Fax Pro-Admin Guide

THIS WIKI HAS BEEN UPDATED FOR VERSION 13 OF YOUR PBX GUI

Commercial Module

> This wiki is for faxing with the commercial Fax Pro. If you are looking for the standard (non-commercial) fax options, please visit the Fax Configuration wiki.

Overview

What does this module do?

Fax Pro is a commercial add-on that enhances the built-in fax capabilities of your PBX. With the commercial Fax Pro module, users can send and receive faxes in the User Control Panel (UCP) as well as receive faxes at an e-mail address. You can manage your cover page settings such as company name, address, etc. for the whole company.

Without Fax Pro, only inbound fax-to-email. Fax Pro offers a full inbound and outbound faxing solution.

Where is the Fax Pro module?

Please note, there is no standalone item called "Fax Pro" in the PBX GUI menus.

Fax Pro enables additional settings in the existing Fax Configuration and User Management modules. You'll use those modules, in addition to Inbound Routes and the User Control Panel (UCP), to manage faxing. This wiki describes how to set fax settings in all of these areas.

To see whether you have Fax Pro installed and enabled, visit **Admin Module Admin** and look for "Fax Configuration Professional." The basic (non-commercial) version is called "Fax Configuration."

Global Fax Settings

Global Fax Settings are set in the **Fax Configuration** module. If you do not see all the options shown below, double-check to ensure you have Fax Configuration Professional installed and enabled.

To navigate to the Fax Configuration module in the PBX GUI:

- In the top menu click **Settings**
- In the drop-down click **Fax Configuration**

Here, you can set some global options including global cover sheet data.

Fax Options

Fax drivers supported by this module are:
- Spandsp based app_fax (res_fax_spandsp.so)

Default Fax header ?	
Default Local Station Identifier ?	
Outgoing Email address ?	
Email address ?	
Error Correction Mode ?	Yes **No**
Maximum transfer rate ?	14400
Minimum transfer rate ?	9600
Default Paper Size ?	**Letter** A4

—Fax Cover Page Options

Company Logo ?	Browse
Company Name ?	
Company Address 1 ?	
Company Address 2 ?	
Company Address 3 ?	
Company Phone ?	
Company Web Site ?	
Company Footer ?	
Preview Coverpage ?	Preview

─User Control Panel Faxing Options

Global Prefix ❓

─Failure Recovery Options

Retries ❓

2

─Failure Notification Options

Email Results ❓   Never   **Always**   Success   Failure

─Local Storage Options

Max Pages ❓

100

Excess Faxes ❓   Reject   **Delete Oldest**

Fax Presentation Settings

Default Fax header

Header information that is passed to remote side of the fax transmission and is printed on top of every page. This usually contains the name of the person or entity sending the fax.

Default Local Station Identifier

The outgoing Fax Machine Identifier. This is usually your fax number.

Outgoing Email address

This is the email address all outbound faxes appear to be coming from when they are sent to the recipient.

Email address

Email address that faxes are sent to when using the "Dial System Fax" feature code. This is also the default email for fax detection in legacy mode (if there are routes still running in this mode that do not have email addresses specified).

Error Correction Mode

Yes/No: Whether to enable Error Correction Mode (ECM). Many new fax machines are capable of resending data that was corrupt. If set to "yes," we will attempt to negotiate error correction mode (ECM) with the other fax machine.

Maximum transfer rate

Maximum transfer rate used during fax rate negotiation. We recommend 14400.

Minimum transfer rate

Minimum transfer rate used during fax rate negotiation. We recommend 9600.

Default Paper Size

Letter/A4: Select the default paper size. This specifies the size that should be used if the document does not specify a size.

Fax Cover Page Options

Here you can set all the company information you want to be displayed on your fax cover page when sending outbound faxes from the user control panel. You can click the preview button to preview what the cover sheet will look like.

Company Logo

Click the **Browse** button to upload an image to be used as the company logo on the cover sheet. Note: file type MUST be JPG.

Company Name, Address, Phone, & Web Site

The company contact information that will be displayed on the cover sheet. Address can be entered using 1 to 3 lines.

Company Footer

Text that will appear at the bottom of every page.

Preview Coverpage

Click the **Preview** button to download a PDF preview of the cover sheet.

User Control Panel Faxing Options

Global Prefix

A number to prefix to the outbound fax number. Used to route a fax to a certain outbound route.

Failure Recovery Options

Retries

The maximum number of times the system will retry sending a fax upon a failure.

Failure Notification Options

Email Results

Never/Always/Success/Failure: When to e-mail the results of an outgoing fax.

Local Storage Options

Max Pages

The maximum number of total pages each user is allowed to store locally. This also affects the maximum page number for a single fax.

Excess Faxes

Reject/Delete Oldest: How the system should respond when a new fax arrives for a user whose storage quota is full. Note: With either option, a single fax that is larger than max pages set above will be deleted after it is received.

- **Reject**: Reject the new fax and disconnect the call.
- **Delete Oldest**: Delete as many faxes as necessary to accommodate the incoming fax, starting with the oldest.

Channel Control Option

FreePBX 14+ (v14.0.1.10) onward, we have added option to add multiple fax recipients to send a fax using UCP.

following "Channel Control option" configuration option present under SettingsFax Configuration and will be visible only if "Faxpro" commercial module is installed and licensed.
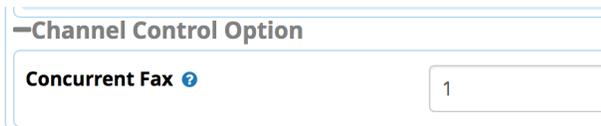
Depends on above "Concurrent Fax" configuration value, UCP will show the option to send the fax to multiple recipients.

for example, We have "Concurrent Fax" option configured as "1" so below UCP snapshot is showing "Max concurrent channels" is 1.

User Fax Settings

This wiki focuses on fax settings and assumes you already know how to set up users and give them access to the User Control Panel (UCP). If you need more information on this, please visit the User Management module user guide.

> **NEW!**
>
> In FreePBX 13+, a fax recipient's settings are found in the User Management Module instead of the Extensions module. Faxing is now linked to a user, not directly to an extension. This means you can now have "standalone" fax users who aren't associated with an extension, if desired.
>
> After you've enabled fax for a user, you'll be able to select that fax recipient as a destination in other modules.

Navigate to the User Management module:

- In the top menu click **Admin**
- In the drop down click **User Management**

If you are not already viewing a user, click the edit button for the user.

Click the **Fax** tab.

When you first arrive, fax settings will be grayed-out.

Next to **Enabled** on the first line, click the **Yes** button to enable faxing and edit the information below.

Enabled

Yes/No/Inherit: Whether to enable fax for this user.

Attachment Format

PDF/TIFF/Both: Format(s) to convert incoming fax files to before e-mailing them to a recipient.

Store Locally

Yes/No/Inherit: Whether to store this user's inbound faxes on the server after the faxes have been e-mailed to the user. If **Yes**, a user will be able to access the fax in the User Control Panel.

Outgoing Station ID

The outgoing Fax Machine Identifier. This is usually your fax number.

Outgoing Header

The outgoing Fax Machine Header. This usually contains the name of the person or entity sending the fax.

Coversheet name

The name that should appear on the outbound coversheet.

Coversheet Tel

The phone number that will appear on the coversheet.

Coversheet Email

The email address that will appear on the coversheet.

Email Results

Use Global Setting/Never/Always/On Success/On Failure: When to e-mail the results of an outgoing fax. The global setting is set in the Fax Configuration module. You can override it on a per-user basis here.

Retries

Use Global Setting/0/1/2/3: Number of times to retry sending a fax upon failure. The global setting is set in the Fax Configuration module. You can override it on a per-user basis here.

Save

After making your changes, Click the **Submit** button, then click the **Apply Config** button.

Inbound Route Fax Settings

This wiki focuses on fax settings and assumes you already know how to set up inbound routes. For details on inbound route settings not covered here, visit the Inbound Routes module user guide.

Navigate to the Inbound Routes module:

- In the top menu click **Connectivity**
- In the drop-down menu click **Inbound Routes**

Select an inbound route by clicking the edit button , or create a new inbound route.

Click on the **Fax** tab.

Detect Faxes

No/Yes: Whether to attempt to detect faxes on this DID. Note: Fax detection is not always totally accurate. It will also cause inbound calls to take longer to ring through, since the system attempts to detect a fax tone before routing the call.

- **No:** Do not attempt to auto-determine the call type. All calls sent to the inbound route's regular destination set in the **General** tab. Use this option if this DID is used *exclusively* for voice OR fax, and set the destination in the **General** tab.
- **Yes:** Try to auto-determine the type of call; route to the **fax destination** below if call is a fax, otherwise route to the regular destination set in the **General** tab. Use this option if you plan to receive both voice and fax calls on this line.

If **Detect Faxes: Yes**, you will see the additional options below.

Fax Detection type

(Only if **Detect Faxes:Yes**) - Type of fax detection to use. If the call is coming from a SIP trunk, select SIP. If the call is coming in on a Analog or PRI line, select DAHDI.

- **Dahdi:** Use Dahdi fax detection; requires 'faxdetect=' to be set to 'incoming' or 'both' in Dahdi.conf
- **NV Fax Detect:** Use NV Fax Detection; Requires NV Fax Detect to be installed and recognized by asterisk
- **SIP:** Use SIP fax detection (t38). Requires asterisk 1.6.2 or greater and 'faxdetect=yes' in the sip config files

Fax Detection Time

(Only if **Detect Faxes:Yes**) - How long, in seconds, to wait and try to detect fax. If no fax is detected within this time, the call will be routed to the regular destination set in the **General** tab. Please note that callers to a Dahdi channel will hear ringing for this amount of time (i.e. the system won't "answer" the call, it will just play ringing).

Fax Destination

(Only if **Detect Faxes:Yes**) - Where to send the fax if it's detected within the time set above. If sending to a user, choose **Fax Recipient: (user name)** in the menus. Set up users in the User Management Module as described earlier.

Save

When finished making changes, click the **Submit** button, then click the **Apply Config** button.

Note: The information below is available as a standalone page at Fax - UCP.

User Control Panel Fax Options

User Control Panel (UCP) is a web-based user interface for the PBX. Fax Pro lets, users can send, receive, and view faxes in UCP depending on the permissions you've set in the User Management module.

Users would typically access UCP at *http://yourpbxdomain/ucp* or *http://yourpbxIP/ucp* (using actual PBX domain or IP).

After logged into UCP, click **Fax** in the menu to access the fax section.
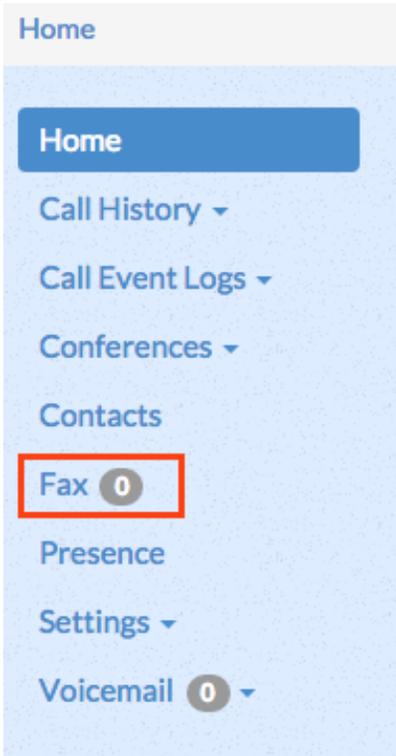
From here, a user can view all locally stored inbound and outbound faxes (if local storage is enabled for the user), and send outbound faxes to anyone.
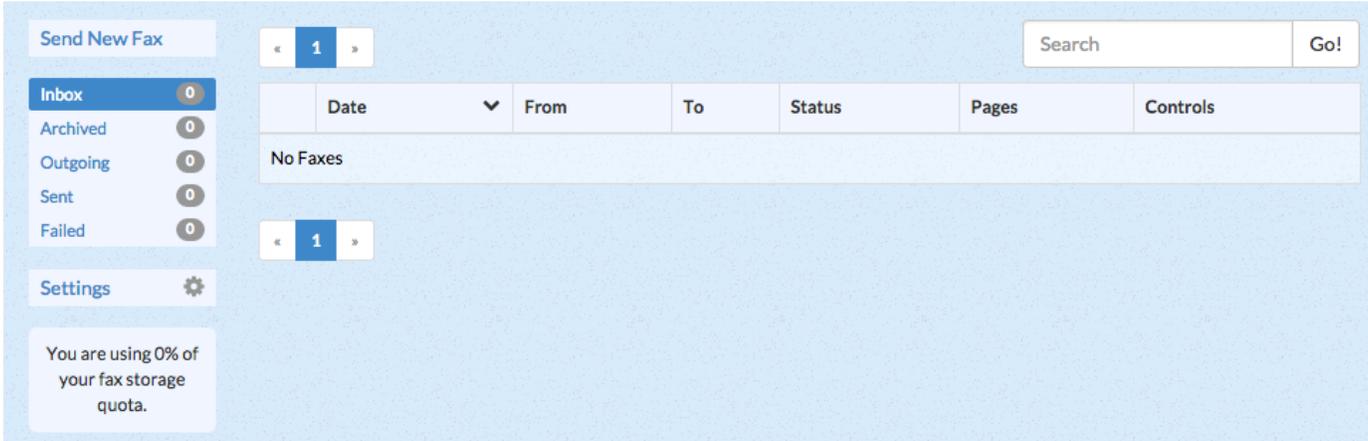
Folders

Faxes can be filed under the following folders:

Inbox

Faxes that have not yet been viewed.

	Date	⌄	From	To	Status	Pages	Controls
	2015-10-07 10:05:17am		APPLETON, WI <19209449990>	45	OK	2	

Archived

Faxes that have been viewed but not yet deleted.

	Date	⌄	From	To	Status	Pages	Controls
	2015-10-07 10:57:00am		APPLETON, WI <19209449990>	45	OK	1	

Outgoing

Faxes in the process of being sent. The page will show the current status of the fax. Information updates automatically in near real-time with no need to reload the page.

-
  - You'll see "In Progress" if the system is still in the process of sending (or trying to send) the fax:

	Date	⌄	From	To	Status	Pages	Controls
	2015-10-06 02:51:42pm		45	9209449990	In Progress	4	

- You'll see "OK" if the fax was sent successfully:

Date		From	To	Status	Pages	Controls
2015-10-06 02:55:16pm		45	9209449990	OK	4	

- The system will also display messages related to any errors that are encountered, such as "Retrying" when it's trying to send a fax again after a failure.

Sent

Faxes that have been sent successfully.

Inbox	1
Archived	0
Outgoing	0
Sent	2
Failed	0

«	1	»						Search		Go!

Date		From	To	Status	Pages	Controls
2015-10-06 03:52:06pm		45	9209449990	OK	2	
2015-10-06 02:55:16pm		45	9209449990	OK	4	

«	1	»

Failed

Faxes that have not been sent successfully.

Inbox	1
Archived	0
Outgoing	0
Sent	2
Failed	1

Date		From	To	Status	Pages	Controls
2015-10-06 04:13:26pm		49	9209449997	Unknown error (Originate failed)	3	

Fax Data

UCP displays the following information for each fax:

- **Date:** The date and time the fax was received or sent, in YYYY-MM-DD format.
- **From:** The user number or caller ID (CID) of the sender.
- **To:** The user number or fax number of the recipient.

- **Status:** The status for the fax as reported by Asterisk.
- **Pages:** The number of pages for the fax as reported by Asterisk.
- **Controls:** Buttons to view, download, forward, or delete the fax, as described below.

Controls (Buttons)

Throughout UCP, buttons allow you to view and manage saved faxes. In the **Inbox**, **Archived**, **Outgoing**, **Sent**, and **Failed** folders, you'll find some or all of these buttons:

- **View PDF in Browser:** Displays the PDF file of the fax document in your browser, if your browser is configured to view PDFs.

- **Download:** Downloads the PDF file of the fax to your computer.

- **Forward:** Lets you send the fax to another recipient - either an outside number or an internal extension.
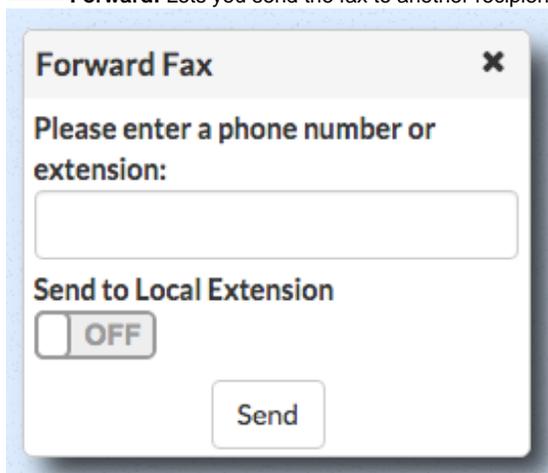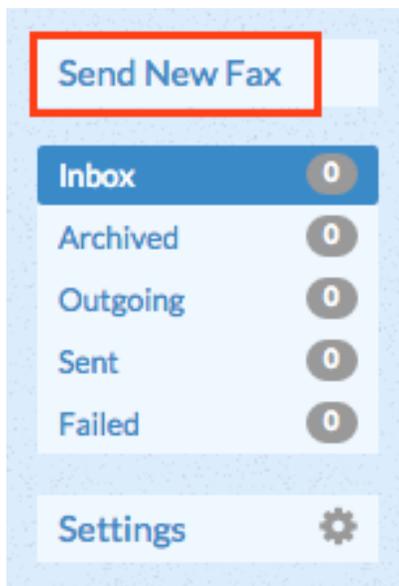

- **Delete:** Delete the saved fax from the system.

How To Send a Fax in UCP

Create one or more PDF or TIFF files on your computer. Multiple pages and/or multiple documents are acceptable.

After you've clicked **Fax** in the main menu in UCP, click the **Send New Fax** button.

Basic options include **Destination**, whether to use a **Coversheet**, and the **Document(s)**. (If you enable the coversheet, additional options will appear.)
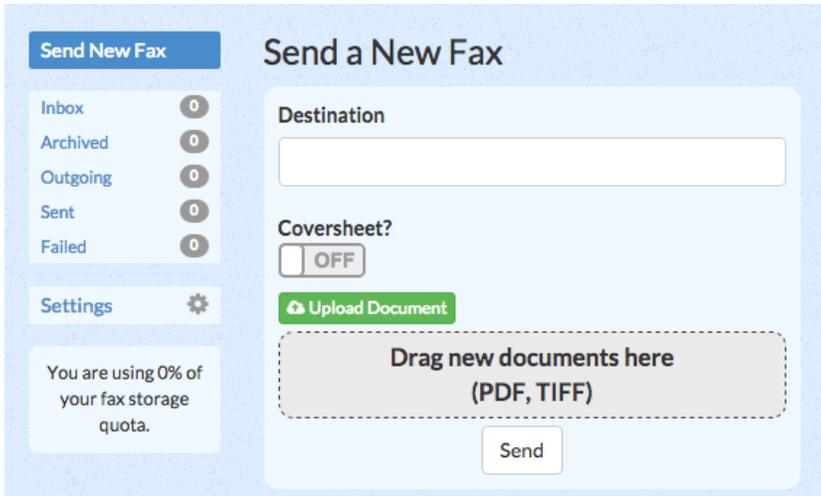
Destination

Enter the fax number of the recipient.

Coversheet

This is **Off** by default. Click the switch to toggle the **on/off** setting.

If the switch is set to **On**, additional fields appear:

The information you enter will appear on the cover sheet.

- **Recipient Name:** The name of the person you are sending the fax to.
- **Message:** A short message to include in the cover sheet.

- **My Name:** The sender's name is pulled from User Management settings, but you can override it here.
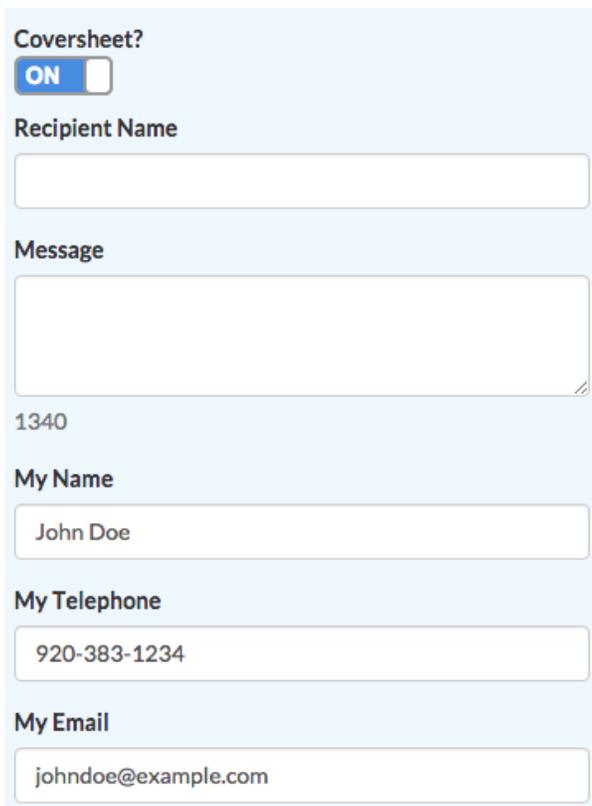- **My Telephone:** The sender's phone number is pulled from the User Management settings, but you can override it here.
- **My Email:** The sender's e-mail address is pulled from the User Management settings, but you can override it here.

Document(s)

Documents must be in PDF or TIFF format.

A single fax can contain one or more documents. There are two ways to upload documents to be included in your fax:

- Click the **Upload Document** button to select a file from your computer,
- *OR* drag and drop files from your computer to the **Drag New Documents Here** area.

The uploaded file(s) will appear in a list:

Files:

samplefax.pdf	
samplefax2.pdf	
samplefax3.tiff	

Upload Document

Drag new documents here
(PDF, TIFF)

- To view a file, click the   button.

- To remove a file from the list, click the   button.

Send

When ready to send the fax, click the **Send** button.
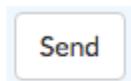
Send

You'll be reminded that you can check the Outgoing section if you would like to see status updates in UCP.

Sending
Check Outgoing for more information

When a fax has been sent successfully, it will be moved to the **Sent** folder. If it fails to send and all retry attempts have been exhausted, it will be moved to the **Failed** folder.

How to Receive a Fax in UCP

Inbox Folder

Receiving a fax in UCP is easy - just check your Inbox! You don't need to be logged into UCP at the time a fax is received. In UCP, after clicking **F ax** in the main menu, click the **Inbox** menu item to view the inbox.

> Remember, the user's fax settings in the User Management module must be set to **Store Locally: Yes** in order to receive faxes in UCP. Otherwise, the fax will only be sent to e-mail.

If you're logged into UCP and have allowed your web browser to display notifications, you'll see a pop-up notification when a new fax arrives.

For instructions on enabling/disabling notifications in your web browser, please see your specific browser's instructions. Typically, your web browser will ask you about whether to enable notifications the first time you log into the User Control Panel.

Fax Settings in UCP

Users can manage their fax settings directly from UCP.

To do this, log into UCP, click **Fax** in the primary navigation menu, and then click **Settings** in the secondary menu.
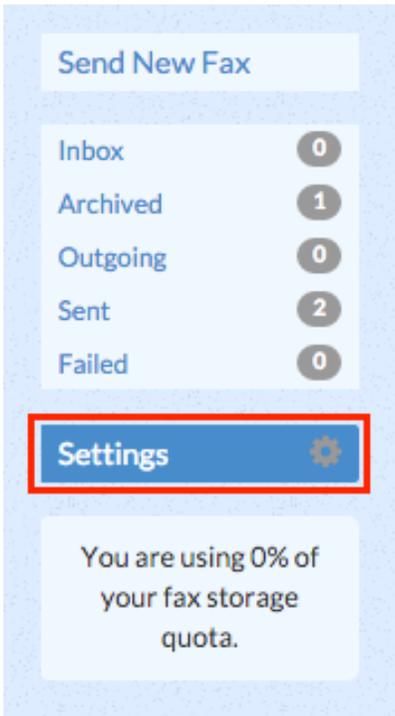
Fax Settings update automatically as new information is entered. There is no "Save" button.

Fax Settings

Fax Email ❓

johndoe@example.com

Attachment Format ❓

PDF ⇅

Store Locally? ❓

ON

Outgoing Station ID ❓

9203831234

Outgoing Header ❓

Sample Company

Coversheet Name ❓

John Doe

Coversheet Telephone ❓

920-383-1234

Coversheet Email ❓

johndoe@example.com

Email Results ❓

Use Global Setting ⇅

Retries ❓

Use Global Setting ⇅

Fax Email

The e-mail address to send inbound faxes to when this user receives a fax

Attachment Format

PDF/TIFF/both: Which file format(s) to use when e-mailing an inbound fax to this user.

Store Locally

- **Yes:** Store the fax locally after e-mailing it to the user, so that the fax can be viewed in UCP.
- **No:** Delete the fax after e-mailing it to the user. The fax will not be accessible in UCP.

Outgoing Station ID

The fax number that will be displayed at the top of each outbound fax.

Outgoing Header

Text, such as a company name, that will be displayed at the top of each outbound fax page.

Coversheet Name

The name of the person who is sending the fax. This will be displayed in the "From" section of the cover sheet.

Coversheet Telephone

The voice telephone number of the person who is sending the fax. This will be displayed in the "From" section of the cover sheet.

Coversheet Email

The e-mail address of the person who is sending the fax. This will be displayed in the "From" section of the cover sheet.

Email Results

This setting controls whether to e-mail the results of an outbound fax to a sender, so that the sender can be alerted of the status.

- **Never:** Never e-mail the results.
- **Always**: Always e-mail the results.
- **On Success**: Only e-mail the results when the outbound fax is successful.
- **On Failure**: Only e-mail the results when the outbound fax fails.
- **Use Global**: Use the setting that is defined globally in the Fax Configuration module of the PBX administration GUI.

Retries

0/1/2/3/Use Global Setting: How many times to try and resend a failed fax (none, 1, 2, or 3). Select **Use Global** to use the global setting from the Fax Configuration module of the PBX administration GUI.