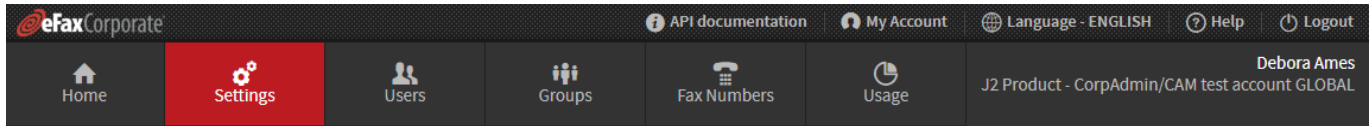# GETTING STARTED

Corporate and Group Administrators: Stated herein is information to help you get started with your eFax Corporate® administrative account. (For detailed procedures, see the online help—and for a hard-copy version of the online help, see the *Get Help* topic in the online help, and click the **eFax Corporate® Administrators Guide** link.)

📢 **IMPORTANT!**

- **For Adobe Reader X:** Add the **Forward** ( ) and **Back** ( ) icons to your toolbar at the top of the screen. Then, when you click a blue linked number or word to navigate to a cross-reference in this guide, you can click the **Back** button to return to where you were. (The **Forward** button takes you to where you just left.)

Navigation buttons in the Adobe Reader toolbar

> ✓**NOTE:** These buttons may already display if you have *Adobe Reader X*. For earlier versions of *Adobe Reader*, you can find the icons via **View > Page Navigation...**or…**View > Toolbars > Page Navigation**.

- **For Adobe Acrobat Pro DC:** When you click a **blue** linked number or word to navigate to a cross reference within this guide: Click **Alt + Left Arrow** on your keyboard—or the **View > Page Navigation > Previous View** menu in the top toolbar—to go back where you were. (**Alt + Right Arrow**—or the **View > Page Navigation > Next View**—takes you to where you just left.)

What do you want to do?

- See the difference between a corporate administrator and a group administrator (pg. **2**).
- Familiarize yourself with information, functions, settings you must enter/perform—and where in the UI to do so (pg. **2**).
- See related API documentation (if the account is API-enabled) (pg. **2**)
- Corporate administrator:
  - Set up my users (pg. **2**).
  - How to set up the account so users can send and receive faxes (pg. **3**).
  - Create extra corporate administrators (pg. **3**).

- Corporate and group administrators:

  - Learn about the **Home** page (pg. **4**).
  - Learn about the **Settings** page (pg. **4**).
  - Learn about the **Users** page (pg. **6**).
  - Learn about the **Groups** page (pg. **7**).
  - Learn about the **Fax Numbers** page (pg. **8**).
  - Learn about the **Usage** page (pg. **9**).

Corporate Administrators vs. Group Administrators

There are two types of administrators for the account:

- A corporate administrator (*super-administrator*) has full administrative privileges over the entire eFax Corporate® account and its users—and there can be more than one.

- A group administrator (*sub-administrator*) manages one or more groups of users (*subgroups*). How much a group administrator can manage those users depends on the permissions given to him or her by a corporate administrator.

For more information, see "Corporate Administrators vs. Group Administrators" in the *eFax Corporate® Administrator's Guide* on how to: Log in or out of the account, edit your profile, contact Customer Service, find or change your password, find your login name (group administrator), and provide feedback.

New to the Application?

If you are new to the application, then to familiarize yourself with the information, functions and settings that you must enter/perform in your eFax Corporate account—and where in the UI to do so: See "Appendix A: Keyword Index for eFax Corporate® Administrators" in the *eFax Corporate® Administrator's Guide*. Clicking a keyword navigates you to a list of its related procedures and where in the UI to perform them.

See API Documentation

If the eFax Corporate account is API-enabled (for an explanation, see "What's New" in the eFax Corporate – Administrator's guide), click the API Documentation link at the top of the screen

Set Up Your Users

Corporate administrator: After the account is created, the next best thing to do is to add fax numbers to the account (see "Add Fax Numbers to the Account" in the *eFax Corporate® Administrator's Guide*). Then, set up the account based on your situation (as stated below).

IF…	THEN…
You have a small group of users with relatively the same functions	1. First, set corporate-account settings for all users. (See "Set Default User Settings" in the *eFax Corporate® Administrator's Guide*.) 2. Then, add users to the account. (See "Add a User or Administrator".) ✓ **NOTE:** If any user needs settings different from those you just set for all users, you can do so when adding that user to the account. 3. Assign fax numbers to the users. (See "Assign or Unassign Fax Numbers to/from Users".) 4. Then—after all users are created, you may create groups (see "Create a Group") and add users to them (via "Add a User or Administrator").

Set Up Your Users (Cont.)

IF…	THEN…
You have a large group of users with different functions	1. First, create groups for those users whose functions are similar. (See "Create a Group". You will also set the default settings for the group.). 2. Then, add the users to the groups. (See "Add a User or Administrator".) ✓ **NOTE:** If any user needs settings different from the defaults you just set for a group, you can do so when adding that user to the group.

Set Up the Account So Your Users Can Send and Receive Faxes

Corporate administrator:

- See "Appendix B – Corporate Administrators: How to Set Up the System So Your Users Can Receive and/or Send Faxes" in the *eFax Corporate® Administrator's Guide.*

> ✓ **NOTE:** If you want a particular user to only send faxes, call Customer Service to configure that option for that user.
> - Corporatesupport@mail.efax.com
> - USA Direct: 1 (323) 817 3202, ext. 2
> - USA Toll-Free: 1 (800) 810 2641, ext. 2
> - Europe: (44) 0 870 711 2200

- If you're going to permit your users to receive outbound-fax delivery notifications (i.e., send-receipts), then to set up your printers to send the notifications, see "Appendix F, Setting Up for the Send-Receipt Feature" in the *eFax Corporate® Administrator's Guide*.

Create Extra Corporate Administrators

You may want to add one or two people (you trust) as corporate administrators (see "Add a User or Administrator" in the *eFax Corporate® Administrator's Guide*). They will have the same rights as you, unless you give them **Read-Only Admin** permission.

However, if you don't want them to be read-only, but do want to prevent them from accidentally deleting you (because they can if they're not read-only), then:

- Place them in a new group with a new name (see "Create a Group").
- Then: Give this new group the same default settings as the **My Account** group. Because this new group will be a sub-group of the **My Account** group (to which you, the main corporate administrator, belong), the corporate administrators in this group will not be able to delete you. (That is: If given permission to delete users [including administrators], an administrator can only delete users in his or her own home group and sub-groups—not above.)

The Home Page

The **Home** page displays your dashboard of "widgets" (quick-glance data reports about users and their fax usage).

*The **Home** page (your dashboard)*

You can:

- Add a widget
- Remove a widget
- Display a particular group's information on a widget

See the *eFax Corporate® Administrator's Guide*—or the online help—for instructions.

The Settings Page

On the **Settings** page, the corporate administrator sets up the information and settings needed for the corporate account and its users.

The Settings Page (Cont.)

eFax Corporate		API documentation	My Account	Language - ENGLISH	Help	Logout

Home	Settings	Users	Groups	Fax Numbers	Usage	Debora Ames J2 Product - CorpAdmin/CAM test account GLOBAL

SETTINGS

User Defaults	Main Default Settings	Edit User Login Message	⌄
Billing	Accounts Payable	Billing Information	⌄
Security	Restricted Domain Settings	Change Users' Email Address Domains	Password Settings	Unassigned-Fax Email	Secure Information	⌄
Custom	Manage Cover Page	Alternate Receipt Domains	Custom Data Fields	⌄
Services	SAP Settings	Domain Send	Mail Server Information	Fax Settings	⌄

Save

*The **Settings** page*

SETTINGS	
USER DEFAULTS	You can: • Set—or reset—default settings for all users. • Enable or disable the *Messenger* download. • Create or edit the user-login message
BILLING	You can see/edit the accounts-payable contact/billing information, current method of payment, credit limit, and/or purchase-order (PO) number.
SERVICES	You can: • Enter or edit the email address for sending delivery notifications of faxes sent directly from SAP, if the account is integrated with the *eFax Corporate SAP Connector*. • Enable or disable the *Domain Send* service • Select corporate administrators allowed to make web-service calls for all users. (**NOTE:** Is only for secure-fax accounts that have this feature enabled.)

The Settings Page (Cont.)

SETTINGS (CONT.)	
SECURITY	You can: • Add/remove domains that can be used in the account. • Change users' email-address domains. • Set password limits. • Add or edit the email address for faxes sent to unassigned fax numbers • View secure-fax information.
CUSTOM	You can: • Manage cover pages [usage, restriction, removal]. • Add/edit email-address domains for users' outbound-fax delivery notifications [i.e., Send-receipts]. • Create/edit custom-data fields

See the *eFax Corporate® Administrator's Guide*—or the online help—for instructions.

The Users Page

On the **Users** page, users are added to the account—and managed.

*The **Users** page*

The Users Page (Cont.)

> ✓ **NOTES:**
>
> - The corporate administrator can manage all users (including group administrators).
> - A group administrator can only manage his or her home-/sub-group users—and only within the limits permitted by the corporate administrator.

You can:

- Import or export a user list.
- See a list of all users or a particular group's users.
- Add a user or an administrator.
- Search for a user
- Resend the *Welcome* email
- See which users can send and/or receive faxes.
- Edit a user's or administrator's information/settings.

- Enter or change the user's inbound-/outbound-fax CSIDs.
- Add or remove a user's inbound-/outbound-fax email addresses.
- Move users to another group
- Remove one or more users from the account.

See the *eFax Corporate® Administrator's Guide*—or the online help—for instructions.

The Groups Page

The **Groups** page displays all the group names (in tree-navigation view). Selecting a group displays its name, billing code (if any), cover page, number of users, and any sub-groups, at the top of the page. On this page, users can be placed into unique groups—and managed.
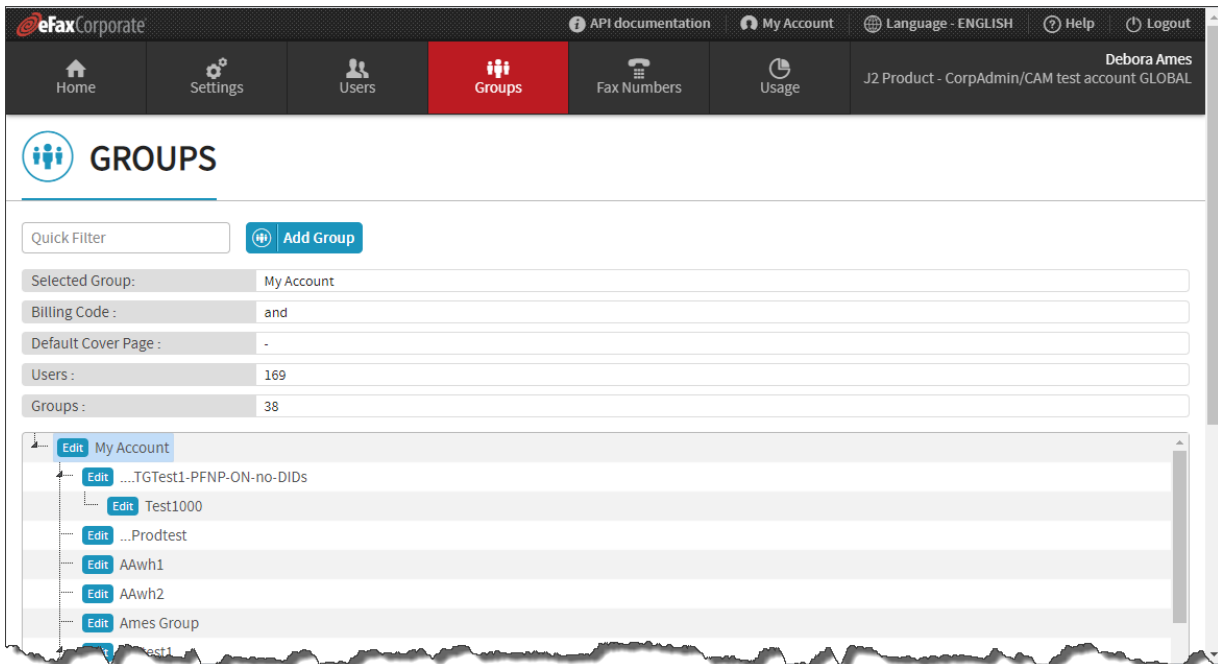
*The **Groups** page*

The Groups Page (Cont.)

> ✓ **NOTES:**
>
> - A corporate administrator may organize users into a group and assign one or more group administrators to manage that group.
>
> - A group administrator, if permitted, may create sub-groups under his or her home group, assign fax numbers to those groups' users, and assign administrators to manage those groups.

You can:

- Search for a group.
- Create a group.
- Add a user or administrator to a group.
- Edit a group's information/settings.
- See all of a group's administrators.

- Reset one or more settings for a group's users.
- Move a user from one group to another.
- Remove a group administrator.
- Move or remove a group.
- Format a group's reports.

See the *eFax Corporate® Administrator's Guide*—or the online help—for instructions.

The Fax Numbers Page

The **Fax Numbers** page displays all the fax numbers added to the corporate account. You can see which numbers are assigned or unassigned—and for those that are assigned, to whom and at which locations.

*The **Fax Numbers** page*

The Fax Numbers Page (Cont.)

You can:

- Add numbers to the account.
- See assigned, unassigned, or all fax numbers.
- Search for a number.
- Assign or unassign numbers to/from users.
- See all of a user's numbers.

- Move a number to another user.
- Move fax numbers from one group to another.
- Remove a specific location's unassigned fax numbers.

See the *eFax Corporate® Administrator's Guide*—or the online help—for instructions.

The Usage Page

The **Usage** page gives access to reports on users' fax usage.

*The **Usage** page*

You can:

- Run a log of a user's inbound/ outbound faxes.
- Download a fax-usage report.

- View recent user-setting updates to the account.
- Download results of user-list imports or exports.

See the *eFax Corporate® Administrator's Guide*—or the online help—for instructions.

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