

# **ICTFAX Tenant Guide**

## **Table of Contents**

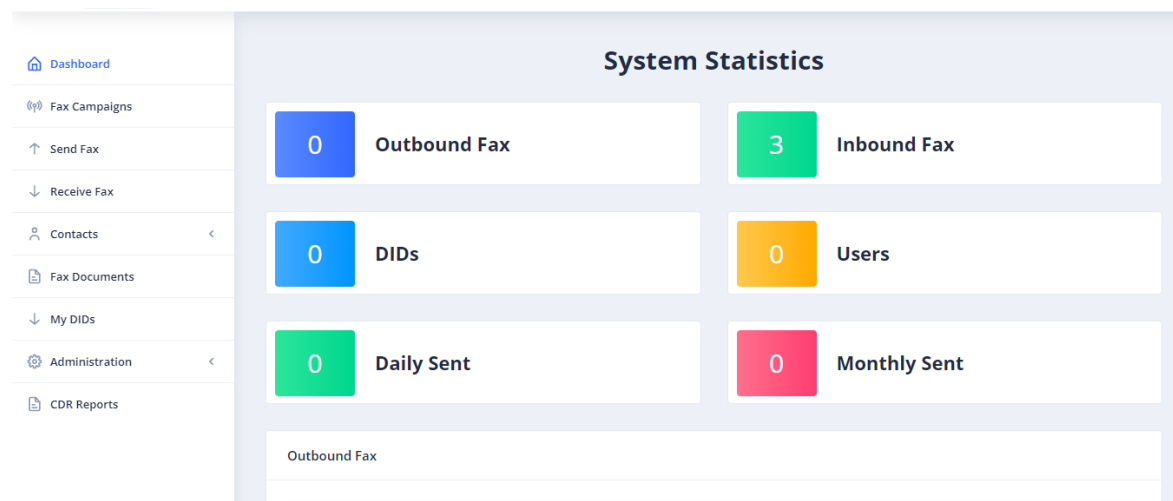
- 1. Introduction**
- 2. Login to ICTFax**
- 3. Creating Fax Campaign**
- 4. Send Fax**
- 5. Receive Fax**
- 6. Contacts Setup**
  - 6.1. Contacts**
  - 6.2. Contact Group Configuration**
- 7. Fax Documents Setup**
- 8. My DIDs**
- 9. Administration**
  - 9.1. Branding**
  - 9.2. User Management**
  - 9.3. Fax Settings**
- 10. CRD Reports**
- 1. Introduction:**

The tenant guide contains tasks that must be done by tenants. ICTFax is an open-source multiuser and web-based software solution for service providers based on open source **Angular** and **Freeswitch** with the bundle of standard features. ICTFax facilitate user friendly environment where tenant can easily manage:

- DID's settings
- Create Fax campaign
- Contacts Setup
- Fax Document Setup
- User Management
- CDR Reports

## 2. Login to ICTFAX:

Type domain name in your browser like (<http://demo.ictfax.com/>), submit required credentials and click on login. Once you have logged in as a tenant, the dashboard screen will appear that displays system statistics of inbound & outbound fax and total monthly sent faxes, list of outbound fax and status.



## 3. Creating Fax Campaign:

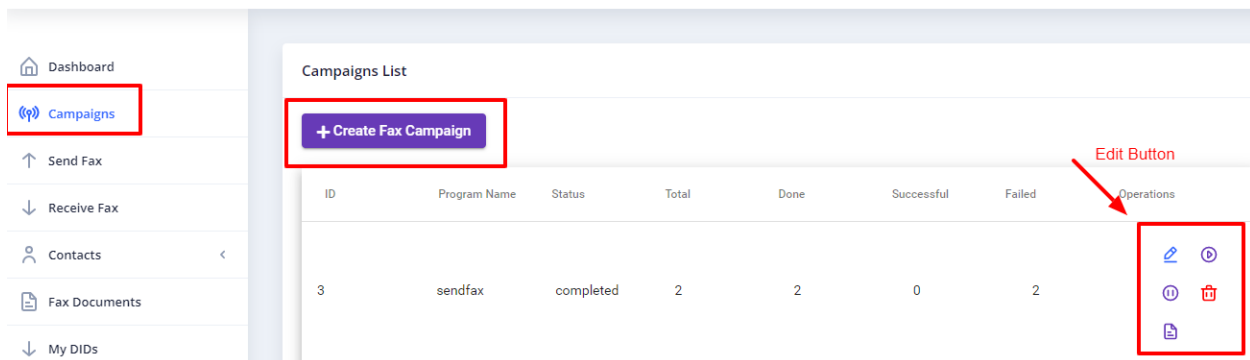
Navigate to **fax campaign** menu, it will display a list of campaigns, status of campaigns and other details.

On the right side, edit icon is shown by arrow key.

Click on edit button to overview and to perform editing in campaign details.

Click on start button corresponding to desired campaign to run campaign.

Click on pause button when it needs to stop campaign.



### To Create New Fax Campaign:

Click on new fax campaign button, it will open campaign form with required field such as:

### Upload document:

Click on **upload document** button, it will open pop-up form to upload new file/document or select from document from drop-list.

Click on contact group drop-down, select desired contact group from list.

Click on retries drop-down, set retries clock time in field box.

Set call per minute time in text box.

Click on submit button to complete action as shown:

### Create Fax Campaign

Choose Document or [Upload](#)

Document:

Choose Group

Groups:

Retry

Retry:  Calls per minute

Submit

## 5. Send Fax:

ICTFax software supports **send fax**, there are following steps are listed below:

Click on send fax main-menu, a list of **outbound faxes**, phone number, date, time, and details available on page.

- [Dashboard](#)
- [Campaigns](#)
- [Send Fax](#)
- [Receive Fax](#)
- [Contacts](#)
- [Fax Documents](#)
- [My DIDs](#)
- [Administration](#)
- [CDR Reports](#)

### Outbound Fax

Filter Fax

[+ New Outbound Fax](#)

ID	Phone number	Date and Time	User Name	Title	Status	Operations
68	██████████	2022-07-21 04:48:05 AM	admin	test	processing	
67	██████████ 5	2022-07-21 04:45:01 AM	admin	prova	processing	
66	██████████	2022-07-21 04:41:28 AM	admin	prova	processing	
65	N/A	2022-07-19 06:56:25 AM	admin	Catshil	completed	<a href="#">↓</a>
64	N/A	2022-07-19 06:51:52 AM	admin	Temp2www	failed	
63	N/A	2022-07-19 06:33:10 AM	admin	Testing	processing	
62	2 ██████████	2022-07-19 02:07:12 AM	admin	xyz	processing	
61	1111111	2022-07-18 22:43:56	admin	test	processing	

## To Add New Fax:

Click on **new outbound fax** button, it will open send fax document form with required fields such as:

Write fax title, phone number and caller ID in the text box.

**Upload document:**

Click on **upload button**, it will open pop-up form to upload new file/document or select document from drop-list.

Write destination number in field box or select contact from contact drop-down.

**Enter Caller ID:**

Enter a caller ID in the caller ID section.

Click on retries drop-down, set retries clock time in field box.

Click on send fax button to complete action as shown:

### Send Fax Document Program

Title

Title:

Choose Document or [Upload](#)

Document:

Phone number of Destination Contact

Choose Contact

Enter Manually

Caller ID

Choose Caller ID :

98745673098

Retry

Retry:

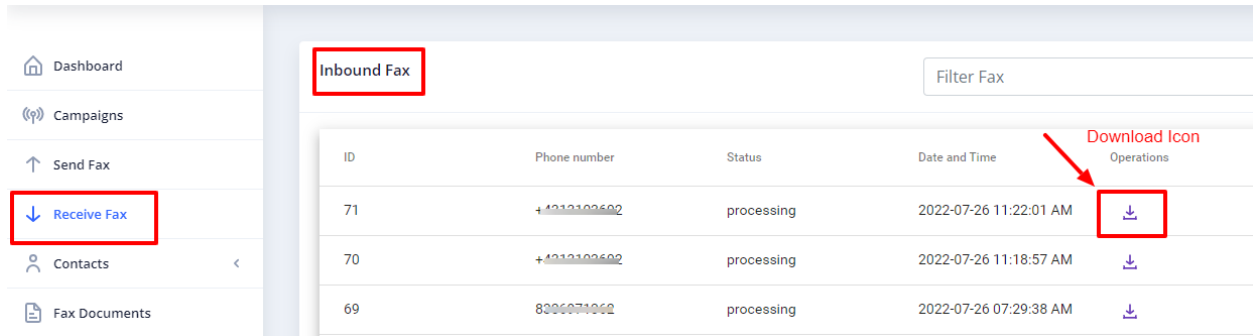
Send Fax

## 6. Receive Fax:

Navigate to **Receive fax** menu, it will display all inbound fax list and details.

On the right side, download icon is shown by arrow key.

Click on arrow icon to download receive fax file as shown.



## 7. Contacts Setup:

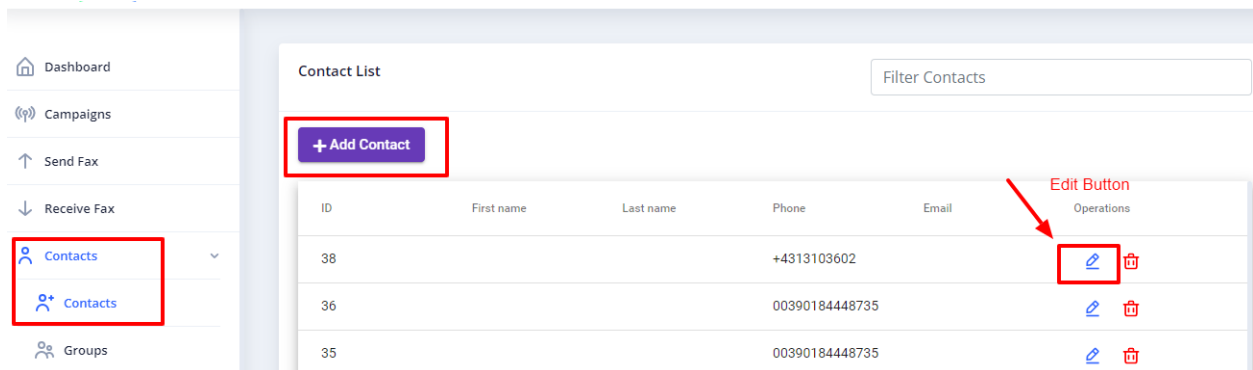
In order to manage contacts in ictfax, following steps are listed below:

### 7.1. Contacts:

Navigate to **contacts** main menu, then click on contact sub-menu, it will show contacts list and details.

On the right side, edit button is shown by arrow key.

Click on edit button to overview and to perform changes in provider information.



### Create New Contact:

Click on **Add Contact** button, it will open the contact detail form that contains the required field.

### Personal Information:

- Write first and last name in the field box.

**Contact Addresses:**

- Write phone number and email address in the fields box.
- Write contact description in text box.

**Custom Data:**

Custom data section is helpful for those users who have multiple phone numbers so that they can use the section custom 1 custom 2 and custom 3.

Click on submit button to complete the task as shown:



**Add Contact**

**Personal Information**

First name:  Last name:

**Contact**

Phone:  Email:

**Address**

Address:

**Custom data**

Custom 1:

Custom 2:

Custom 3:

**Description**

Description:

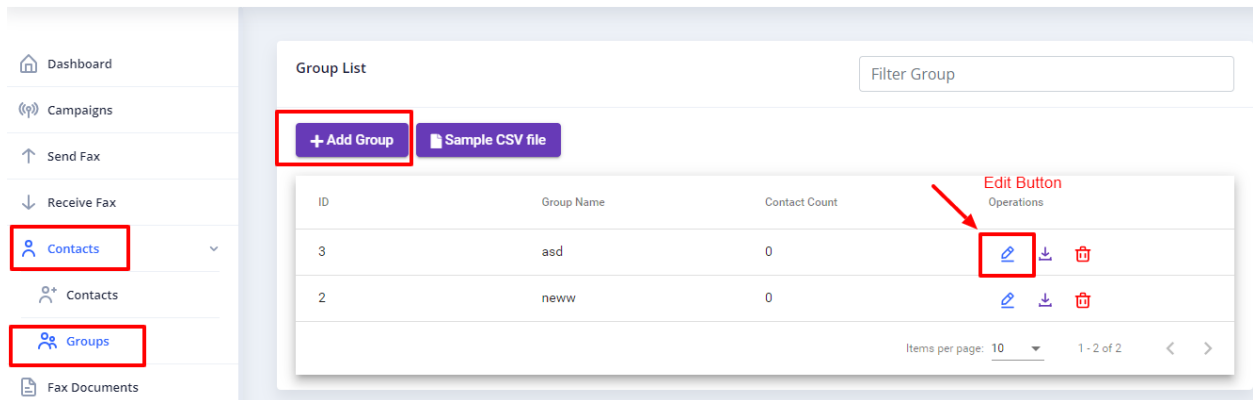
**Submit**

## 7.2. Contact Group Configuration:

Navigate to contacts menu, then click on groups sub-menu, a list of group list, group name, contact count, operations are available on page.

On the right side, edit button is shown by arrow key.

Click on edit button to overview and to perform editing in contact group details.



## To Create Contact Group:

Click on Add group button, it will open contact group form with require fields such as:

- Write Contact group name in text box.
- Click on choose file button to upload contacts list.
- Write contact group description in text box.

Click on submit button to complete action as shown:

## Add Group

Group Name

Group Name:

Upload CSV file

Choose File No file chosen

Description

Description:

Submit

### 8. Fax Documents Setup:

In fax campaign, first upload document/file that will be transferred to contacts when campaign run. ICTFax support only (pdf, png, tiff and jpeg) file.

There are following steps are listed below to manage fax document in ictfax.

Navigate to the fax document menu, it will open document list.

On the right side, edit button is shown by arrow key.

Click on edit button to overview and to perform changes in document details.

Click on arrow to send fax from here to individual recipient.

Submit required fields and click on the send fax button as shown.

### To Add New Document:

Click on the Add Document button, it will open document form with required fields such as:

Write name of document and description in text box.

Click on choose file button, to upload document/file.

Click on quality type drop-down, select **fax quality** type from the list like **(standard)**.

Click on submit button to complete task as shown.

The image shows a web form titled "Add::Document". It contains several sections: "Document Information" with a "Document Name:" text input field; "Upload Document (pdf, png, tiff, jpeg and Office files are supported only)" with a "Choose Files" button and "No file chosen" text; "Fax Quality Type" with a "Quality Type:" dropdown menu showing options: Standard, Please Select an Option below, Standard, Fine (highlighted), and Super; and a "Description:" text input field. At the bottom is a green "Submit" button. Red boxes highlight the "Upload Document" section, the "Fax Quality Type" dropdown, and the "Submit" button.

## 9. My DID's:

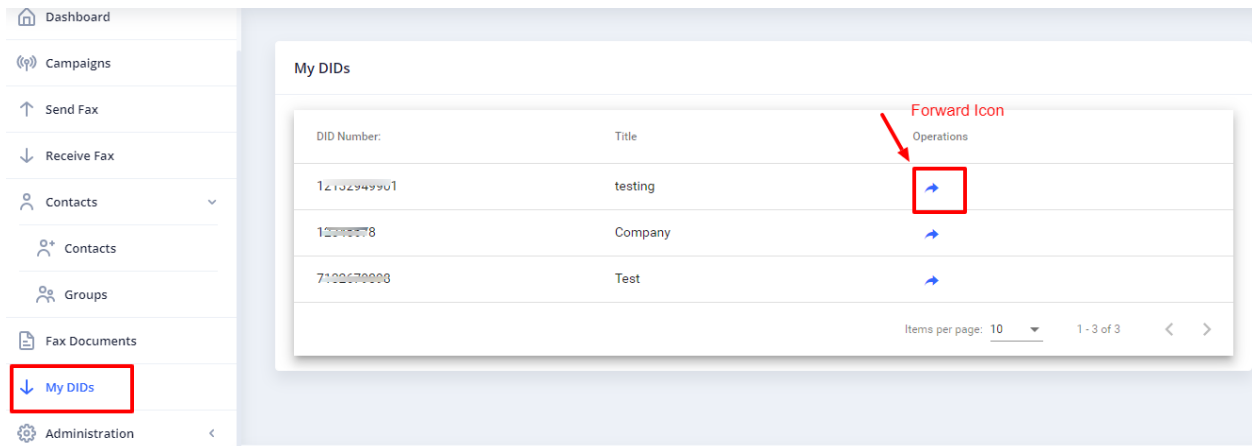
All DID numbers are available in my DID's menu. Its tenant choice which DID number is to be forward for any particular service like (Fax to email, Send to extension) etc.

Following steps are listed below to perform this task:

Click on **My DID's** menu, it will open list of DID's.

On the right side, forward key is shown by arrow key.

Click on arrow icon associated with desired DID number in operations column, it will forward DID page.



## DID Info:

Write DID Number in the require field.

## User Information:

Select service from drop-down list that DID is to be transferred.

Write Login email address in the require field.

Click on submit button to complete the action as shown:

The screenshot shows a form titled 'Forward DID' with two sections: 'DID Info' and 'User information'. The 'DID Info' section has a 'DID Number' field containing '98745673098'. The 'User information' section has a 'Select Service' dropdown menu with 'Fax to Email' selected, a 'Login Email Address:' field, and a blue 'Submit' button at the bottom left. Red boxes highlight the 'DID Number' field, the 'Select Service' dropdown, the 'Login Email Address:' field, and the 'Submit' button.

## 9. Administration:

In ICTFax tenants can do the personalize settings. There are following steps are listed below:

## 9.1 Branding:

ICTFax supports **branding** in which tenant can change logo and company name as per requirement.

To carry out this action, follow the steps listed below:

Click on the Administration main-menu, then click on the Branding sub-menu, it will open the domain and footer information form that contains the following parameters to fill.

- Write the Domain name in the field box.
- Write Domain Title in the field box.
- Write footer Text in the require field.
- Click on the choose button to upload the **new logo** as required.

Click on submit button to complete the action as shown.

The screenshot displays the ICTFax Administration interface. On the left is a sidebar menu with the following items: Dashboard, Fax Campaigns, Send Fax, Receive Fax, Contacts, Fax Documents, My DIDs, Administration (highlighted with a red box), Branding (highlighted with a red box), User Management, Fax Settings, CDR Reports, and Fax Settings. The main content area shows the 'Domain and Footer Information' form (title highlighted with a red box) with three input fields: 'Domain Name:', 'Domain Title:', and 'Footer Text:'. Below this is the 'Upload Logo - (max-width = 400, max-height = 90)' section (title highlighted with a red box) containing a 'Choose File' button and the text 'No file chosen'. At the bottom of the form is a green 'SUBMIT' button (highlighted with a red box). The footer of the page reads 'Developed by ICTInnovation Team'.

## 9.2. User Management:

ICTFax allow tenant to add/remove users, manage their roles, implement authentication policies and change passwords etc. Tenant can also set limit for any user to send faxes on fixed monthly/weekly basis.

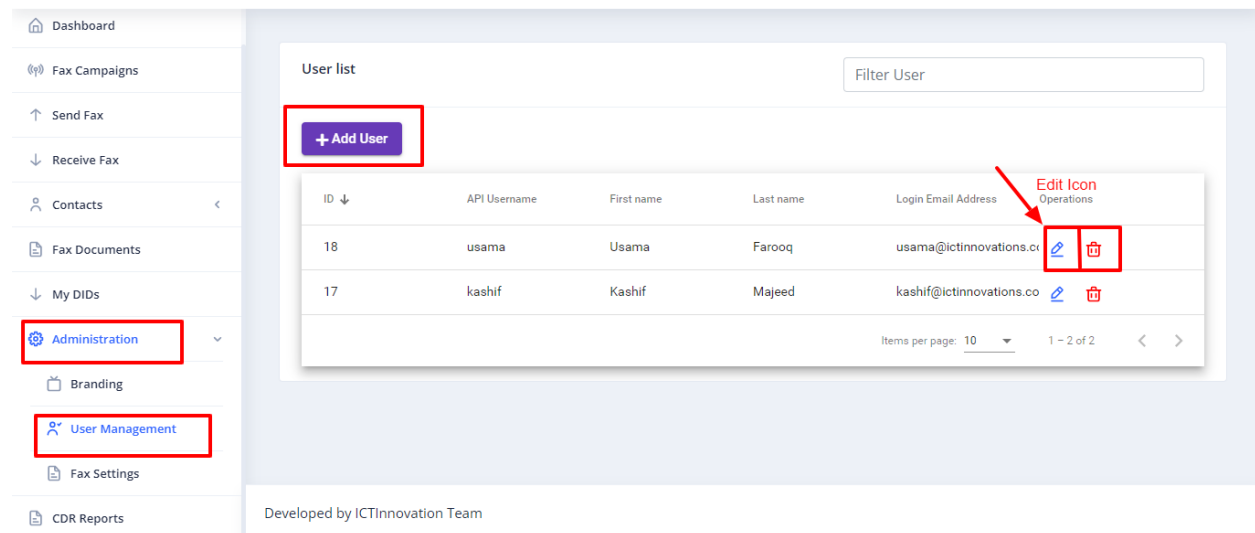
There are following steps are listed to create new user:

Click on administration main-menu, then click on **user management** sub-menu, it will open a list of users, API name, first and last name and other details.





On the right side, all the operation icons like (edit, delete, switch) are shown by arrow key.

Click on the edit button for an overview and to make changes to the user's information.

Click on the arrow icon in operation column associated with the desired user, it will switch to that user's account.



The screenshot displays the 'User list' management interface. On the left, a sidebar menu includes 'Administration' and 'User Management', both highlighted with red boxes. The main content area shows a table of users with columns for ID, API Username, First name, Last name, and Login Email Address. A '+ Add User' button is highlighted with a red box. The first user, 'usama', has an 'Edit Icon' (pencil) and a trash icon highlighted with red boxes, with a red arrow pointing to the 'Edit Icon' label. The second user, 'kashif', also has these icons. The interface includes a 'Filter User' search box, a table with 2 rows of user data, and pagination controls at the bottom right showing 'Items per page: 10' and '1 - 2 of 2'.

ID ↓	API Username	First name	Last name	Login Email Address	Operations
18	usama	Usama	Farooq	usama@ictinnovations.co	 
17	kashif	Kashif	Majeed	kashif@ictinnovations.co	 

### To Create New User:

Click on add user button, it will open user form contains required fields such as:



**User Information:**

Write API user name in fields box.

**Password:**

Write password and confirm password in field box.

**Name:**

Write first name and last name in the require field.

**User Address:**

Write phone number, login email address and Address in the field box.

**Choose Country and Time zone:**

Select country and time zone from drop-down list.

**Company and Active Status:**

Enter your active status (Yes or No).

Write Company name in the require field.

Select role e.g. (User, Admin, tenant).

Select tenant from the drop-down list, which is required.

Click on submit button to complete the action as shown:

## Add User

### User information

API Username:

### Password

Password

Confirm Password

### Name

First name:

Last name:

### User Address

Phone:

Login Email Address:

Address:

### Choose country & timezone

Country

Timezone

### Company & active

Active:

No  Yes

Company

### Select Role

- user  
 admin  
 tenant

### Select Tenant

Tenant

Submit

## 9.3 Fax Settings:

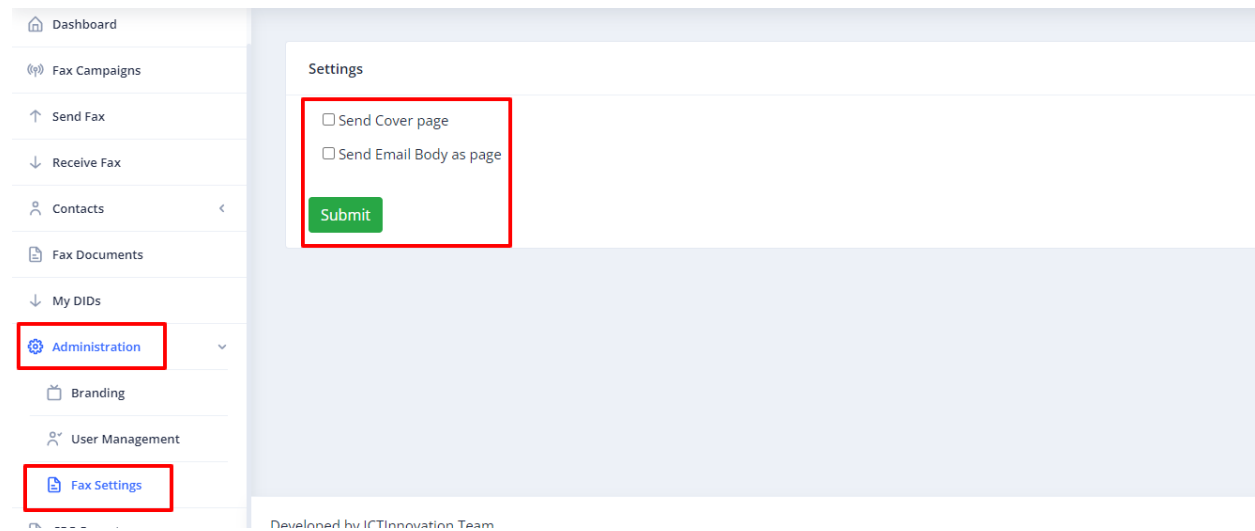
ICTFax supports fax cover-page option, when tenant enables this option, the recipient will receive contact information about sender before actual fax message like (**Send by, Send to, Phone, Date, Subject**), etc.

There are few steps to configure the fax cover page.

Click on the Administration main menu, then click on the Fax Settings sub-menu.

Click on heck-boxes to enable the **cover-page template**.

Click on submit button to complete the action as shown.



## 10. CDR Reports:

CDR menu provide complete details of calls like (Call start time, Call end time, Call Status) etc which helps tenant to analyze results.

Following steps leads to view CDR reports:

Click on CDR reports menu at bottom of main menu, it will open list of **\*\*CDR reports\*\*** and other details.

Click on export to CSV file button to download CDR report as shown:

- Dashboard
- Fax Campaigns
- Send Fax
- Receive Fax
- Contacts
- Contacts
- Groups
- Fax Documents
- My DIDs
- Administration
- CDR Reports**

### CDR Report

[Export to CSV file](#)

Time start	Time connect	Time end	Contact Phone	Account Phone	Status
2021-05-01 22:10:58 PM	2021-05-01 22:11:12 PM	2021-05-01 22:11:54 PM	+34941545001		completed
2021-04-16 13:20:29 PM	2021-04-16 13:20:33 PM	2021-04-16 13:20:53 PM	+19724211886		completed
2021-04-14 12:19:49 PM	2021-04-14 12:19:50 PM	2021-04-14 12:20:18 PM	441264347902		completed
2021-04-14 12:15:06 PM	2021-04-14 12:15:07 PM	2021-04-14 12:15:26 PM	+19724211886		completed
2021-04-14 12:12:44 PM	2021-04-14 12:13:31 PM	2021-04-14 12:14:33 PM	+14086808474		completed
2021-04-14 12:07:24 PM	2021-04-14 12:08:09 PM	2021-04-14 12:09:11 PM	+38116204530		completed