NEXTIVA vFAX
QUICK START GUIDE

Getting Started with Nextiva vFAX

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Step 1: Accessing Your Account

After you have purchased Nextiva's Virtual Fax Service, you will receive your login information via email. After your account has been activated, you will then be prompted to log in at vfax.nextiva.com (Figure 1-1). If you don't receive an email within 24 hours from sign up, please contact Nextiva Support at 1-800-285-7995 or vFAX@nextiva.com.
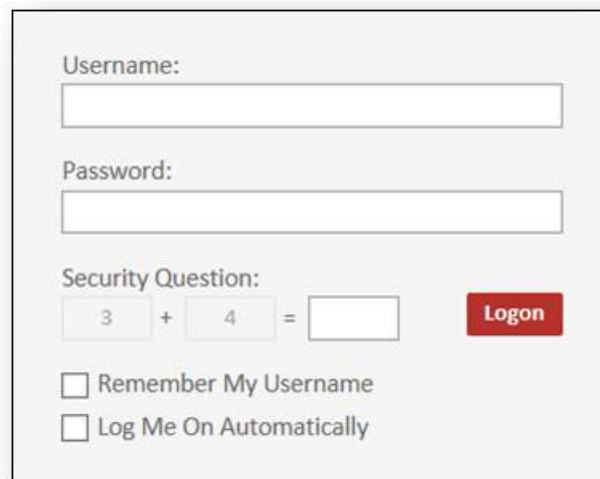

Figure 1-1: vFAX System Login

Step 2: View Faxes

Once successfully logged in, you will see the Dashboard (Figure 2-1). On this screen, you can view any recent faxes sent and received. If you click **Search** you will see all faxes sent and received from the past six months. You can also download, print, and forward faxes directly from this screen.
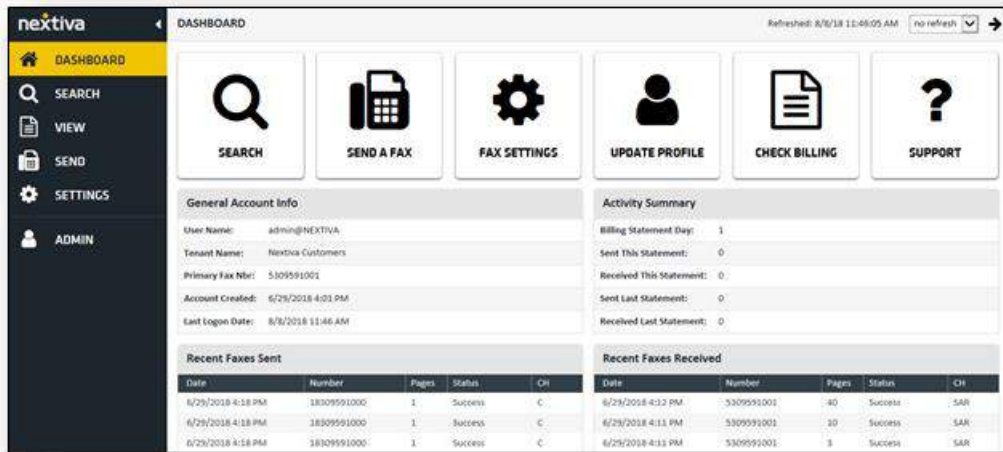
Figure 2-1: vFAX Dashboard

Step 3: Sending Faxes

To send a fax, click **Send A Fax** from the Dashboard. Enter the information in the blank fields, please note the only field that is required is the **Fax Number**. Click **Next** once you have filled in all desired fields (Figure 3-1).

Figure 3-1: Recipient Info

Uploading Your Fax Attachment

Here you have the option to upload a file (up to 10 files total per fax/5MB max). The Accepted File Formats are listed on the right hand side for easy reference. Find the file(s) on your computer that you want to send by clicking **Browse**. The file(s) you selected will display under **Selected Files** once they have been successfully attached. Files will send out in the order you add them (Figure 3-2).

Figure 3-2 Attachments

Fax Transmission Detail

This screen will give you a preview of the default Cover Page (Figure 3-3). Don't worry about the code in the fields of the cover page, as this is just a preview of the cover page format. Those are filled in based on what you included in Section 1 of the send fax wizard. If you do not fill in those areas, the code will be blank on the recipient's side.

Figure 3-3: Fax Transmission

Filter Settings

Here you have the option of selecting filters to help keep your faxes organized (Figure 3-4). Once you have setup Folders or Types, you can quickly select them before sending the fax. This will make it easier to find and organize your fax later. The options on this screen are completely optional. If you do not wish to use them, click **Send**.

Figure 3-4: Filter Settings

Fax Confirmation

The Fax Confirmation page displays details about the fax transmission (Figure 3-5) It will let you know that the fax has been processed and is currently trying to transmit to the recipient. From the menu at the top of the page, you can click on the **Search** tab, and view the status of the faxes to make sure they were sent successfully or if there were any errors.

Figure 3-5: Fax Confirmation

Step 4: vFAX to Email

You can also send and receive faxes via email. To fax from your email, compose a new email on the primary email account registered with our company. In the address bar where you would

normally put the email address, you will put a 1 and then the 10 digit fax number and @nextivafax.com after it (Ex: 1xxxxxxxxxx@nextivafax.com). From there, simply attach your document and press send (Figure 4-1).

> **NOTE:** By default, you will receive email notifications to the primary email address on file each time you send or receive a fax.
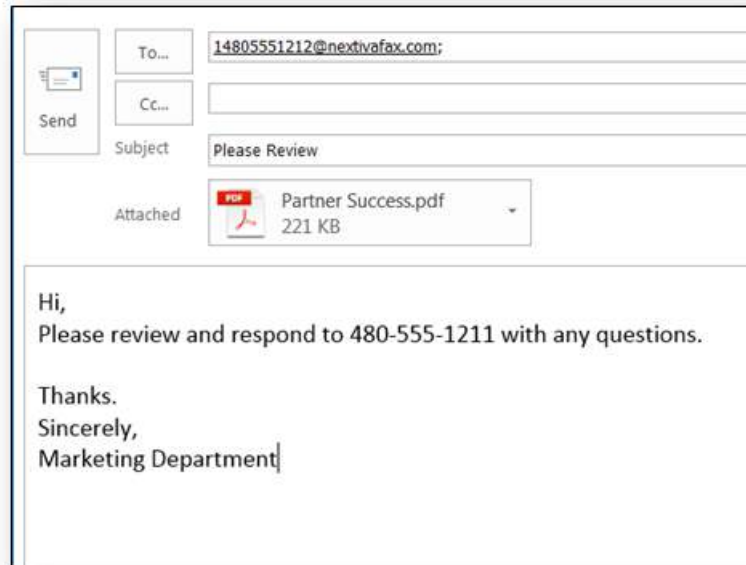

Figure 4-1: vFAX via email

Step 5: Account Settings

You have many different customizable options within the Nextiva vFAX Portal that can help you personalize and optimize your Nextiva faxing experience.

The Profile Tab:

This is where you can manage basic account info, such as Display name, the primary email address that you want to send faxes from and receive fax notifications to. This is also where you can choose how you want to be notified via email, such as on all faxes, only on successful or only on failed fax transmissions. You can do these notifications for both sent and received faxes (Figure 5-1). You can also add your cellphone number so that you can be notified of faxes while you're out in the field. Your SMS address is provided to you by you cell phone provider, please contact your cell provider or search the web to find your SMS address. Here are some common ones:

- ATT: phonenumber@txt.att.net
- T-Mobile: phonenumber@tmomail.net
- Sprint: phonenumber@messaging.sprintpcs.com
- Verizon: phonenumber@vtext.com

Figure 5-1: Profile Settings

The Filters Tab:

The Filter tab is where you can create Types or Folders for easy archiving. You can create Types such as "Personal" and "Business", and Folders that can further those organizational Types, such as "Contracts" or "Follow Up" (Figure 5-2).

Figure 5-2: Filters

The Password Tab:

Every Nextiva vFAX user will get their own user name and temporary password sent to them via email. The password tab is where you can reset your password (Figure 5-3).

Figure 5-3: Password Reset

The Notifications Tab:

Here you can specify additional email addresses or SMS notifications if you want multiple people to receive notifications for all inbound or outbound faxes (Figure 5-4).

Figure 5-4: Notifications