



**NEXTIVA vFAX**  
QUICK START GUIDE

Nextiva.com  
(800) 285-7995

## Getting Started with Nextiva vFAX

|                                      |   |
|--------------------------------------|---|
| Step 1: Accessing Your Account ..... | 3 |
| Step 2: View Faxes.....              | 3 |
| Step 3: Sending Faxes .....          | 4 |
| Step 4: vFAX to Email.....           | 6 |
| Step 5: Account Settings .....       | 7 |

# Getting Started with Nextiva vFAX

## 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](http://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](mailto:vFAX@nextiva.com).

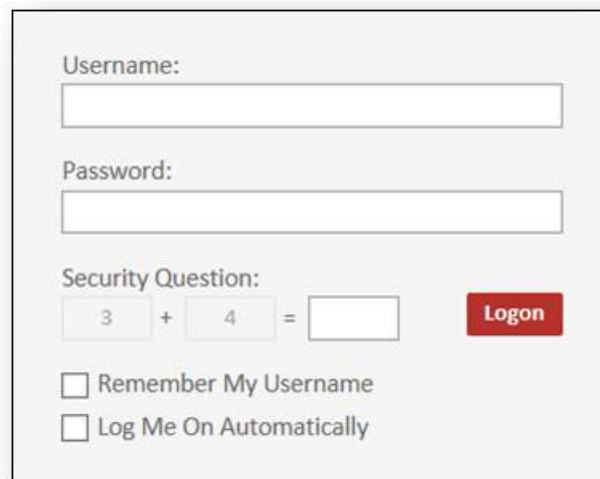
The image shows a login form with the following elements: a 'Username:' label above a text input field; a 'Password:' label above another text input field; a 'Security Question:' label above a math problem '3 + 4 =' followed by an empty input box; a red 'Logon' button; and two checkboxes labeled 'Remember My Username' and 'Log Me On Automatically'.

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.

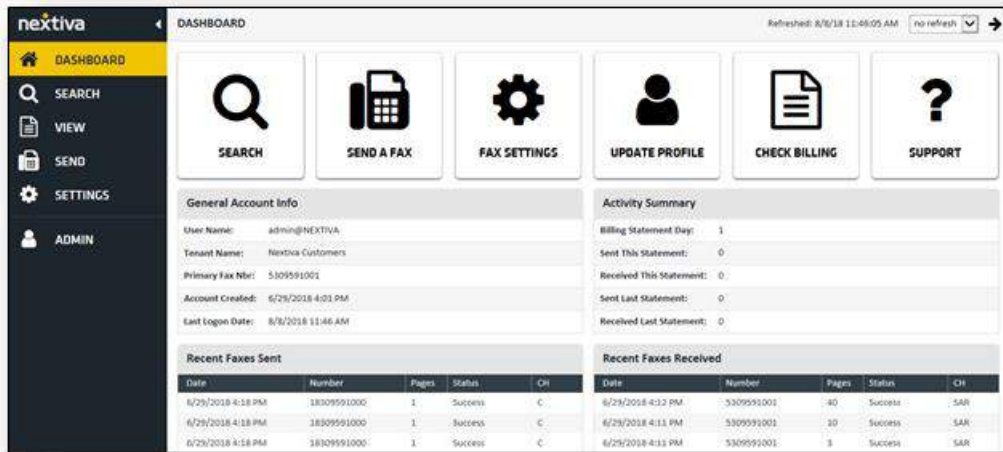


Figure 2-1: vFAX Dashboard

## 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).

The form is titled "1: RECIPIENT INFO" and includes the following fields:

- Fax Number:** +1 [input field]
- Deliver To:** [input field]
- Sent From:** [input field]
- Fax Subject:** [input field]
- Notes:** [text area]
- Cover Page:** CoverPage [dropdown menu]
- Schedule:** send immediately [dropdown menu]
- Tracking Key:** [input field]
- Charge Code:** [input field]

Buttons: RESET, NEXT →

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**.

The screenshot shows a web form titled "OPTIONAL: SET FILTERS FOR EASY ARCHIVING". At the top right, there are "EDIT" and "SEND" buttons. The form contains the following fields:

- Type: --select type-- (dropdown menu)
- Folder: --select folder-- (dropdown menu)
- Notes: (text input field)
- A section titled "If needed, you can send a copy of the fax transmission to additional recipients." containing five rows. Each row has a checked checkbox, a dropdown menu set to "email", and a text input field for the recipient's name.

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.

The screenshot shows a "MESSAGE:" log with the following entries:

- initializing fax request submission ...
- fax request initialized: message #: 360849112, id: 2171110164453930096
- adding file 1 of 1 .... TEST FAX.pdf.tif (43 KB)
- completing fax request submission .....
- ✓ fax request submitted for processing with message #: 360849112, primary recipient: +1 5203332983

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: [1xxxxxxxx@nextivafax.com](mailto:1xxxxxxxx@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.

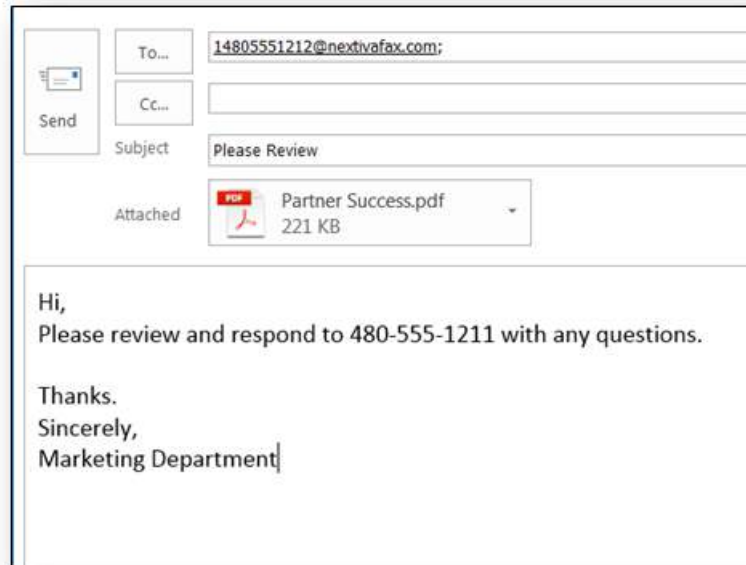


Figure 4-1: vFAX via email

## 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 your 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](mailto:phonenumber@txt.att.net)
- T-Mobile: [phonenumber@tmomail.net](mailto:phonenumber@tmomail.net)
- Sprint: [phonenumber@messaging.sprintpcs.com](mailto:phonenumber@messaging.sprintpcs.com)
- Verizon: [phonenumber@vtext.com](mailto:phonenumber@vtext.com)

The screenshot shows the 'PROFILE' settings page. At the top, there are tabs for PROFILE, FILTERS, PASSWORD, NOTIFICATIONS, PERMISSIONS, and BILLING. The PROFILE tab is selected. In the top right corner, there are 'RESET' and 'SAVE' buttons. The form is organized into several sections:

- Display Name:** A text input field with 'Display Name' as a placeholder.
- Phone:** A text input field with 'Phone' as a placeholder.
- Company:** A text input field containing 'NEXTIVA'.
- Fax CSID:** A dropdown menu set to 'inherited' and a text input field containing 'NEXTIVA'.
- Primary Email:** A text input field containing 'example@nextiva.com'.
- Notify On Send: Email:** Two dropdown menus set to 'all' and 'attachment'.
- Notify On Receive: Email:** Two dropdown menus set to 'all' and 'attachment'.
- Caller ID:** A dropdown menu set to 'inherited' and a text input field containing '5309591001'.
- Primary SMS:** A text input field.
- Notify On Send: SMS:** A dropdown menu set to 'none'.
- Notify On Receive: SMS:** A dropdown menu set to 'none'.
- Area Code:** A dropdown menu set to 'inherited' and a text input field.
- FaxBridge Receive Device:** A dropdown menu.
- FaxBridge Send Behavior:** A dropdown menu set to 'do not print'.
- FaxBridge Receive Behavior:** A dropdown menu set to 'no'.
- Email Attachment Format:** A dropdown menu.
- Account Code:** A text input field.
- Cover Page:** A dropdown menu set to 'CoverPage'.
- Primary Fax Number:** A dropdown menu set to '5309591001'.
- Notification Icon Legend:** Two checkboxes: 'notifications disabled' (checked) and 'notification attachments disabled' (unchecked).
- All Assigned Fax Numbers:** A text input field containing '5309591001'.

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).

The screenshot shows the 'FILTERS' settings page. At the top, there are tabs for PROFILE, FILTERS, PASSWORD, NOTIFICATIONS, PERMISSIONS, and BILLING. The FILTERS tab is selected. In the top right corner, there are 'RESET' and 'SAVE' buttons. The page is divided into two main sections:

- Manage Types:** A tree view showing a folder named 'Types' which is currently expanded.
- Manage Folders:** A tree view showing a folder named 'Folders' which is currently expanded.

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).



The screenshot shows a user profile interface with tabs for PROFILE, FILTERS, PASSWORD, NOTIFICATIONS, and BILLING. The PASSWORD tab is active. On the left, under 'User Identity', there is a 'Username' field with a note: 'username must be at least 8 characters without spaces, or username must be a valid email or end with: @NextivaCustomers'. On the right, under 'Password Management', there are three password fields: 'Old Password', 'New Password', and 'Confirm Password'. A note below the 'New Password' field states: 'password must be at least 8 characters and contain 1 digit, 1 uppercase, and 1 lowercase character'. At the bottom right of the password management section is an 'Update Password' button.

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).

The screenshot shows the NOTIFICATIONS tab in the user profile interface. It features a 'Standard Notifications' section with a table for configuring notifications. The table has three main columns: 'Notification Address', 'Notify On Send', and 'Notify On Receive'. Each of these columns is further divided into two sub-columns. The first row is pre-filled with 'email' and 'example@nextiva.com' for the address, and 'all' and 'attachment' for both 'Notify On Send' and 'Notify On Receive'. The following three rows are empty, each starting with a plus icon in a circle. At the top right of the interface are 'RESET' and 'SAVE' buttons.

| Notification Address: |                             | Notify On Send: |            | Notify On Receive: |            |
|-----------------------|-----------------------------|-----------------|------------|--------------------|------------|
| +                     | email   example@nextiva.com | all             | attachment | all                | attachment |
| +                     | sms                         | failure         |            | all                |            |
| +                     | email                       | none            | none       | none               | none       |
| +                     | email                       | none            | none       | none               | none       |
| +                     | email                       | none            | none       | none               | none       |

Figure 5-4: Notifications