Note: This document applies to OpenText RightFax version 10.0
Contents

RightFax FaxUtil ........................................................................................................................... 1
Contents ......................................................................................................................................... 2

Creating and Sending Documents .......................................................................................... 3
  Create a New Fax ..................................................................................................................... 3
  Send a Email Address or SMS Number .................................................................................. 4
  Add a Cover Sheet .................................................................................................................. 5
  Attach Library Documents ..................................................................................................... 7
  Attach Other Documents ....................................................................................................... 8
  Add a Form Overlay ............................................................................................................... 10
  Assign Billing Codes ............................................................................................................. 11

Adding Entries to Your Phonebook ......................................................................................... 12
  Create an Individual Phonebook Entry .................................................................................. 12
  Create a Group Phonebook Entry .......................................................................................... 14
  Use Your Phonebook ............................................................................................................. 16
Creating and Sending Documents

Create a New Fax

FaxUtil can be used to create new faxes with a variety of attachments types and destination options.

1. Click the **New Document** button. This opens the Fax Information dialog box.
2. In the Fax Information dialog box, add one fax recipient. Specify your cover sheet notes and options, add attachments, and specify other sending preferences.

3. Click **Send** to send the fax.
Send a Email Address or SMS Number

FaxUtil will also allow sending faxes as emails or as text messages (SMS). With email, the entire fax will be sent as an attachment.

1. In the Fax Information dialog box, go to the **Main** tab.
2. Click the arrow next to the Fax Number field and select **Email Address** or **SMS Number**.
3. Enter the Email Address or SMS Number as well as any other required information (bold fields).
4. For SMS messages, you must enter your message in the Cover Sheet Notes. This message has a 160 character limit. Only the message included in the Cover Sheet Notes will be sent as an SMS.
5. Click **Send** to send the fax.

**Click Here For Video Demo**
**Add a Cover Sheet**

Cover sheets are optional for every fax sent from RightFax. The cover sheet can contain additional notes intended for the recipient.

1. In the Fax Information dialog box, go to the **Main** tab. Under the **Options** section in the Main tab, select the **Use cover sheet** option.

2. Fill out the recipient’s information and go to the **Cover Sheet Notes** tab.
3. Type the cover sheet notes in to the **Notes to be Placed on the Cover Sheet** box (up to 21 lines).
4. Go to the **More Options** tab and select a cover sheet from the **Cover Sheet File** box.

![Fax Information](image)

5. Optional: Enter the sender’s contact information in the **From** section fields and click **Send** to send the fax.
Attach Library Documents

Library Documents are frequently used documents that can be added to faxes. Your administrator can add these to the Attachments tab in the Available Attachments section.

1. In the Fax Information dialog box, go to the Attachments tab.
2. To add an attachment from the Available Attachments library, double-click each library document required for this fax. The documents will be added to the end of the fax, in the order they are selected.

![Fax Information dialog box]

**TIP:** The attached document(s) will appear in the Selected Attachments section. You can view each attachment by double-clicking on the file. You can delete a Selected Attachment by highlighting the attachment and clicking the delete button.

![Click Here For Video Demo]
**Attach Other Documents**

RightFax will allow many kinds of document to be added to a fax.

**TIP:** It is important to remember that the attachment will be converted to a fax image so do not try to attach documents that you would not normally print.

1. In the Fax Information dialog box, go to the **Attachments** tab.

2. Click the **Browse** button and navigate to the location of the document(s) you would like to attach.
3. Double click each document or select file and click Open to attach the file(s) to be included in the fax. The documents will be added to the end of the fax, in the order they are selected.

**TIP:** The attached document(s) will appear in the **Selected Attachments** section. You can view each attachment by double-clicking on the file. You can delete a Selected Attachment by highlighting the attachment and clicking the delete button.
Add a Form Overlay

RightFax allows you to add an image to your fax that is layered over the top of the rest of information on the fax. Form Overlays can be customized to add elements to a fax such as company letterhead, invoice templates, or watermarks.

1. In the Fax Information dialog box, go to the **More Options** tab.
2. Select the **Use Form** option and select an overlay form from the list.
**Assign Billing Codes**

Billing codes allow an administrator to identify the sender, the recipient or the content of the fax for reporting purposes.

1. In the Fax Information dialog box, go to the **Main** tab.
2. Under **Accounting**, enter one or two billing codes, or click Lookup to select from a list of available billing codes which can be customized for your company.

---

**Click Here For Video Demo**
Adding Entries to Your Phonebook

RightFax lets you create a personal phonebook of fax contacts. You can add individual contacts to your phonebook for frequently faxed numbers. You can also create group contacts that let you easily send one document to multiple members of the same group.

Create an Individual Phonebook Entry

Entries can be added to the phonebook individually for quick access to frequently used contacts.

1. Click the Open Phonebook button in the FaxUtil toolbar and click New Entry.

2. Enter a contact name in the ID box.
3. Click the arrow next to the **Fax Number 1** box and select the type of contact.

4. Fill out the contact information and click **OK**.

**Click Here For**

**Video Demo**
Create a Group Phonebook Entry

Phonebook Groups greatly simplify the process of sending faxes to multiple recipients.

1. Click the Open Phonebook button in the FaxUtil toolbar and click **New Group**.

2. Enter a name in the **ID** box to identify the name of the New Group you are creating.
3. To add Group Members to the **New Group**, select the contact on the left and click the ➡️ button. The members of the New Group you have selected will appear in the **Group Members** box.

![Image of Phonebook Group interface]

4. To remove **Group Members** from the **New Group** you have created, select the contact in the **Group Members** box and click the ⬅️ button.

5. When you have included all of the Group Members of the New Group, click **OK**.

---

Click Here For

Video Demo
Use Your Phonebook

It is possible to easily add multiple recipients to one fax by using the RightFax Phonebook.

1. In the Fax Information dialog box, go to the Main tab.
2. Click the Phonebook button to display all of the contacts in your RightFax phonebook.
3. Double-click each contact you want to include, and their name will appear in the **Current Recipients** list.

4. Click **OK** on the Phonebook to return to the Fax Information dialog box. Then fill out the required (bold) fields, add any attachments, and click **Send**.

---

**Click Here For Video Demo**