

## Faxing Basics

*This guide is designed to help you with basic faxing techniques in RelayFax.*

### Sending a Fax Via an Email Client

Most of the time, printing to the RelayFax Printer Driver from within a Windows application will create a fax. However, it is possible, and sometimes most effective, to simply launch your email client and directly generate a message to be faxed. This is done by composing your email message and addressing it to one of the email accounts that you know RelayFax is monitoring. For example, if RelayFax is collecting all the email messages sent to `outboundfax@example.com` then sending your message to that address will get it faxed.

Several special considerations must be observed in order to use this method of faxing:

1. When you address your email message you can specify just a fax number on the TO: line.

**Example:** TO: "555-1212"<faxserver@company.mail>

2. You can also specify the recipient's name, company information, and fax number on the TO: line.

**Example:** TO: "555-1212, John Brown, Altn.com"<faxserver@company.mail>

*Note how each part within the quotations is separated by a comma. The format is like this: [Open Quote]FAX NUMBER[Comma]PERSONAL NAME[Comma]COMPANY NAME[Close Quote]*

**Note:** *If you are using Outlook or another email Client that will separate addresses by commas, you will need to disable this feature within the Email client.*

3. Some email clients will not let you place quotation marks in the To: field. If this is your case you will need to address your email message without the quotation marks ( " ).

**Example:** TO: 555-1212, John Brown, Altn.com, FaxServer@company.mail

*Notice the missing quotation marks ( " ).*

**Note:** *Macros can be used to specify several key items within the email message when sending a fax via an email client.*

*For more information, and for a list of macros that can be used, visit the RelayFax Macros chapter in the RelayFax Help file.*

### How to Fax From the RelayFax Printer Driver

With the RelayFax Printer Driver, you can fax documents directly from an application. You can do this by printing the document to the RelayFax Printer Driver instead of to your usual printer.

1. Open your document, click **File**, then click **Print**, and choose the **RelayFax Printer Driver**.
2. Click the **Properties** button, then click the **Graphic** or **Advanced** tab.
3. Highlight **Resolution**, choose **200x196 DPI**, click **OK**, and then click **OK**. The RelayFax Client will now appear.
4. In the **Fax To This Number** field, type the phone number of the fax machine you would like to send the fax to.
5. In the **Recipient's Name** field, type the recipient's name.
6. In the **Recipient's Company** field, type the recipient's company name.
7. In the **Comments for Cover Page** - (up to 1000 characters) field and small note enter any comments that you would like to include. This field is optional.
8. Select **Advanced Options**. Click **I want confirmation that thisfax was sent properly**. *This is optional.*
9. Click **Add**, then click **Send Fax**.

## Installing a Modem for Use With RelayFax

Before you begin, please see our hardware compatibility list here:

[www.altn.com/Products/RelayFax-Network-Fax-Manager/CompatibleHardware/](http://www.altn.com/Products/RelayFax-Network-Fax-Manager/CompatibleHardware/)

1. Install the modem or modems, following the instructions of the modem manufacturer to install the drivers they provide and verify that Windows is recognizing the board(s) in Device Manager.
2. Install RelayFax and select the option to start RelayFax after the installation is finished.
3. RelayFax will automatically scan the com ports on the machine for modems, and if detected, it will list it (or them) in the left hand pane under Fax devices. You should not need to manually add the modem.
4. To customize the modem settings:
  1. Right click on the modem in the left-hand pane and click **Properties**.
  2. From there you can customize settings such as (check with the modem manufacturer to see what is supported by your board): Enabling error correction, Enabling flow control, Dialing properties, and Whether the modem(s) will be answering incoming fax calls and/or dialing out for outgoing faxes.

**Note:** *Dialogic (formerly Brooktrout) Trufax modem boards require a driver package provided by Alt-N Technologies. To use a Trufax board, download the Brooktrout drivers from our site, and follow the readme provided with the installation to configure the board. Brooktrout Drivers can be downloaded here: [www.altn.com/Downloads/RelayFax-Free-Trial/](http://www.altn.com/Downloads/RelayFax-Free-Trial/)*

## OCR (Optical Character Recognition)

Optical Character Recognition (OCR) is a technology that functions much like a printer in reverse. An OCR system reads printed text and converts it to an electronic format for use in document processing applications.

You can download the RelayFax OCR Printer Driver from our website at: [www.altn.com/Downloads/RelayFax-Free-Trial/](http://www.altn.com/Downloads/RelayFax-Free-Trial/)

1. To enable OCR, open RelayFax Server and starting from the **Menu Bar**, click **Tools**.
2. Click **OCR Options** to open a dialog box.
3. In the **Restrict OCR recognition to the first "x" faxed pages only** field, enter the number of pages that you would like the OCR engine to check.
4. In the **OCR recognizes documents written in** field select the language that you will be using.
5. If you would like to save the OCR work files check the box for **Save OCR work files in this format**.
6. From the pull down menu select the format you would like to save the files in.
7. Check the box for **Automatically route faxes to known email addresses** if you would like the incoming faxes to be checked against your account database. If a Real Name is found in the fax that matches a real name in the account database the fax will be forwarded via Email to that user.
8. Check the box for **Automatically route faxes to unknown email addresses** if you want RelayFax to route faxes to unknown accounts.

**Warning:** *Enabling this feature will in effect cause RelayFax to become an open fax gateway for any user. That is, of course, the goal of this feature, but it may violate your local network policy. When this switch is enabled, the OCR engine will scan the fax for the first email address that it contains and then automatically route the fax to that address, even if it is otherwise unknown to RelayFax (not a known account).*

9. Click **Apply**, then click **OK**.