File	For example: <code>fmdb_rul.fst</code> and <code>fmdevcfg.fst</code> .
<code>fmdb_rul.mdb</code>	File	

Folder\Files	Type	Notes
File config.mdb	File	
fmsmscomms.xml	File	
doccvr.ini	File	
remclient.ini	File	
modems.dev	File	
rcvlog.txt	File	
sendlog.txt	File	
File capi.dev	File	If available.
options.ini	File	If available.
mobiles.dev	File	If available.
logs\rcvlog.fmlogger.txt	File	This is the default location of log files . If you changed the default location, copy the file from that folder.
logs\sendlog.fmlogger.txt	File	This is the default location of log files . If you changed the default location, copy the file from that folder.
coverpge	Folder	Include all folder contents.
data	Folder	Include all folder contents.
archive	Folder	Include all folder contents. This is the default location of the Firebird database fax archive feature. If you changed the default location, backup that folder as well.

When using a Brooktrout TR1034 fax board, go to folder `..\FaxMaker\brooktrout\TR1034\Boston\config\` and back up `callctrl.cfg` and `btcall.cfg`.

9.3.3 Step 3: Start the GFI FaxMaker services

Start the services that were stopped in Step 1.

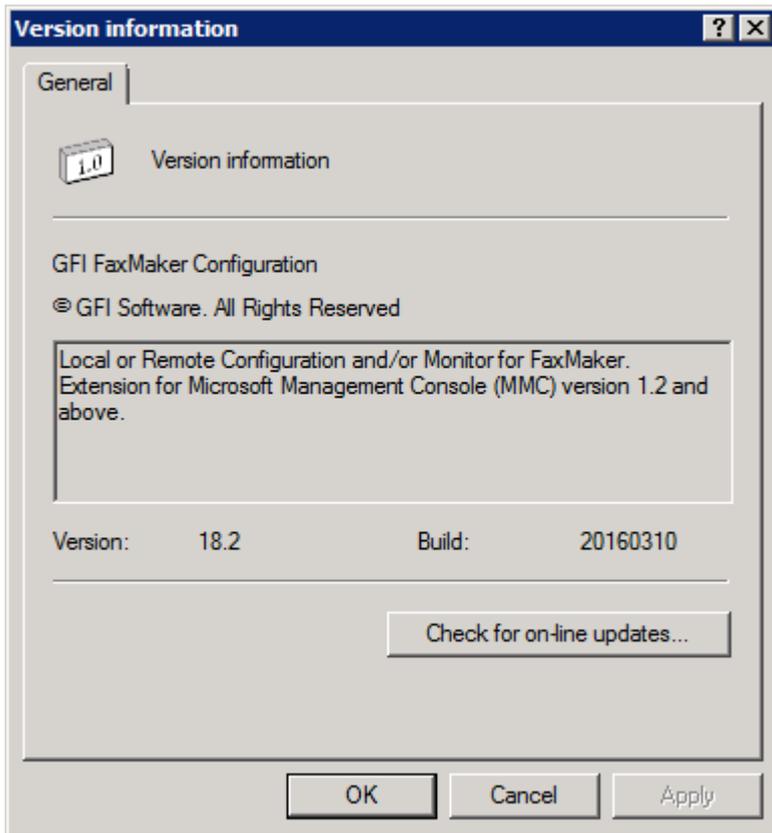
When starting services manually, use either the Services applet or create a batch file using the `net start` command.

For more information, refer to [How to move your GFI FaxMaker installation to a different server](#) (page 177).

9.4 Version information

To review information about your GFI FaxMaker installation, from GFI FaxMaker Configuration, right-click **General > Version information** and select **Properties**.

You can also check for newer versions of GFI FaxMaker from the GFI web site.



Screenshot 111: GFI FaxMaker version information

9.5 Product Patches

The Product Patches feature verifies if there are any software patches available for your version of GFI FaxMaker by directly connecting to the GFI Update Servers.

NOTE

It is highly recommended to check for patches periodically to keep GFI FaxMaker updated.

1. From GFI FaxMaker Configuration, go to **General > Product Patches**.
2. GFI FaxMaker connects to the GFI Update Server and lists all available updates.
3. Click the link of patches to download.
4. Decompress the downloaded patch file.
5. Follow the instructions included with the downloaded file to implement the patch.

NOTE

Incorrect patch installation (for example, by not following instructions) may cause GFI FaxMaker to malfunction or degrade its performance.

10 SMS

GFI FaxMaker also features a complete SMS gateway that enables users to send SMS from their workstations.

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10.1 How to send an SMS

- » [Method 1: Via email](#)
- » [Method 2: Using the web-based SMS Client](#)
- » [Method 3: XMLAPI](#)

10.1.1 Method 1: Via email

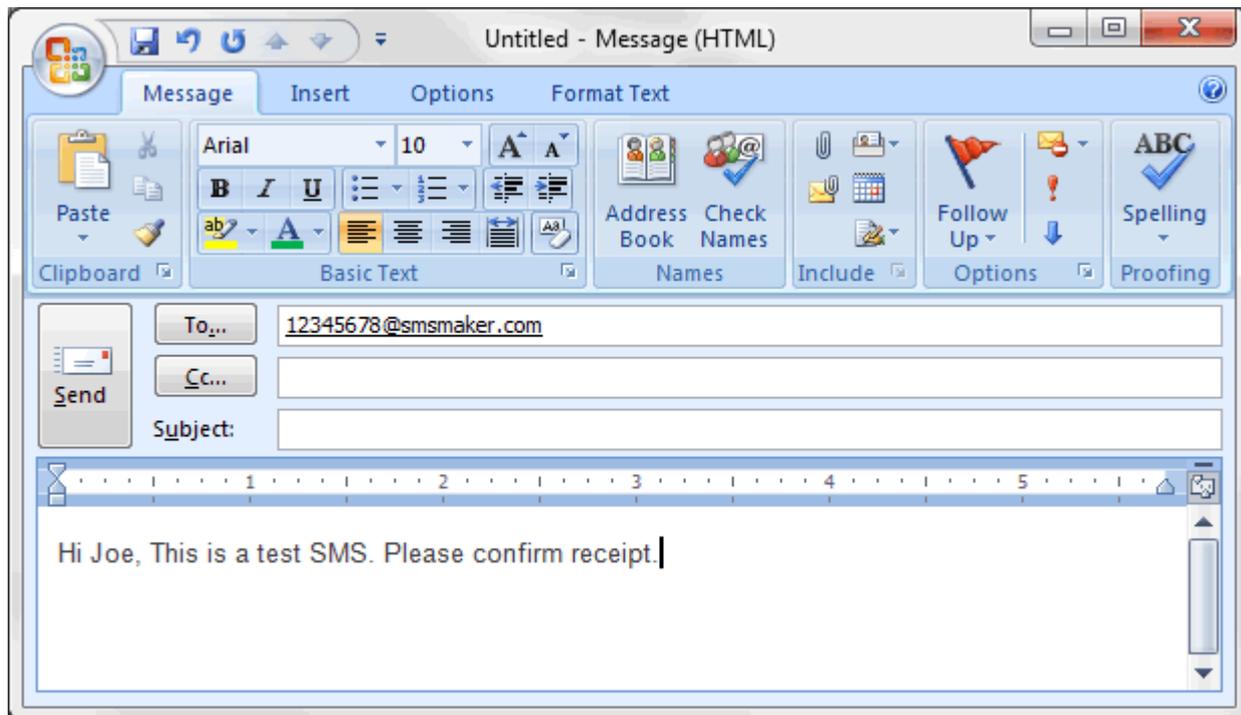
To send an SMS from an email client, such as Microsoft® Outlook®, address an email to `<number>@smsmaker.com`. For example: `12345678@smsmaker.com`

Key in the SMS message in the email body.

NOTES:

- » Remove email signature and any other not required content from the email body, as this will be included in the SMS message.
- » The default fax (`faxmaker.com`) and SMS (`smsmaker.com`) domains can be customized by the GFI FaxMaker administrator. Use the configured SMS domain accordingly.

» This method is only applicable when routing emails via SMTP. This is not applicable when using the POP3 Downloader to poll SMS from a POP3 Mailbox. For more information, refer to [Sending faxes/SMS via a POP3 Mailbox](#) (page 105).

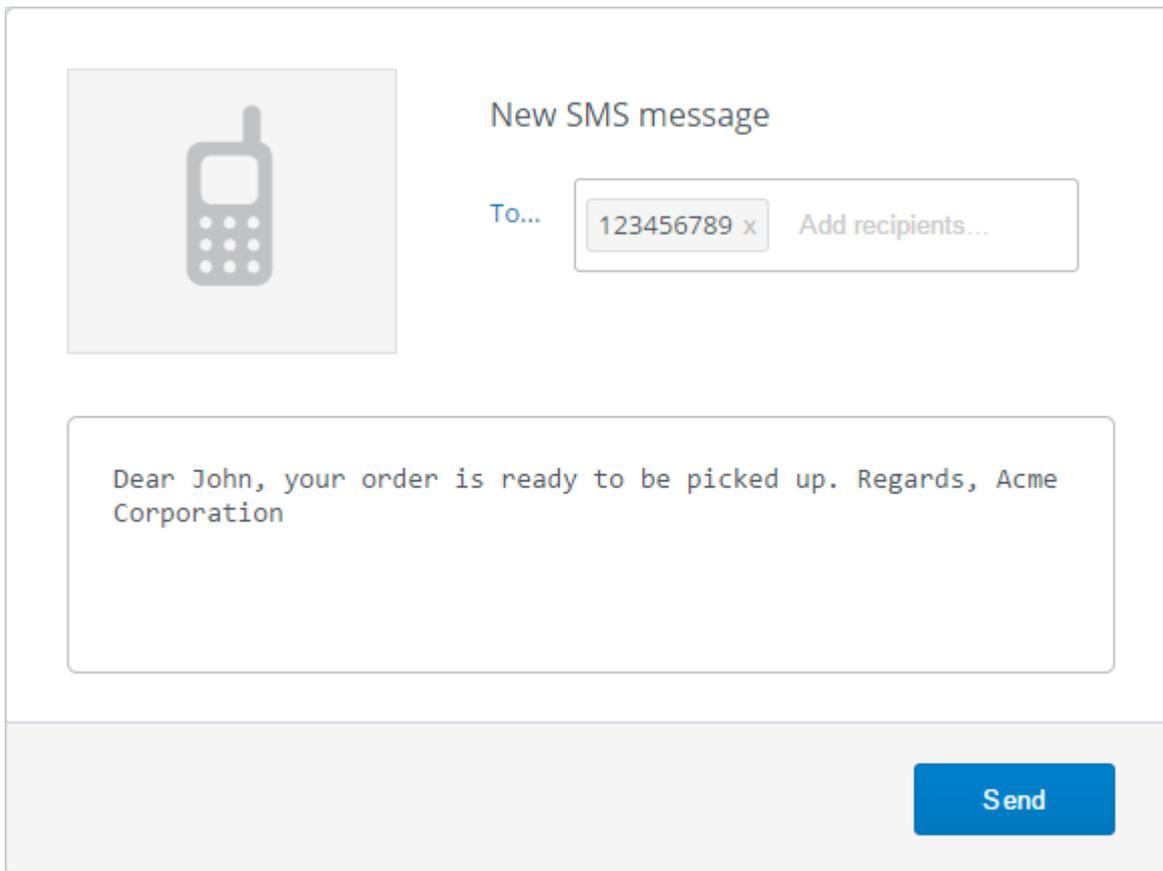


Screenshot 112: Sending SMS from email client

10.1.2 Method 2: Using the web-based SMS Client

Licensed users can send SMS by accessing the GFI FaxMaker web client from a supported web browser.

1. [Login](#) to the GFI FaxMaker web console and click the **Client** tab.
2. From the left pane, go to **SMS > Compose**.
3. In the **To...** field key in the recipients' SMS numbers or click **To...** to select recipients from the address book. For more information, refer to [Web client address book](#) (page 74).
4. Enter the SMS text in the body.
5. Click **Send**.



The screenshot shows a web-based interface for composing an SMS message. On the left, there is a grey square icon of a mobile phone. To its right, the text "New SMS message" is displayed. Below this, a "To..." label is followed by a text input field containing "123456789 x" and a link "Add recipients...". A large text area below contains the message: "Dear John, your order is ready to be picked up. Regards, Acme Corporation". At the bottom right, there is a blue "Send" button.

Screenshot 113: Composing an SMS in the web-based SMS Client

10.1.3 Method 3: XMLAPI

Use third-party tools to automatically generate XMLAPIs containing the information about the SMSs to send.

Store XMLAPIs to a [central location](#) and GFI FaxMaker automatically processes files located in this folder.

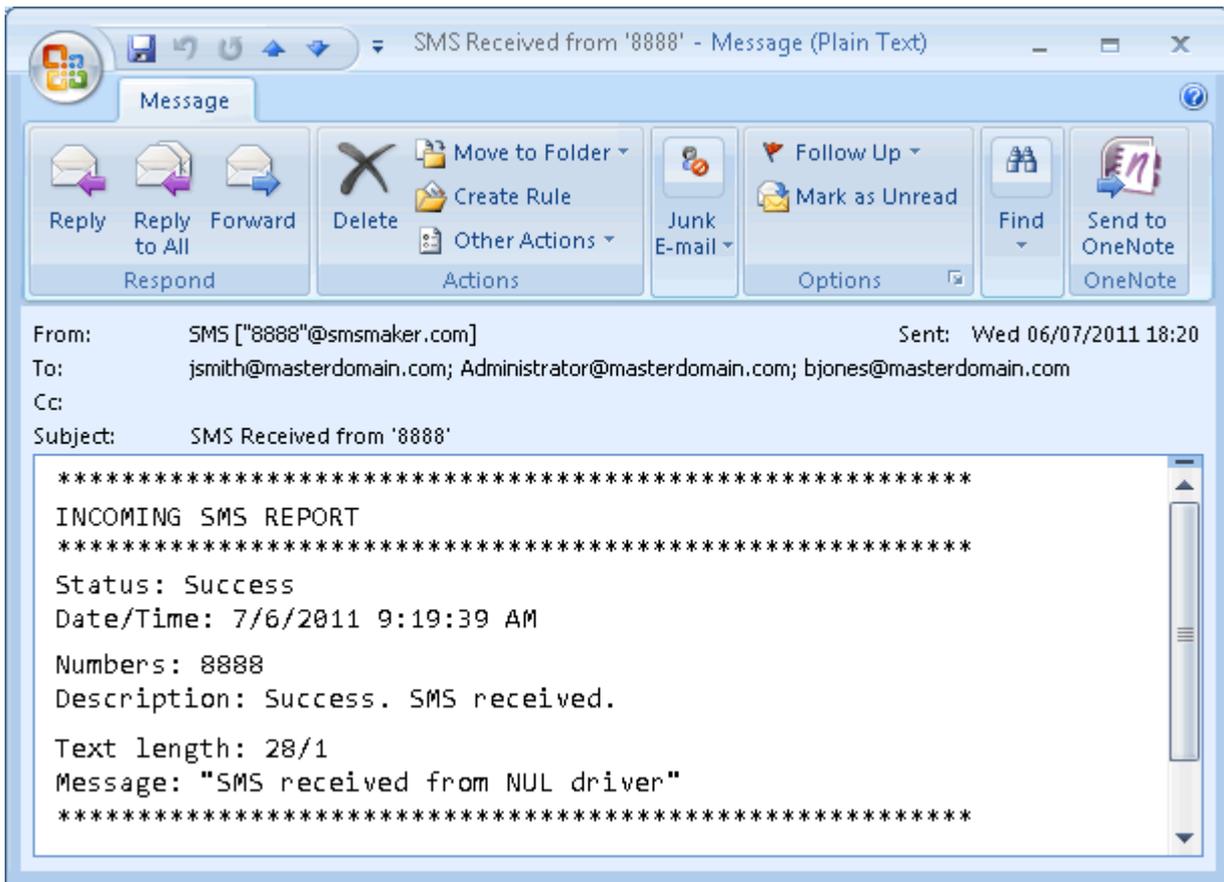
A wide range of applications can be configured to automatically create such files and automating the SMS sending process.

For more information refer to the GFI FaxMaker API manual available from:

<http://go.gfi.com/?pageid=FM19help&lang=en#cshid=APImanual>.

10.2 Receiving SMS

GFI FaxMaker routes incoming SMS directly to the user's mailbox via email. The email contains details about the SMS transmission and the SMS message.



Screenshot 114: Received SMS viewed in email client

For more information, refer to [Configure SMS settings](#) (page 189).

10.3 SMS Requirements

Use one of the following types of SMS gateways:

- » [Web based SMS](#)
- » [Network-connected SMS servers](#)
- » [GSM modem](#)

10.3.1 Web based SMS

Use a custom web based service that allows sending SMS messages via SMTP or subscribe to a supported web based SMS provider:

- » **Message Media** - For more information, refer to [Message Media SMS service](#) (page 195).
- » **Clickatell** - For more information, refer to [Clickatell web based service](#) (page 194).

Note that web based SMS setups are usually quicker and easier to setup than purchasing and installing GSM devices.

10.3.2 Network-connected SMS servers

GFI FaxMaker integrates with MultiTech MultiModem® iSMS which is a network-connected device for sending and receiving SMS. For more information, refer to [MultiTech MultiModem® iSMS SMS Server](#)

(page 191).

10.3.3 GSM modem

Use a supported GSM modem connected to the GFI FaxMaker fax server machine. Using a GSM SMS modem enables sending SMS even when the internet connection is down. You can also receive messages, which may not be possible with certain web-based SMS gateway.

For the latest list of supported mobile phones and GSM devices, refer to:

http://go.gfi.com/?pageid=FM_GSMDevices

10.4 Configure SMS settings

Configure SMS options:

- » [SMS gateway settings](#) - select and configure the type of SMS modem or device.
- » [SMS options](#) - various SMS options, such as maximum SMS length.
- » [SMS Users](#) - the list of users allowed to send SMS.
- » [Routing received SMS](#) - how GFI FaxMaker routes received SMS.
- » [Archiving SMS](#) - archive sent and received SMS to database.
- » [SMS log files](#) - SMS activity logs

10.4.1 SMS gateway settings

Configure the SMS gateway settings depending on the type of SMS gateway chosen.

- » [GSM device](#)
- » [MultiTech MultiModem® iSMS SMS Server](#)
- » [A custom Web based SMS provider](#)
- » [Clickatell web based service](#)
- » [Message Media SMS service](#)

GSM device

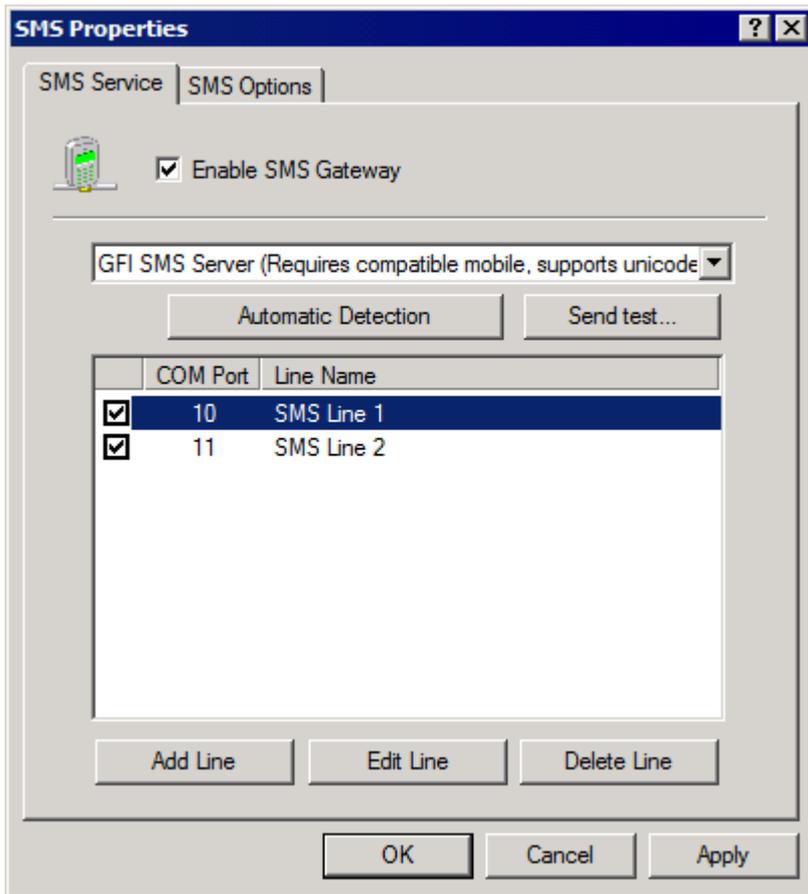
Set up the SMS server to communicate directly with the GSM devices to send and receive SMS messages.

NOTE

For the latest list of supported mobile phones and GSM devices, refer to:

http://go.gfi.com/?pageid=FM_GSMDevices

1. From GFI FaxMaker Configuration, right-click **SMS** and select **Properties**.
2. In **General** tab, select **Enable SMS Gateway**.



Screenshot 115: Configuring the GFI SMS server

3. Select **GFI SMS server** and configure:

Option	Description
Automatic Detection	Select this option to detect GSM devices connected to serial ports. In the GFI Device Detection dialog, click Start Detection to automatically detect devices. Click OK . If devices are not detected automatically, click Add Line to add device manually. Ensure that device drivers are installed properly.
Add Line	Click to manually add a line and configure its properties. Specify the following options: <ul style="list-style-type: none"> » Communication Port - Select the communications (COM) port that the GSM device is connected to. Click Validate to ensure that GFI FaxMaker finds and is able to communicate with the device. » Line name - Specify a friendly name for the new line. » Copy settings from installed device - Select this option to copy the settings of another device.
Edit Line	Select a line to edit properties for and from the GSM Device tab, configure the following options: <ul style="list-style-type: none"> » COM Port - The communications (COM) port that the GSM device is connected to. » Baud Rate - Select the speed in bits-per-second (bps) at which PC and GSM device talk to each other. Check with the device manufacturer for the best baud rate that the device can use. » Line name - (Optional) A friendly name for the line. » SMSC Number - (Optional) The Service Center Number given by the GSM network or SIM card provider. » Initialization String - (Optional) The initialization string used when initializing the GSM device. If empty, GFI FaxMaker uses AT&F as the default initialization string. <p>From the Line Options tab, configure the following options:</p> <ul style="list-style-type: none"> » Receive Incoming SMS - Select to allow SMS to be received on this line. » Send outgoing SMS - Select to allow SMS to be sent from this line. » Enable international numbers - Select this option to allow sending SMS from this line to international numbers. <p>Click OK.</p>

Option	Description
Enable/Disable Lines	From the SMS Properties dialog, select/unselect the checkbox next to the configured lines to enable/disable SMS transmission over that line.
Delete Line	Select a line to delete and click Delete Line . Click Yes to confirm deletion. WARNING: Deleted lines are not recoverable. If in doubt, it is recommended to disable a line.

4. Click **OK**.

(Optional) To verify settings click **Send test....** Key in a test recipient **Number** to send SMS to and customize the **Text** message. Click **Send** to send the test message. Verify that the test SMS is received by the test recipient.

MultiTech MultiModem® iSMS SMS Server

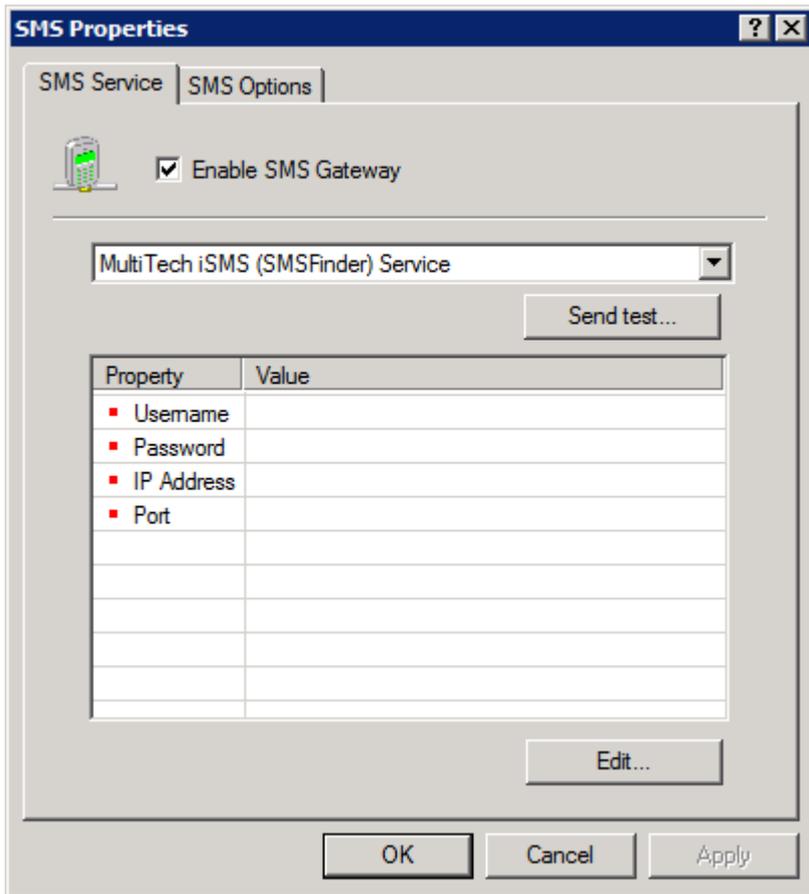
GFI FaxMaker can send/receive SMS via a MultiTech MultiModem® iSMS SMS server. To use this device with GFI FaxMaker, first setup the SMS API options in MultiTech, then enable the SMS Gateway options in GFI FaxMaker.

Step 1: Configure the MultiTech MultiModem® iSMS API options

1. Log in to the MultiTech iSMS device SMS Services configuration and click the **SMS API** node.
2. Enable **HTTP API Status** and select the **HTTP Port** to use. Take note of the port number.
3. Ensure that **TCP API Status** is disabled.
4. Disable **Non Polling Receive API Status**.
5. Under **Protocol**, choose **HTTP**.
6. Save all settings.
7. Reboot the MultiTech iSMS by navigating to **Save & Restart**. Save configuration to Flash memory and restart MultiModem iSMS.

Step 2: Enable MultiTech iSMS in GFI FaxMaker

1. From GFI FaxMaker Configuration, right-click **SMS** and select **Properties**.
2. In **General** tab, select **Enable SMS Gateway**.



Screenshot 116: Configuring a MultiTech iSMS SMS Server

3. Select **MultiTech iSMS (SMSFinder) Service** and configure:

Option	Description
Username	Your MultiTech iSMS username.
Password	Your MultiTech iSMS password.
IP Address	The MultiTech iSMS device IP address. Usually this is the same IP address used when accessing the MultiModem iSMS web configuration. For example, 192.168.2.22
Port	The port number as configured in the MultiTech iSMS HTTP API settings in step 1.

4. Click **OK**.

(Optional) To verify settings click **Send test...** Key in a test recipient **Number** to send SMS to and customize the **Text** message. Click **Send** to send the test message. Verify that the test SMS is received by the test recipient.

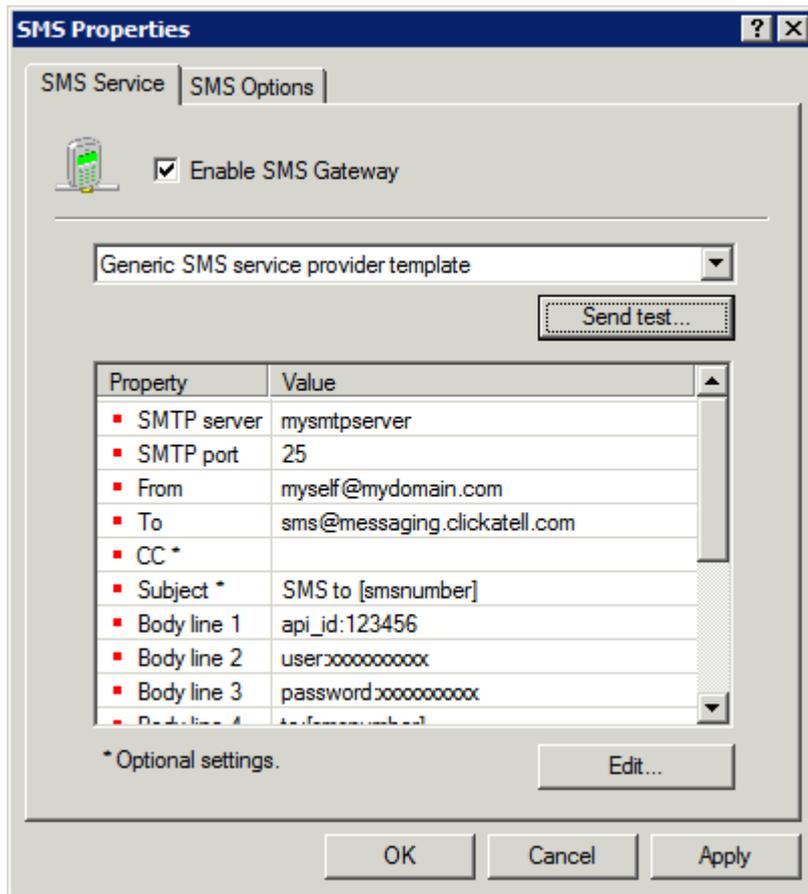
NOTE

If the device is busy with a heavy load of SMS, the test may fail due to a time-out. Ensure that the test is run when the device is not very busy.

A custom Web based SMS provider

Configure the following SMS gateway settings when using a Web-based SMS service that allows SMS to be submitted via SMTP:

1. From GFI FaxMaker Configuration, right-click **SMS** and select **Properties**.
2. In **General** tab, select **Enable SMS Gateway**.



Screenshot 117: Configuring an SMS service provider

3. Select **Generic SMS service provider template** and configure the following settings:

Option	Description
SMTP server	Specify your own mail server or the mail server of the service provider.
SMTP port	Specify SMTP port number.
From	Specify your email address.
To	Specify to which email address SMS are sent. NOTE: If provider requires the SMS number to be inserted in the To address, use field <code>[smsnumber]</code> to replace the recipient's number. GFI FaxMaker automatically replaces this field with the recipient's number. For example, <code>[smsnumber]@providerdomain.com</code> .
CC	(Optional) Specify if to send a copy of the message to another email address.
Subject	(Optional) Specify an email subject. NOTE: If provider required the SMS number to be inserted in the subject, include field <code>[smsnumber]</code> . GFI FaxMaker automatically replaces this field with the recipient's number.
Body line 1 - X	Key in text to show in each email body line, as required by the provider. Fields that can be used: <code>[smsnumber]</code> - replaced by the recipient's mobile number. <code>[smsmessage]</code> - replaced by the SMS text to be sent.

4. Click **OK**.

(Optional) To verify settings click **Send test...** Key in a test recipient **Number** to send SMS to and customize the **Text** message. Click **Send** to send the test message. Verify that the test SMS is received by the test recipient.

Clickatell web based service

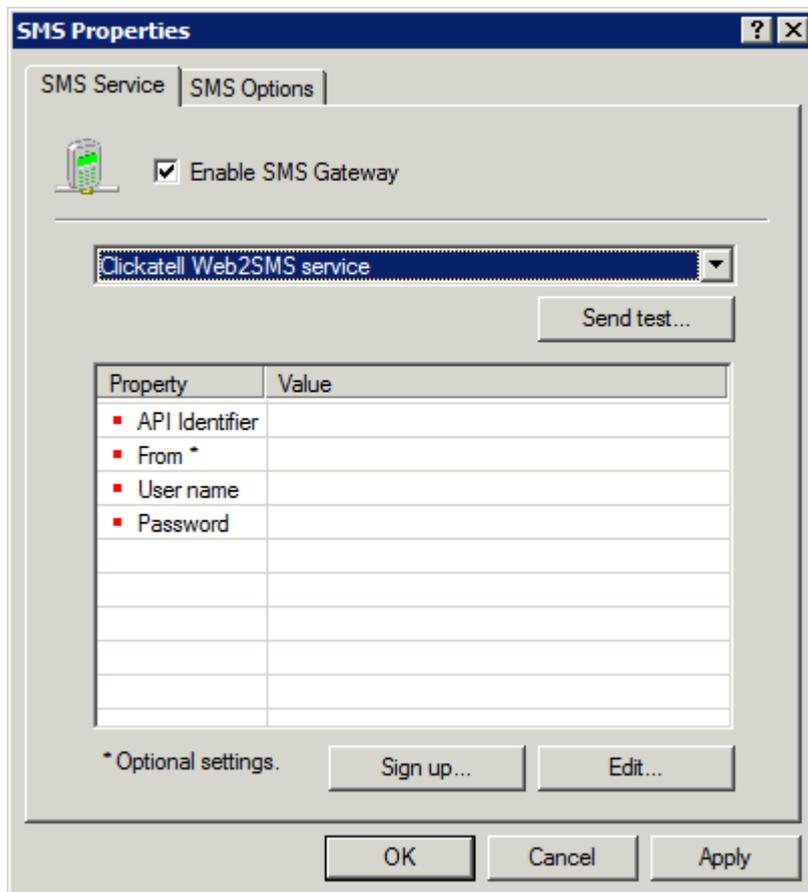
When using Clickatell service, a number of settings are automatically pre-configured.

NOTE

- » GFI FaxMaker accepts the two authentication methods supported by Clickatell. Clients can use either the API Identifier or the username and password.
- » When using the Clickatell SMS service, ensure that users always include the country code of recipients.

Configure the following options:

1. From GFI FaxMaker Configuration, right-click **SMS** and select **Properties**.
2. In **General** tab, select **Enable SMS Gateway**.



Screenshot 118: Configuring the Clickatell service

3. Select **Clickatell Web2SMS service**.
4. Select the following options and click **Edit...** to configure:

Option	Description
API Identifier	Value assigned by Clickatell on signing up to the service. Verify if your account has this value assigned. When available, it is enough to add the API Identifier and then you can jump to step 5.
From	(Optional) Specify the sender value of an SMS message, for example 'MyCompanyName'.
User name	(Optional) Value assigned by Clickatell on signing up to the service.
Password	(Optional) Value assigned by Clickatell on signing up to the service.

5. Click **OK**.

(Optional) To verify settings click **Send test....** Key in a test recipient **Number** to send SMS to and customize the **Text** message. Click **Send** to send the test message. Verify that the test SMS is received by the test recipient.

Message Media SMS service

When using the Message Media service, a number of settings are automatically pre-configured.

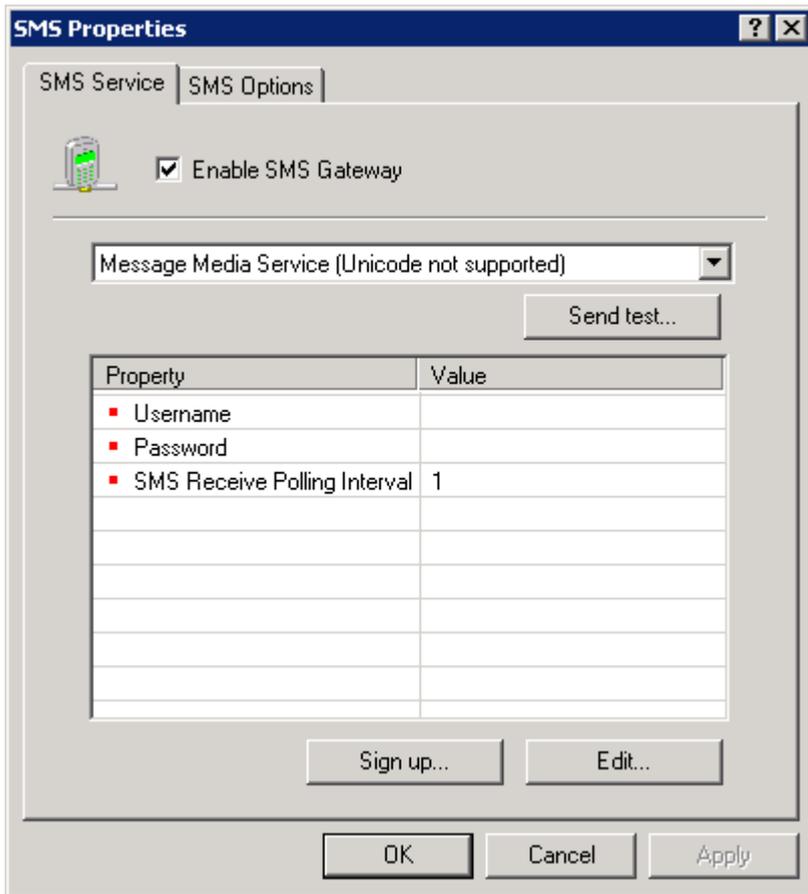
To create a Message Media account for GFI FaxMaker, go to http://go.gfi.com/?pageid=FM_MessageMedia.

NOTES

1. When using the Message Media SMS service, ensure that users always include the country code of recipients.
2. The Message Media SMS service does not support Unicode.
3. GFI FaxMaker uses HTTPS port 443 to communicate with Message Media servers. Ensure that this port is open on your firewall.

Configure the following options:

1. From GFI FaxMaker Configuration, right-click **SMS** and select **Properties**.
2. In **General** tab, select **Enable SMS Gateway**.



Screenshot 119: Configuring the Message Media service

3. Select **Message Media Service**.
4. Select the following options and click **Edit...** to configure:

Option	Description
Username	Your Message Media username.
Password	Your Message Media password.
SMS Receive Polling Interval	Key in the frequency in minutes for GFI FaxMaker to check for new incoming SMS.

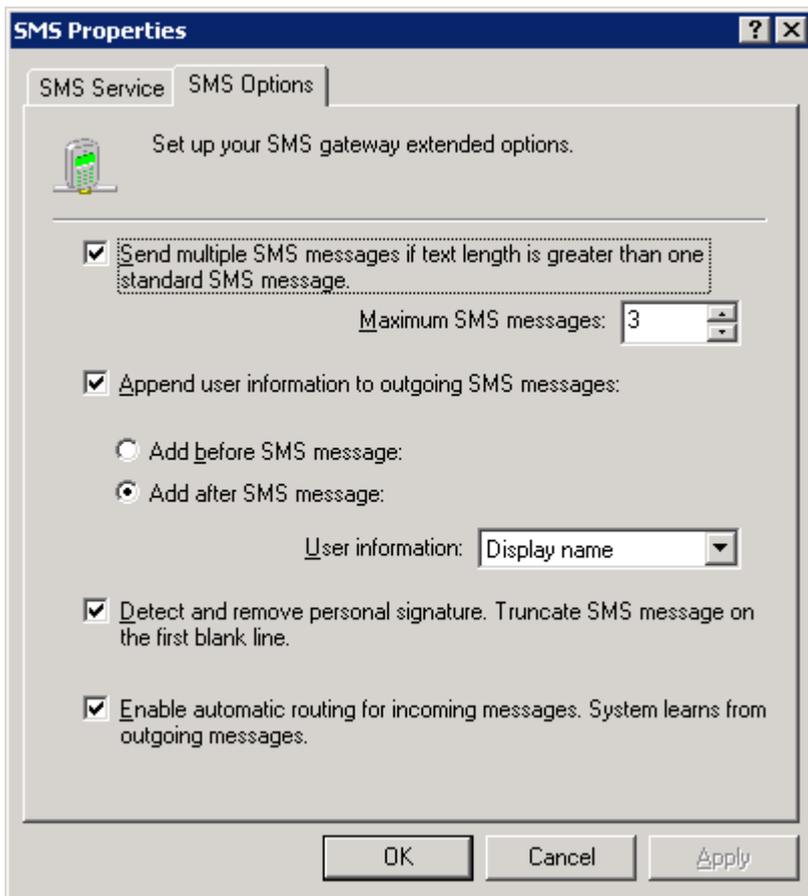
5. Click **OK**.

(Optional) To verify settings click **Send test...** Key in a test recipient **Number** to send SMS to and customize the **Text** message. Click **Send** to send the test message. Verify that the test SMS is received by the test recipient.

10.4.2 SMS options

Configure SMS sending settings:

1. From GFI FaxMaker Configuration, right-click **SMS** and select **Properties**.



Screenshot 120: SMS options

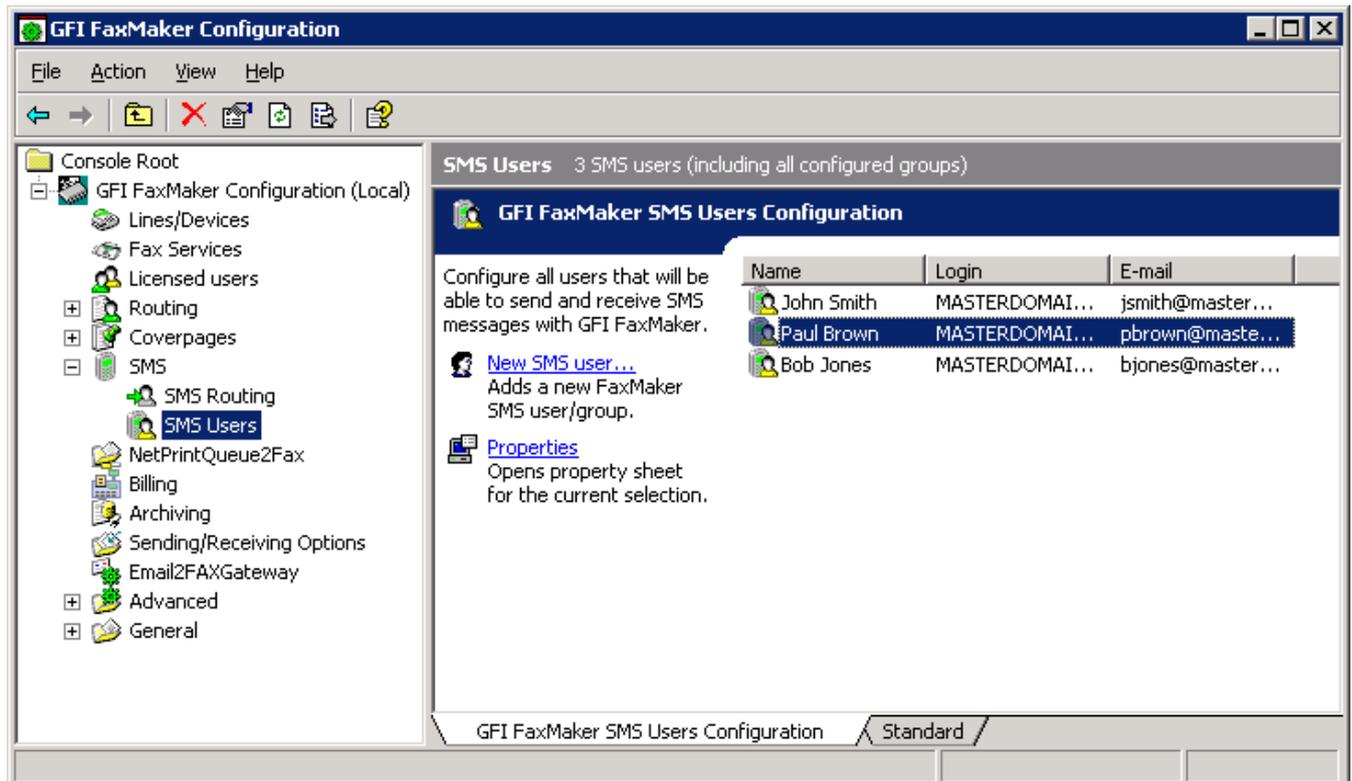
2. From the **SMS Options** tab, configure:

Option	Description
Send multiple SMS messages if text length is greater than one standard SMS message	Select to split messages longer than the allowed length into multiple SMS messages. Specify the maximum number of SMS messages allowed. NOTE: Each short message is up to 160 characters when using Latin characters, or 70 characters when using non-Latin characters such as Arabic and Chinese.
Append user information to outgoing SMS messages	Add one of the following sender information fields either before or after the SMS message: <ul style="list-style-type: none"> » Display Name » Name » Surname » Company » Department
Detect and remove personal signature. Truncate SMS message on the first blank line.	Select to automatically send the text before the first blank line. This ensures that email signatures are not sent as part of an SMS.
Enable automatic routing for incoming messages	Received SMS are automatically routed to the user who sent an SMS to that number. For example, Joe Bloggs sends an SMS to number 123456. When number 123456 replies back, SMS is automatically routed to Joe Bloggs. NOTE: If more than one user sends an SMS to the same number, GFI FaxMaker routes replies to the latest sender. However, replies are always routed to all users that had sent an SMS to the same number in the previous 5 hours.

3. Click **OK**.

10.4.3 SMS Users

To specify the list of users allowed to send SMS:



Screenshot 121: Configuring SMS users

1. From GFI FaxMaker Configuration, right-click **SMS > SMS users** and select **New SMS user...**
2. Select users to add, depending on the user directory service:
 - » **Active Directory:** Add users or groups from the Active directory user dialog.
 - » **GFI Directory:** Select the users allowed to send SMS. Only users that were previously added to the **Licensed Users** screen can be set as SMS users.
3. Click **OK**.

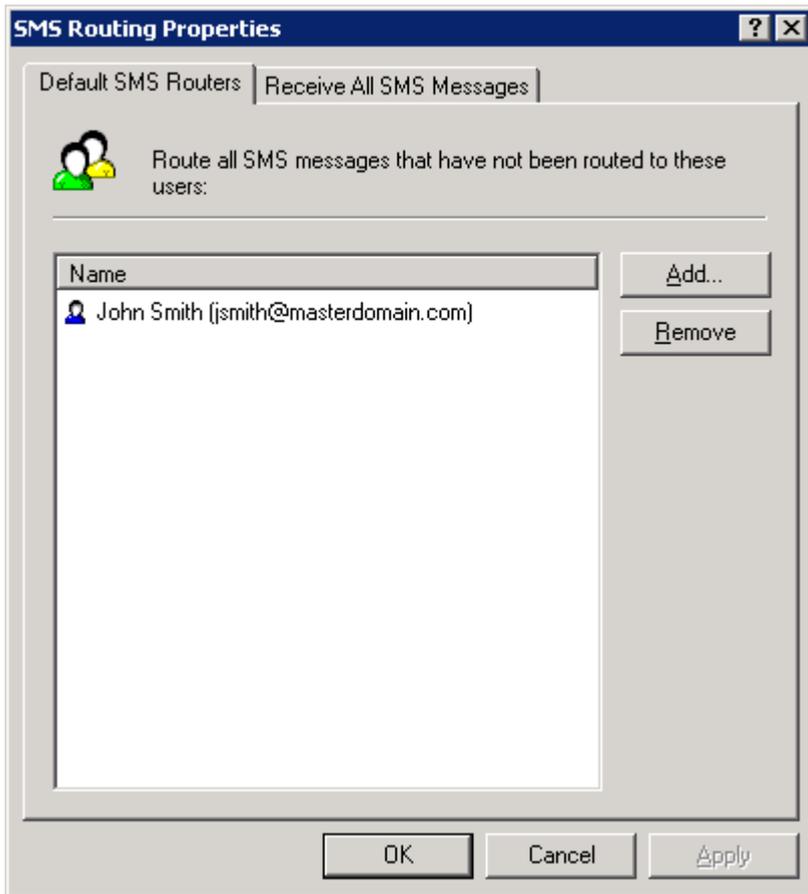
10.4.4 Routing received SMS

Configure how GFI FaxMaker routes received SMS.

NOTE

GFI FaxMaker can automatically route received SMS to the user that originally sent SMS. To enable option, select **Enable automatic routing for incoming messages** from **SMS Options**. For more information, refer to [SMS options](#) (page 196).

1. From GFI FaxMaker Configuration, right-click **SMS > SMS Routing** and select **Properties**.



Screenshot 122: SMS routing properties

2. Configure the following options:

Table 6: SMS routing properties tabs

Tab	Description
Default SMS Routers	Users to whom GFI FaxMaker routes all SMS that have no associated users.
Receive All SMS Messages	Users to route all SMS messages to.

3. Click **OK**.

10.4.5 Archiving SMS

All inbound and outbound SMS are archived in the same archiving database as fax archiving. For more information, refer to [Fax archiving](#) (page 107).

10.4.6 SMS log files

GFI FaxMaker logs all activity of incoming and outgoing SMS in two log files within the GFI FaxMaker installation folder:

Table 7: SMS log files

Log file	Description
sms_ sent.log	Contains a log of sent SMS in the following format: Date, Time, Sender, Recipient, Status, Message, Details For example: "7/6/2018", "8:23:38 AM", "jsmith@masterdomain.com", "123126", "Success", "This is a test SMS sent from GFI FaxMaker - John Smith", "Success. SMS posted to destination."
sms_ recv.log	Contains a log of received SMS in the following format: Date, Time, Sender, Recipient, Status, Message, Details For example: "7/6/2018", "8:52:39 AM", "621321", "bjones@masterdomain.com", "Success", "This is a test SMS received by GFI FaxMaker", "Success. SMS received."

11 Uninstalling GFI FaxMaker

This topic describes how to uninstall GFI FaxMaker.

NOTE

Any configurations done on other machines, such as send and receive connectors on the mail server, are not removed.

1. Exit GFI FaxMaker.
2. From **Control Panel** select **Programs** and choose to uninstall a program.
3. From the list of installed software select **GFI FaxMaker** and click **Remove** or **Uninstall**.
4. Follow on-screen instructions.

11.0.1 Removing the Microsoft® Exchange 2007/2010/2013 Connector

This topic describes how to remove the GFI FaxMaker connectors.

Removing the connectors automatically

GFI FaxMaker installed on Microsoft® Exchange Server

If the connectors were created automatically during installation of GFI FaxMaker, the connectors are automatically removed during uninstall.

No further configuration is required.

NOTE

If the connectors are not named `GFI FaxMaker` (for example, if connectors were renamed or were manually created using a different name), remove the connectors manually. For more information, refer to [Removing the connectors manually](#) (page 201).

GFI FaxMaker installed on a separate machine

If the connectors were created automatically by running the GFI FaxMaker setup on the Microsoft® Exchange server, the connectors are automatically removed by uninstalling GFI FaxMaker from the Microsoft® Exchange server.

No further configuration is required.

NOTE

If the connectors are not named `GFI FaxMaker` (for example, if connectors were renamed or were manually created using a different name), remove the connectors manually. For more information, refer to [Removing the connectors manually](#) (page 201).

Removing the connectors manually

GFI FaxMaker installed on Microsoft® Exchange Hub Transport Server

From the Microsoft® Exchange Management Shell, run the following commands:

NOTE

If a custom name was given when creating the connector manually, replace `GFI FaxMaker` with the name of the connector.

1. Remove **Receive Connector**:

```
Remove-ReceiveConnector "GFI FaxMaker"
```

2. Remove **Send Connector**:

```
Remove-SendConnector -identity "GFI Faxmaker" -confirm:$false
```

GFI FaxMaker installed on a separate machine

From the Microsoft® Exchange Management Shell, run the following commands:

NOTE

If a custom name was given when creating the connector manually, replace `GFI FaxMaker` with the name of the connector.

1. Remove **Receive Connector**:

```
Remove-ReceiveConnector "GFI FaxMaker"
```

2. Remove **Foreign Connector**:

```
Remove-ForeignConnector -Identity "GFI Faxmaker"
```

11.0.2 Removing the Microsoft® Exchange 2000/2003 Connector

To remove the GFI FaxMaker connectors from Microsoft® Exchange 2000/2003:

1. Launch **Exchange System Manager** and expand **Connectors** node.
2. Right click the GFI FaxMaker connector name (default value is **FaxMaker SMTP connector**) and click **Delete**.

12 Troubleshooting and support

This topic explains how to resolve any issues encountered during installation of GFI FaxMaker. The main sources of information available to solve these issues are:

- » This manual - most issues can be solved through the information in this help system.
- » GFI Knowledge Base articles
- » Web forum
- » Contacting GFI Technical Support

A list of common issues encountered when using GFI FaxMaker:

12.1 Email2FaxGateway test fails	203
12.2 Problems accessing the web interface	204
12.3 Error “Call failed 46” when sending fax	205
12.4 Error 1701 during document conversion	205
12.5 Error 1706 during document conversion	206
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12.9 Cannot send SMS via GSM device	207
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12.1 Email2FaxGateway test fails

The Email2FaxGateway settings specify how GFI FaxMaker communicates with the mail server for sending and receiving faxes.

From the Configuration Wizard or Email2FaxGateway dialog, click **Test** to ensure correct communication between the two servers.

If the test fails, refer to table below for most common causes and solution:

CDO Error	Possible Solutions
The transport failed to connect to the server.	Connection with the mail server couldn't be established. Confirm the following settings: <ul style="list-style-type: none">» IP address of the mail server.» Secure connection (encryption) settings.» Check if firewall is blocking connection between GFI FaxMaker and the mail server.

CDO Error	Possible Solutions
The server rejected one or more recipient addresses. The server response was: 550 5.7.1 Unable to relay for <email address>	Connection with mail server was established but mail server refused the domain of the recipients address. This normally occurs because relaying is not allowed from the GFI FaxMaker server. Configure SMTP server to accept relaying from the GFI FaxMaker machine's IP or allow relaying for the internal email domain only.
The server rejected the sender address. The server response was: 530 5.7.3 Client was not authenticated.	GFI FaxMaker can connect with mail server but user authentication details are missing. Select Use SMTP Authentication and key in credentials.
The message could not be sent to the SMTP server. The transport error code was 0x80040217. The server response was not available	GFI FaxMaker can connect with mail server but user authentication details are invalid. Check credentials.

12.2 Problems accessing the web interface

Issue encountered

When accessing the GFI FaxMaker web interface, the web server is reached but does not render the GFI FaxMaker login page. Instead, the following may occur:

- » HTML code is displayed in the browser
- » A blank page is returned to the browser
- » You may receive instructions to download the aspx page

Possible causes

If the web browser and site can be reached, but the returned data is invalid, the most likely cause is that ASP.NET is not registered with IIS.

Solution

Register ASP.NET with the IIS Web Server using the below instructions depending on your operating system or IIS version:

How to register ASP.NET on Microsoft Windows Server 2016

To register ASP.NET on Microsoft Windows Server 2016, launch an elevated command prompt and run the following command:

```
dism /online /enable-feature /featurename:IIS-ASPNET45
```

How to register ASP.NET on Microsoft Windows Server 2012

To register ASP.NET on Microsoft Windows Server 2012, open a command prompt session as administrator and execute the following command:

```
dism /online /enable-feature /featurename:IIS-ASPNET45
```

Registering ASP.NET on IIS 7.0

To register ASP.NET on operating systems running IIS 7.0, such as Windows 7 and Windows Server 2008 R2:

1. Open Command Prompt and change the directory as follows:

- `<WindowsDir>\Microsoft.NET\Framework64\<version number>`
2. Run the following command: `aspnet_regiis.exe -i`
 3. Go to **Start > Administrative Tools > Internet Information Services (IIS) Manager**.
 4. Select the local computer node and launch **ISAPI and CGI Restrictions**.
 5. Right click **ASP.NET v4.x.xxxxx** and select **Allow**.

12.3 Error “Call failed 46” when sending fax

Issue encountered

An error **Call failed: 46** is shown in the [GFI FaxMaker Monitor](#) or in the debug logs.

Causes

This is a generic error indicating that GFI FaxMaker attempted to dial a fax number, but failed to set up the call. The reasons for this failure can be various depending on the environment where GFI FaxMaker is installed. For example:

- » The fax device is behind a PABX that does not accept the local fax ID when making an outbound call
- » The fax number is invalid
- » The fax line requires a prefix to dial out
- » CLIP is required to authenticate outbound fax calls
- » Old Dialogic (Eicon) Diva Server drivers

Possible solutions

- » Check manually whether the fax number can be dialed and can hear a fax tone
- » Check if the issue persists only with this fax number and if it is reproducible
- » Check if a prefix is required in order to dial out
- » If GFI FaxMaker is behind PABX that does not accept the local fax ID when making an outbound call, remove the **Local fax ID** value from the **Lines/Devices** settings in GFI FaxMaker.
- » Check if CLIP is required
- » If using Dialogic (Eicon) Diva Server, download and install the latest drivers from Dialogic website.

If these initial approaches do not resolve the issue, then the root of the problem might be outside of GFI FaxMaker.

12.4 Error 1701 during document conversion

Issue encountered

Faxes in the [GFI FaxMaker Monitor](#) get stuck converting attachments when processing outbound fax jobs. Eventually conversion times out with error **1701** and message:

- » **Document conversion timeout**, or
- » **Coverpage Conversion timeout**

Solution

There are various causes for this issue. To determine cause and applicable solution, refer to:

http://go.gfi.com/?pageid=FM_Error1701

12.5 Error 1706 during document conversion

Issue encountered

When sending a fax that contains an attachment, the sender receives a report with the following error:

1706 : Document Conversion Timeout.

There is no application associated with the file extension of the attachment.

Cause

This issue normally arises when there is no application associated with the extension of the file to fax.

Possible solution

On the GFI FaxMaker server, ensure that the file format sent in the fax can be printed. In Windows® Explorer, right-click a similar (same extension) file and ensure the option **Print** is available.

- » If printing is not available, install an application that can open and print that extension. For example, install an OpenDocument Text reader (such as OpenOffice) to open and print ODT files.
- » If printing is available, try using the print option to check whether the association is working correctly

12.6 Problems with Microsoft® Office® attachments

Issue encountered

GFI FaxMaker encounters problems when converting Microsoft® Office® files to fax.

Possible solutions

- » Verify that Microsoft® Office® 2007 or later is installed on the GFI FaxMaker server.
- » Ensure that Microsoft® Office® is not in trial mode or has an expired license.
- » Ensure Microsoft® Office® was installed using the same account as that used by GFI FaxMaker fax server services.
- » Confirm that the account used for installing GFI FaxMaker and Microsoft® Office® has administrator rights.
- » Run all Microsoft® Office® applications, such as Microsoft® Word® and Excel®, to clear any messages displayed the first time the applications are run.
- » Ensure that GFI FaxMaker printer driver is set as the default printer for the machine.
- » Re-start GFI FaxMaker machine to ensure that changes take effect.

12.7 Transmission failure report when using online fax services

Issue encountered

Receiving a transmission failure report when sending faxes using an online fax service

Possible cause

Online fax services require the full recipient number, including the international dial symbol "+", the country and area codes. Do not use hyphens, spaces or dashes between any parts of the fax number.

The full recipient number is also required when sending faxes locally.

Possible solution

Re-send fax using the full fax number that includes the "+" international dial symbol, the country and area codes.

For more information, refer to [Fax services](#) (page 116).

12.8 No calls answered on a particular fax number

Issue encountered

GFI FaxMaker does not answer calls on a particular fax number.

Cause

This issue usually arises when MSN numbers are specified incorrectly.

Possible solution

Configure MSN numbers that GFI FaxMaker should answer from the device properties.

To determine the MSN numbers to answer:

1. Send a fax to GFI FaxMaker, dialling the number that you want GFI FaxMaker to answer.
2. From GFI FaxMaker Monitor **Fax Server** node, take note of the number displayed.
3. Enter this MSN number in the list of MSN numbers of the device properties. Click **OK** and restart the **GFI FaxMaker Fax Server** service.

NOTE

To answer a whole range of numbers (for example, when using DID routing), enter the starting number of the range of numbers. For example: to answer all numbers from 35922410 to 35922419, enter 3592241.

12.9 Cannot send SMS via GSM device

Issue encountered

GFI FaxMaker cannot send SMS via a GSM device

Possible solutions

- » GFI FaxMaker is not configured to use the COM port as a fax modem.
- » GSM modem is not installed as a modem in control panel. Other applications such as RAS or Microsoft® Fax may attempt to take control of the modem.
- » Test SIM card with a mobile phone. Check operation, checking amongst others that there is reception, no pin number has been set, there is enough credits to send SMS.

If no issues are found, perform other checks on GSM device. Refer to:

http://go.gfi.com/?pageid=FM_IssuesSMS

12.10 Debug mode

By switching on the GFI FaxMaker debug mode, GFI FaxMaker creates more detailed log files in the **logs** folder within the installation directory.

To enable this option, from GFI FaxMaker Configuration, navigate to **Advanced > Miscellaneous** and select **Properties**. Select option **Enable debug mode**.

12.11 Other troubleshooting resources

12.11.1 Knowledge Base

GFI maintains a comprehensive Knowledge Base repository, which includes answers to the most common installation problems. In case that the information in this manual does not solve your installation problems, next refer to the Knowledge Base. The Knowledge Base always has the most up-to-date listing of technical support questions and patches. Access the Knowledge Base by visiting:

<https://www.gfi.com/support/products/gfi-faxmaker/>.

12.11.2 Web Forum

User to user technical support is available via the GFI web forum. Access the web forum by visiting:

<http://forums.gfi.com/>.

12.11.3 Request technical support

If none of the resources listed above enable you to solve your issues, contact the GFI Technical Support team by filling in an online support request form or by phone.

» **Online:** Fill out the support request form and follow the instructions on this page closely to submit your support request on: <https://www.gfi.com/support/technical-support-form>

» **Phone:** To obtain the correct technical support phone number for your region visit: <https://www.gfi.com/contact-us>

NOTE

Before contacting Technical Support, have your Customer ID available. Your Customer ID is the online account number that is assigned to you when first registering your license keys in the GFI Customer Area at: <http://customers.gfi.com>.

We will answer your query within 24 hours or less, depending on your time zone.

13 Glossary

A

AD

Active Directory

B

Backup2Folder

A feature of fax routing rules that automatically backs up received faxes in a folder.

Basic Rate Interface

An ISDN channel intended for small systems which achieves up to 128kbps data rate.

BRI

Basic Rate Interface

C

Called Subscriber Identification

An identification string transmitted by the recipient's fax device to the sender during a fax transmission.

CAPI

Common ISDN Application Programming Interface

CLIP

The Caller Line Identity Presentation is used to identify the calling party's number. It is also commonly referred to as CLI (Caller Line Identity), CLID (Caller Line Identity Display), CND (Caller Number Display) or just Caller ID.

Common ISDN Application Programming Interface

A standard interface that enables applications to communicate with ISDN devices.

Coverpage

A page containing information attached and sent as the first page of a fax. This page is customizable and can contain company logo and colors, sender and recipient information, fax details and more.

CSID

Call Subscriber Identification

D

Default routers

A list of users that receive faxes when an incoming fax matches no routing rules.

Dialtone

A tone heard at the start of a telephone call indicating connectivity with the telephone exchange system and that the line is ready for dialing.

DNS

Domain Name System

Domain Name System

A database used by TCP/IP networks that enables the translation of hostnames to IP addresses and provides other domain related information.

DTMF

Dual-tone multi-frequency signalling

Dual-tone multi-frequency signalling

The tone generated by the telephone (or fax) device when dialling. This is used for communicating with the telephone line provider.

E**ECM**

Error correction mode

Error correction mode

A fax mode that automatically detects and corrects errors during fax transmission.

Exchange connector

A Microsoft Exchange feature that forwards sent or received emails to a certain server or domain.

F**Fax administrators**

Users who monitor and manage the fax server. They are also notified by email when critical conditions occur.

Fax line

A physical telephone line or software-based (FoIP) line, linked to a fax device (modem or ISDN/fax card).

Fax over Internet Protocol

Fax transmission over the internet, rather than the telephone line.

Firebird

A free, open source SQL based database with a 10GB size limit. GFI FaxMaker can be configured to archive faxes and SMS to Firebird.

FoIP

Fax over Internet Protocol

FQDN

Fully qualified domain name

Fully qualified domain name

The absolute domain name of a network device that specifies the exact location of the device in a domain's hierarchy.

G**GFI FaxMaker Client**

An application installed on clients' machines used to send faxes and SMS.

GFI FaxMaker server

The machine where GFI FaxMaker is installed.

Global System for Mobile Communications

A standard that defines the protocol for digital 2G cellular networks that is usually used by mobile phones.

GSM

Global System for Mobile Communications

H**HTTP**

Hypertext Transfer Protocol

Hypertext Transfer Protocol

A protocol used to transfer hypertext data between servers and internet browsers.

I**IIS**

Internet Information Services

IMAP

Internet Message Access Protocol

Initialization string

A command transmitted between two devices while initiating a connection, used to specify important parameters of the connection.

Integrated services digital network

A technology enabling digital transmission of data and voice signals over a telephone network.

Internet Information Services

A set of Internet-based services created by Microsoft Corporation for internet servers.

Internet Message Access Protocol

One of the two most commonly used Internet standard protocols for e-mail retrieval, the other being POP3.

ISDN

Integrated services digital network

J

Junk fax

Unwanted incoming faxes that are not to be delivered to users.

M

Mailbox

A directory or folder on the mail server used for receipt, filing, and storing messages of emails.

MFP

Multi-function peripheral

Microsoft Exchange System manager

A specialized MMC console that enables managing your Microsoft Exchange Server organization.

MSN

Multiple Subscriber Numbering

Multi-function peripheral

A device that performs a selection of common office tasks such as printing, scanning and faxing.

Multiple Subscriber Numbering

A service given by the telephone company that enables multiple telephone numbers on one telephone line.

N

NDR

Non delivery report

NetPrintQueue2FAX

A GFI FaxMaker printer driver installed on client machines and used for sending faxes. On printing to this driver, it delivers content to GFI FaxMaker for transmission. GFI FaxMaker determines fax recipient details from within the printed content.

Non delivery report

An automated email sent to the sender on an email delivery problem.

O

OCR

Optical Character Recognition

Optical Character Recognition

The process of converting text embedded in images into machine-encoded text.

P

PABX

Private Automatic Branch Exchange

POP3

Post Office Protocol 3

POP3 Downloader

The GFI FaxMaker feature that retrieves faxes and SMS from a POP3 mailbox for transmission.

Post Office Protocol 3

A protocol used by local email clients to retrieve emails from mailboxes over a TCP/IP connection.

PRI

Primary Rate Interface

Primary Rate Interface

An ISDN channel intended for larger systems which is capable of achieving higher speeds than Basic Rate Interface.

Private Automatic Branch Exchange

A digital telephone system within a network. This enables internal calls within the network and telephone connectivity with the external system.

PSTN

Public switched telephone network

Public folder

A common folder within Microsoft Exchange that allows users to share information.

Public switched telephone network

A global telecommunications network that operates the traditional telephony system.

R

Routing

The methods used by GFI FaxMaker to determine how to route faxes to internal recipients.

S

Secure Sockets Layer

A protocol that ensures integral and secure communication between networks.

Short message service center

The center that routes and regulates SMS functionality of a wireless network.

SIM card

A card that plugs in to a GSM cellular device which stores cellular subscription information.

Simple Mail Transport Protocol

An internet standard used for email transmission across IP networks.

SMSC

Short message service center

SMTP

Simple Mail Transport Protocol

SMTP Connector

The GFI FaxMaker process that connects to the mail server and uploads emails for transmission to internal users.

SSL

Secure Sockets Layer

T**Transmission report**

An email sent by GFI FaxMaker to internal users that contains information about sent/received faxes/SMS.

TSID

The transmitting subscriber identification is a string sent by the fax sender to the recipient which typically includes the fax or telephone number.

U**UNC path**

A standard that specifies the location path of a network resource.

URL

The Uniform Resource Locator is the address of a web page on the world wide web.

V**Voice over Internet protocol**

A digital telephone system that uses the internet as the transmission medium, rather than the PSTN.

VoIP

Voice over Internet protocol

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