Fax Online Administrator

User Guide

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Contents

Publication Notice

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This is the third edition of this publication.

3.0.1 (2022)

Concord Fax Online

Concord Fax Online is a business-class fax service that provides hosted fax capabilities with reliability, security, and speed. As a Fax Online administrator, you will have access to the Concord Web Portal, a web-based application allowing you to create and manage Fax Online users and administrators, as well as access activity reports for your inbound and outbound fax traffic.

Fax Online administrators are typically established and authorized upon the initial creation of your Fax Online account. If you do not have administrative credentials, please contact Concord Premium Support (**premiumsupport@concord.net**) and they will work with your organization's main business contact in order to provision administrative credentials for you.

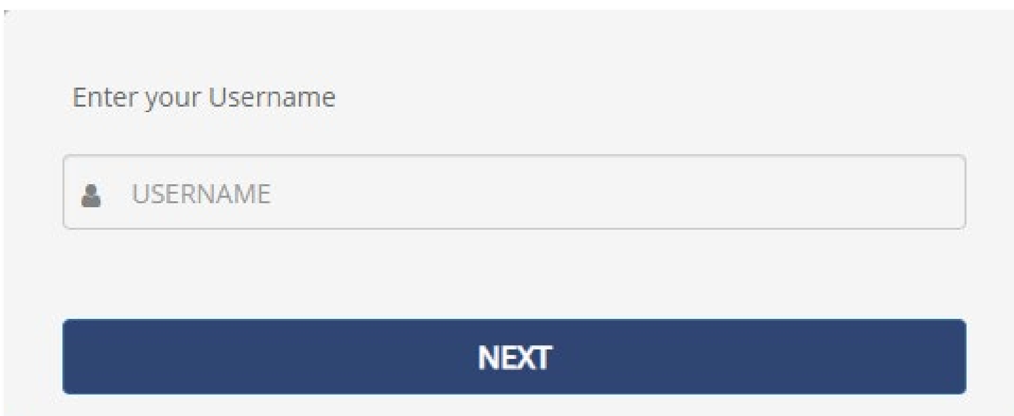
Additional administrators can be created by anyone with Company-level administrative access. Administrators are also able to create "Departments", or sub-groups within your Company account, and authorize new administrators with access restricted to a designated Department.

Concord Web Portal

Login

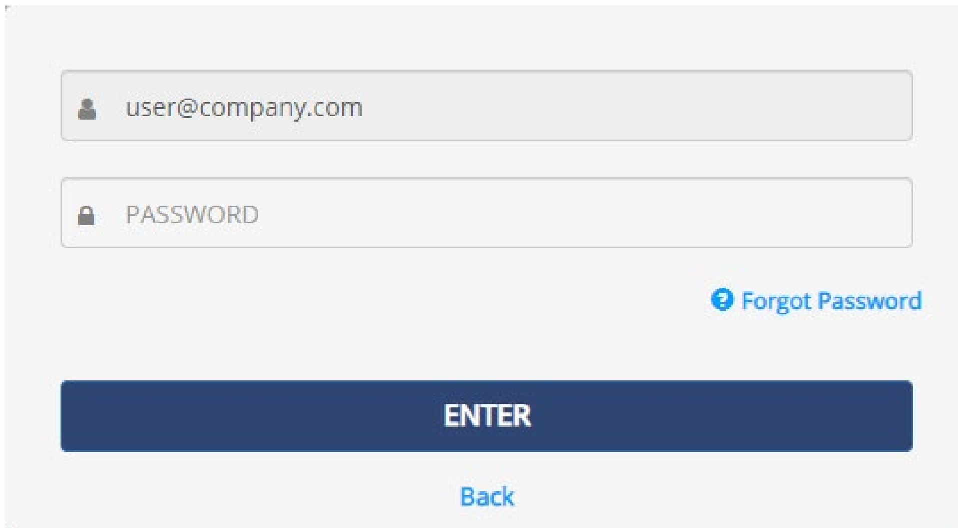
The Concord Web Portal is a web-based application that enables Concord administrators (and possibly users) to view detailed information about their fax account configuration and account activity. Access to a variety of account settings and reports is available within the Concord Web Portal.

The Concord Web Portal is accessible via the Internet at https://portal.concordfax.com. You will be prompted to enter your **Username** and **Password**.



Enter your Username and click **NEXT**.

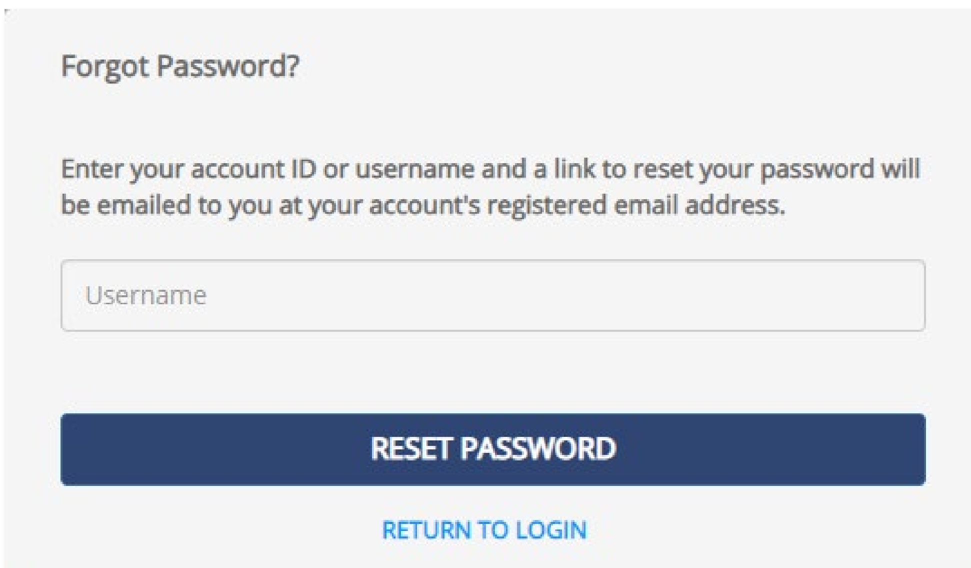
Enter your Password and click **ENTER**.



Forgot Password

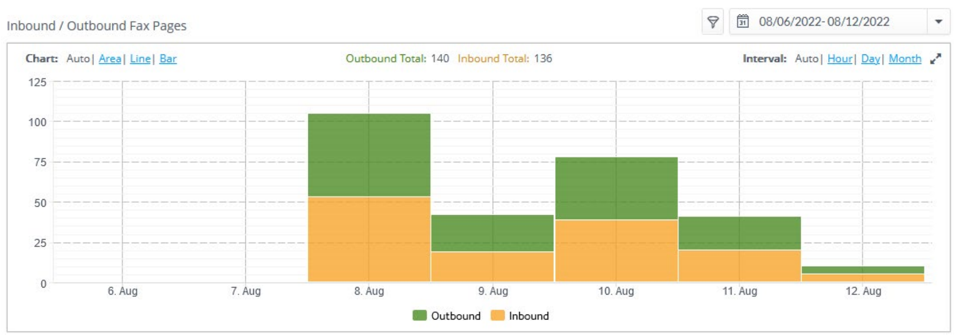
If you need to reset your password, you can do so by following the "Forgot Password" link in the login screen and entering your username. You will receive an email with further instructions on resetting your password.

Note that Concord also supports the use of Federation for portal-based services such as the Admin Portal, which allows a customer to leverage their existing Identity Provider when accessing the portal (and/or other Concord services). Via Federation, an admin's process to log into Concord willbe different from one whose account is not Federated with Concord and the process will vary according to a customer's Identity Provider. For more information on Federation, please contact your Concord account manager.

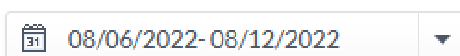


Dashboard

The home screen of the Concord Web Portal consists of a "Dashboard" overview of your Company-level account. A graph of inbound and outbound pages is displayed in the top left portion of the home screen. Outbound traffic is noted in green; inbound traffic is noted in orange.



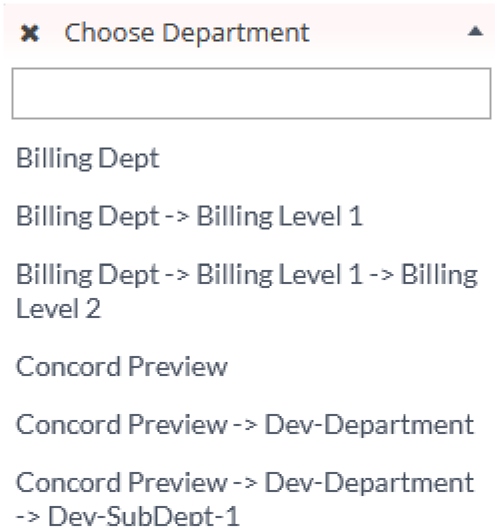
You are able to set date ranges within the filter at the top right of the graph:



By adjusting the interval, you can further modify your filter settings by **Hour**, **Day**, and **Month**.

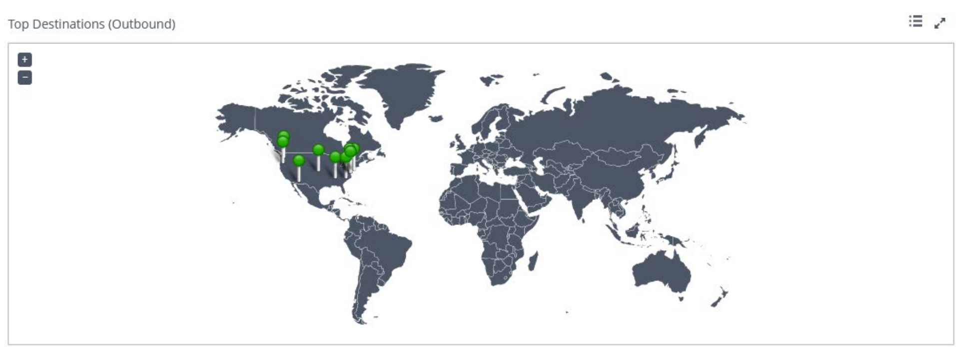
According to your access rights, you may also have the ability to select the department you wish to view data for by clicking the department selection filter.

This allows you to select the department or sub-department for which you want to display Inbound and/or Outbound fax page data.



In the lower left portion of the Dashboard, you will see a map of your outbound

Top Destinations. This is a "Top 10" list of the locales you are sending the most faxes to:



You are able to use the +/- "Zoom" feature to view particular geographic locations. By clicking on the icon, you can see a general overview of your outbound activity:

By clicking the icon, you can expand the map to full screen.

Concord
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Fax Number Inventory

In the top right portion of the Dashboard, you will see the **Fax Number Inventory.** This is an overview of your **Unassigned**, **Assigned**, and **Pending** fax number inventory, broken down by **Inventory Location**. By default, your inventory

Fax Number Inventory

Inventory Location	Unassigned	Assigned	Pending
USA, 201 (NJ)	0	1	0
USA, 202 (DC)	0	10	0
USA, 203 (CT)	0	1	0
USA, 205 (AL)	0	1	0
USA, 206 (WA)	0	13	0
USA, 209 (CA)	0	1	0
USA, 216 (OH)	0	1	0
Total	0	120	0

is sorted alpha-numerically by **Inventory Location.** You may also sort the columns by the other values by clicking on **Unassigned**, **Assigned**, and **Pending,** respectively:

By clicking on any of the numeric values associated with an Inventory Location**,** you can see a list of all inventories in the Fax Pool Details for each of the **Unassigned**, **Assigned**, and **Pending** fax pools. See below example of Assigned fax numbers:

Fax Pool Details

Assigned

Market ID: 30

User Account	Fax Number	Status
Dave Kastl - Fax Inbox (663013)	US +1 5102395813	In Use
Test User (756690)	US +1 5102395829	In Use

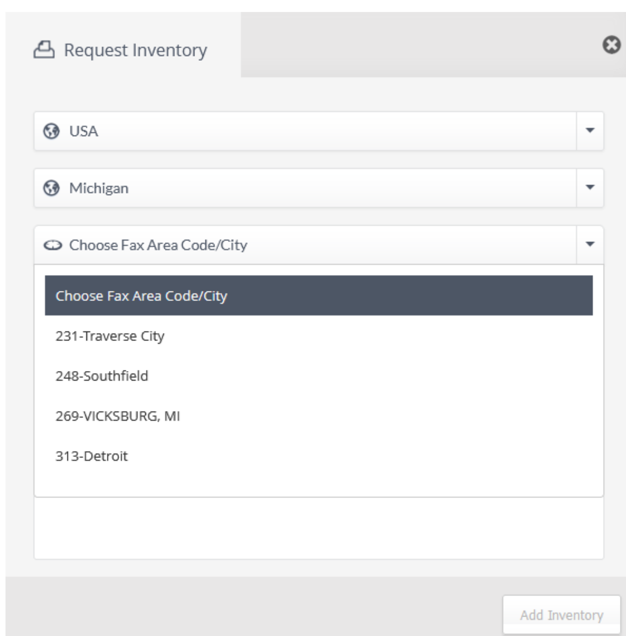
Adding Fax Number Inventory

As a Concord Administrator, you can order additional inventory directly through the Concord Web Portal. To obtain additional inventory, click the **Request Inventory** button below the **Fax Number Inventory**.

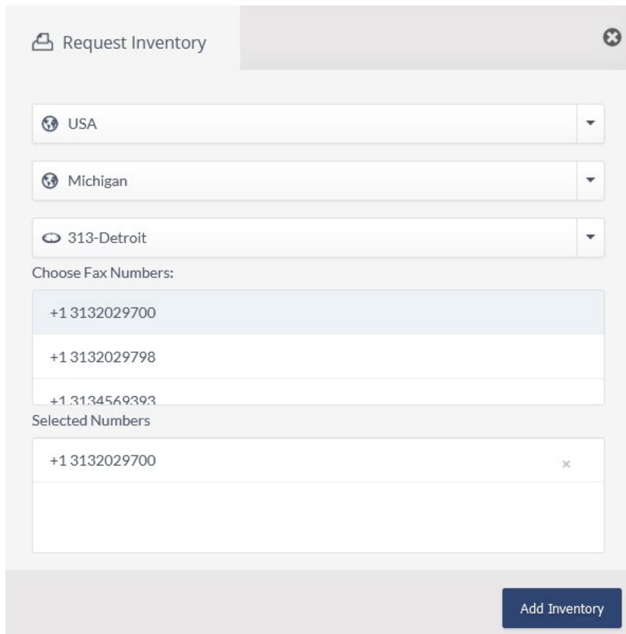
By selecting the **Country** of the desired inventory location, you will be prompted to select information from drop-down menus to choose your desired inventory.

By selecting "United States", or "Canada", you will be prompted to select the State or Province of your desired inventory. For other countries, the inventory areas should be listed directly under the "Country".

After you have selected the **State**, a list of all available area codes will be populated (often accompanied by the city associated with them). After selecting the desired area code and city, a drop-down of available fax numbers will be listed.



Select the numbers that you wish to add and click, **Add Inventory**. You may de-select a number after clicking on the “x” to the right of the fax number.*



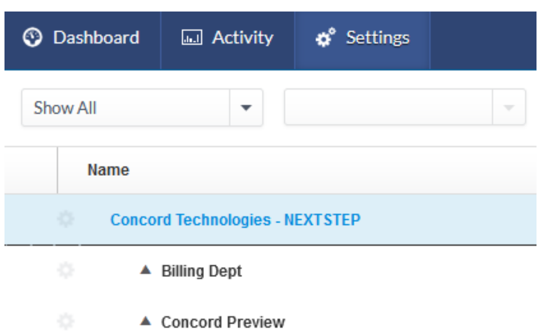
*Note that there is a maximum inventory threshold established by your organization’s main point-of-contact. If you exceed this limit, a warning message will be displayed. Your inventory threshold can be increased/decreased by Concord Premium Support (*premiumsupport@concord.net*).

Settings

To access the account settings for a Company, Department, User, and/or Administrator accounts, select **Settings/Account Administration** in the menu bar.

Account Hierarchy

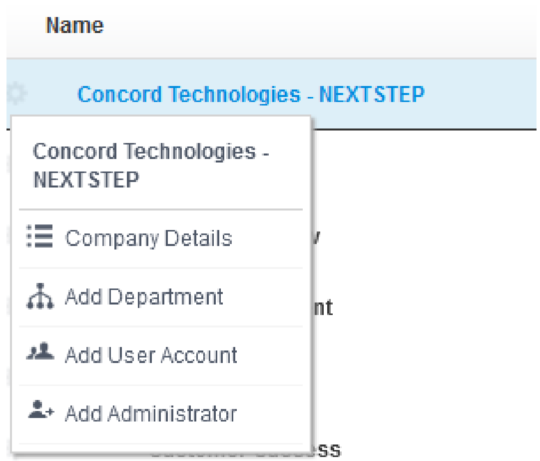
A Concord account is generally constructed in the following hierarchical order: **Company/Department/User**. Additionally, there is the option to add one or more **Departments** within a **Department** at multiple hierarchical levels, to create “sub-Departments” or even “sub-sub-Departments.” Default settings can be specified at each of these hierarchical levels. Settings made at the most granular level will ultimately be followed (i.e., settings made directly at the **User** level will override settings made at the **Department** or **Company** levels). To see an overview of your Concord account hierarchy, click the **Settings** icon ( ) in the menu bar and select **Account Administration**.



For demonstration purposes, “Concord Technologies - NEXTSTEP” is the name of the “**Company**” level. Beneath the Company level, there are two **Departments** displayed: “Billing Dept”, and “Concord Preview”. You =can see individual end users within each Department by clicking on any of the Departments. Below the Departments, you may see sub-departments as well as users and the authorized Concord account administrators within your organization, depending on rights and hierarchy settings.

Account Settings (Company & Department Levels)

To view the account settings at the **Company** level, right click on your company name, and a drop-down will appear, listing **Company Details**, **Add Department**, **Add User Account**, and **Add Administrator**.



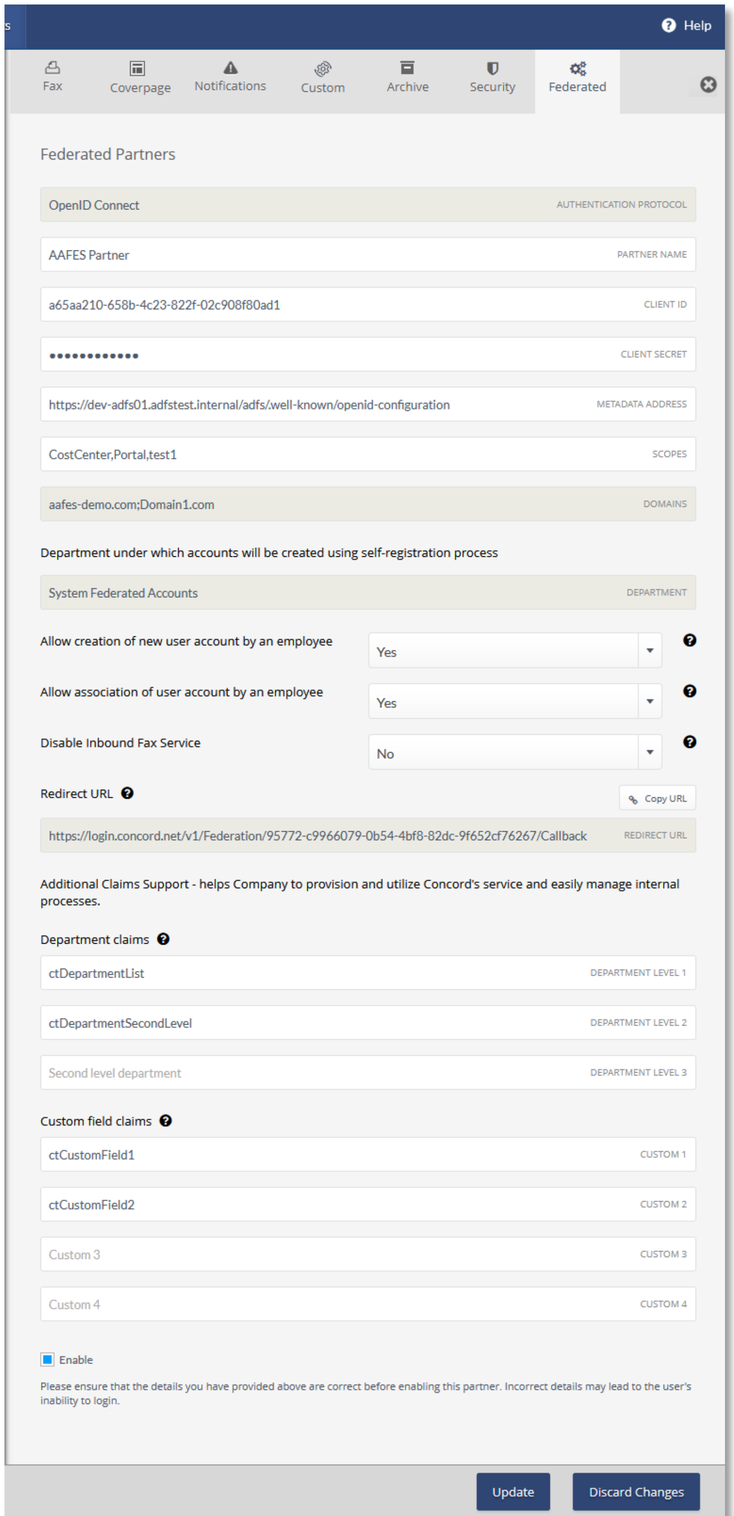
Select **Company Details** to view and edit the settings.

By default, the Company Details contain a minimum of seven (7) tabs:

- **Fax**
- **Coverpage**
- **Notifications**
- **Custom (Previously, Date)**
- **Archive**
- **Security**
- **Contacts**

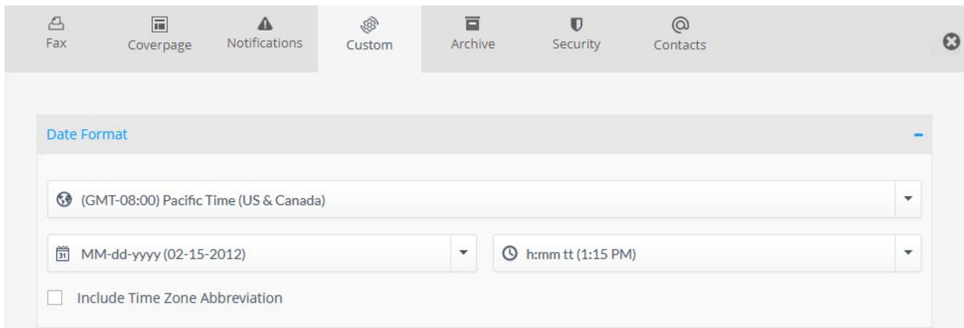
The following tab may be enabled depending on how the corporate account is set up:

Federated Tab: This provides for configuration of Federated access to Concord services via a customer's Identity Provider.

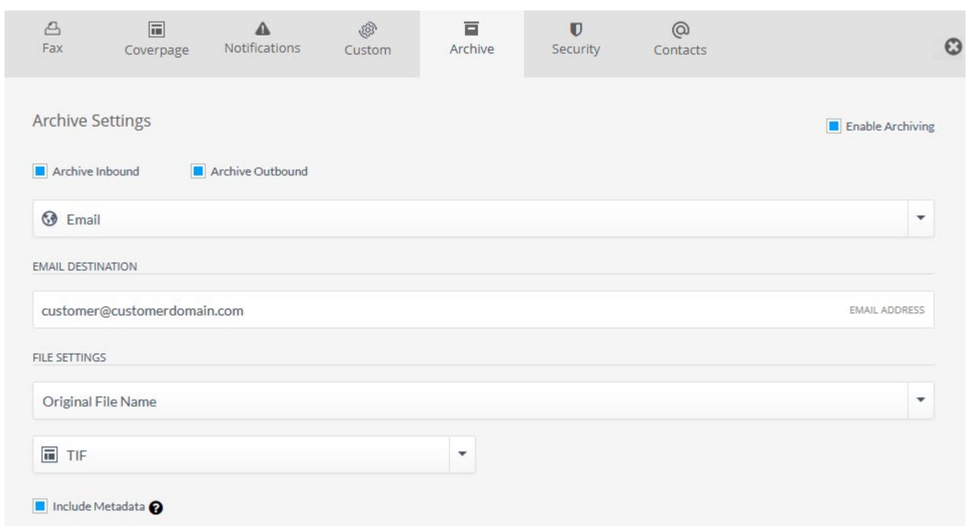


The below tabs are default. We will cover the Fax, Coverpage and Notifications tabs in detail later in the guide.

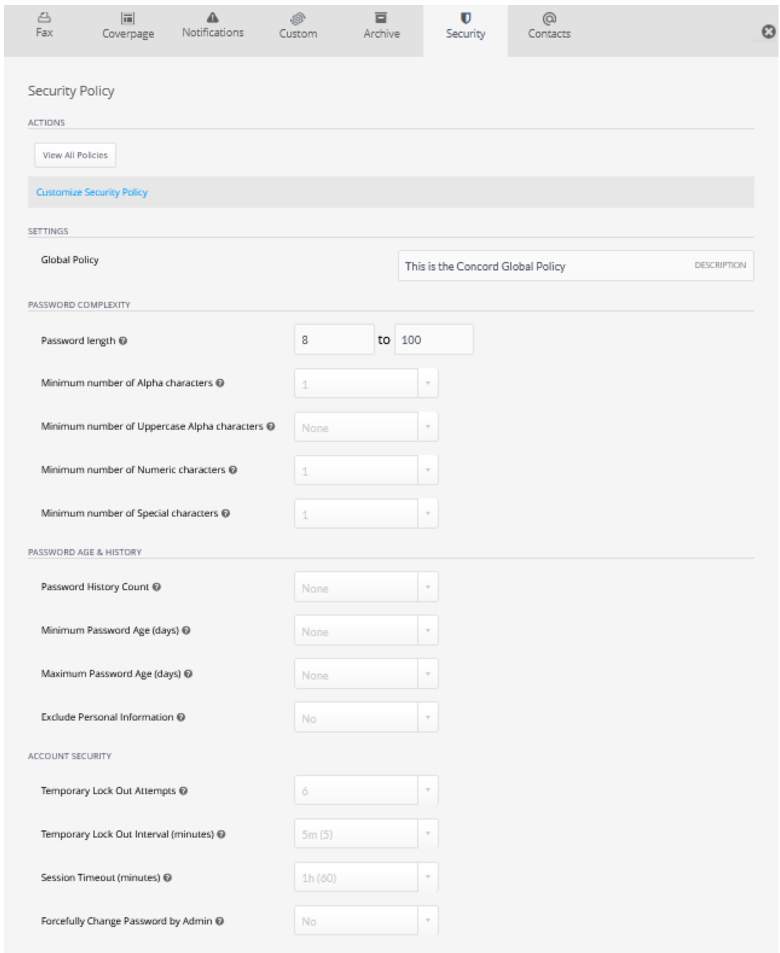
Custom Tab: This allows customers to set date and time defaults, including default time zone.



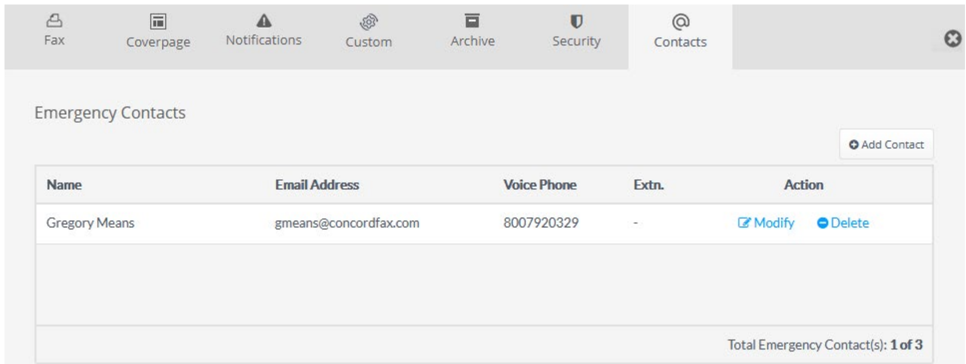
Archive Tab: This allows customers to specify email or FTP archive locations where fax content may be sent following transmission.



Security Tab: This allows customers to manage password and related security settings



Contacts Tab: This allows customers to manage emergency contacts associated with their Concord account.



Fax Preferences

The first tab, **Fax**, concerns the default settings for inbound and outbound fax message handling.

Inbound messages may be received in the following file formats:

- TIF (.tif)
- XPS (.xps)
- PDF (default)
- TIF-HiRes (High-Resolution TIF File)
- TIF-Fax (standard TIF with ".fax" extension)

To change the default file type, select the desired file type and click **Save** on the top left-hand side of the menu bar.

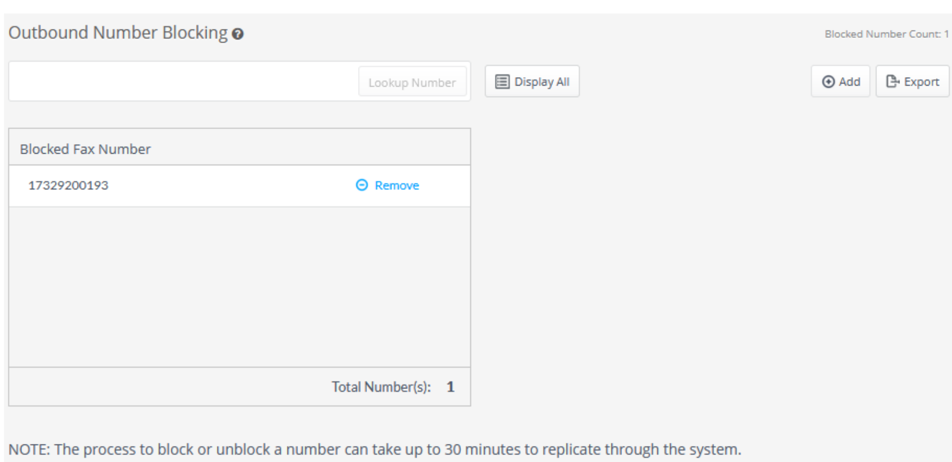
There are three additional settings that you may wish to set as defaults:

- **Fax Page Separation:** (Inbound) Multiple-page faxes will be separated into separate, single-page files.
- **Require SPF Record:** (Outbound) Requires SPF (Sender Policy Framework) record.
- **Add Metadata:** (Inbound) Triggers additional XML file to be added to email, containing event data specific to the received fax.

To enable any of these options, check the appropriate box and click **Save** on the top left-hand side of the menu bar.

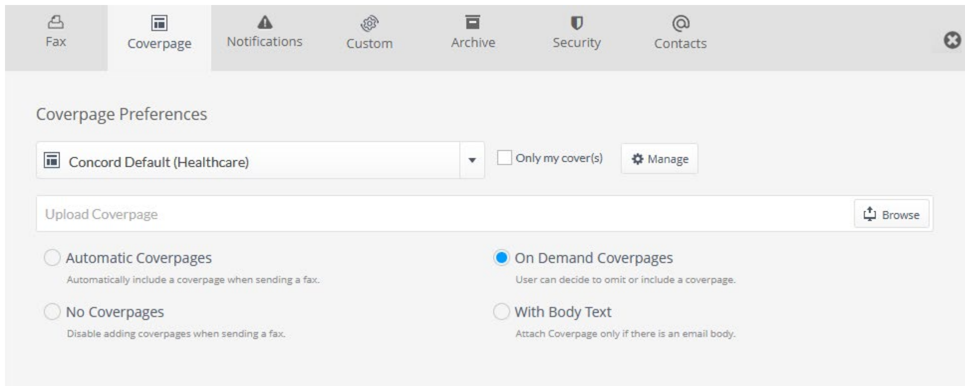
Note that default settings are only applied to newly created users, according to the hierarchy. Changing default behaviors will not "push" changes to users at lower hierarchical levels. ***To push settings from the Company level to other Departments and Users, contact Concord Premium Support.***

The Fax tab also contains Outbound Number Blocking, which allows a ***Company Level administrator to manage fax numbers that they do not want their OUTBOUND users to be able to send faxes to.***



Coverpage Preferences

The second tab concerns **Coverpage** preferences.

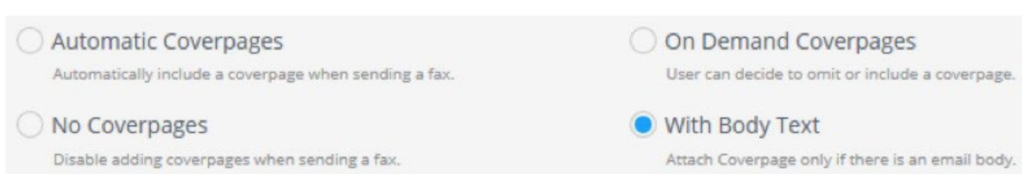


The first drop-down allows you to select the default coverpage. By default, the generic, "Concord Default" coverpage is available for your use. You also have the ability to upload one or more coverpages of your own. Additionally, Concord can design and upload coverpages for you for a nominal fee. For more information on custom coverpage creation, please contact Concord Premium Support.

To restrict coverpages to only those coverpages directly owned by the hierarchical level, select the option, **Only my cover(s)**.

To select a new default coverpage, choose the desired coverpage from the drop-down menu and click **Save** on the top left-hand side of the menu bar.

On the bottom of the Coverpage tab, you will see four options for different default coverpage behaviors:



To have a coverpage included for every outbound fax, select **Automatic Coverpages**.

To prevent outbound faxes from being included, select **No Coverpages**.

To have the option to include a coverpage at time of submission, select **On Demand Coverpages**.

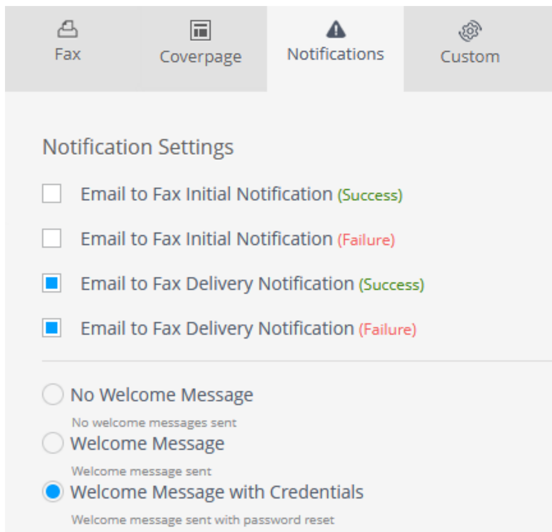
To include a coverpage when text is entered into the body of your email-to-fax (E2F) submission, select **With Body Text**.

To make any changes to default coverpage behavior check the appropriate box and click **Save** on the top left-hand side of the menu bar.

Note that it is **HIGHLY RECOMMENDED** that your users **DO NOT** include any Personal Health Information (PHI) or Personally Identifiable Information (PII) in any coversheet fields as this creates a separate record of this data apart from the content of the attached document.

Notification Preferences

The third tab, **Notifications**, concerns the email notification message behavior for outbound faxes, and welcome messages for newly created users.



Fax Delivery Notifications

The notifications listed here apply primarily to email-based outbound fax senders. By default, the notification behavior is that ***the sender*** will receive one email notification message for the ***initial fax request*** (**Success** or **Failure**), and one email notification message for the ***final delivery*** (**Success** or **Failure**). You may choose which notifications your users will receive, but it is Concord's recommendation that by default, ***all*** notifications are enabled.

- **Email to Fax Initial Notification (Success)** – This notification message confirms that the email-to-fax request has been successfully submitted to the Concord platform, and that Concord will attempt to deliver the fax shortly.

- **Email to Fax Initial Notification (Failure)** – This notification message confirms that the email-to-fax request has failed to be successfully submitted to the Concord platform. Further, an error reason is supplied in order for the sender to take the proper corrective action and resubmit the request.

- **Email to Fax Delivery Notification (Success)** - This notification message confirms that the email-to-fax request has been successfully delivered to the designated recipient.

- **Email to Fax Delivery Notification (Failure) ***– This notification message confirms that the email-to-fax request has failed to be successfully delivered to the designated recipient. Further, an error reason is supplied (e.g. “No Answer”, “Not a Fax Machine”).

*To see a complete list of Fax Error Messages, please see the Error Code list in the appendix.

Welcome Messages

Welcome Messages can be sent to the associated email address of a given user. Note that these are not generated automatically on user creation but may be sent to an existing user to help them access the service or set a new password. The settings here govern the default that would be selected when an administrator accesses the Welcome Message section of the user. There are three options regarding the sending of these Welcome Messages:

- **No Welcome Message –** No message is the default Welcome notification behavior for that Department or User.

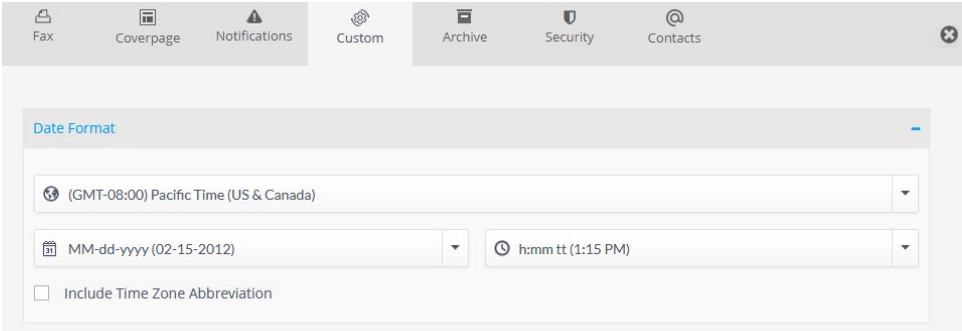
- **Welcome Message –** A Welcome Message would be sent containing general account information.

- **Welcome Message with Credentials -** A Welcome Message would be sent containing general account information as well as instructions for resetting the user's password.

If you modify any of the default notifications provided to the User/sender, remember to click **Save** on the top left-hand side of the menu bar.

Date & Time Display Preferences

The fourth tab, **Custom**, concerns the date and time formatting for newly created users. Date and Time information are reflected on the fax header of sent pages, as well as referenced in notifications activity reports for sent and received fax traffic.



The first drop-down menu designates the T**ime Zone** which you wish associated, by default, for the **Company** hierarchical level.

The second drop-down menu designates the **Month/Day/Year** format. An example of the format is also displayed after each option.

The third drop-down menu designates the **Hour/Minute** format.

You may also opt to include the **Time Zone Abbreviation** as part of the Date/Time string.

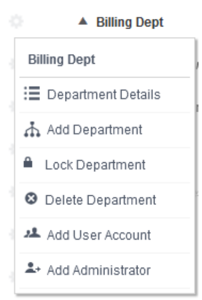
If you make any changes to the default date and time formatting settings, remember to click **Save** on the top left-hand side of the menu bar.

Department-Level Settings

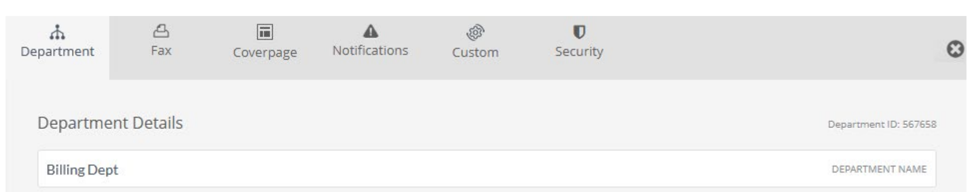
The default settings for Departments are managed in a very similar manner to the Company-level default settings discussed in the previous section.

As account settings follow the behavior designated at the most granular hierarchical level, settings made at **Department** levels override settings established at the **Company** level.

To manage settings at the Department level, right click on the individual Department you wish to modify and select **Department Details** from the drop-down menu.



For demonstration purposes, the **Department**, “Billing Dept” is selected. To the right of the screen, you will see similar tabs to those displayed when viewing Company-level preferences:



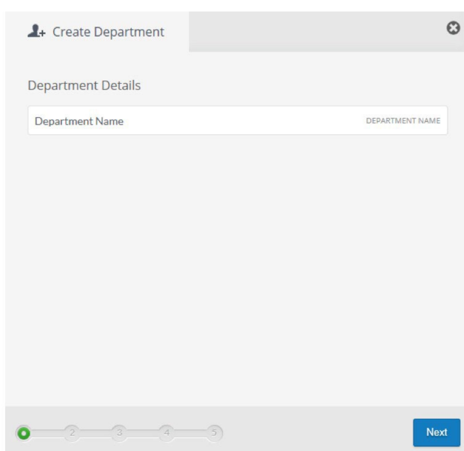
By default, the Department details contains a minimum of six (6) tabs:

- **Department**
- **Fax**
- **Coverpage**
- **Notifications**
- **Custom (Previously, Date)**
- **Security**

Modify the Department-level changes that you wish to set, always remembering to click **Save** on the top left-hand side of the menu bar.

Adding A Department

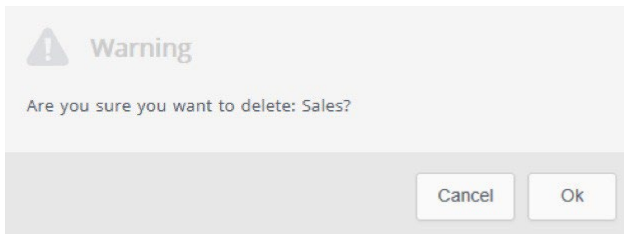
To add a new Department, either under the Company level, or beneath an existing Department, right click on the **Company**, or **Department** under which you would like to create the new Department, and select, **Add Department**.



Enter the name you wish to assign to the new Department and click **Next**. You will then select the default settings for **Fax**, **Coverpage**, **Notifications**, and **Date** (clicking **Next** after completing each section). After entering the defaults for the last tab, "**Date**", click **Finish**.

Deleting A Department

To delete a Department, right click on the Department you wish to delete, and select **Delete Department** from the drop-down menu. A warning message will be displayed, which must be acknowledged (by clicking **OK**) before the Department is deleted:



Note that you are not able to delete a Department that has active Users. You will first need to delete or move all Users within the Department before deleting it.

Managing A Department

Department default settings can be modified after their initial creation. To modify the settings of an existing Department, simply right click on the **Department** you wish to manage and click **Department Details.** You will then have the option to edit all of the options that you designated during the initial creation of the Department and have them apply to any associated User created *after the change is made*.

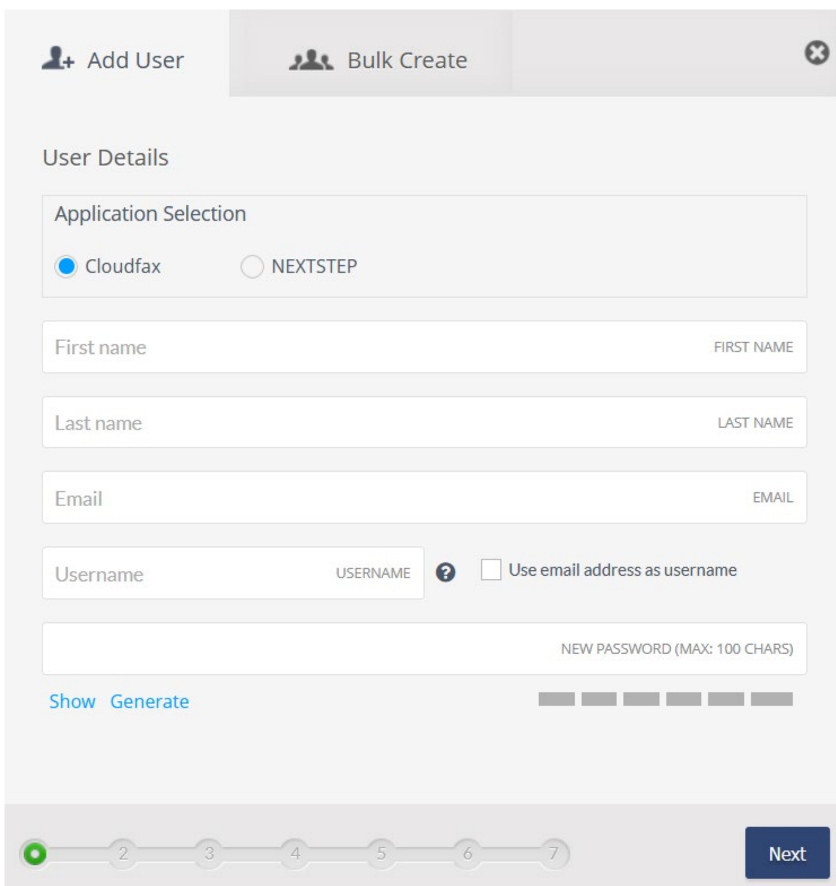
Note that changes at any hierarchical level are not retroactive. To push changes from the Company/Department to Department/User levels, please contact Concord Premium Support (premiumsupport@concord.net).

Account Settings (User Level)

Adding a User

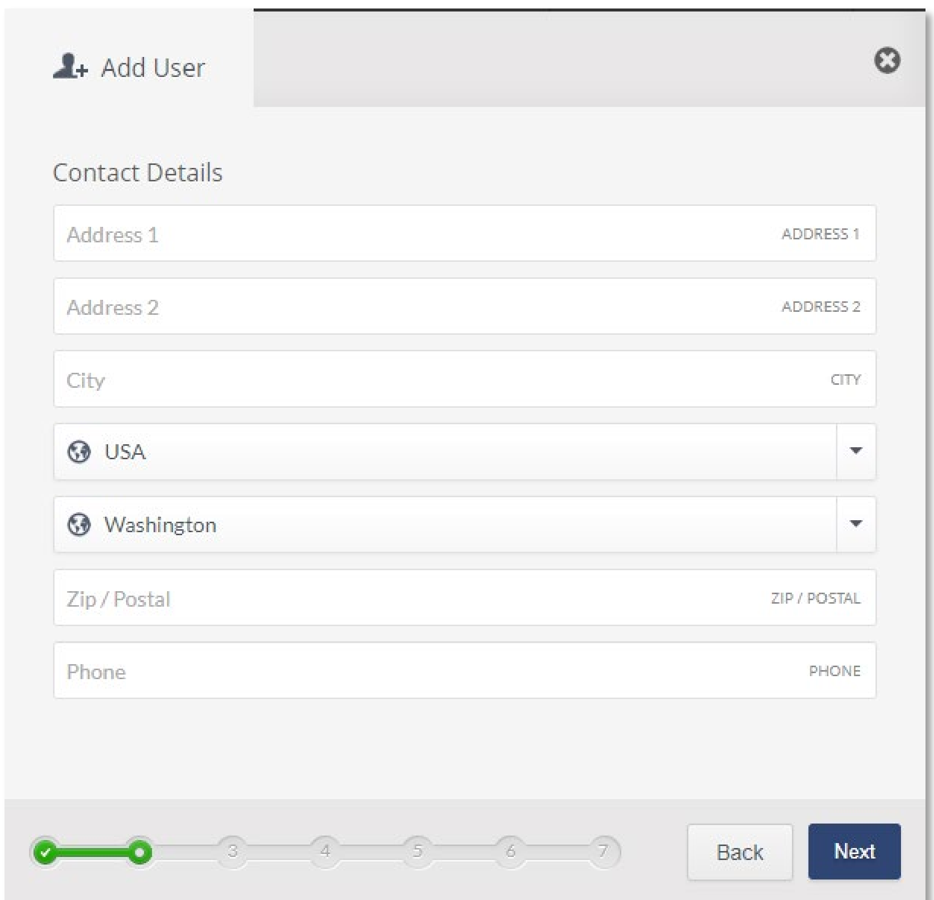
To add a new User, right click on the gear next to the Company or the Department in which the user will reside and click **Add User Account**.

As you create the user, you will be guided through a series of prompts. Enter information at each prompt and click **Next**. Some fields are optional; required fields will be noted. Note also that **Application Selection** may vary depending on contracted Concord services. For the purposes of this guide, we will be creating a Cloudfax User.

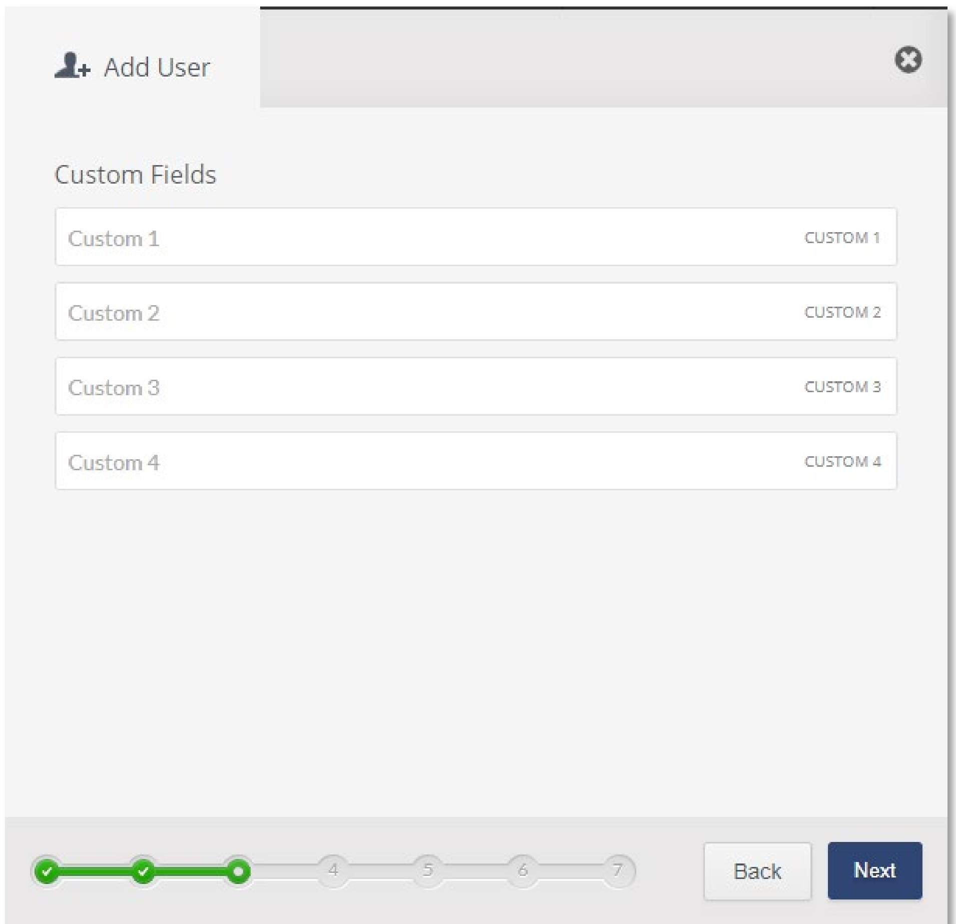


First Name and **Last Name** are required as is an **Email** address, which may be set as the **Username** by checking the box. A specific **Password** may be set for the user at this stage, or the password may be generated. Note that passwords must conform to standards dictated in the Company-level or relevant Department-level Security tab.

- **Contact Details** (Optional): These are typically used to populate variable information to fax coversheets.



- **Custom Fields** (Optional): These fields may be populated to capture additional user tracking information in status and activity reporting.



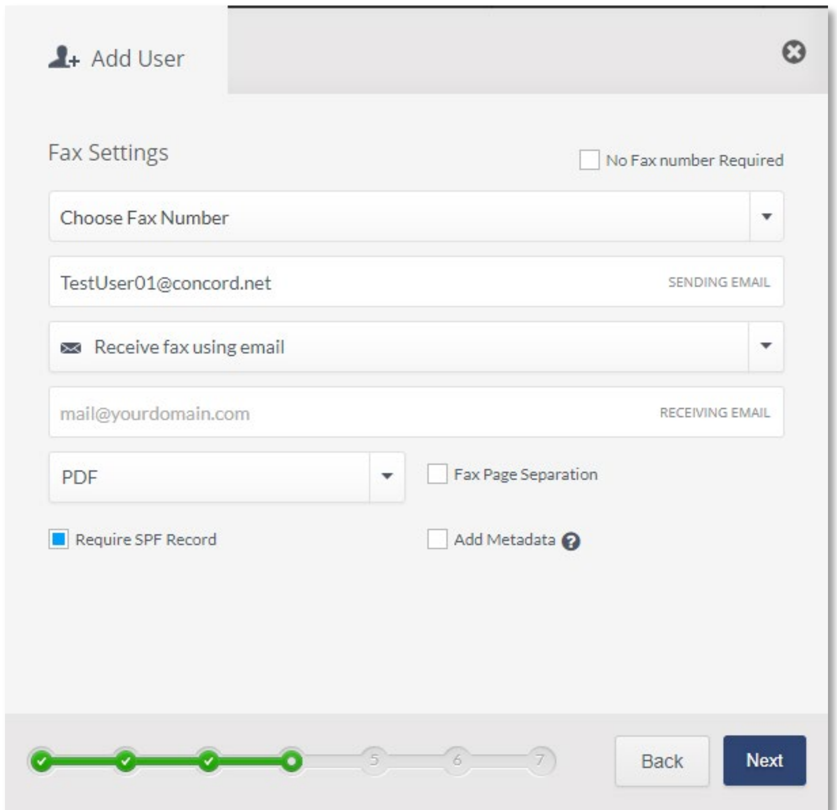
Note that it is HIGHLY RECOMMENDED that you DO NOT include any Personal Health Information (PHI) or Personally Identifiable Information (PII) in any Custom Fields as this creates a separate record of this data apart from the content of a faxed or attached document.

- **Fax Settings**

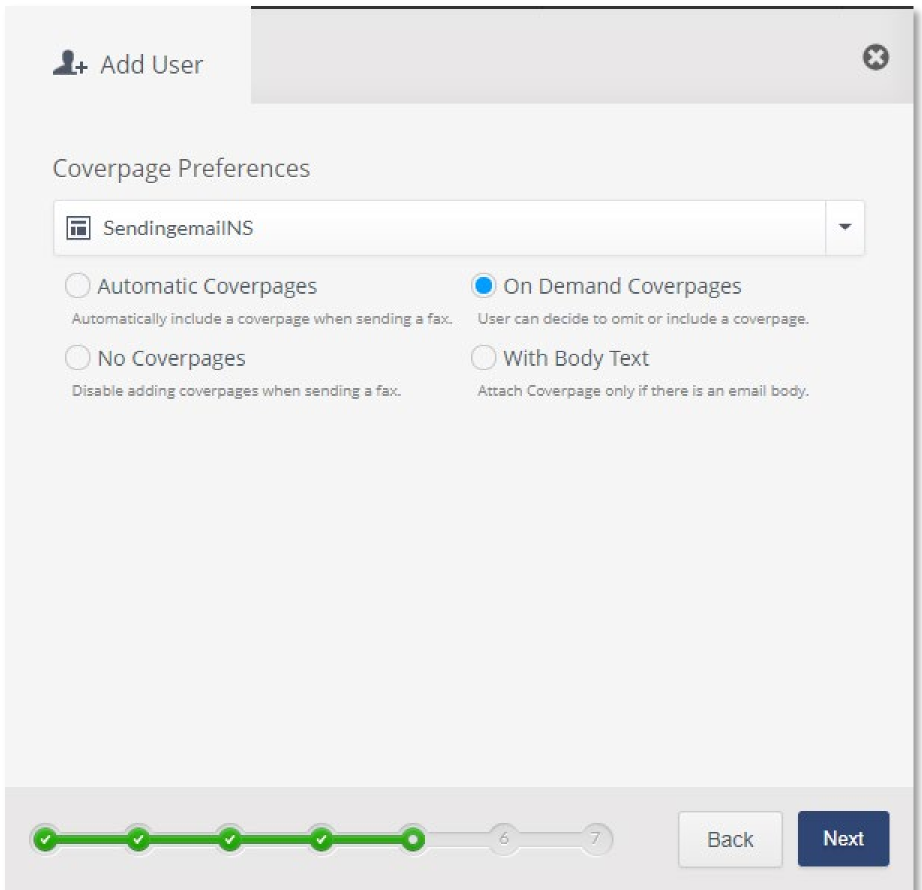
  If no inbound fax number is required, select "**No Fax Number Required**" and an outbound-only user account will be generated for you.

  - **Choose Fax Number:** This allows an admin to select a number from their fax number inventory.
  - **Sending email address:** This allows an admin to set an email address that will be allowed to send outbound faxes.
  - **Receiving email address:** This allows an admin to set one or more email addresses to receive inbound fax numbers (up to three).
  - **Inbound Fax Message File Type:** This sets the type of file the user will receive when they receive an inbound fax.
  - **Fax Page Separation:** Allows for separate files per page for inbound faxes.
  - **Require SPF Record:** Checks against customer SPF records when a user sends outbound faxes via email. This is normally set at the account level.

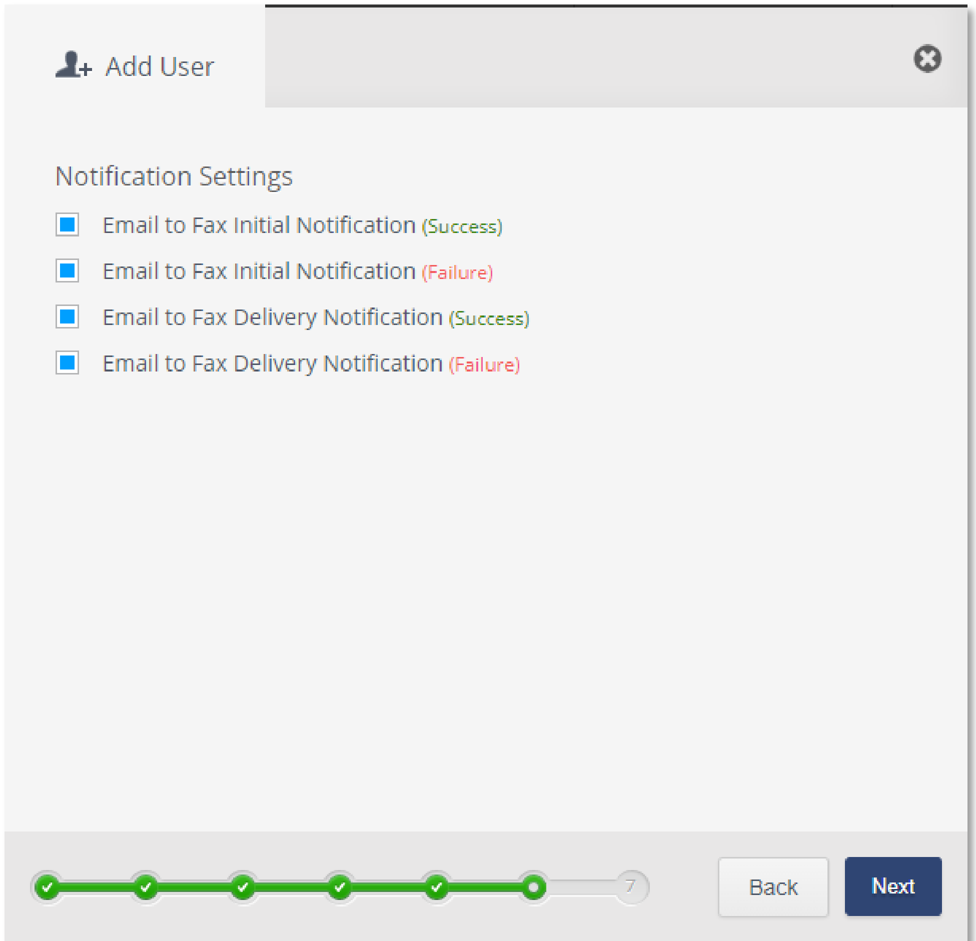
- **Add Metadata:** Attaches a metadata XML file to recipient inbound messages. This is typically used in fax integrations.



- **Coverpage Preferences:** See Coverpage Preferences in the Company Settings section for additional information.

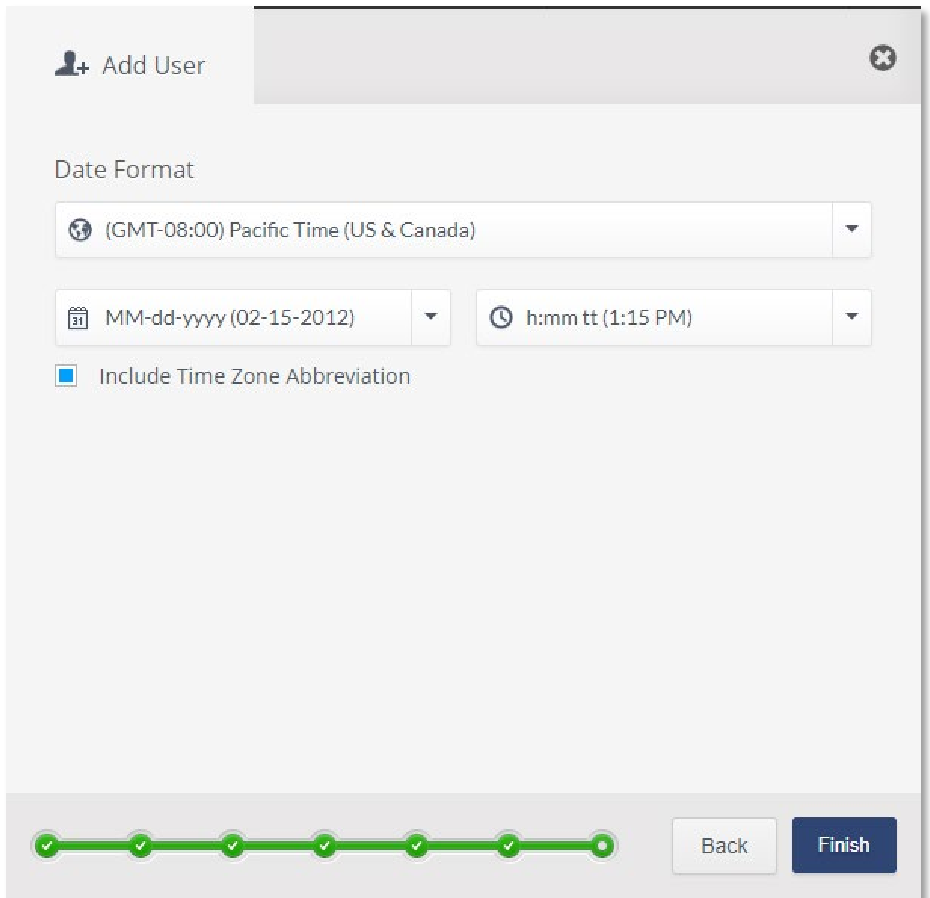


- **Notification Settings:** See Notification Settings in the



Company Level Settings for additional information.

- **Date Format Preferences:** See Custom Date/Time Settings in the Company Level Settings for additional information.

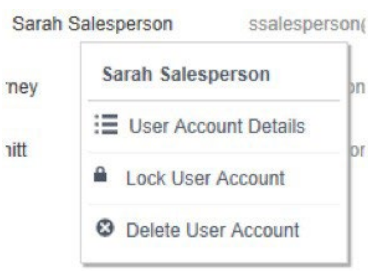


When complete, click **Finish**!

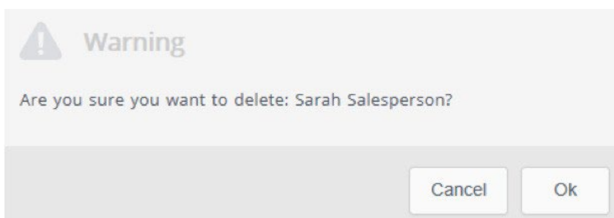
Deleting a User

To delete an existing User, right click on the **User** you wish to delete and select

Delete User Account.



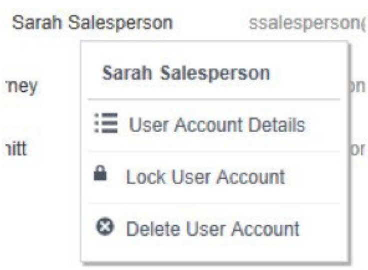
A warning message will appear.



Click **OK** to delete the User.

Managing a User

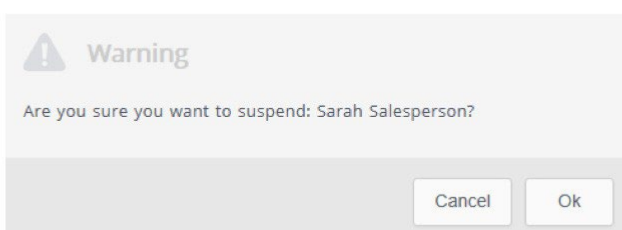
User settings can also be modified after their initial creation. To modify the settings of an existing User, simply right click on the **User** you wish to manage, and click **User Account Details**:



You will then have the option to edit all of the options that you designated during the initial creation of the User.

Temporarily Suspending a User

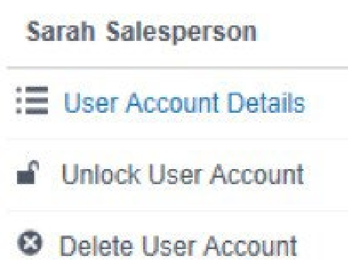
To temporarily suspend, or "lock" a user and prevent them from sending and receiving faxes, right click on the **User** you wish to suspend, and click **Lock User**. The following warning message will be displayed:



Click **OK** to suspend User from sending and receiving faxes. The User will remain in locked status until an authorized Fax Online Administrator unlocks the account.

Locked accounts are noted by a red "lock" icon in the overview portion:

To "unlock" the User, right click on the locked User and select **Unlock User Account**.

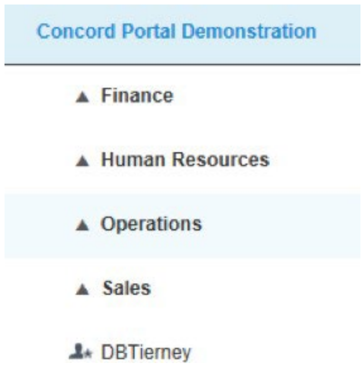


Concord Administrator Settings

Concord Premium Support will provision your initial Account Administrator(s) with Company-level access. Subsequent Administrators can then be created within the Concord Web Portal via a Company-level administrator account. It is important to note that a Company-level administrator can make changes to other Company-level administrators, Department-level administrators, as well as change account settings at the Company, Department, and User levels. It is also possible to restrict administrative rights for a new or existing administrator.

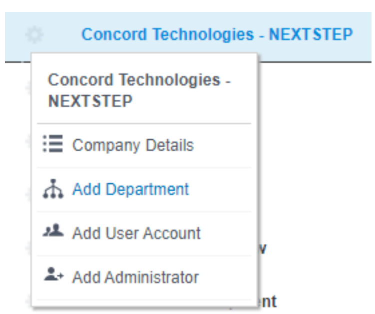
Administrators are visible in the overview of the **Account Administration** section of the Concord Web Portal, noted by a special icon (human silhouette), differentiating it from Departments and Users.

At the bottom portion of the hierarchical overview, all Company-level

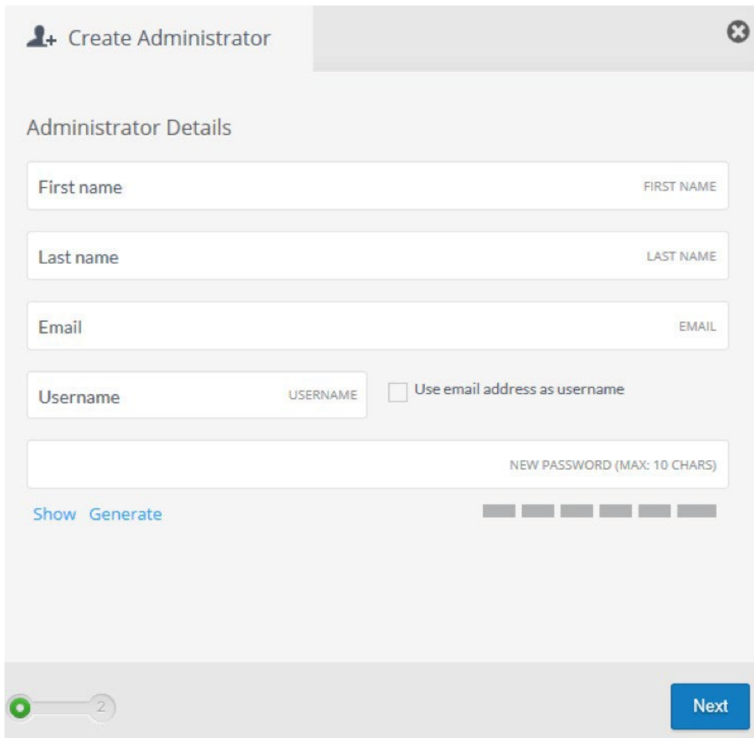


Administrators are listed:

To create a new Administrator, right click on the Company (for a Company-level administrator) or Department (for Department-level administrator), and select **Add Administrator**:



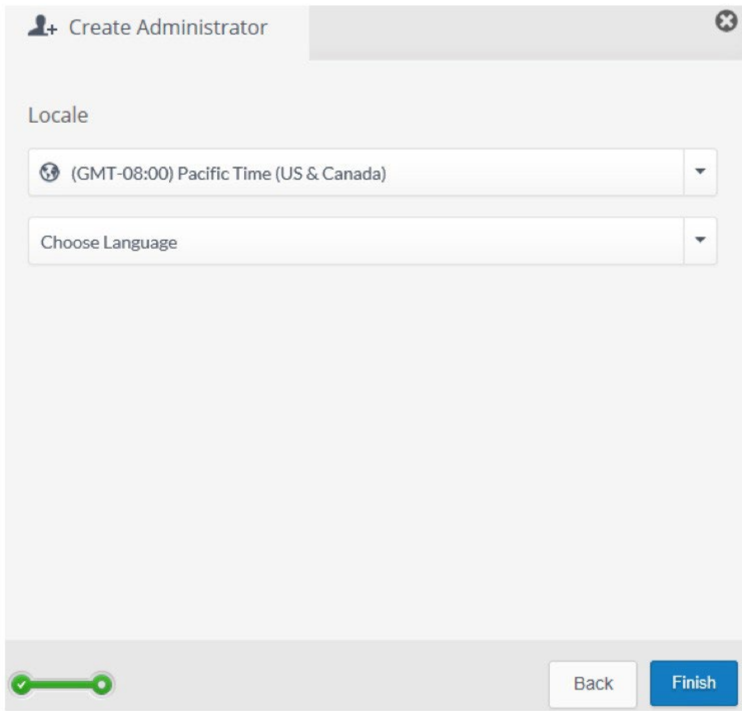
You will then be prompted to complete a series of required fields, to provide relevant information concerning the new Administrator:



Note that passwords must conform to standards dictated in the Company-level or relevant Department-level Security tab.

Click **Next**.

To complete the creation of the administrator, select the T**ime Zone** of the administrator's locale and select your preferred **Language**:

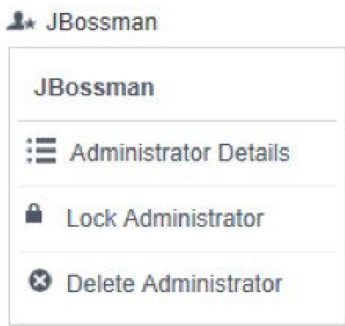


Click **Finish**.

Administrator Rights

Administrators can be created at Company and Department levels. You may choose to set up administrators at a Department level, to restrict their access to certain groups, functions and features. These permissions are managed within the **Account Administration** (Settings / Account Administration) section of the Concord Web Portal.

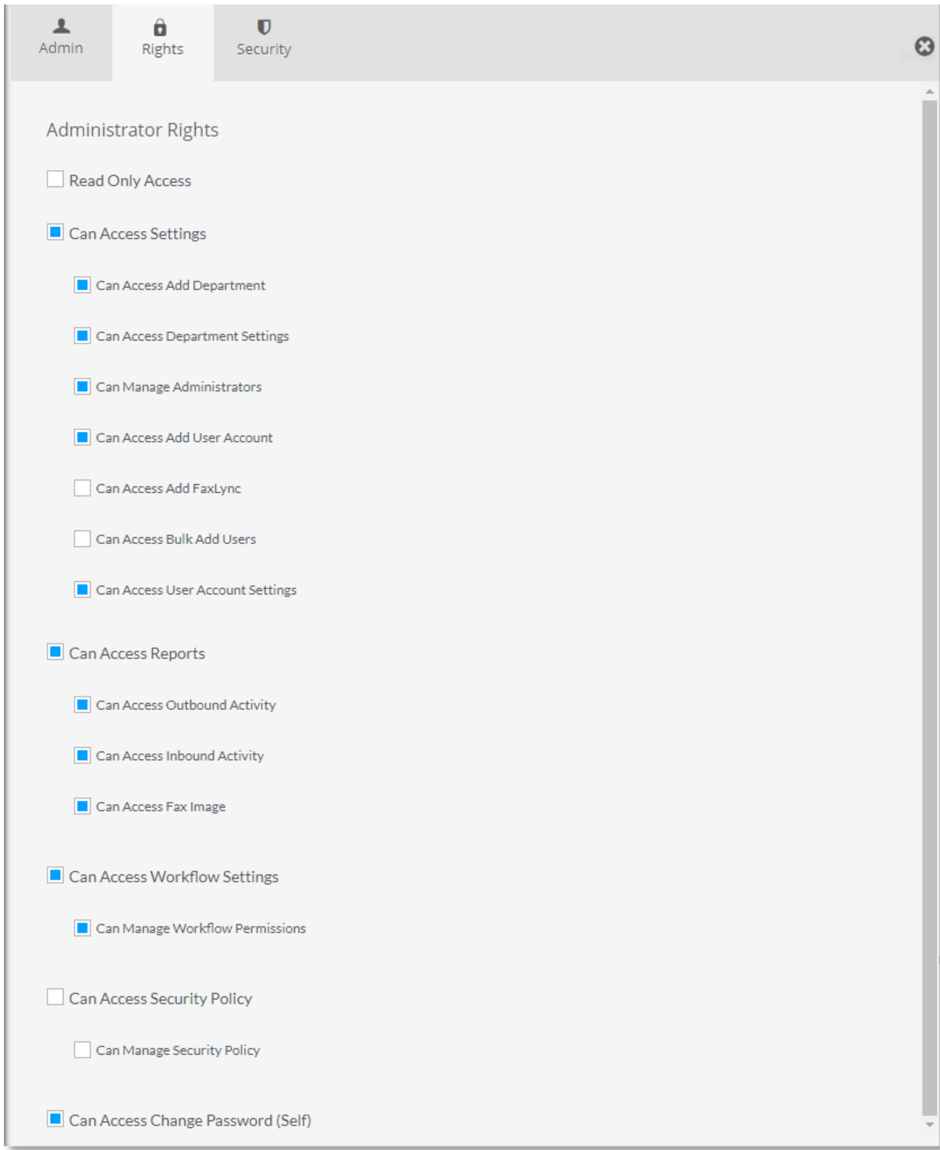
To manage the permissions of an Administrator, right click on the Administrator that you wish to manage and select **Administrator Details**.



The Administrator Details page has three tabs. The first tab has name and contact information for the Administrator, the level (Department) at which they have administrative privileges, as well as their time zone and language preferences.

From the Administrator Details menu bar, click on Rights (the second tab). A list of Administrator Rights is then listed, with check boxes. Select, or de-select the Rights that you want the Administrator to have and click **Save**.

The following Rights can be controlled:



A **Read-Only Administrator** is permitted to view settings and administrative report data but may not make changes to the Company, Departments or Users.

Note that by de-selecting one of the main categories, the list of associated permissions is automatically de-selected. You may add individual Rights back to the Administrator, as desired.

Click **Save** on the top left-hand side of the menu bar.

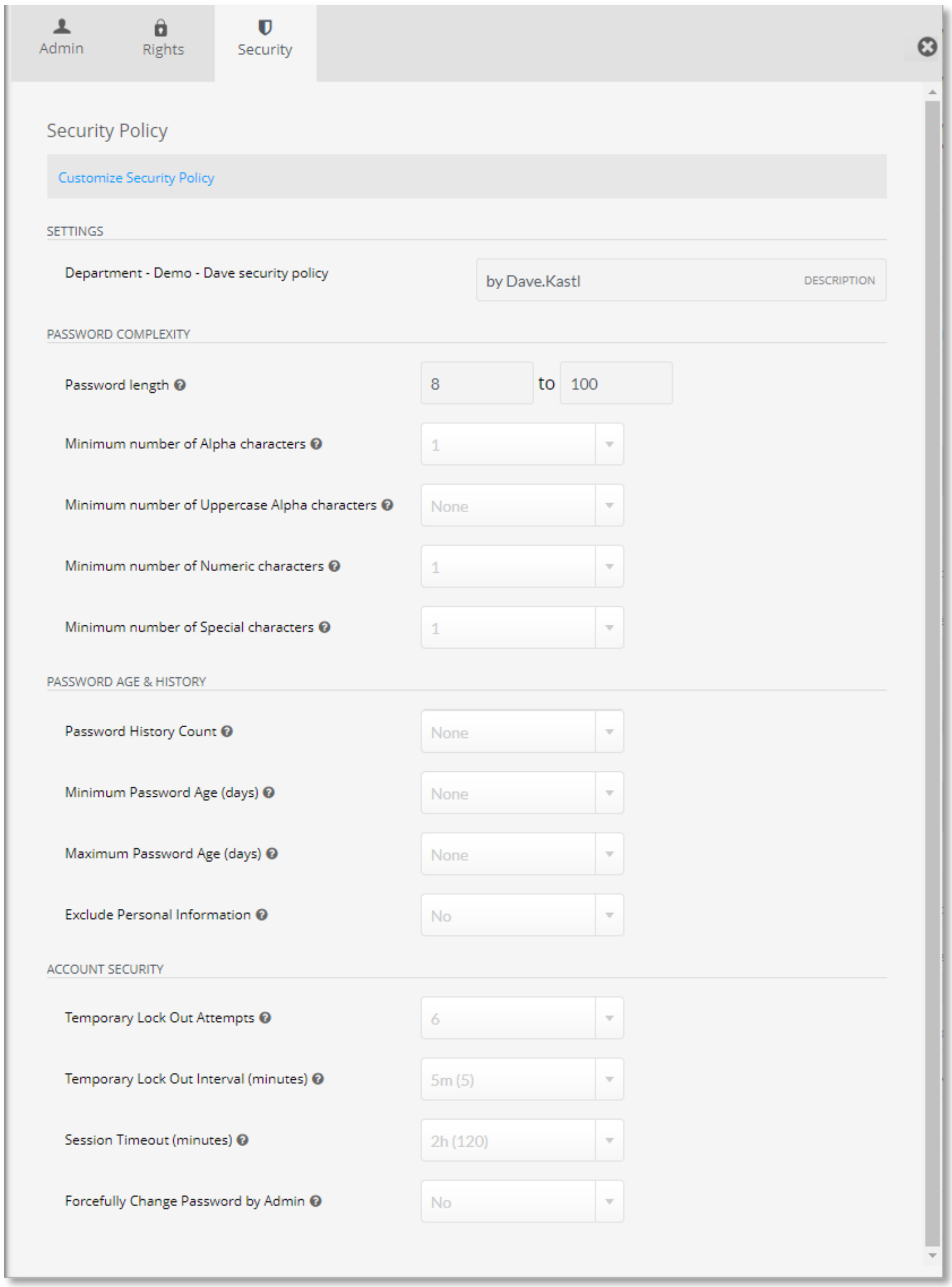
Security Tab

This may be edited for a specific administrator upon creation or after, but is typically managed at the Company or Department level at which the administrator has been added. There are three relevant sections to manage:

Password Complexity: This allows an Administrator to set thresholds for password complexity including minimum length and what characters must be present in the passwords the users are creating.

Password Age and History: This allows an Administrator to set thresholds for how long passwords can exist before being changed and whether users are allowed to reuse passwords or include account information as part of a password.

Account Security: This allows Administrators to set thresholds for lockouts if users are entering incorrect credentials as well as how quickly a session will timeout after a period of inactivity.


Admin
Rights
Security
Security Policy
Customize Security Policy
SETTINGS
Department - Demo - Dave security policy
by Dave.Kastl
DESCRIPTION
PASSWORD COMPLEXITY
Password length
8
to
100
Minimum number of Alpha characters
1
Minimum number of Uppercase Alpha characters
None
Minimum number of Numeric characters
1
Minimum number of Special characters
1
PASSWORD AGE & HISTORY
Password History Count
None
Minimum Password Age (days)
None
Maximum Password Age (days)
None
Exclude Personal Information
No
ACCOUNT SECURITY
Temporary Lock Out Attempts
6
Temporary Lock Out Interval (minutes)
5m (5)
Session Timeout (minutes)
2h (120)
Forcefully Change Password by Admin
No

Number Porting

Concord customers may retain their pre-existing, published, or otherwise established fax numbers by porting their fax numbers to a new carrier servicing Concord's inbound network.

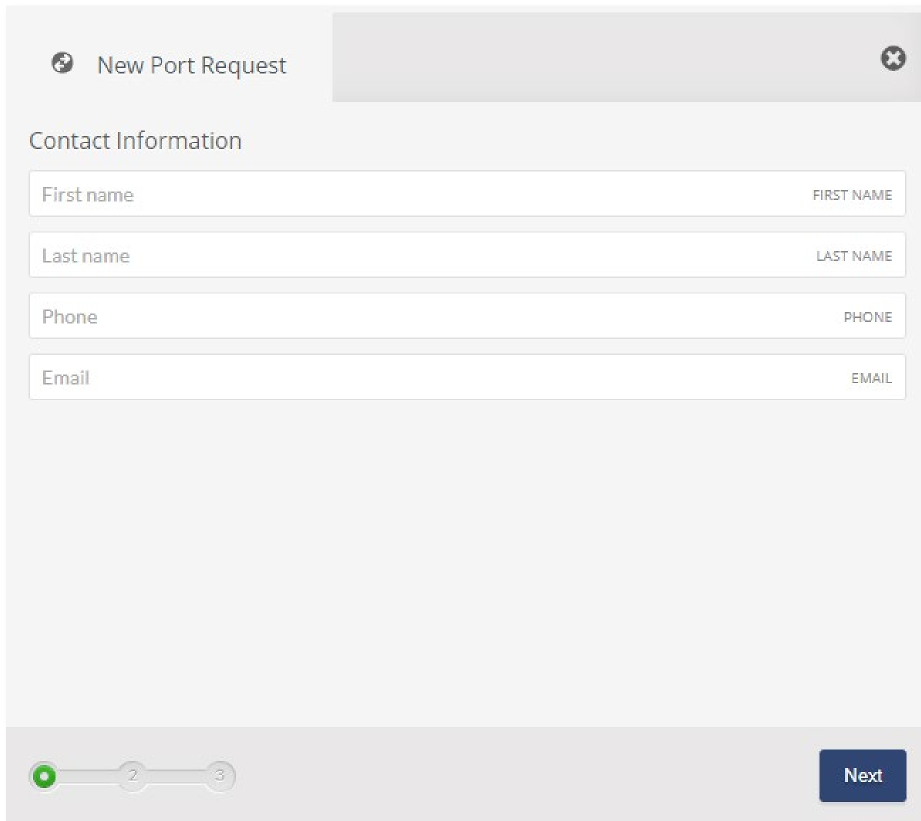
Note that, unless the porting of numbers is expected to be an ongoing activity, you may elect to arrange the number porting directly with Concord Premium Support (premiumsupport@concord.net).

Administrators may initiate new and manage existing port requests in the Number Porting section of the Concord Admin Portal via **Settings/Number Porting**.

Initiating a New Port Request

Click on the icon to **"+New Port Request"**, on the left-side of the screen:

You will then be prompted to enter contact information, should Concord need to request further information in order to complete the port.

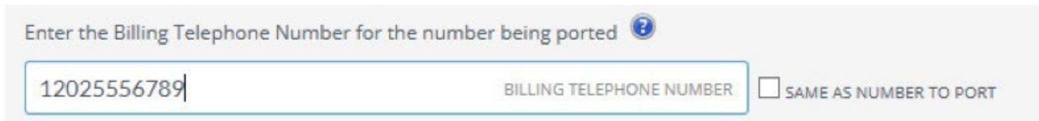


Click **Next**.

Enter the Country Code and Subscriber Number (porting number) in the noted fields.

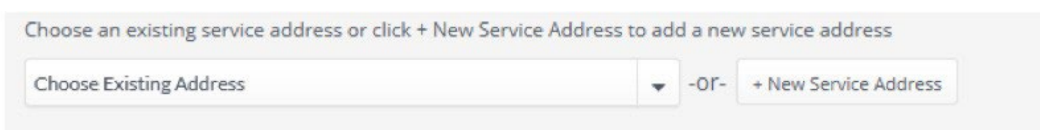
Concord TECHNOLOGIES

Enter the **Billing Telephone Number*** in the noted field. If the Billing Telephone Number is the same number that is porting, check the appropriate box.



*A note on the **Billing Telephone Number**, or **BTN -** Each phone or fax number is assigned a BTN by the carrier. It shares the same 10-digit formatting as a phone number (area code + 7-digit local number). The BTN may not be obvious, or self-evident, and should always be confirmed by the losing carrier. The losing carrier will provide the user with a Customer Service Record, or CSR. The Customer Service Record includes the BTN, the registered name of the company or organization, and the service address of the porting number. Telephone privacy and security policies prevent anyone but the owner of the number *from obtaining the Billing Telephone Number.*

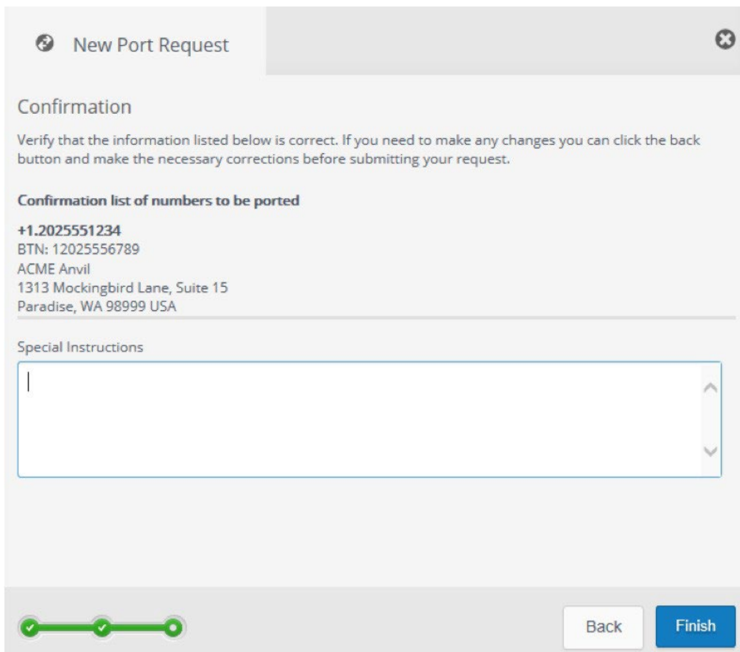
Click on **+ New Service Address*** to add the service address associated with the porting number.



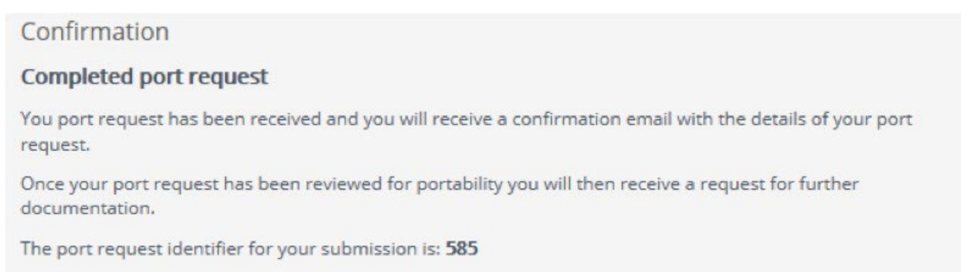
*Note that the service address may differ from the billing address. *Your carrier will be able to confirm the Service Address of the porting number. Again, this information is contained in the Customer Service Record.*

If the Billing Telephone Number, Name, or Address information does not match the information contained in the Customer Service Record (CSR), the port can be rejected by the losing carrier. To prevent unnecessary rejections and delays, Concord asks that you include a CSR with every port request.

After entering the Name and Address information, click **Next**. A summary of your request will be displayed. Confirm that all of the request information is correct. If there are special instructions that you would like to include with your request, include them before clicking **Finish**.



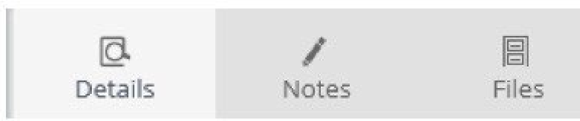
You will then receive a pop-up confirming that your port request has been successfully submitted to Concord.



Note that a tracking number will be provided for future reference.

You will now need to attach a valid Letter-of-Authorization and current Customer Service Record. ***Concord cannot port your number(s) without this documentation!***

To add files to your port request, click on the icon. You will now see three tabs on the right-hand side of the Web Portal:



Click on **Files** to upload the necessary documents.

If you would like to leave a note for the Concord porting team, click on the **Notes** tab. Progress notes and updates from the Concord porting team will also be displayed in this section.

Tracking a Current Port

By clicking on **Number Porting** under the **Settings** menu option, a list of current ports will be displayed.

Port Requests

	ID	Business Name	Created
	585	ACME Anvil	2/27/2014

<< < 1 > >> Go to page: 1 Row count: 15

You can see an expanded view of the details of the port, by clicking on . You are able to make changes to this information, however, once your port is in process, you will need to contact Concord Premium Support if any of the changes need to be communicated to the losing or winning carriers (e.g., a new address, BTN, etc.).

By clicking on the Notes tab, you can read updated notes left by the Concord porting team, as well as leave notes for Concord in order to assist with the porting process. You are also able to attach additional documents by clicking on the **Files** tab.

The **ID** (second column) lists the tracking ID assigned by Concord.

The **Business Name** (third column) lists the name of the company associated with the port.

Created (fourth column) lists the date the port initiated.

FOC, or Firm Order Commit lists the scheduled port date, agreed to by both the winning and losing carriers. When an FOC date is established, Concord will update the order with this date. Further, the porting contact will also receive an email message from Concord.

Completed lists the date the port was completed, when a port has completed.

Status. The status of each port request is displayed in the far-right column. The following status designations can be displayed:

- **New -** The default status for all new requests. The Concord porting team has not taken additional steps to process the port with the losing carrier.
- **Pending** - Concord has reviewed the request and begun communication with the losing carrier
- **In Progress** – Similar to Pending. Indicates that the losing carrier has requested additional information.
- **Scheduled** – A port date has been committed to by the losing and winning carriers.
- **Rejected** – The losing carrier has rejected the request. Specific
- reasons will be included in the **Notes** section.

- **Cancelled** – The request has been cancelled by the Concord porting team.
- **Completed** – The number has ported to Concord’s network.

Concord will update your port order a minimum of three times. Each of these updates are accompanied by an email to requesting party.

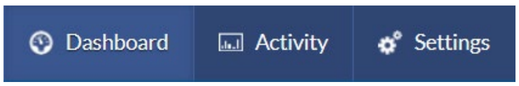
- Concord will update requesting party with an estimated port date upon submission of the request to the losing carrier. Provided all information contained in the Letter-of-Authorization and Customer Service Record agree with the information on record with the losing carrier, this estimated date will most likely be confirmed.
- Concord will update requesting party when the port date has been confirmed and committed to by the losing and winning carriers.
- Concord will update requesting party when the port has successfully completed. Each port is tested by Concord, confirming that inbound traffic is routing through the Concord network.

In the event your carrier has rejected the port request, Concord will update the status of the request in the Web Portal, as well as send an email to the requesting party indicating the required action necessary to proceed with porting the number.

Most ports complete within ten (10) business days. Note that if there is any rejection, the resubmission process re-starts at the beginning. To avoid delays, always ensure that the information contained in the LOA and CSR is correct, confirming it with the losing carrier.

Reports

To access the reports pertaining to inbound and outbound fax traffic activity, click on Activity on the top menu bar.



From there, you will have the choice of four options:

- **Outbound Activity**
- **Inbound Activity**
- **Accounting**
- **Reports**

Select the option you wish to access.

Outbound Activity

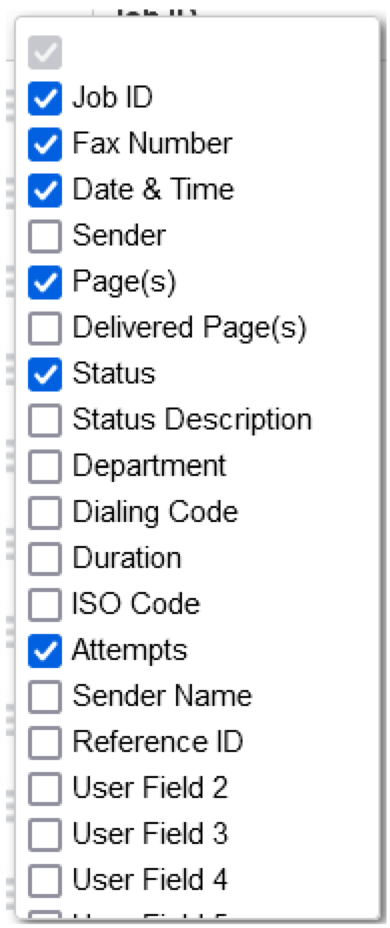
By selecting **Outbound Activity**, you can review outbound fax activity logs for the users and department that you have access to.

First, you can select the Date Range for the time period that you are interested in viewing. You may further refine your search by selecting a variety of filters (such as by Department, recipient fax number, Job ID, etc.). If needed, you can add multiple filters by clicking on the "plus" symbol: 

You can apply an additional layer of filtering according to the fax delivery "Status" of the Outbound Activity (e.g., Success, Failed, In Progress).

When you have refined your search options to your desired values, click **Search**. All outbound fax activity within your selected ranges and filters will be returned.

You can select which columns of data you want to display by right-clicking on the column headers and checking the boxes that correspond to the columns you wish to see.



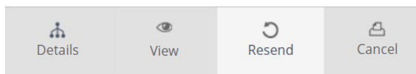
You are also able to select the number of records you would like to see on each page, by selecting different values under Row Count (10, 15, 20, 50, 100, 250, 500 and 1000).

icon in the left column of the list of fax jobs. The list of Activity Details is extensive, including information on the sender and recipient, status of each delivery attempt and other detailed transmission data pertaining to the outbound fax.

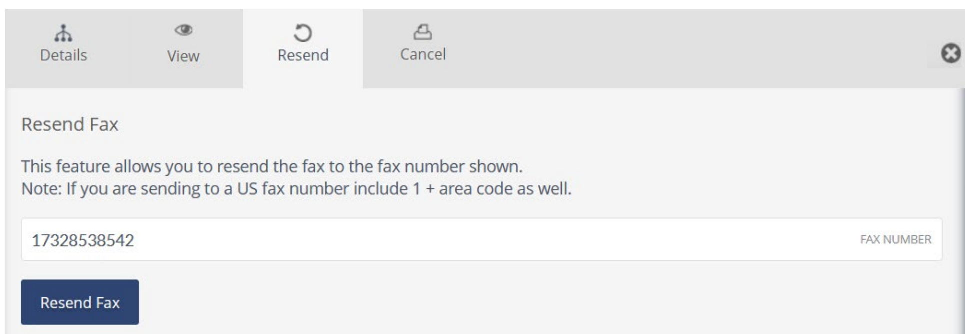
The Job Details may also include the ability to view the outbound document, depending on retention configuration and the administrator's rights to access the fax content.

Resending a Fax from the Concord Admin Portal

From the Resend tab of the Activity Details page, you will see the option to resend the fax. Click **Resend**.



You will now have the option to change the recipient fax number. By default, the original recipient fax number will be pre-populated.



If you wish to change the recipient fax number, enter the new recipient number into the **Fax Number** field. If the correct number is listed in the **Fax Number** field, click **Resend Fax**. Your fax will then be submitted, and a new job identifier will be generated.

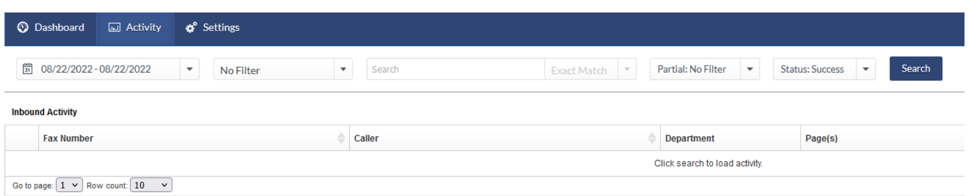
Inbound Activity

By selecting **Inbound Activity**, you are able review inbound fax activity including successful and failed inbound calls and the post-receipt delivery of fax messages to customer endpoints such as email, FTP or Webservices.

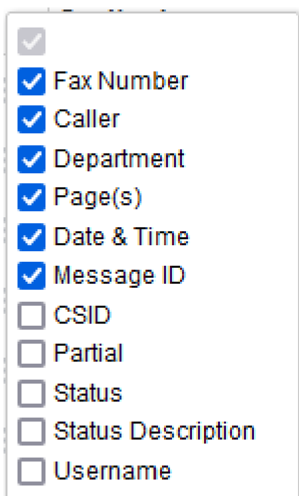
First, select the **Date Range** for the time period that you are interested in viewing. You may further refine your search by selecting a variety of filters (e.g., Department, Fax Number, etc.).

You can also opt to include searching based on status. This may include updating the Partial filter to search for messages that may be considered partial receipts, as well as using the Status filter to search for inbound dials that may have failed to connect and deliver pages.

When you have refined your search options to your desired values, click **Search**. All inbound fax activity within your selected ranges and filters will be returned.



As with Outbound, you can select which columns of data you want to display by right-clicking on the column headers and checking the boxes that correspond to the columns you wish to see.



You are also able to select the number of records you would like to see on each page, by selecting different values under Row Count (10, 15, 20, 50, 100, 250, 500 and 1000).

For job details, click on the Details icon in the left column of the list of fax jobs. The list of Activity Details includes information regarding the Caller ID of the sender (**Caller**), the Call Station Identifier (**Fax Number**), as well as the number of pages and duration of the transmission.

The Job Details section also includes the status of the fax transfer from Concord to the customer destination associated with that fax number. This may include email, FTP, webservices or may display transfer to Concord's NEXTSTEP portal service, all depending on configuration.

This example shows the receipt of the fax and delivery to an email address:

Message Events

Date	Event Type	Receiving Address	Status
8/22/2022 2:48:39 PM	Message received		Success
8/22/2022 2:48:43 PM	Message forwarded	jmcfadden@concord.net	Success

This example shows the receipt of the fax, delivery to Concord's Inbound Webservices API host and ultimate download and delete via webservices API:'

Message Events

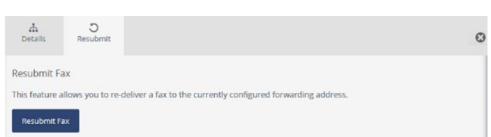
Date	Event Type	Receiving Address	Status
8/22/2022 2:48:37 PM	Message received		Success
8/22/2022 2:48:42 PM	Message forwarded	inbound web service	Success
8/22/2022 2:51:20 PM	Message retrieved	71.125.73.51	Success
8/22/2022 2:51:22 PM	Message deleted	71.125.73.51	Success

Resubmit a Received Fax from the Concord Admin Portal

From the **Activity Details** page, you will have the ability to resubmit inbound faxes to the ***authorized destination(s) associated with the recipient***. This means Concord will resend the inbound fax to whatever routing is associated with that fax number, as long as the document is still retained.

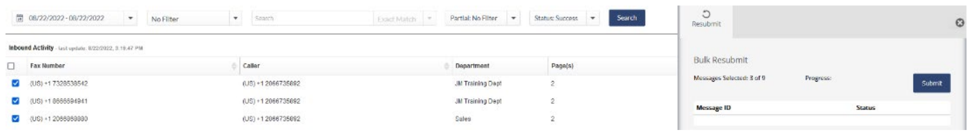
From the second tab of the Activity Details page, you will see the option to resubmit the fax. Click **Resubmit**.

You will then see the following message which you must OK in order for the fax to be resubmitted.



Click **Resubmit Fax**.

You also have the option to resubmit multiple inbound fax messages to their respective routing destinations by clicking the Bulk Resubmit button and choosing which jobs you wish to resubmit to their original routing destination(s).



Accounting

Below Outbound Activity and Inbound Activity, you will see the option for Accounting. Note that this is available to Account-level administrators only. Click on **Accounting** to generate and review Call Detail Records, or CDRs. CDRs contain the details of all billable inbound and outbound activity by default. CDR information is available for a period of six (6) months. Should you need to retain CDR information for a longer period of time, you will need to store Call Detail Records locally.

Call Detail Records are generated *only in months where there is either inbound or outbound activity*. Records are generated at the conclusion of each calendar month. Should you need CDR information before the end of the month, you may generate Call Detail Records for the current month and a file will be generated for each day of the current month.

Call Detail Records are formatted as comma separated, ".csv" files. They can be sorted by column and used to reconcile usage and costs for different Departments and Users. While CDRs contain event information, actual billing information (charges for sent pages, etc.) are not included in the file.

Reports

Concord provides performance and analytical summary reports which can be accessed from the Activity drop down by clicking **Reports.** These are divided according to the direction of the fax traffic flow, so you can review your outbound and inbound traffic distinctly.

These reports provide for a rolling 90 days' worth of activity related data and charts. Multiple filters may be applied according to the function of a given report to help isolate the time and/or entity you wish to report on.

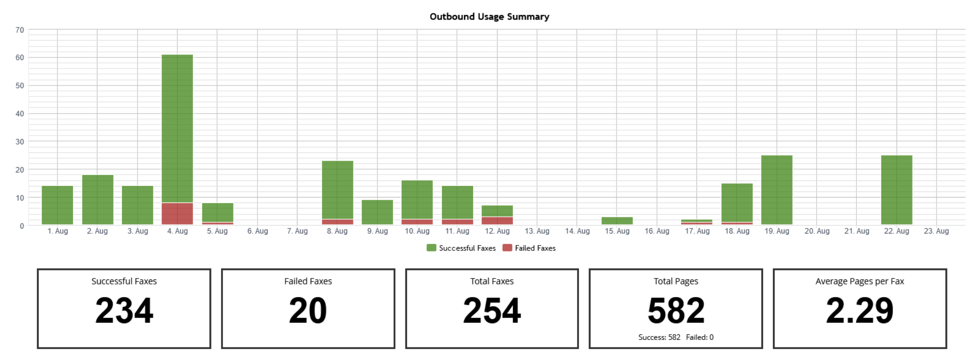
Outbound Reports

Beginning with Outbound, you have the option of navigating to the following reports:

- **Average Time-to-First-Dial:** This provides data related to the amount of time messages spent processing within Concord's platform, between the time of receipt and the time Concord made the first fax delivery attempt.
- **Average Total Completion Time:** This provides the total time related to the processing, retry queuing and fax connection for outbound messages in a given period.
- **Frequent Busy Destinations:** This report provides a “"Top 50” list of recipient fax numbers that are found to produce Busy tone when messages are sent to these numbers and the total number of Busy attempts for each fax number.
- **Highest Volume Destinations:** This provides a “Top 50” list of fax numbers that users and/or applications in your organization are sending faxes to, along with total fax counts for each number.
- **Outbound Failures:** This report offers a visual breakdown of fax delivery errors according to error code (Busy, No Answer, Voice

Answer, etc) along with totals for each error type encountered during the selected period.

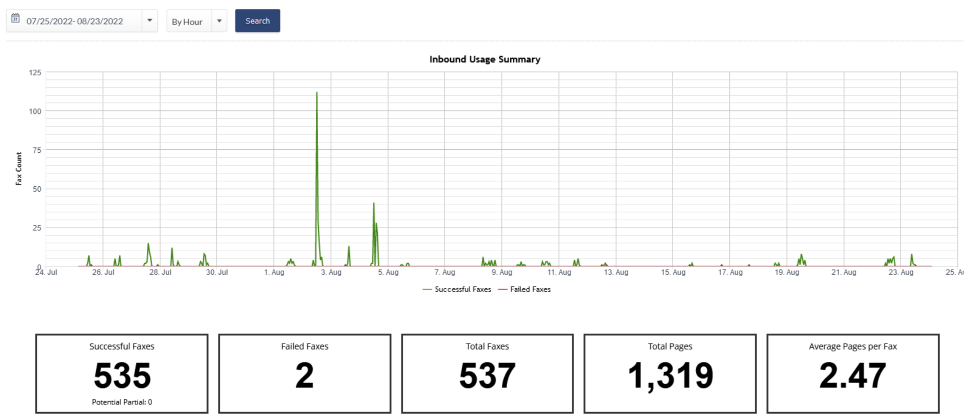
- **Usage Summary:** The Outbound Usage Summary provides an overview of fax traffic for a given interval, including successful and failed fax count, total pages and average page count per transmission.



Inbound Reports

- Av**erage Time-to-First Forward:** This report provides metrics on the time Concord spent processing a message following fax receipt, to prepare the message for delivery to a customer's destination endpoint for that fax number (email, FTP, webservices, etc.)
- **Highest Volume Numbers:** This provides a “Top 50” list of a customer’s most active inbound fax numbers and data related to successful and failed transmissions on those numbers.
- **Potential Partial Faxes:** This report displays metrics related to whether or not messages may have been partially received. This includes an overall Partial Rate percentage of total traffic. Note that these messages are considered "Potential Partials” as a fax may be fully received in terms of pages, but may not receive the proper termination that allows Concord to confirm complete receipt.

- **Transmission Failures:** This report provides metrics on failed inbound fax receipt including inbound calls that fail to transmit fax data as well as messages deemed potential partials.
- **Usage Summary:** The Inbound Usage Summary provides an overview of inbound traffic for a given period, including successfully received and failed fax transmissions, total pages and the average page count per fax message.



Concord Error Messages | Enhanced Descriptions

Busy

"Busy" indicates that the called number (phone line) is already in use or engaged.

Exceeded ECM Retransmit

"Exceeded ECM Retransmit" indicates the call was answered by a fax device and connected using ECM or Error Correction Mode. The failed attempt required an excessive amount of data to be retransmitted to the receiving device prior to confirming acknowledgment of successful transmission completion. The call was aborted to allow a retry or new attempt to get a better connection.

Fast Busy

"Fast Busy" indicates that there was no available path to the receiving fax number. This normally indicates that the destination is currently not reachable. This may be caused by an outage, severe weather conditions, circuit overloads, or other conditions. In many cases, “Fast Busy” conditions are temporary. Please confirm the validity of the fax number by calling from a handset device. If the recipient answers with a fax tone, but a fax fails when sending through Concord, contact customer service for further assistance.

General Error

"General Error" indicates that another uncommon error not listed has occurred, resulting in the failure to transmit the fax. Please retry the fax job. If you receive the same error, please contact Concord Premium Support for further assistance.

Invalid Attachment

"Invalid Attachment" indicates the attachment is not one of the file types listed below, the document should be converted into a supported format.

- TIF/TIFF (Tagged Image File Format) G3/G4 ***Black & White only***.
- TXT (Plain Text)
- RTF (Rich Text Format)
- DOC, DOCX (Microsoft Windows - Word 97-2019 and Office 365
- XLS, XLSX (Microsoft Windows - Excel 97-2019 and Office 365
- PPT, PPTX Windows PowerPoint 97-2019 & Office 365
- PDF (Adobe Portable Document Format) - (v1.0-v1.7)
- VSD (Microsoft Visio Windows - Visio 2000-2016)
- JPG/JPEG (Joint Photographic Experts Group - **Strongly discouraged / Not Advisable.**
- GIF (Graphics Interchange Format) **- Strongly discouraged / Not Advisable.**
- PNG (Portable Network Graphic) - **Strongly discouraged / Not Advisable.**

Invalid Fax Number

"Invalid Fax Number" indicates a problem with the destination fax number. You must address the fax request with the full fax number, including area code (including Country Code for international fax) Please correct the fax number and try again.

Job Cancelled

"Job Cancelled" indicates that the job or recipient number was cancelled or the set time for delivery expired.

Negotiation Failed

"Negotiation Failed" indicates the call was answered by a fax device but during the initial training phase of the call, communication between the fax transmitter and the receiving fax device failed or the two devices could not agree on the parameters to be used for the call. This often indicates a phone line quality issue and may occur at the beginning of the fax transmission, or during the fax transmission between pages on a multi-page fax.

No Answer

"No Answer" indicates that the line was not picked up (answered) by a fax machine or person before timing out. The timeout is sufficient to ensure at a minimum of 58 standard rings, which is actually a duration of 55 seconds.

No Attachment

"No Attachment" Indicates that there was no document attached to the fax request. You must attach the document you wish to fax in an accepted format, such as .DOC or .PDF. Please see https://concord.net/cloud-fax/cloud-fax-faq/ for a comprehensive list of acceptable file types.

Not a Fax Machine

"Not a fax machine" indicates that a fax device has failed to answer the call. Specifically, fax tones or the fax signal from a remote machine has not been detected. This may happen for a number of reasons, including but not limited to, a wrong number, a machine not configured to automatically answer, or a device that has stopped answering because it is out of paper or has a paper jam.

Sit-Tone / Operator Msg

"Sit-Tone / Operator Msg" indicates that the call was intercepted by the special situation information tones followed by an operator message, examples include "The number you have dialed is disconnected or is no longer in service. Please check the listing and try your call again.", "The number you have dialed has been changed...the new number is...XXX-XXX-XXXX", "All circuits are currently busy, please try your call again later". "Operator Msg" indicates the same issue however the special situation information tones were not detected.

Transmission Failed

"Transmission Failed" indicates the receiving fax machine has answered and connected but the fax was not able to be fully and successfully transmitted. This can be caused by line quality issues, fax device issues, the sharing of phone line with other devices such as credit card processing terminals. Temporary conditions such as severe weather conditions in the destination area can also cause transmissions failures.

Unauthorized Sending Address

"Unauthorized Sending Address" indicates that the email address from which an email-to-fax request was sent is not registered with Concord. The origin email address must be added as a valid sender via the Concord Web Portal. Please login to the Concord Web Portal to add the email address. If you are unable to do so or need instruction with this process, please contact Premium Support for assistance.

Voice Answer

"Voice Answer" indicates that either a person or voicemail message answered the call.

Getting Help

Concord Technologies Premium Support

Customer service hours are Monday – Friday from 9:00 AM to 9:00 PM EST.

Contact Information (Technical Support):

Email: premiumsupport@concord.net.

Phone: +1 (206) 441-3346

After-hours Emergency Support (For critical issues only): +1 (206) 467-4068