



# ESI eSIP Evolution Series

## eFax for eSIP User's Guide

This document explains how to set up your ESI eFax service and ATA devices to send and receive faxes, and view fax history. The ESI eFax for eSIP is a stand-alone service with a separate website and windows application for print to fax. Please see the table of contents for your specific eFax service. If you are still unsure, please contact support for assistance.

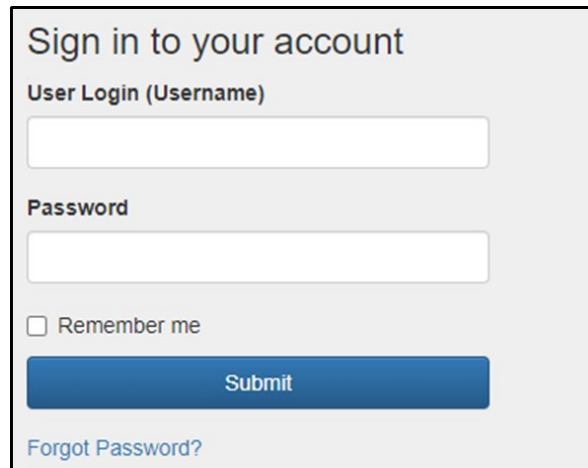
### Contents

ESI eFax for eSIP	2
Account Login	2
Change your password	2
Account Settings	3
Personal Information	3
Fax Send and Receive Confirmation	4
Sending a fax	5
Web to Fax	5
Fax Activity Report	6
Sample Detailed Report	7
PC to Fax (Windows Only)	7
Send a Fax	8
Cover Page Options	9
Realtime Notifications	9
Secure Fax File Cabinet	10
Fax to Fax (ATA)	10
Receive a Fax	11
Fax to Email	11
Fax to Fax (ATA)	11
Billing	11
Fax to Fax ATA Network Diagram	12
FAQ	13

## ESI eFax for eSIP

### *Account Login*

Access your user account by going to <https://secure.ipfax.net/>, and then enter your Username and Password. Your initial login credentials will be given to you by ESI. We recommend changing it after you log in. You can also select **Forgot Password?** to receive a temporary password. If you have forgotten your **Username**, please contact ESI support for assistance.

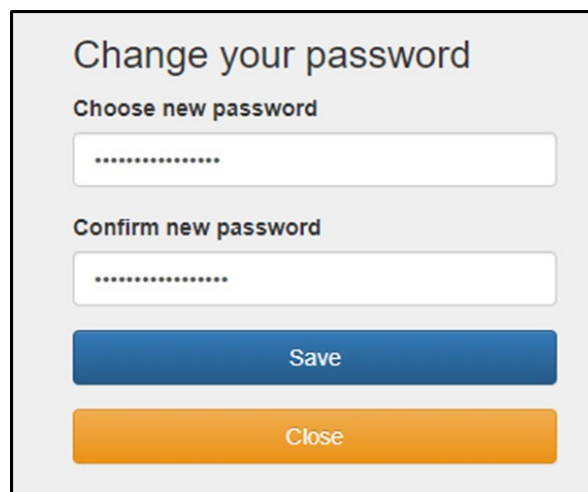


The screenshot shows a login form titled "Sign in to your account". It contains the following elements:

- A label "User Login (Username)" above a text input field.
- A label "Password" above a text input field.
- A checkbox labeled "Remember me".
- A blue "Submit" button.
- A blue link labeled "Forgot Password?" below the button.

### *Change your password*

To change your password select **Change my password**, then enter your new password and click **Save**.

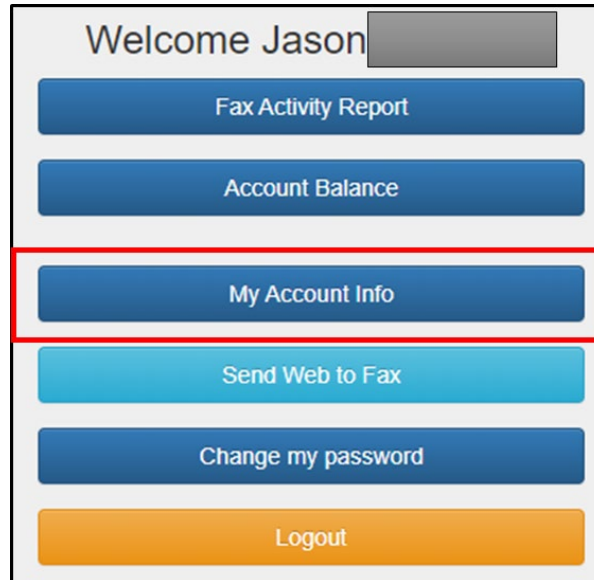


The screenshot shows a form titled "Change your password". It contains the following elements:

- A label "Choose new password" above a text input field with masked characters (dots).
- A label "Confirm new password" above a text input field with masked characters (dots).
- A blue "Save" button.
- An orange "Close" button.

## Account Settings

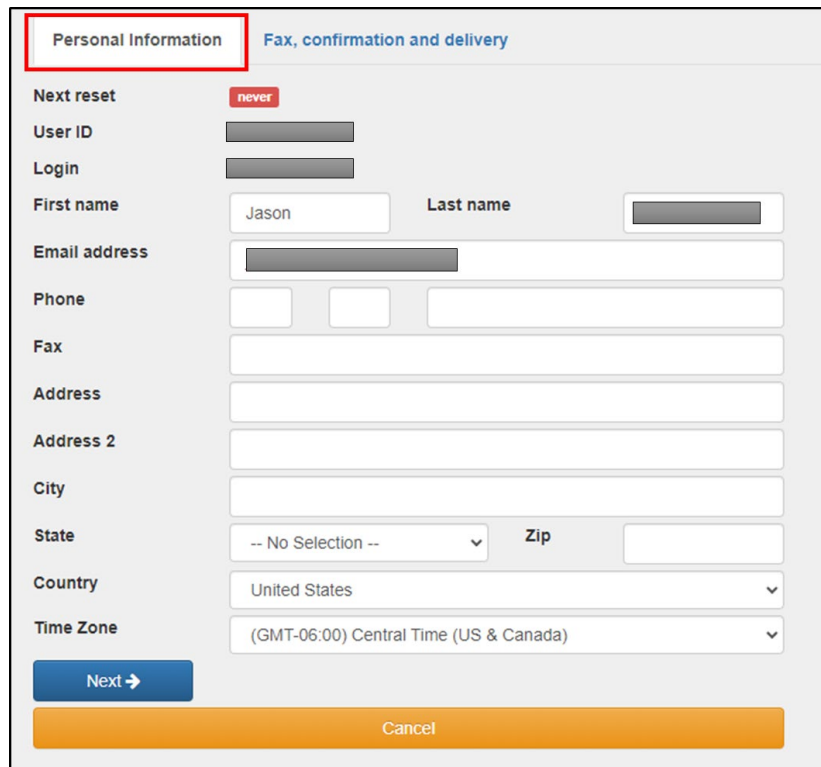
Go to **My Account Info** to change your personal information, and fax delivery and receive confirmation settings.



Welcome Jason [redacted]

- Fax Activity Report
- Account Balance
- My Account Info**
- Send Web to Fax
- Change my password
- Logout

## Personal Information



**Personal Information** Fax, confirmation and delivery

Next reset **never**

User ID [redacted]

Login [redacted]

First name Jason Last name [redacted]

Email address [redacted]

Phone [redacted]

Fax [redacted]

Address [redacted]

Address 2 [redacted]

City [redacted]

State -- No Selection -- Zip [redacted]

Country United States

Time Zone (GMT-06:00) Central Time (US & Canada)

Next →

Cancel

## Fax Send and Receive Confirmation

Personal Information Fax, confirmation and delivery

Fax to Email No. [Text Field]

1 Fax to Email - Email [Text Field]

Send Fax to Email as PDF file

Fax to Fax No. [Text Field]

2 Fax to Fax - Email [Text Field]

Queue Fax When ATA is Offline

Deliver Incoming Fax to Fax Machine

Deliver Incoming Fax to Email

Deliver Incoming Fax to Fax Machine and Email

3 Fax Confirmation On  Failure  Success

4 Confirmation Email [Text Field]

5 Email Confirmation On  Failure  Success

Text

Text and First page

Text and All pages

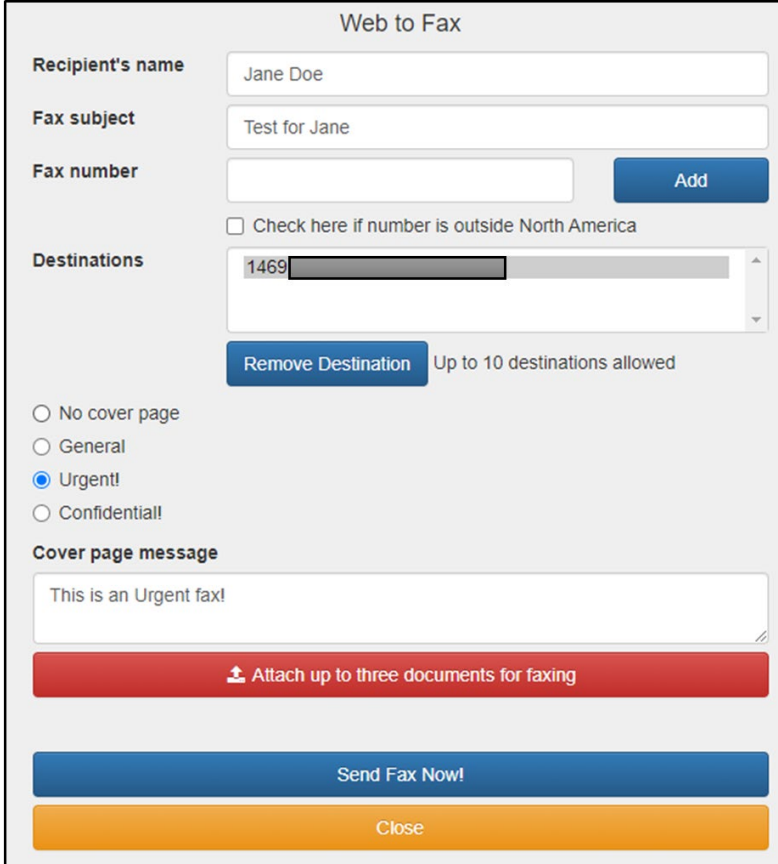
← Previous Save Cancel

1. **Fax to Email - Email:** Enter the email destination for incoming Fax to Email faxes. Multiple email destinations may be separated with a comma.
2. **Fax to Fax - Email:** Enter your email address that Fax to Fax is to be sent to.
  - a. **Queue Fax When ATA is Offline:** Customers with ATA for fax machines may have incoming faxes Queue for seven days while offline. After 7 days faxes will be deleted and cannot be recovered.
  - b. **Delivery Options:** Select to have faxes delivered to only the fax machine, email, or both.
3. **Fax Confirmation On:** Select to receive confirmation for failed and successful Fax to Fax faxes.
4. **Confirmation Email:** Enter email address to send confirmations.
5. **Email Confirmation On:** Select to receive confirmation for failed and successful Fax to Email faxes. You can also select to receive the first page or all pages of the fax.

## Sending a fax

### Web to Fax

From the main menu select the **Send Web to Fax**  option.



The screenshot shows a 'Web to Fax' form with the following fields and controls:

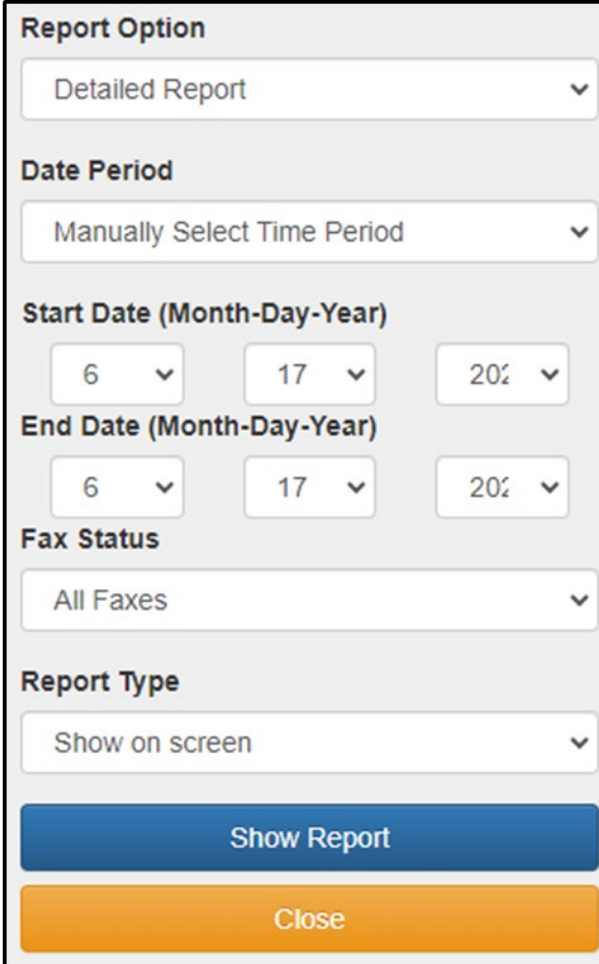
- 1** Recipient's name: Text input field containing 'Jane Doe'.
- 2** Fax subject: Text input field containing 'Test for Jane'.
- 3** Fax number: Text input field (empty) and an 'Add' button. Below it is a checkbox labeled 'Check here if number is outside North America'.
- Destinations**: A list box containing '1469' and a 'Remove Destination' button. Text below indicates 'Up to 10 destinations allowed'.
- 4** Cover page priority: Radio buttons for 'No cover page', 'General', 'Urgent!' (selected), and 'Confidential!'.
- 5** Cover page message: Text area containing 'This is an Urgent fax!'.
- 6** Attach up to three documents for faxing: A red button with a document icon.
- 7** Send Fax Now!: A large blue button.
- Close: A yellow button at the bottom.

1. **Recipient's name:** Enter recipient's name.
2. **Fax Subject:** Enter fax subject.
3. **Fax Number:** Enter the desired fax number, then click **Add**
  - a. Up to 10 destinations may be added.
4. **Cover Page:** Set cover page priority.
5. **Cover page message:** Add additional text to the cover page.
6. **Attach Documents:** Click the **Attach up to three documents for faxing**, then select the files to be faxed
7. Click **Send Fax Now!** to send the fax.

## Fax Activity Report

Various detailed status and history reports are available.

From the Main menu select the **Fax Activity Report**  option.



The screenshot shows a configuration form for the Fax Activity Report. It includes the following sections and elements:

- 1 Report Option:** A dropdown menu currently set to "Detailed Report".
- 2 Date Period:** A dropdown menu currently set to "Manually Select Time Period".
- 3 Start Date (Month-Day-Year):** Three separate dropdown menus for month (6), day (17), and year (202).
- End Date (Month-Day-Year):** Three separate dropdown menus for month (6), day (17), and year (202).
- 4 Fax Status:** A dropdown menu currently set to "All Faxes".
- 5 Report Type:** A dropdown menu currently set to "Show on screen".
- 6 Show Report:** A blue button to generate the report.
- Close:** An orange button to close the form.

1. **Report Option:** Select between a full Detailed Report, Summary by Country, Summary by Fax Number, or Summary by User.
2. **Date Period:** Select the Date Period for the report. Manually Select Time Period, Month to Date, Last 30 Days, Last Hour, and Today
3. Enter **Manual Time Period** for the report.
4. **Fax Status:** Select what Fax Status to show in the report. All Faxes, Successful Faxes Only, Fax to Email Only, Fax to Fax Only, Processing Faxes Only, and Failed Faxes Only
5. **Report Type:** Select what type of report to display or download. Show on screen, Download in EXCEL, Download in EXCEL zipped
6. Click **Show Report** to view or download the report.

## Sample Detailed Report

Status	Download/View/Resend	Fax ID	Dest No.	Country	CallerID	Fax Machine	Subject	Time	Rate	Pages	Dur.	Cost	Retry
Processing		93144144	14693315812	USA	8173574381	6/17/2024 2:35:13 AM PST (GMT-8) FROM: 8173574381-TO: 14693315812	Test_Message_1	6/17/2024 4:35:13 AM	0.03	3	00:00:00	0.00	1
Fax to Email		93144189	*8173574381	Fax to Email	8173574381	6/17/2024 2:42:50 AM PST (GMT-8) FROM: 8173574381-TO: 18173574381	0	6/17/2024 4:42:50 AM	0.00	1	00:01:00	0.00	0
SUCCESS		93144188	18173574381	USA	8173574381	6/17/2024 2:42:50 AM PST (GMT-8) FROM: 8173574381-TO: 18173574381	Jason_Test	6/17/2024 4:42:50 AM	0.03	1	00:01:00	0.03	0
SUCCESS		93144300	14693315812	USA	8173574381	06/17/2024 04:59 FROM: 8173574381-TO: Ryan Smalls@14693315812	Test for Ryan	6/17/2024 4:59:11 AM	0.03	3	00:01:54	0.06	1

1. Click the **Refresh** button to refresh the current report.
2. **Status**: Show current incoming and outgoing fax status and fax type.
3. **Download/View/Resend**: Allows you to Download, View, and Resend faxes
4. **Dest No.:** Destination number of Sent and Received faxes
5. **Caller ID**: Caller ID of Sent and Received faxes
6. **Time**: The time the fax was processed
7. **Cost**: Total cost of the fax.

## PC to Fax (Windows Only)

You can also send a fax directly from your computer.

If you have not installed the software, visit [ESI Resource Library](#) to download the PC to Fax software zip file. Then unzip and run the setup.exe file to install the software.

Once the software is installed, first time users will need to enter their account information to login. If you do not know your account login information, see the [Account Login](#) section for recovery procedures.

Internet Fax Settings

Cover Page Information

1 Full Name

Company

Your Email Address

Your Fax Number

Authorization

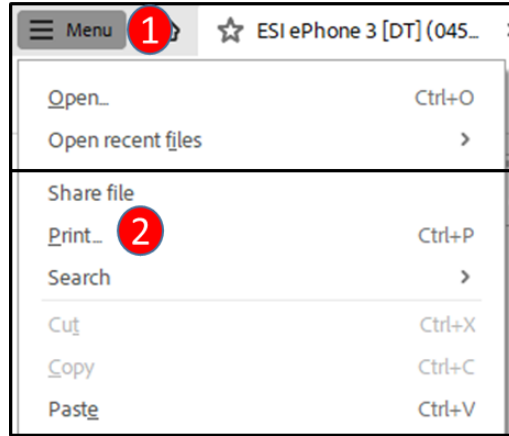
2 User Name

Password

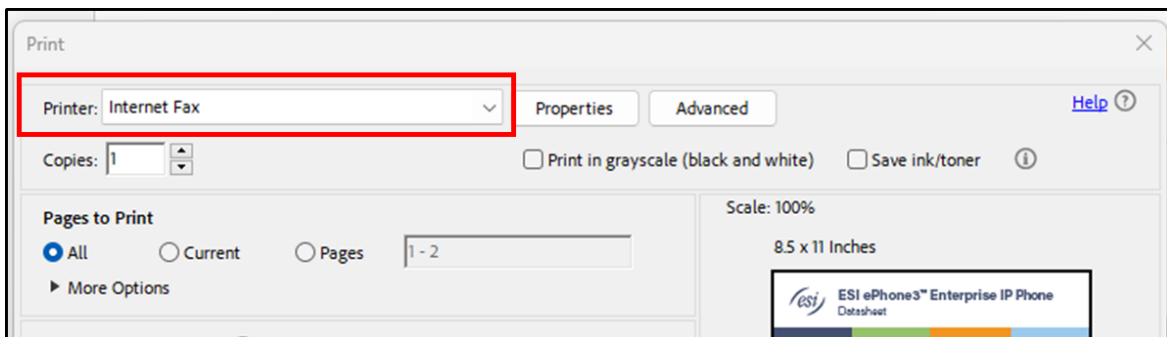
Save Close

1. **Cover Page Information:** Enter your information as it would appear on the fax cover page.
2. **Authorization:** Enter your Username and Password. If you do not know your account login information, see the Account Login section for recovery procedures.

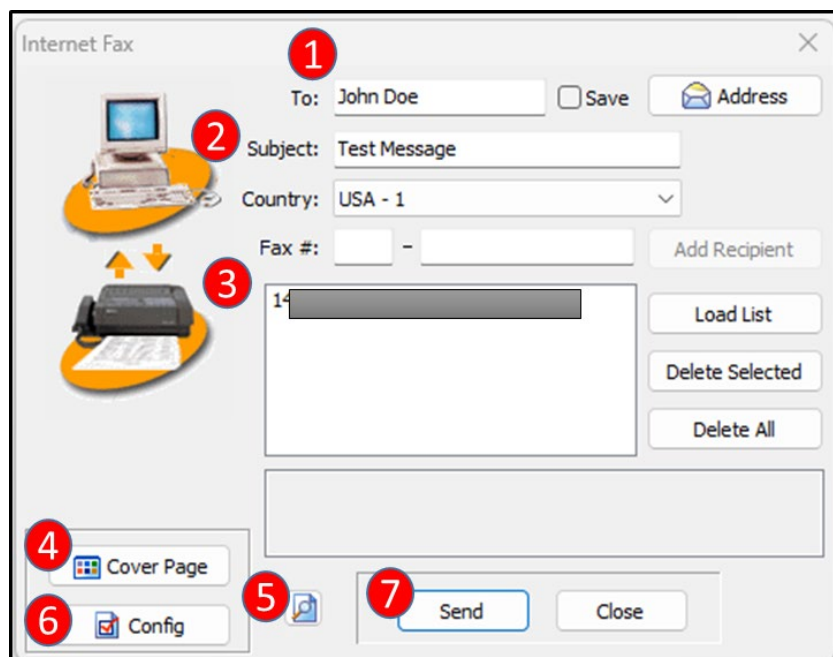
## Send a Fax



From the document application you have created your content in go to the **File Menu** and select **Print**.



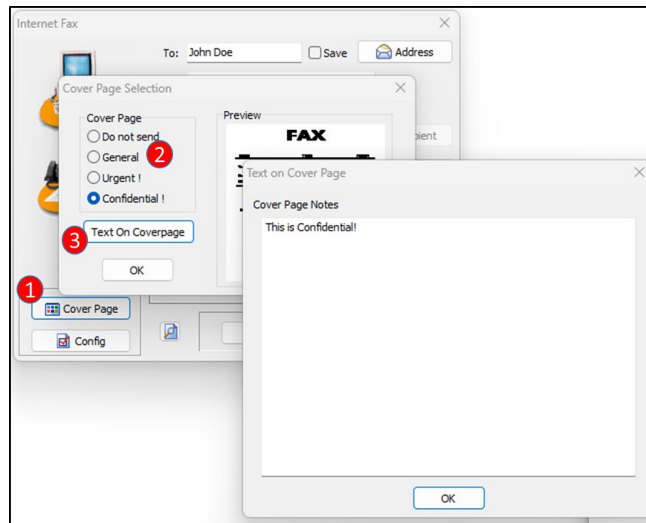
Select the **Internet Fax** from the list of printers from the Printer drop down menu, and then select **Print**.





1. **To:** Enter recipient's name.
2. **Subject:** Enter fax subject.
3. **Fax #:** Enter the desired fax number, then click **Add Recipient**
  - a. Up to 10 destinations may be added.
4. **Cover Page:** Set cover page options.
5. **Preview Icon:** See a preview of the fax to be sent
6. **Config:** eFax Account Information and Password login settings.
7. Click **Send** to send the fax.

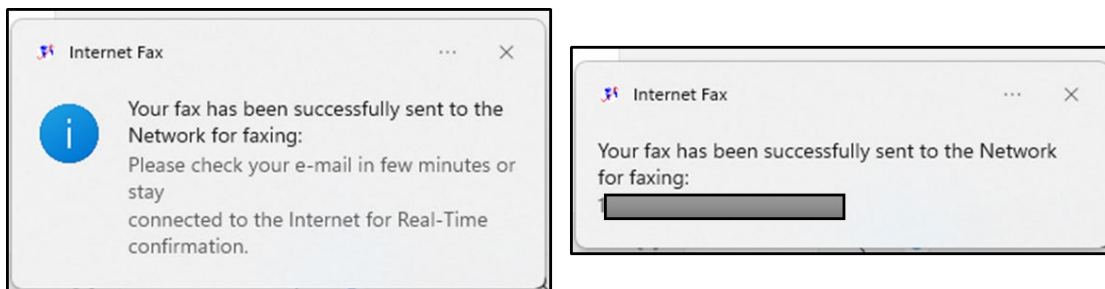
### Cover Page Options



1. Select **Cover Page**
2. Select **Cover Page** priority
3. Add additional text to the cover page.

### Realtime Notifications

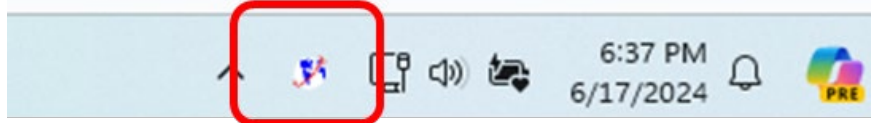
After sending your fax, realtime notifications will keep you up to date on whether your faxes were sent successfully or not.



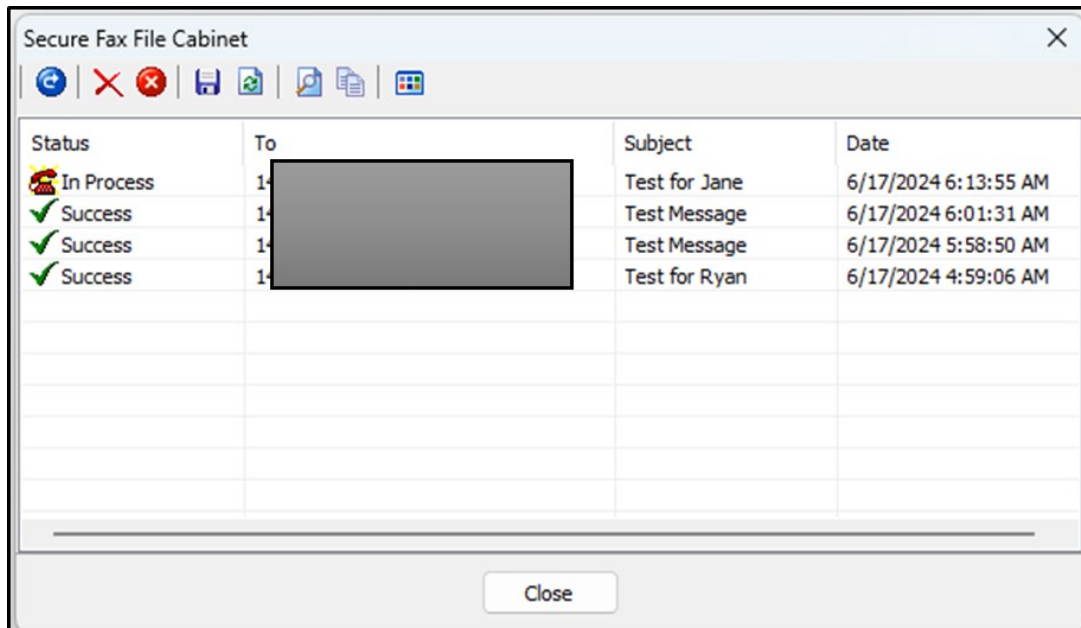
## Secure Fax File Cabinet

The **Secure Fax File Cabinet** allows you to see sent fax status details, resend faxes, delete faxes from your file cabinet, save fax history as an .xls file, view sent fax pages and cover letter, and user settings.

To open **Secure Fax File Cabinet**, in your System Tray open Secure Fax File Cabinet. It will look similar to this.



## Secure Fax File Cabinet



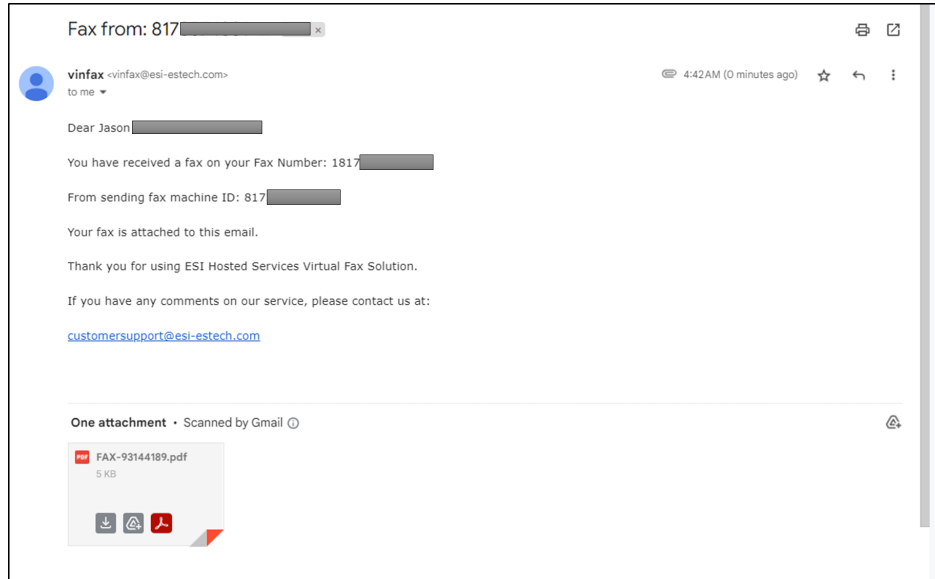
## Fax to Fax (ATA)

Sites with Fax to Fax ATA's may go to their fax machine to send faxes out as normal. See Fax to Fax ATA Network Diagram for network and fax machine connections.

## Receive a Fax

### Fax to Email

Fax to Email faxes are sent to the designated email address from [vinfax@esi-estech.com](mailto:vinfax@esi-estech.com) with a PDF attachment of the fax. The emails will look something like this.



### Fax to Fax (ATA)

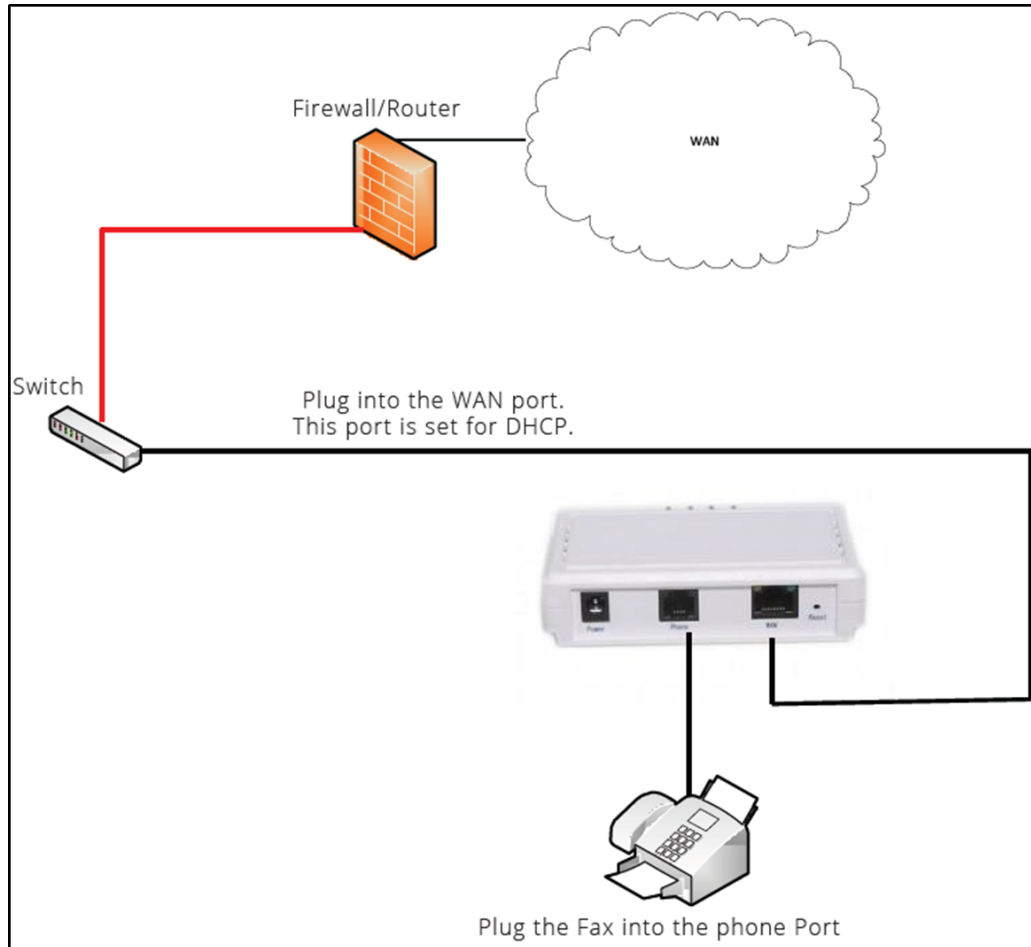
Sites with Fax to Fax ATA's may receive faxes at the following locations.

1. At the fax machine.
2. Email sent to the designated email address from [vinfax@esi-estech.com](mailto:vinfax@esi-estech.com) with a PDF attachment of the fax.
3. Both, at the fax machine and email.

## Billing

The Account Balance Account Balance option does represent your total amount billed. Your monthly subscription fee includes 200 minutes and anything over is an additional fee.

## Fax to Fax ATA Network Diagram



## FAQ

Question	Answer
Why can't I log into the fax portal (or the Print-to-Fax application says I'm not authorized)?	There may be an issue with the login information you are using. Please see the Account Login section on how to reset your password.
What is the maximum allowable size for the fax file?	3 files @ 4.8 Megabytes each
What is the maximum allowable number of pages that can be faxed?	PC to FAX (Print to Fax): 100 pages FAX to FAX (ATA): No Limit Web to FAX (user portal): 3 files @ 5 Megabytes each Email to FAX (#####@ipfax.net): Limited by email server
How do I create a custom cover page?	See Send a Fax section on how to create fax cover pages.
Can multiple people be added to receive email faxes?	Yes, Multiple email destinations may be added.
How many users can receive inbound faxes to their email?	up to 250 characters of emails addresses
How do I find older faxes?	Go to Fax Activity Report in the user web console
How secure is internet fax?	All data is TLS encrypted and cannot be read if intercepted by anyone outside of the recipient.
Is the eFAX HIPAA compliant?	Yes, all faxes are only viewed by HIPPA sites and those covered under HIPAA through contract.
What do the lights on the ATA mean?	POWER - Is the ATA powered WAN - It is reaching the local network equipment ONLINE - Is the ATA able to reach the internet FAX - It is processing a fax (this will be off most of the time)
How do I find the IP address of the ATA?	Hook up an analog phone to the ATA and dial *2*#