

# TSI SmartFax<sup>SM</sup>

## administrator functions fax reference guide

### Welcome to TSI SmartFax

Thank you for using TSI SmartFax. This brief reference guide will assist you in utilizing our fax solution for receiving and sending faxes from your desktop.

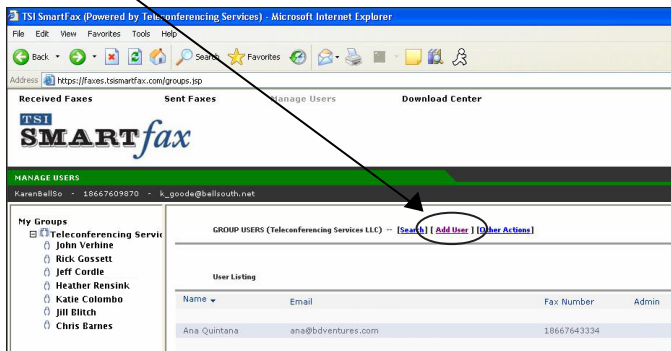
### Manage Users

If you are the primary account holder or an administrator, this menu area allows you to add and remove users from your account, and to modify their settings. As a user with administrative rights, you have the ability to:

- Provision New Users
- Create Sub Groups
- Re-Parent users to another Sub Group
- View all activity of users in your Group
- Edit Preferences for users in your Group

### Adding a User

To Add a New User first Click on Manage Users along the top menu, then select Add a User.



- Click on Manage Users, then add a user.
- New numbers will be waiting in the drop down menu. Call if you need additional fax numbers.
- Complete the user information. Assign the same password (i.e. zip code, welcome, 1234, etc.) for everyone. It will be easier to manage.
- Make sure you select the appropriate Time Zone.
- Click on the Create a User link in the bottom right hand corner to save.

*Note: There is a Bulk Upload function available for lists of new users. Ask your representative for details.*

### Creating a New Group and Re-Parenting

#### Creating Subgroups

- To create a new group click on Other Actions and select Add a Subgroup.
- Name the new group and click OK.

#### Re-Parenting to a different Group

- Re-Parent a user to a different Group. Select the Edit icon for the user.
- The user's preference screen will open up. Select Re-Parent User at the bottom of the page.
- Select the group you want to move the user to. Click OK.

### Blocking Numbers

TSI SmartFax allows you to block calls from specific callers for an individual user or for a group.

To block or unblock calls, do the following:

- Login to your account, select Received Faxes, and click on Manage Blocks.
- If you are an administrator, you can block calls to another user by selecting Manage Users and clicking on the Manage Blocks icon next to that user.\*
- A form will appear at the bottom of the screen. Enter up to 5 numbers (separated by spaces or commas) to block or unblock. Note that all numbers must share the same country code.\*\*
- Blocks take effect within 4 hours.

\* To block calls to all users in a group, select Other Actions and choose Block or Unblock Numbers for All Users.

\*\* Enter the country code for the numbers being blocked. For example, the country code for the United States is 1, and the country code for the United Kingdom is 44. Do not enter the name of the country.

### View Activity

As an administrator, you can view activity for a Group or for all users. Sent Faxes for all users or for Sub-Groups allows the Administrator to view received or sent activity for all users or Sub-Group. You can re-send faxes to email to view document.

- Click on Other Actions.
- Select View Sent Faxes for this Group or view Received Faxes for this Group.

Note: You can re-direct Received Faxes to another recipient only when logged in as that user.

### Need Help?

Call Customer Service: 1-888-332-9435

Email: Support@TSISmartFax.com