Fax Admin™

FaxAdmin™ by KEYSTROKE

User's Guide

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TRADEMARKS

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Welcome to FaxAdmin™

FaxAdmin™ by KEYSTROKE

Fax right from within ACT! without leaving your desk!

FaxAdmin lets you easily send personalized faxes to one or multiple contacts. You can even Fax Blast attached documents such as brochures, price lists, or contracts to your ACT! contacts. Instantly send personalized faxes to a single customer - or to a lookup of customers.

System Requirements

FaxAdmin Requirements

♦ System Requirement for Act! are sufficient for FaxAdmin to run

♦ ACT! PRO or Premium

♦ Fax Modem

♦ Standard Telephone Line (in order to send the outgoing fax)

Configuring Preferences

Setting ACT! Communication Preferences

After installing FaxAdmin, you will need to ensure that FaxAdmin is chosen as the default faxing software. To configure this, launch ACT! and click **Tools > Preferences** and select the "Communication" Tab.

IMPORTANT! *You should restart ACT! once you have made any changes to either ACT! preferences or KEYSTROKE Preferences.*
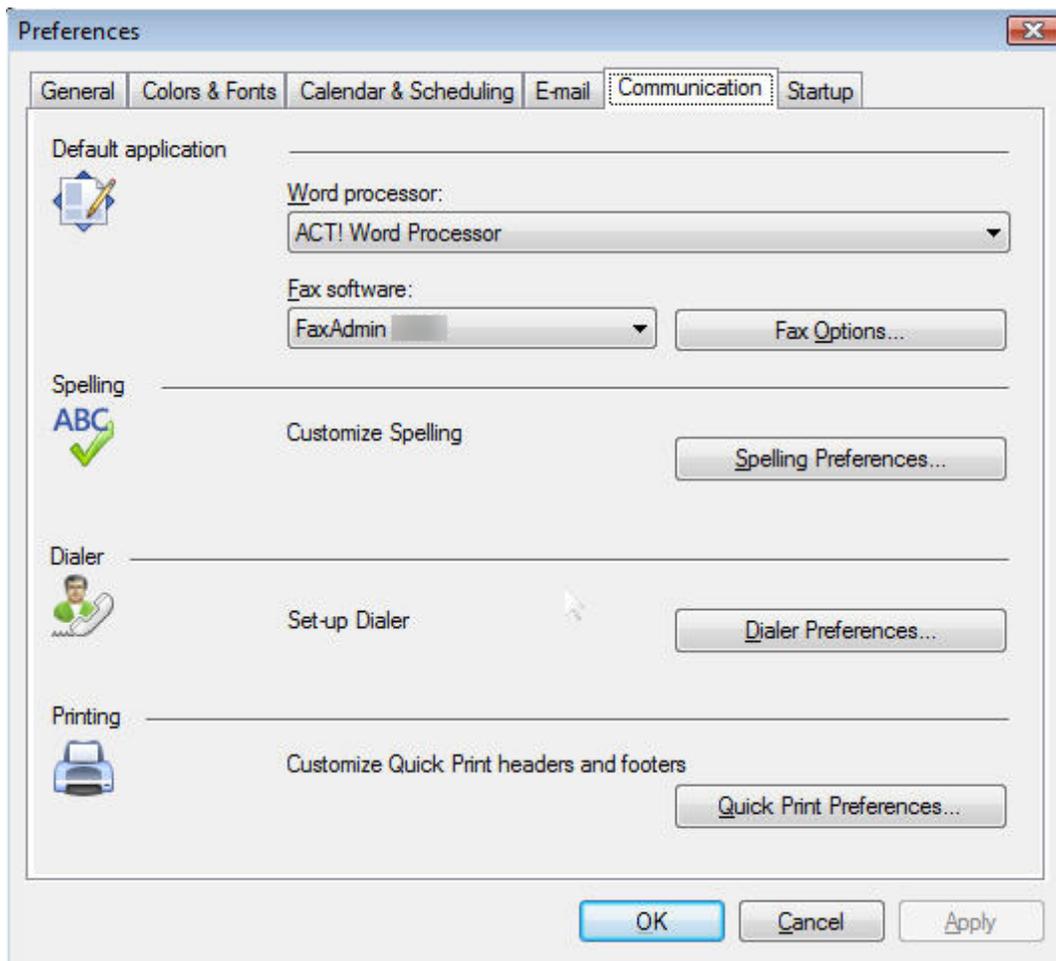
Setting FaxAdmin Preferences

Now that you have set ACT! to use KEYSTROKE FaxAdmin for the default faxing software, you will need to configure FaxAdmin. In order to configure FaxAdmin, you can click the "Fax Options" button from the ACT! Communications preferences.
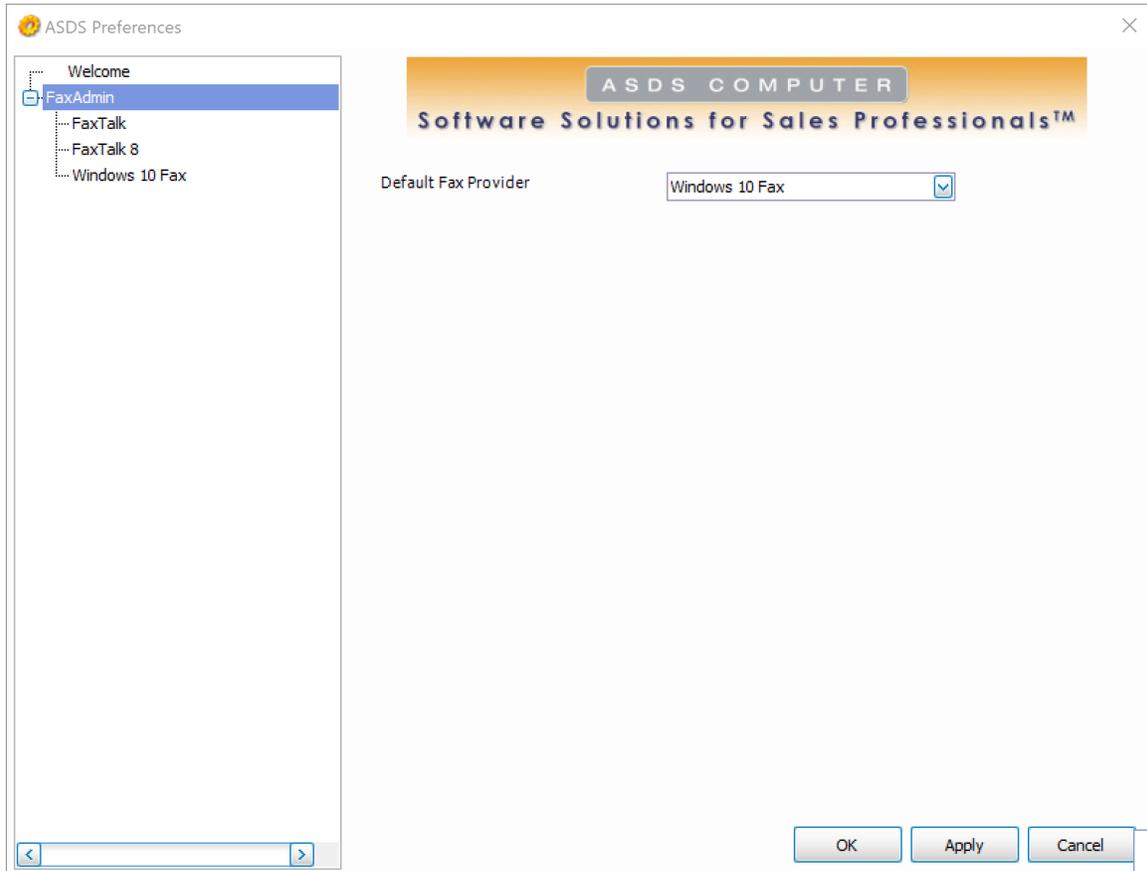
From the preference screen above, you will need to choose the supported faxing software to use. Currently we support our Microsoft Fax and Scan or FaxTalk.

Microsoft Fax and Scan Preferences

There are several preferences that will affect the way FaxAdmin processes your fax from ACT! Below is the preferences screen for Microsoft Windows 10 Fax and Scan.

Default Cover Page is set to one of the options. If you would NOT like to send a cover page automatically when you send a fax you can click the drop down arrow and choose "{None}".

Attach Fax To History is set to place a copy of the sent fax into the history tab of the contact record.
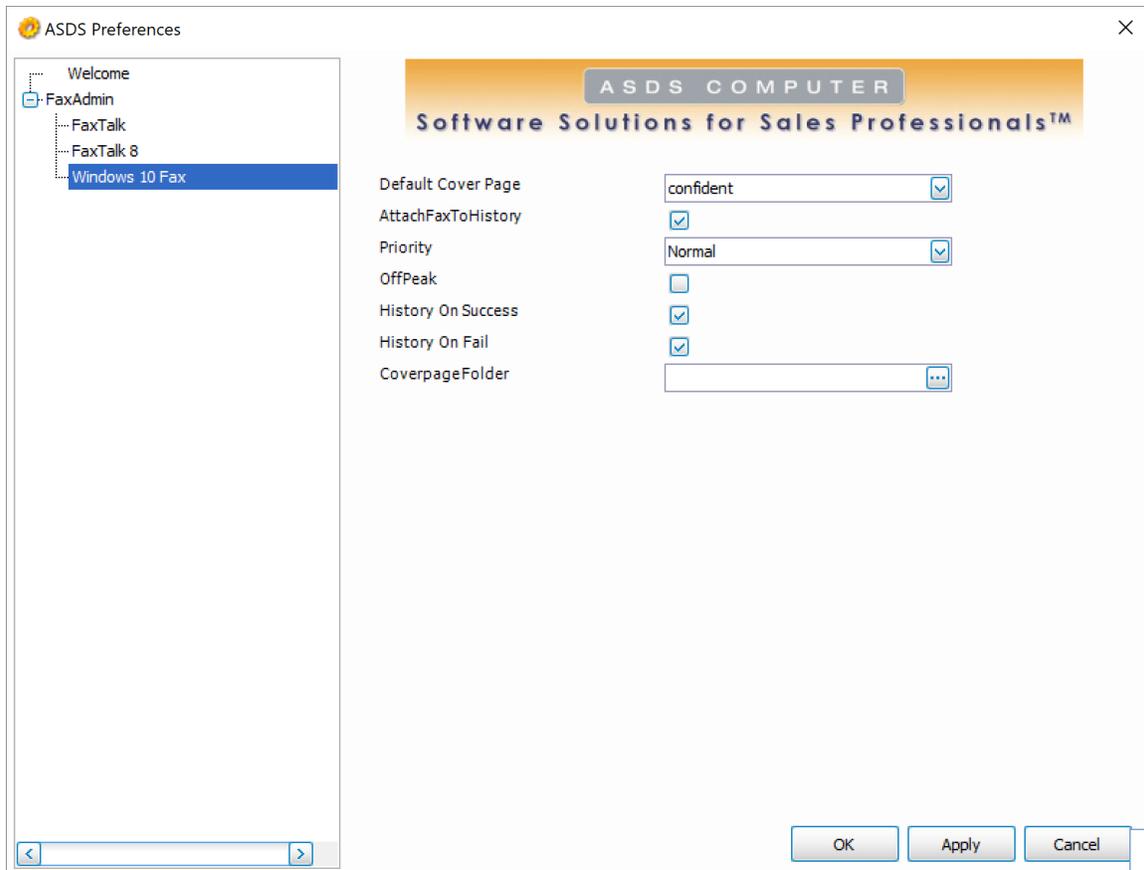
Priority will set the urgency on the fax for your recipient.

OffPeak will cause the fax being sent to use the offpeak preferences that you have set in Microsoft Fax and Scan.

History On Success will create a history entry in ACT! that the fax was sent successfully. These entries mean FaxAdmin successfully sent the fax to the chosen engine. You will need to check the Windows Fax and Scan or FaxTalk engines themselves to determine if the fax was truly delivered.

History On Fail will create a history entry in ACT! that the fax has failed.

KEYSTROKE FaxTalk Preferences

There are several preferences that will affect the way FaxTalk processes your fax from ACT! Below is the preferences screen for FaxTalk.
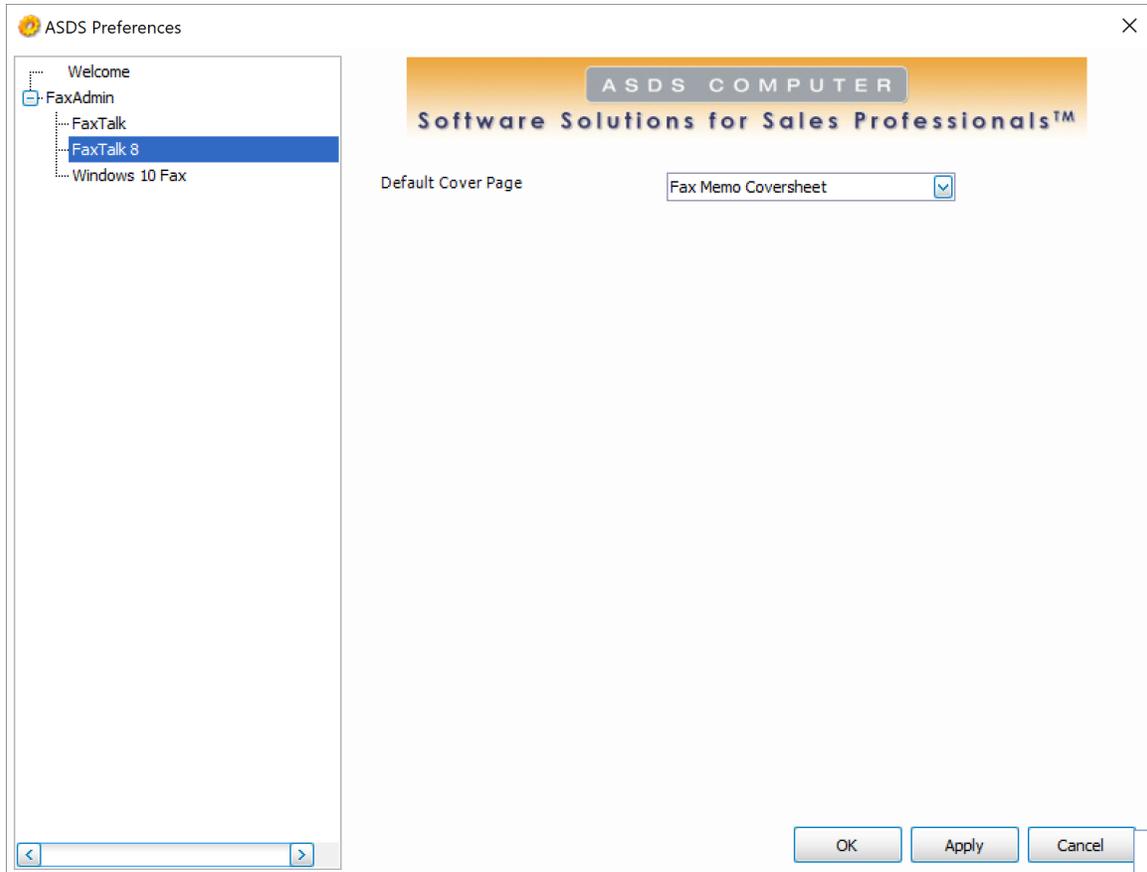
Default Cover Page is set to one of the options. If you would NOT like to send a cover page automatically when you send a fax you can leave it set to "{None}". Otherwise you can select one to use as a default.

Fax Blast

Introduction

The Fax Blast option that comes with FaxAdmin will enable you to send faxes to single contacts, specific lookups, and at the same time allow you to create attachments for these contacts. In addition, the Fax Blast tool will allow you to send documents that are not from ACT! to your ACT! contacts whether they are in a lookup, group, etc. You simply create the lookup in ACT! first and then use the Fax Blast tool.

Starting A Fax Blast

1. Create your lookup from within ACT!
2. Go to **Write** > **Fax Blast** and you will see the following screen.

Selecting Contacts

Here you can select which contacts are going to receive the fax attachment. See the example below of what options you have for selecting contacts. You have the following options as seen below:

- All Contacts
- Companies
- Groups
- Current Lookup

Here is an example of the "Select From" box.
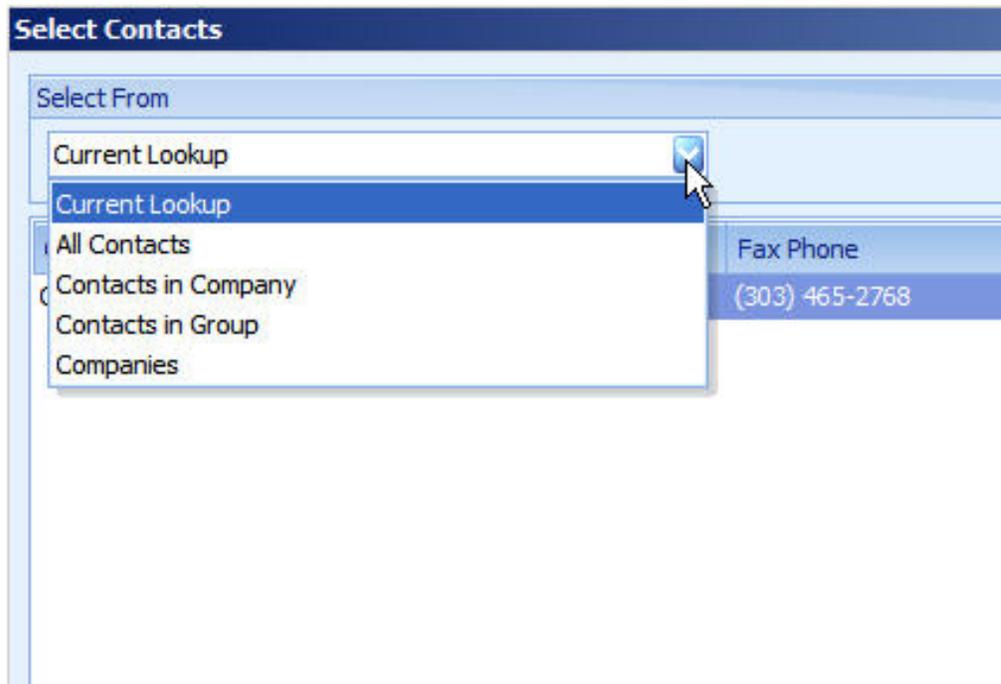
The most common option is the "Current Lookup". To select the lookup you have chosen, choose "Current Lookup" from the drop-down and use the double set of arrows [>>] pointing to the empty box on the right. This will grab the entire lookup from the left and move to the recipient's list on the right. Click **OK** at this point to get back to the main Fax Blast screen. See the example below.
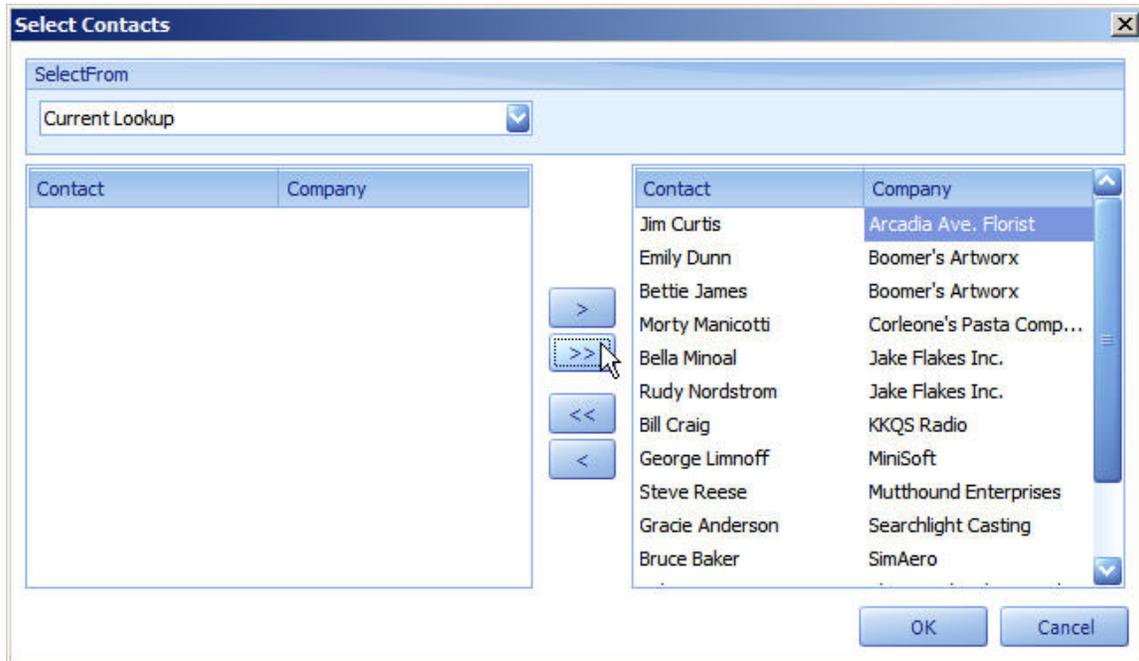
Choosing Documents

To choose an attachment for your Fax Blast, choose the ellipse button ⠿ next to "Attachments". You will see the screen below.
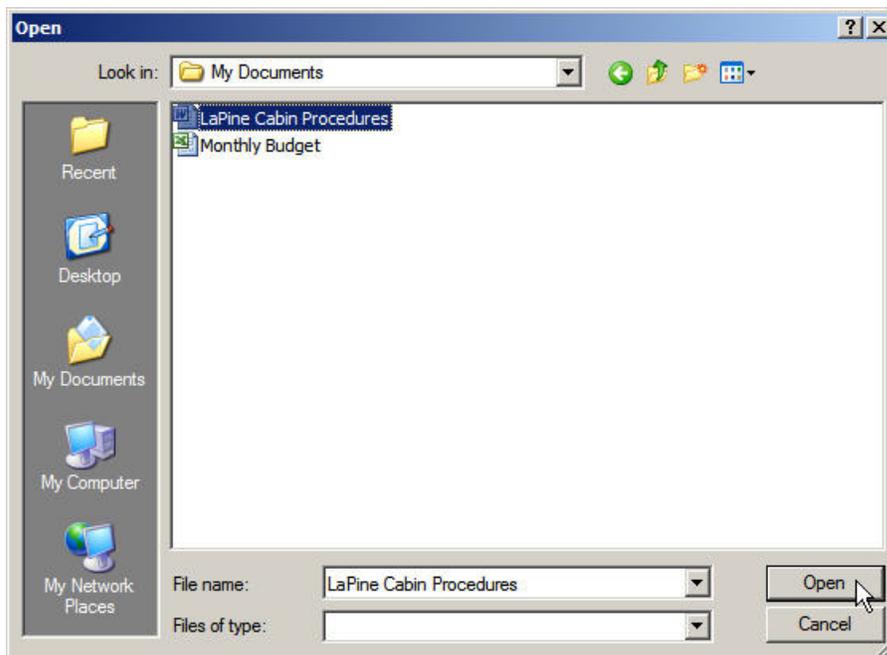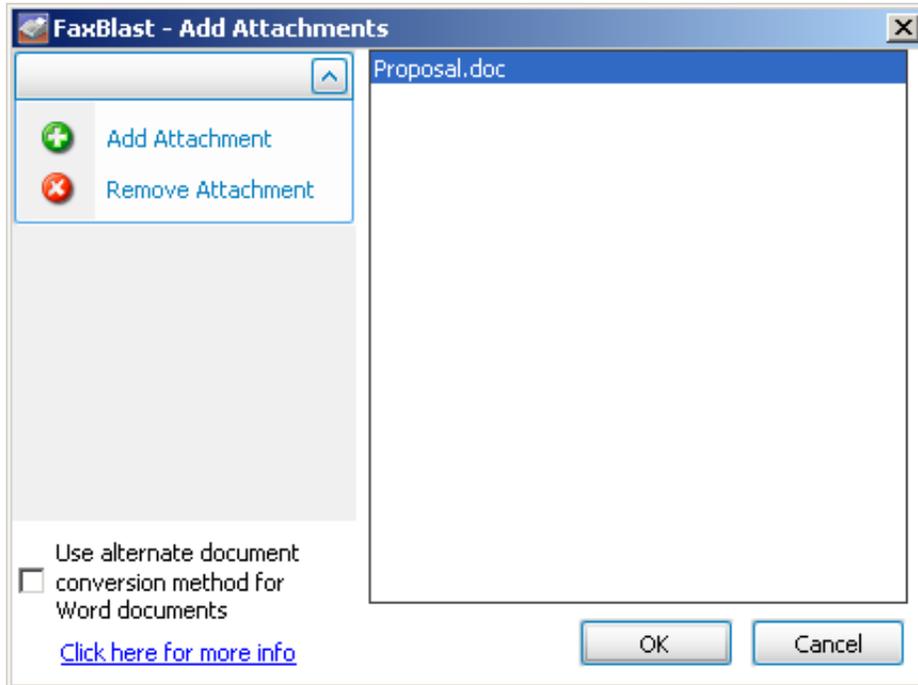
Once you have highlighted your document, press the "Open" button to select that document to be used for your Fax Blast. You will return to the following window to see what you have attached. Press "OK" to return to the Fax Blast window.
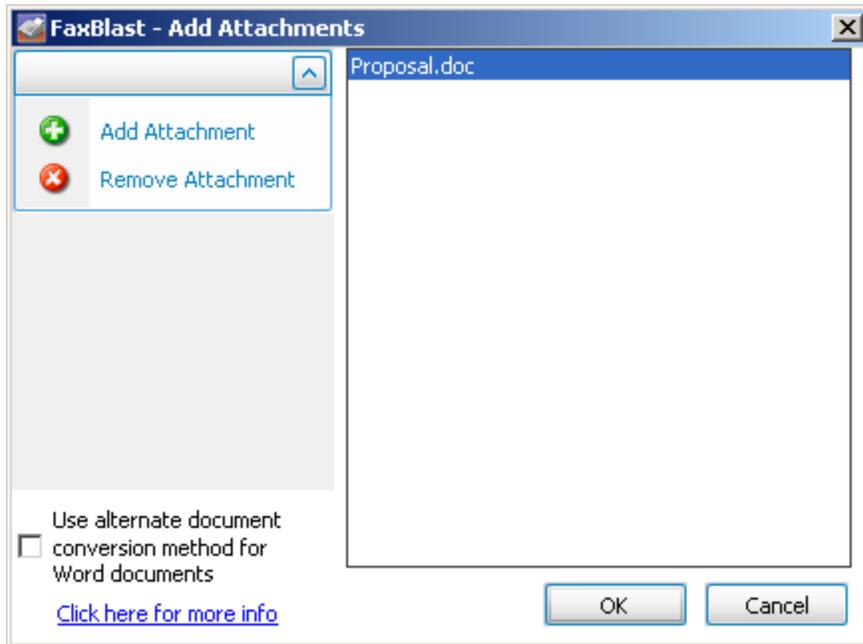
NOTE: There is currently an issue where Word documents that contain columns are not coming out exactly as the document should. The columns in the document will push margins settings out and force a multiple page document.

Option 1:
The manufacturer of the document conversion component recommends using a table instead of a column whenever possible to avoid this issue.

Option 2:
Click the "Use alternate document conversion method" option in the FaxBlast - Add Attachments dialog.

When this option is checked, the Word document will be sent to the KEYSTROKEFax fax/print driver, allowing Word to control how the document is created for the fax attachment.

Here is an example of the option for "Use alternative document conversion method"

FaxBlast – Add Attachments

Proposal.doc

➕ Add Attachment

❌ Remove Attachment

☐ Use alternate document conversion method for Word documents

Click here for more info

OK   Cancel
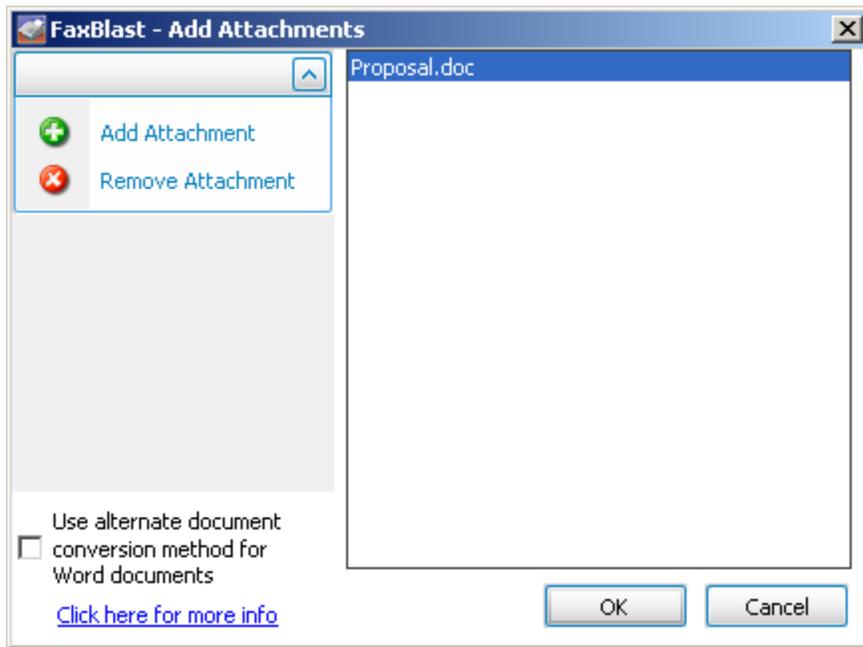
Fax Blast Options

From the main Fax Blast screen, you can choose the **Options** button. Once you click the **Options** button, you will see the Options screen below.

Send during Off-Peak time will cause the fax being sent to use the off-peak preferences that you have set.

Show Send Screen will display the Windows Fax and Scan send screen prior to sending the fax. You will then have additional options available since you will be in Windows Fax and Scan prior to the fax being sent.

Attach fax to History (1st file only FaxBlast) will create a history of the Fax Blast that was sent AND place a copy of the document on the history tab of the contact.

Send at a scheduled time will let you set on the fly what time etc. to send the fax.

Once all your options are set, click **OK**.

Completing A Fax Blast

Once back on the main Fax Blast screen as seen here, you will click OK and your Fax Blast will begin processing.

From the 'Select From' drop down you can choose 'Contacts in Group'. On the right hand side you will select the group you want to fax to. From there you can choose the contacts one by one, or select the entire group by clicking the double set of arrows to move the contacts from the left side pane to the right side pane.

See the example of this below:

Sending A Fax Blast To A Company

From the 'Select From' drop down you can choose 'Contacts in Company'. On the right hand side you will select the company you want to fax to. From there you can choose the contacts one by one, or select the entire company by clicking the double set of arrows to move the contacts from the left side pane to the right side pane.

See the example of this below:
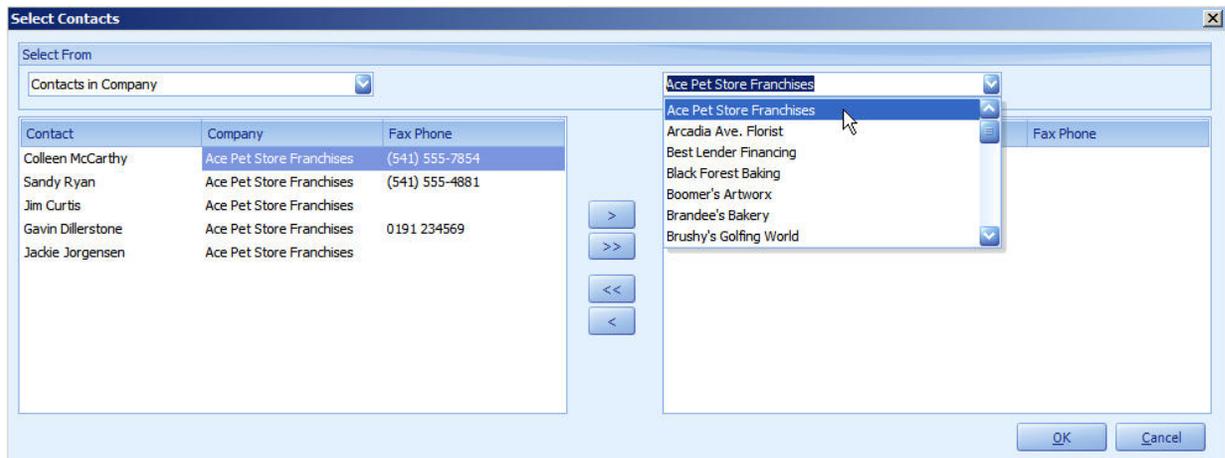
Faxing From Documents

Introduction

With FaxAdmin, you are also able to fax a document that you already have saved in ACT!. This process changes slightly depending on which word processor you are using.

Faxing From An ACT! Document

If you have ACT! chosen as your default word processor you will use the following steps to send a document as a fax.

1. Go to **Write** menu and choose your document or template. In our example below we chose "Letter".
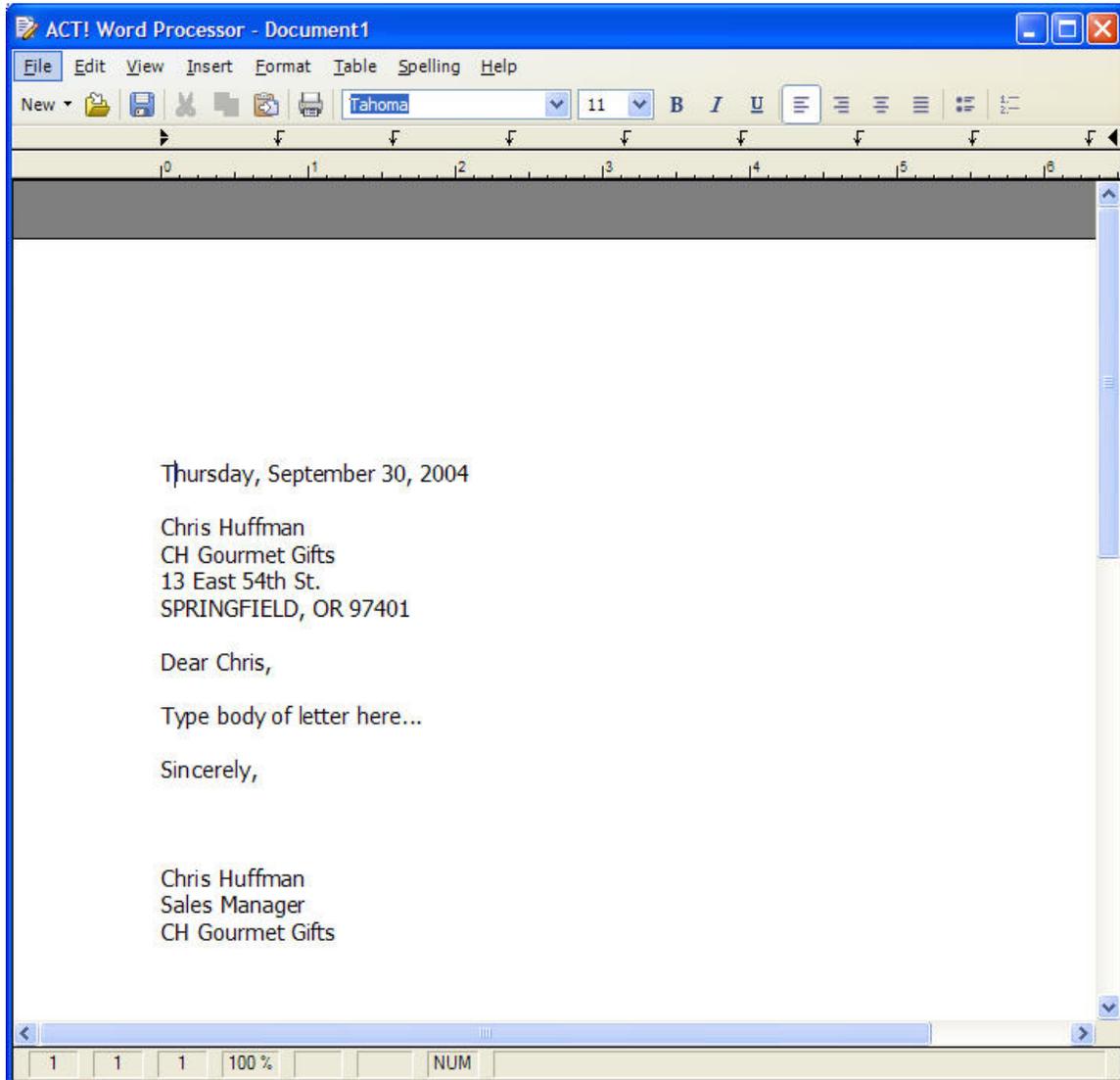
2. Go to **File** > **Send Fax**. You may get prompted to save the document first. If this is the case, Go to **File** > **Save As** and save the document then proceed with these steps again. The following box will appear.

4. Your fax is then sent using the default preferences you have chosen.

Faxing From A Word Document

If you have Microsoft Word chosen as your default word processor you will use the following steps to send a document as a fax.

1. Go to **Write** menu and choose your document or template. In our example below we chose "Letter".
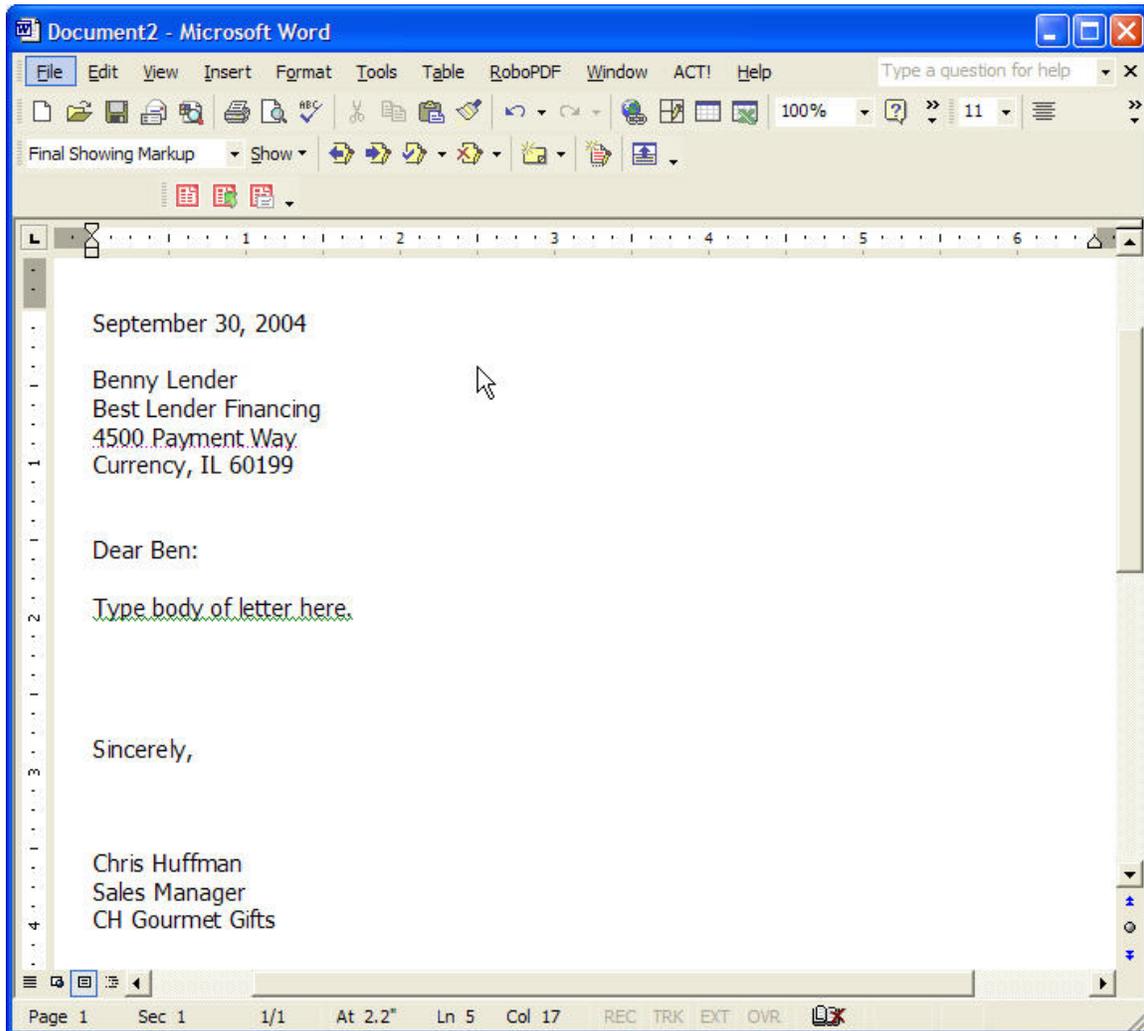
2. Go to **Add-ins**, **ACT!** > **Send Fax**. You may get prompted to save the document first. If this is the case, Go to **File** > **Save As** and save the document then proceed with these steps again. The following box will appear.

4. Your fax is then sent using the default preferences you have chosen.

Mail Merge To A Fax

Introduction

With FaxAdmin you will have the ability to send a fax to numerous recipients using a fax template. This is done by using the ACT! mail merge wizard and using "Fax" as the output.

Sending A Mail Merge Fax

To create a Mail Merge Fax use the following steps:

1. Go to **Write** > **Mail Merge Fax** and set your options and then select **OK** and then the mail merge wizard will appear as shown below:

Mail Merge Wizard (1 of 5) ? ✕

act!™

Welcome to the Act! Mail Merge Wizard

Use a mail merge to merge contact information with a template to create personalized letters, e-mail messages, and faxes.

This wizard will guide you through the process of selecting contact(s), where to send the mail merge, the template to use, and additional output options.

☐ Check to hide in the future

Click here to learn about Act! emarketing

< Back | Next > | Finish | Cancel

2. Choose "Fax " on the "Select Output" box and click **Next**.
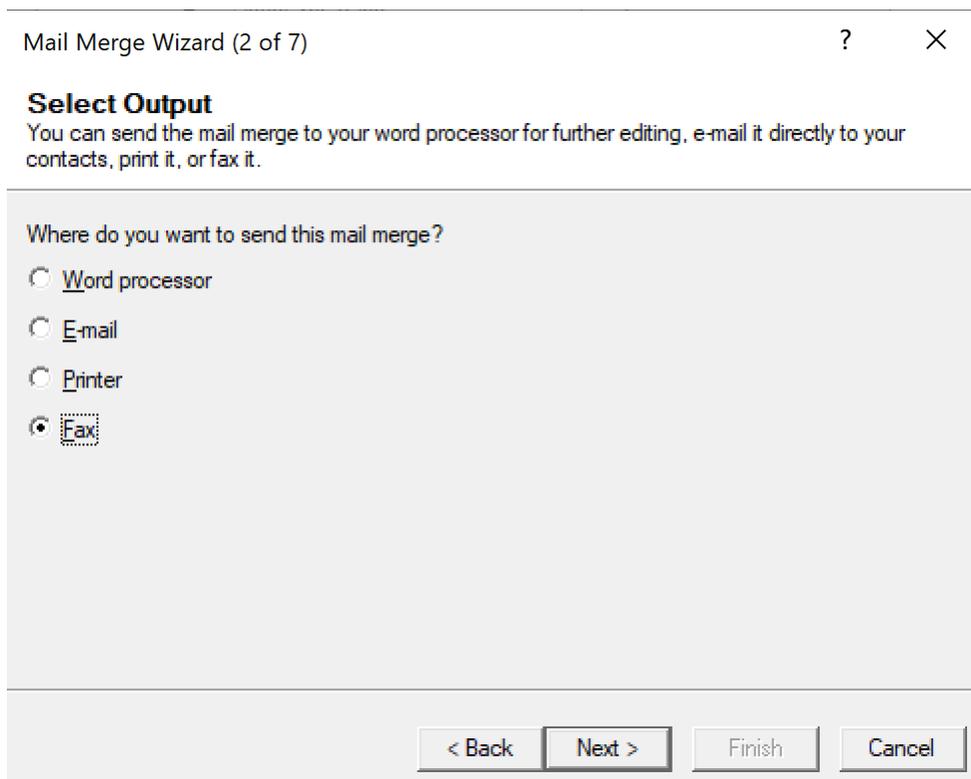
Mail Merge Wizard (2 of 7)		?	✕

Select Output
You can send the mail merge to your word processor for further editing, e-mail it directly to your contacts, print it, or fax it.

Where do you want to send this mail merge?

○ Word processor

○ E-mail

○ Printer

◉ Fax

< Back	Next >	Finish	Cancel

3. Click Browse on the "Select Template" box and choose your template to use and click **Next**.

4.

Mail Merge Wizard (3 of 7)　　　　　　　　　　　　? 　　×

Select Template
Select the template to use in the mail merge.

Type the path to the template, or browse to locate the template:

\\SERVER4\ASDS-database files\Templates\03 Presentation - Follow -　　　Browse...

< Back　　　Next >　　　Finish　　　Cancel
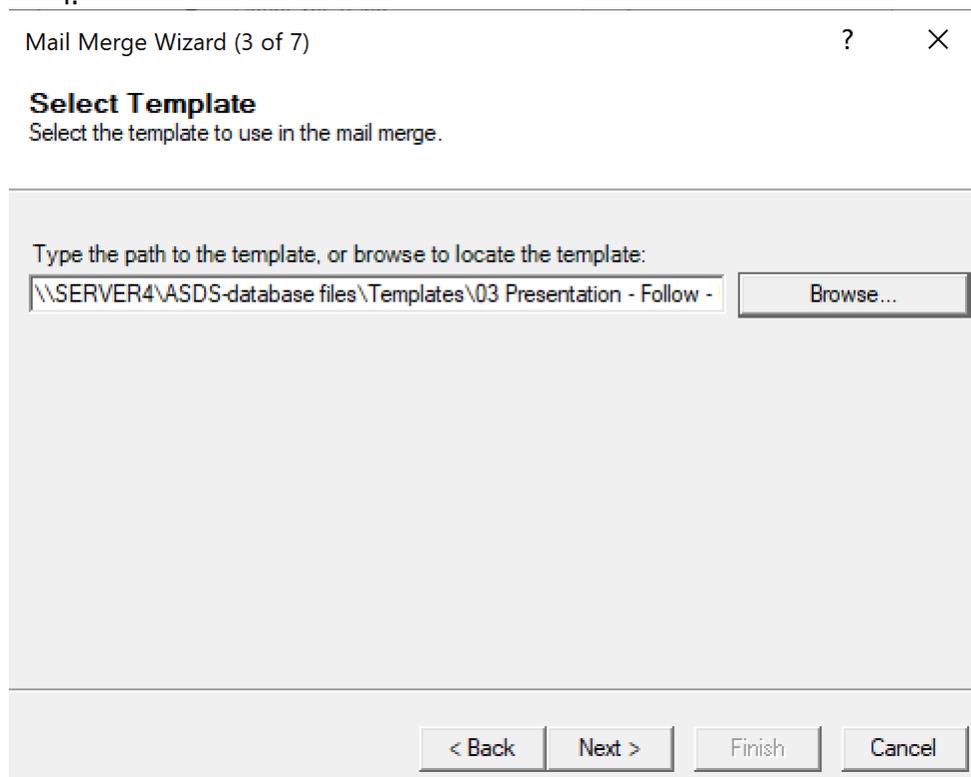
4. Choose which contacts or groups on the "Select Contact" box and click **Next**.

Mail Merge Wizard (4 of 7)   ?   ✕

Select Contact
Select the contacts to receive the mail merge.

Select contacts from:

- ⦿ Current lookup
- ○ Current contact
- ○ All contacts
- ○ Selected group: `09 ACTScan 05 Group`
- ○ Selected company: `1Looije Agro Techncis BV8777445615sshaneCo`

[< Back]   [Next >]   [Finish]   [Cancel]

5. Enter a subject for the fax as well as choose your "Record history" options and click **Next**.

Mail Merge Wizard (5 of 7) ? ✕

Set Fax Options
Select history options for the fax mail merge.

Enter subject for fax

┌─ Record history ─────────────────────────────
│ ⊙ Yes, record history
│   Regarding:
│
│   ☐ Attach document to history
│ ○ No, do not record history
└──

< Back | Next > | Finish | Cancel

6. Select how you would like FaxAdmin to handle the contacts with missing fax numbers and click **Next**.

7. You have now completed the wizard and are looking at the Summary of tasks and the options you have chosen. Click **Finish** to process your mail merge.
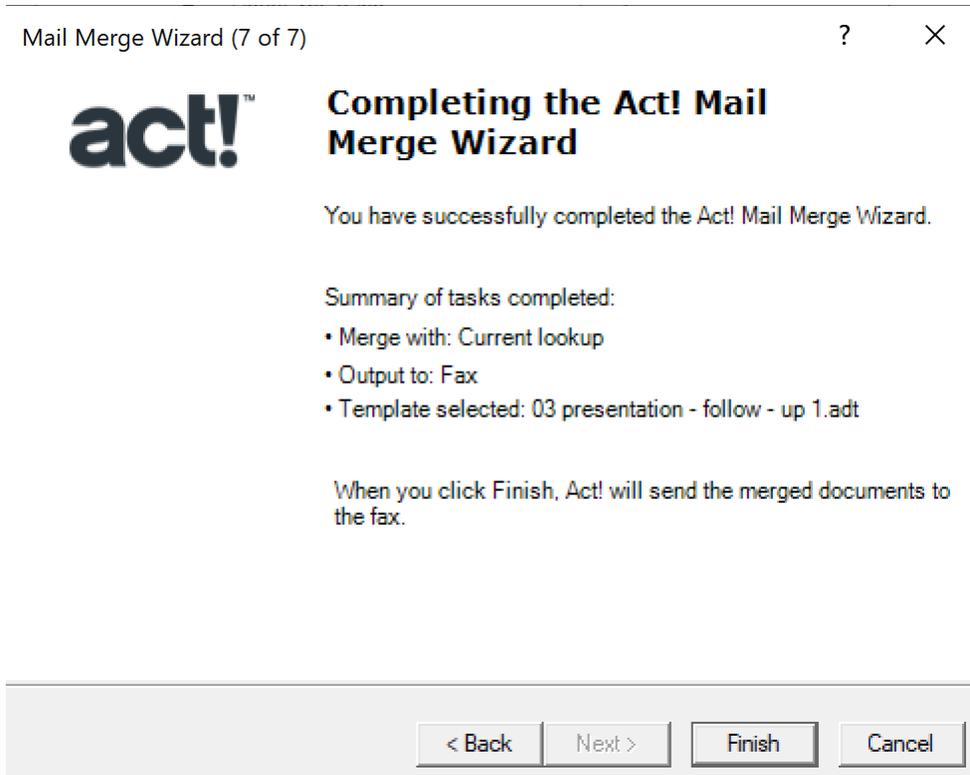
8. The "Merging Records" box will appear showing you the contacts being merged into the template.
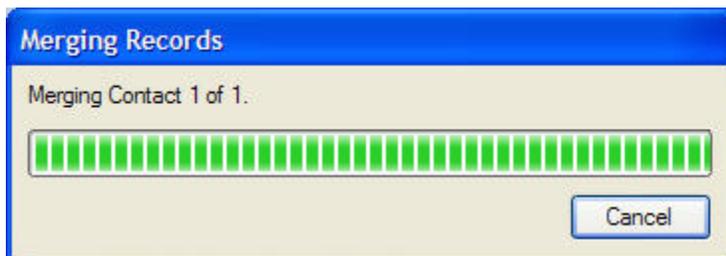
Sending A Mail Merge Fax With Options

If you want to set options for your mail merge such as the Priority, Send at a scheduled time, etc. you can do this by going to WRITE > MAIL MERGE FAX first. You will see the following window that will allow you to set various preferences prior to performing the mail merge.

Once you click **OK** on the Options screen, you will go through the rest of the mail merge wizard as described in the 'Sending a Mail Merge Fax' help topic.
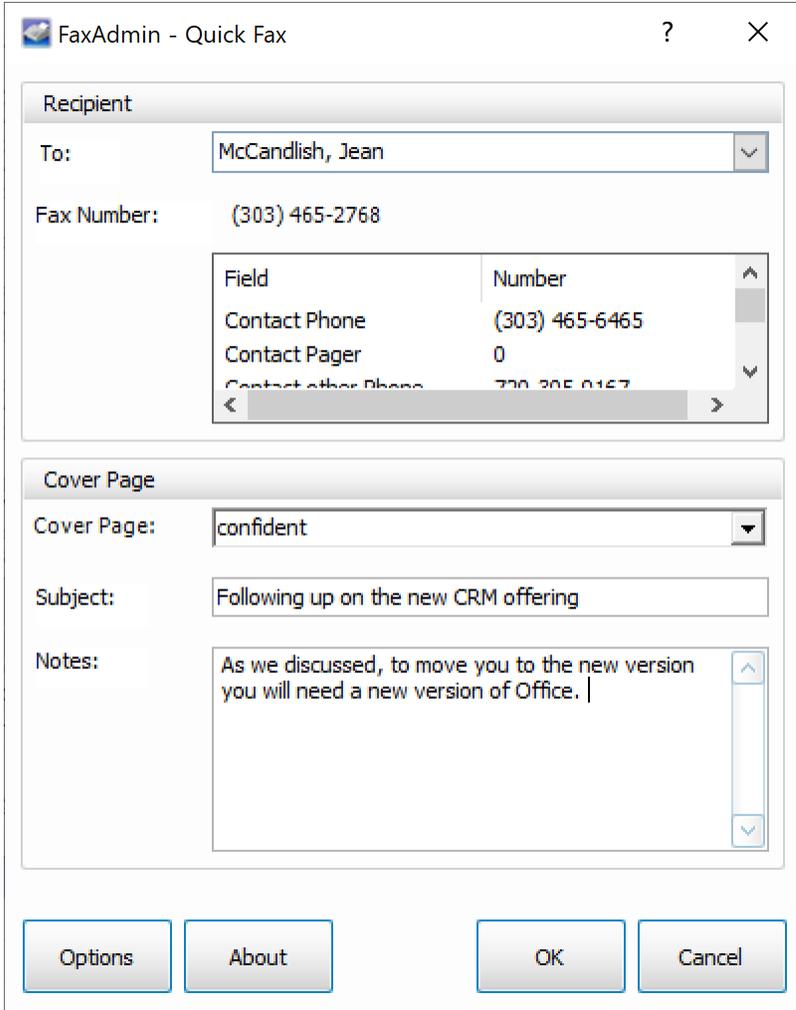
Quick Fax

Introduction

The Quick Fax option gives you a quick way to send a contact a fax cover page or simple document. It is only intended for single faxes.

Sending A Quick Fax

To send a contact a Quick Fax, you can either click the Icon on the toolbar 🖼 or go to **Write** > **Quick Fax**. You will see the following screen below:

Recipient - The "To:" box in the "Recipient" section of the window will be filled out by default with the contact record you were on in ACT!. If you wish to send to somebody other than this contact, you can either use the Cancel button or use the drop down and choose another contact to send the fax to. The fax number can also be chosen from the list that is presented. If these numbers need correction, you must change them from within the corresponding field in ACT!.

Cover Page - From this section you MUST choose the cover page to use as that is what is being sent on a Quick fax. You MUST enter a subject for the fax that is being sent. Any notes you would like to make should also be entered at this time.

Subject - Here you can enter the subject of the fax that will show up on the fax.

Notes - Here you enter any notes that you want to populate on the body of the fax. **IMPORTANT!** You must NOT preview the fax or show the send screen or the engine will determine you want to enter something different and the end result will be a blank notes section on the outgoing fax.

Sending your Fax

In order to complete and send your fax, at this point you will click OK. Depending on which fax solution you have set as the default, your fax will be sent using the preferences that you have set.

Trial Ware Information
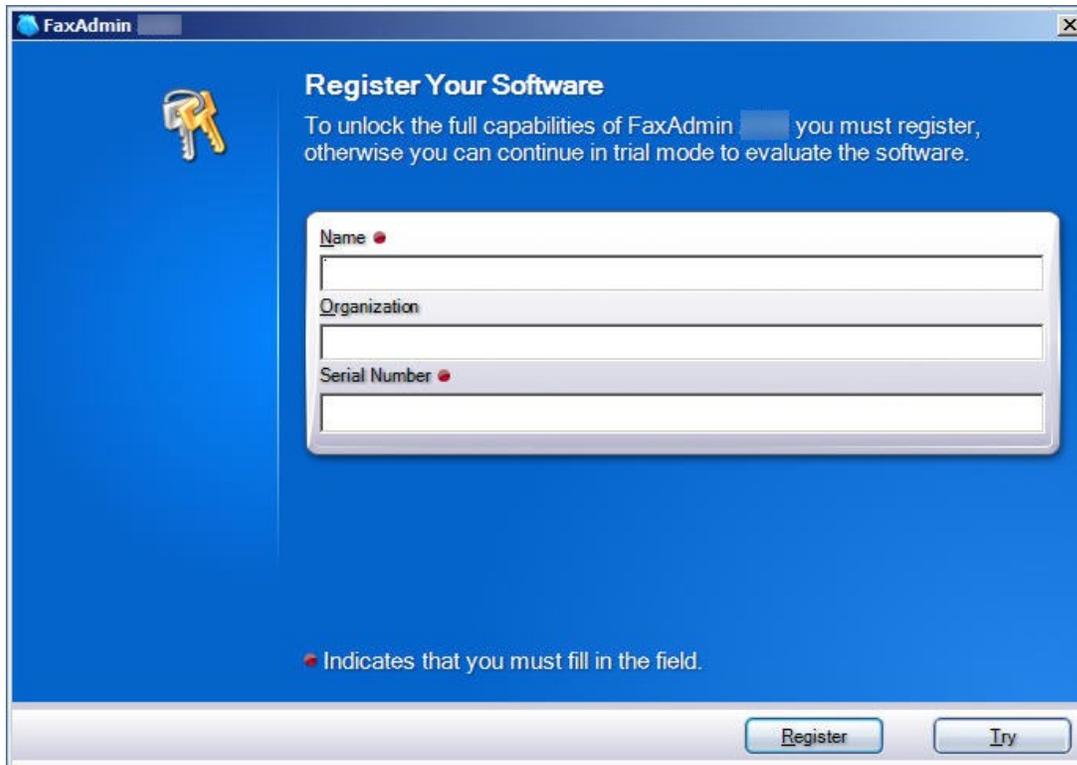
Trial Ware Information

FaxAdmin comes with a fully functional 30 day trial. When you launch FaxAdmin, you will be prompted to try the program or register. You can utilize your 30-day trial by simply clicking the 'Try' button. If you have purchased the software, you can choose the 'Register' button and continue through the process by activating your software. See the example below:
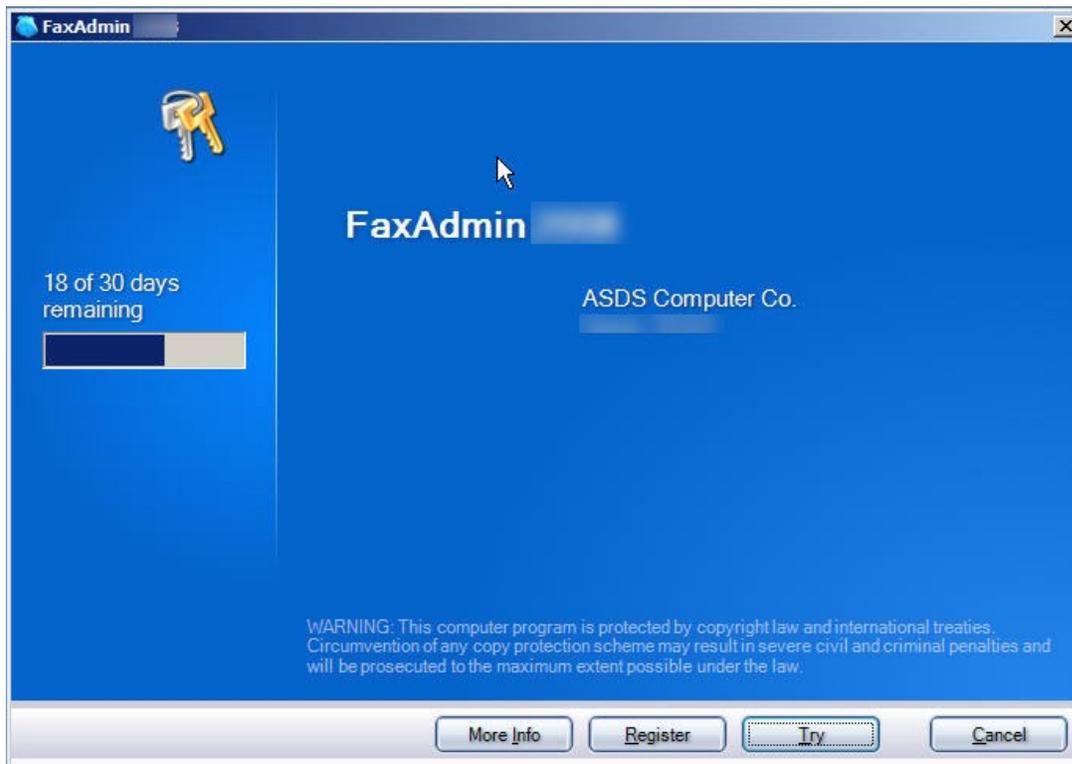
Registration

Registration

When you choose to register your product, you will be prompted to input your information as shown below. You must fill out the fields marked with a red circle. Upon entering this information, you will choose the 'Register' button to continue on to activation.

Activation

Activation

Once you have entered your information on the 'Register Your Software' window, you will be prompted to Activate Your Software. See the example below:

Once you choose 'Activate online now', you will see the following box to show it was successful.

Note: When you activate your software, it can ONLY be used on the machine in which it was activated on. If you choose to install it on another machine you MUST 'Deactivate' the software first and then 'Activate' it on the new machine.

Deactivation

Deactivation

Open ACT!.

Click the **FaxAdmin** menu and choose the **About FaxAdmin** item.

Click the "Deactivate" button in order to deactivate the FaxAdmin software.

Now you can install the FaxAdmin software on the new computer and re-use the original serial number you were given and then you can activate the software online.

Troubleshooting

Why Are The Fax Margins 1 Inch?

The most common cause of this problem is Tables or Text Boxes being used on the template. Templates should be created using very simplistic formatting. Graphics in the templates are fine, but all text should be entered directly into the template vs. using tables or text boxes.

Another cause for margins not being the same on the outgoing fax is due to the default margins in Wordpad being different than the margins you are using in your Word template. You must open Wordpad by going to **START** > **PROGRAMS** > **ACCESSORIES** > and go to **FILE** > **PAGE SETUP**. From there, set these margins the same as you used in your template in Word or ACT!.

Why Does The Number Being Dialed Always Show "+1"?

When the document is ported over to the engines, the number may display as "+1" then the number. This does not necessarily indicate that it is dialed with the "1". The best way to determine how the engines are dialing the number is by looking at the "Call Progress" screen as seen below.
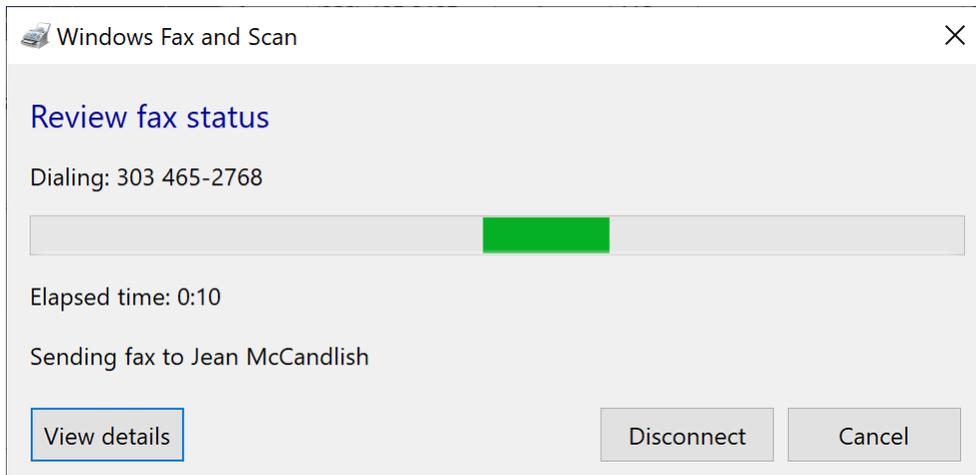
If you see the "1" on this screen and it should not be dialing the "1" then you will need to ensure you have "Area Code Dialing Rules" set properly. This is found in Control Panel, Phone and Modem.

Technical Support

Contact Us

Technical support is available by visiting the KEYSTROKE site. We offer several services to meet your technical support needs. Please visit us today @ www.Keystroke.ca/support to see if there are any known issues for your product.