CONCORD
TECHNOLOGIES

Concord Fax Online | **Cover Page Guide**

Contents

Overview

Fax Online Users may elect to include cover pages with their outbound fax transmissions. These cover pages may be generic cover pages (created by Concord) or customized cover pages, created in Microsoft Word by the Fax Online User, and uploaded by the User to the User's account through the Concord Web Portal.

This document provides instruction for the creation, uploading, and ongoing management of customer-generated Microsoft Word cover pages, and the assignment of cover pages to Departments and Users. You can also watch the Cover Page video under the how-to section of our website, located at http://concordfax.com/support/video.asp.

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This is the third edition of this publication.

Version

This guide describes the management of coverpages, as they relate to the Concord Fax Online fax service, and the Concord Web Portal. Release date February 9, 2015.

Selecting Cover Page Behavior

Fax Online Users may specify the conditions in which a cover page is included. These options include 1) always including a cover page, 2) never including a cover page, and 3) only including a cover page when certain conditions are met, such as when a token is included in the subject line ("On Demand"), or when text is included in the body of the email-to-fax request ("With Body Text").

The following is a definintion of these options, as the options are listed in the Concord Web Portal:

➤ **Automatic Cover Pages** – Cover page will be included with every outbound fax, whether or not there is text in the accompanying email body. Some business models mandate that all fax transmissions include a company-designated cover page.

➤ **On Demand Cover Pages** – Cover page will be included only when the User includes a corresponding command token in the subject line of the email-to-fax transmission.

➤ **No Cover Pages** – Cover pages are not available to the specified User(s).

➤ **With Body Text** – Cover page will be included whenever text is detected in the email body of the outbound transmission. The purpose of this setting is to ensure that text typed into the body of an email is passed along to the fax recipient in the "Notes" section of the cover page.

Cover page behavior can be set at the "Company", "Department", or "User" levels. Company and Department level settings, by default, will apply to any user created subsequent to the setting being made. Changes made to cover page settings at the Company and Department levels do not apply to pre-existing Users unless the fax behavior change is specifically "pushed" to current/existing customers.

Cover page settings (like all account settings made within the portal) follow the settings made at the most granular level. If no overriding settings are made at the "User" or "Department" levels, all Users will follow the default settings established at the "Company"

level. Should an underlying Department require cover page behavior different than the Company-level default, the Companylevel settings can be overridden at the Department level. Similarly, Department-level settings can be overridden at the User level.

Company-level Settings

Cover page behavior is set within the portal. By default, cover page behavior will follow the settings established at the Company level within the Portal (**Settings/Account Administration/Company Details**).

Department-level Settings

Each Department may have their own, unique Cover Page behavior. If Cover Page behavior is not defined at the Department level, it will follow the behavior defined at the "Company" level.

To set Cover Page settings at the "Department" level, follow the same steps you followed to establish Company-level settings under, "Department Settings" (**Settings/Account Administration/Department Details**).

User-level Settings

Should an End User need to have Cover Page behavior that differs from the "Company", or "Department" levels, Cover Page behavior can be defined at the User level.

To define cover page settings at the User level, navigate to the specific user by clicking on the user in the Account Administration section of the Portal.

Upon making the desired change to your Cover Page behavior, click on "**Save**".

Sending an On-Demand Cover Page

Should your account be configured to use cover pages on an "on-demand" basis, you will need to include the following command token in the subject line of the email you are using to send the fax: %{Cover}
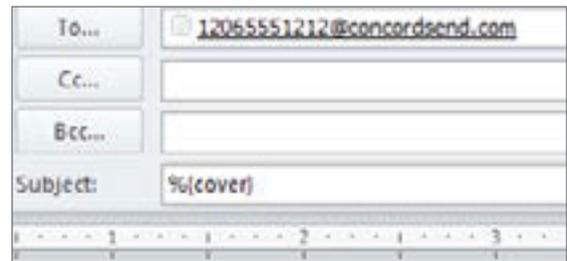
Selecting Your Cover Page

In addition to changing when and how a Cover Page will be used, you may also select *which* Cover Page you will use. Choose your desired Cover Page from the "Available Cover Pages" dropdown menu.
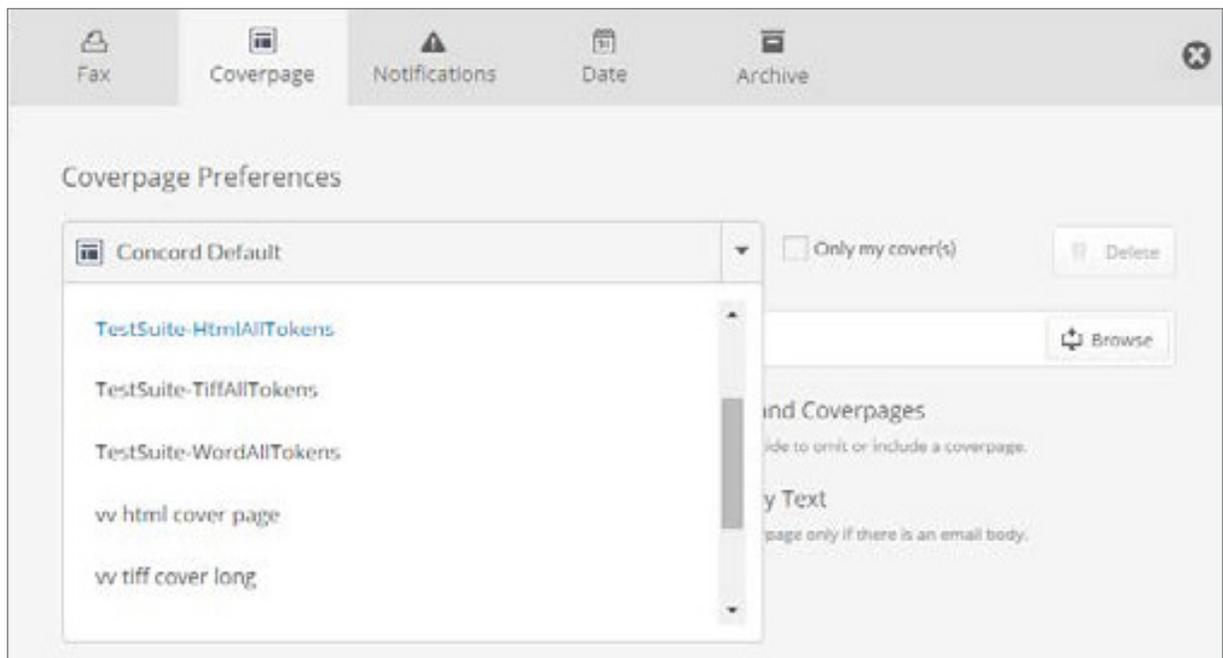
By clicking on "**Set Default**", you will set, or re-set the default Cover Page for any new users on the "Company" or "Department" level, as well as specify the Cover Page for any existing account that is set to use the "Default" Cover Page.

By clicking on "**Preview**", you will be able to view an image of the selected Cover Page, chosen from the drop-down menu.

Creating a Microsoft Word Fax Cover Page – Best Practices

Fax Online Users that prefer to use a cover page with the logo/branding of their organization may elect to create their own cover page within Microsoft Word, and upload their coverpage(s) to their account within the Portal. It is important that Users follow best practices to ensure that cover pages are legible and that fields expected to be auto-populated contain correct information. There is a video and branded cover page template available under the how-to section of the Concord Fax website.

Microsoft Word has many fax cover page templates available for use that can be customized with your company information and Concord tokens. In Word, select a Microsoft Word template by choosing **File** then **New** and selecting from the available templates:
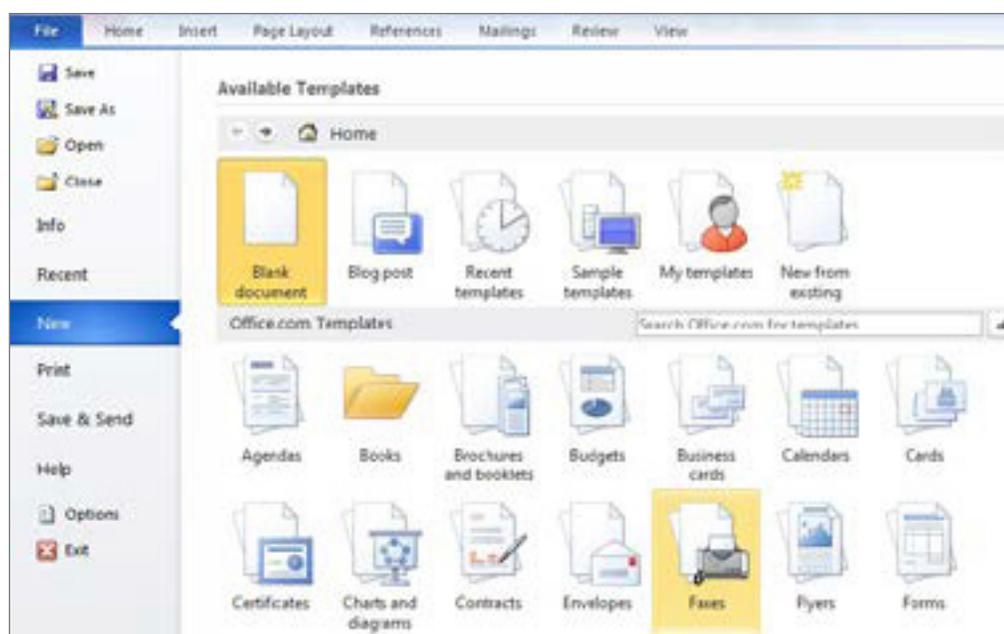
Whether you make use of a prebuilt template or choose to start from scratch, the following tips should help to ensure your cover page will look its best when sent as a fax.

Ensure that your cover page is black and white, not color or grey scale. All faxes sent through Concord are rendered in black and white, so color or greyscale covers will likely appear blurry or illegible.

Any logo, or image that is included on a cover page is "Black and White" While color logos look nice in HTML or on a.pdf file, they do not render well when transmitted as a fax. Similarly, grayscale, shading, or any sort of photographic image will not render crisply and cleanly when transmitted as a fax image.

The color image below would need to be converted to all black to approximate the color variations and differences:

The greyscale image below, arguably referred to as "Black & White", would need to be converted to **All Black** to approximate the variations in grey.

The image below is **All Black** and would not need to be converted, and should result in a sharp and clear image, when faxed. This image is **All Black**: no color, and no greyscale, or shading.

Tokens - character strings (" tokens") are frequently inserted into cover pages, so addressee information will be replaced dynamically when faxed. Tokens are enclosed in tilde characters (~), on each side of the token string (e.g., ~Date~, ~RecptName~).

Below, is an example of commonly used example of how these tokens are populated within a cover page:

FAX	To:	~RecptName~
	Fax No:	~FaxNumber~
	From:	~SenderName~
	Date:	~Date~
	Subject:	~CoverSubject~
	No. of Pages (with cover):	~TotalPages~

~Cover Text~

Tokens populate information taken from the senders account in the Web Portal, or through the senders email contacts. Note that most cover pages include an area where a memo can be written. Most commonly, this text originates from the text typed/entered into the body of the email. For this text to appear on your cover page, be sure to include the **~CoverText~** token.

For a complete list of cover page tokens, please see *appendix*.

Other helpful hints:

➤ Use a "sans-serif" style font that is 10-point, at minimum. "Serif" style fonts and small text may not render as clearly.

➤ Use 0.75" for each margin, and ensure all cover data fits on an 8.5"x 11" page.

➤ Consider putting your company logo and address in the "Header" of the Word document.

This is especially useful when employing the 'With Body Text' option to clarify where the cover page ends and the fax itself begins when there are multiple pages of email body text.

➤ Make use of Tables to organize your cover page into columns if you have more than 4 line items you wish to display. This will minimize the amount of unusable whitespace and ensure there is enough room for body text that you wish to populate your cover page.

Uploading / Adding a New Cover Page

New cover pages are added within the Details section under Account Administration in the settings section fo the Portal.
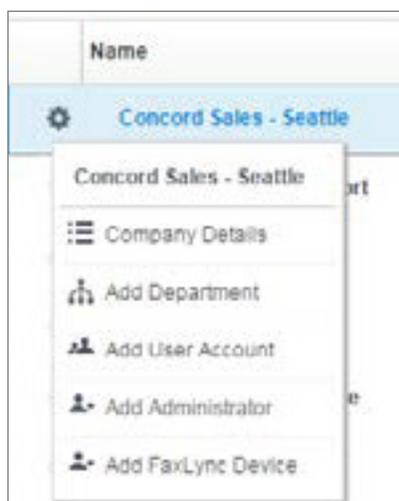
Select, "**Cover Page**". The following screen will appear:
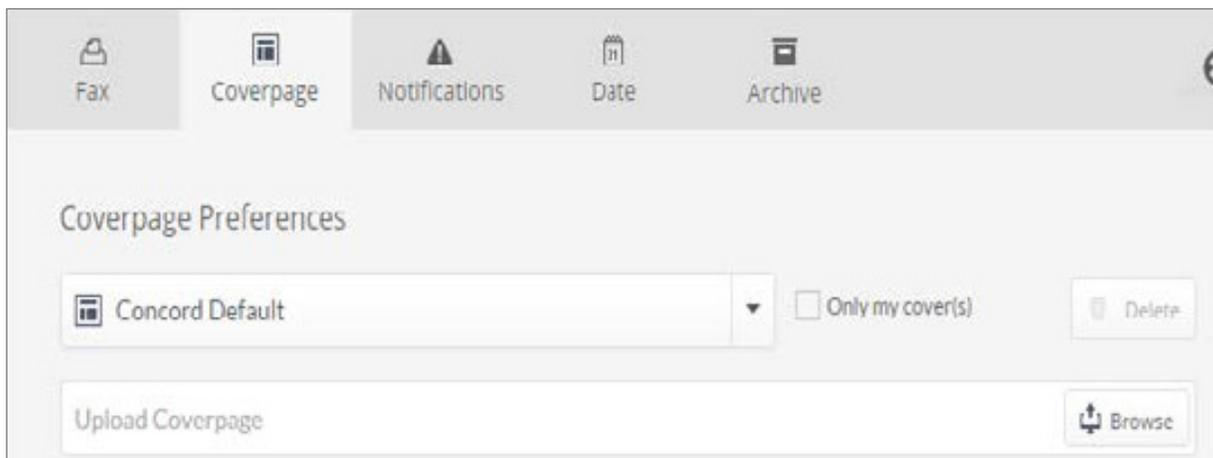
Click "**Browse**" and select the cover page you wish to upload. Then can type the desired name into the textbox before clicking '**Save**".
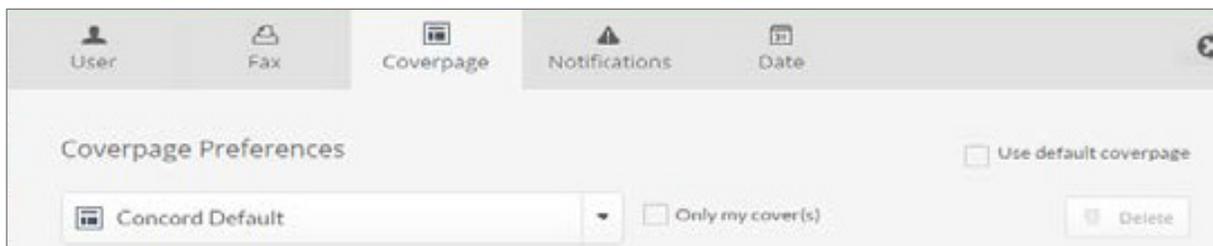
Upon successful uploading of the cover page,the following notice will appear:

> ⊘ Successfully created Coverpage AAA 2013 CoverPageId: 1286
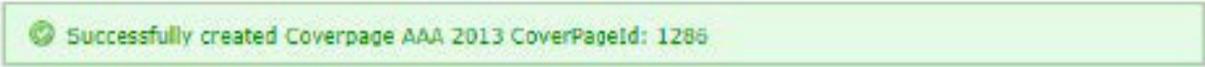
Deleting Cover Pages

To review and manage uploaded and available cover pages from the **Cover Page** section, simply select the cover page you wish to delete from the drop down menue, and click the delete button to the right.

Assigning Cover Pages

Cover pages are assigned at the "Company", "Department", or "User" level.

To assign a cover page at the Company level, navigate into the Account Administration section of the portal under the Settings tab. Then right click on the company and select Company Details. Under **Cover Page Selection of Department Details**, set the default cover page from the dropdown list of "Cover Page Preferences".

To assign a cover page at the Department level, right click on the the Department and choose Department Details. Under **Cover Page Selection**, set the default cover page from the drop-down list of "Cover Page Preferences".

To assign a cover page at the User level, select the individual user under the **Account Administration** section, and after selecting the desired user, click on **Coverpage tab**. There you can set the default cover page from the drop-down list of "Cover Page Preferences".

Support

Any questions in regard to the porting process can be directed to the Concord support group at premiumsupport@concordfax.com.

Appendix – Cover Page Tokens

Token	Description
RecptCompany	Recipient company name - see also Company
Company	Recipient company name - see also RecptCompany
MessageId	Unique job identifier in format "X-Y", where X is JobPrefixId and Y is JobId
FaxNumber	Recipient fax number
RecptName	Recipient name
Subject	Original subject line with all user specified tokens removed - See also CoverSubject
NumPages	Number of pages in Job - see also TotalPages
DeptName	Senders department name - see also SenderDeptName
SenderDeptName	Senders department name - see also DeptName
Date	Date & Time. Formatted as user specified format and timezone - See also Time and DateTime
Time	Date & Time. Formatted as user specified format and timezone - See also Date and DateTime
DateTime	Date & Time. Formatted as user specified format and timezone - See also Date and Time
CurrentPage	Current page number. Hard coded to, "1". Do not use if using a cover page that exceeds one page.
Title	Recipient title - see also RecptTitle
RecptTitle	Recipient title - see also Title
FirstName	First Name - see also RecptFirstName
RecptFirstName	First Name - see also FirstName
LastName	Last Name - see also ReptLastName
RecptLastName	Last Name - see also LastName
Address1	Address 1
RecptAddress1	Recipient Address 1
Address2	Address 2
RecptAddress2	Recipient Address 2
City	City

RecptCity	Recipient City
State	State
RecptState	Recipient State
Zip	Zip Code
RecptZip	Recipient Zip Code
Telephone	Recipient Telephone Number
RecptTelephone	Recipient Telephone Number
SenderName	Sender Name
SenderCompany	Sender Company
SenderAddress1	Sender Address1
SenderAddress2	Sender Address2
SenderCity	Sender City
SenderState	Sender State
SenderZip	Sender Zip Code
SenderCountry	Sender Country
SenderTelephone	Sender Telephone Number
SenderFax	See also SenderFaxNumber
SenderFaxNumber	See also SenderFax
SenderCSID	CSID value associated with sender account
CoverSubject	See also Subject
CoverText	Cover body text - converted from HTML to plain text. Very limited formatting. Word processes the raw/original .EML file to get properly formatted HTML bodies.
TotalPages	Number of pages in Job - see also NumPages