

Creating and adding a fax cover sheet within 4-Sight FAX

Table of Contents:

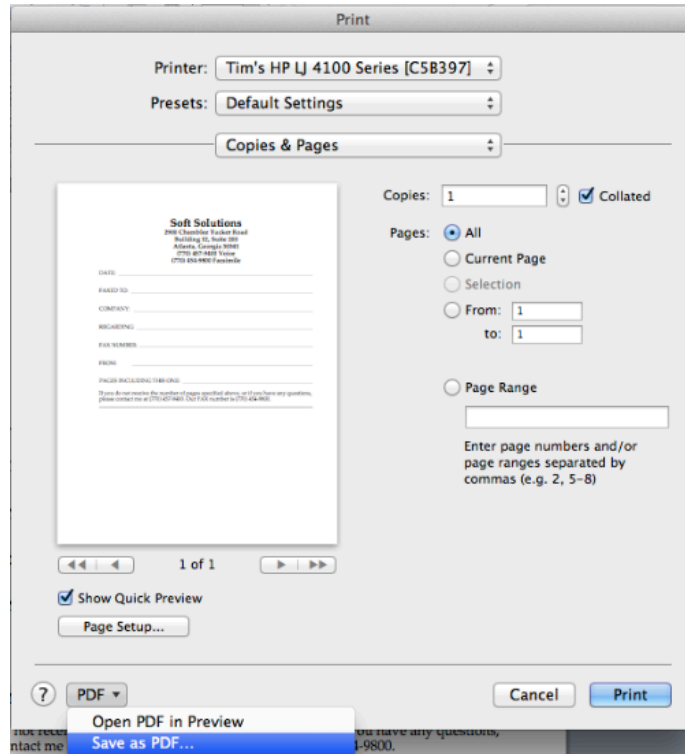
#	Topic	Page#
1	Create your cover page template	1
2	Save your cover page template into a PDF file	1, 2
3	Transfer your PDF cover page file to the 4-Sight FAX Server	2, 3
4	Assign the Fax Cover Page within the 4-Sight FAX Server program	3, 4
5	Edit the Cover Page to complete the field assignments	4, 5
6	Select, Drag and Drop the Cover Page fields onto the template	5 - 8
7	Save the edited file	8
8	Access the cover page from the 4-Sight FAX Client software	8

1. Create your cover page template

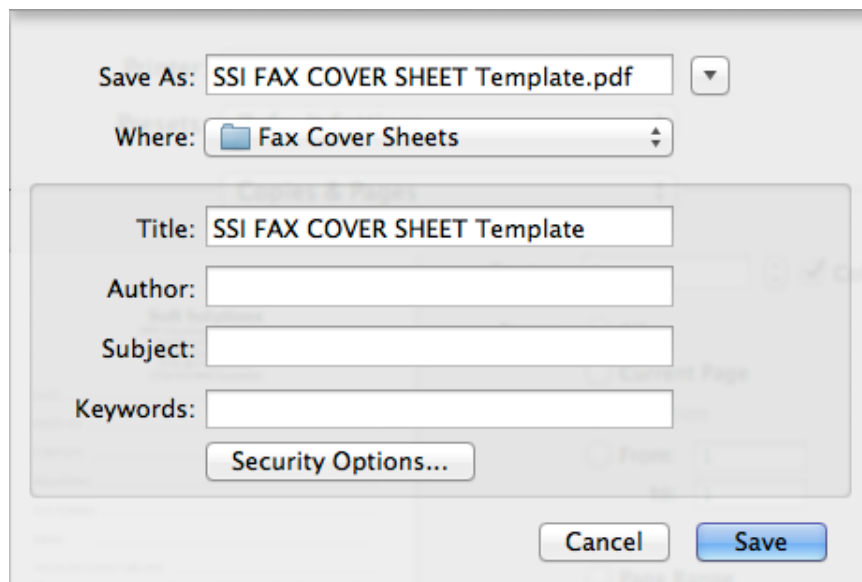
- a. Use a publishing program, such as MS Word, to create your template.
 - i. Consider existing cover sheets as a basis for new cover sheet.
 - ii. Include company information, logos, confidentiality notices, etc.
- b. This cover page is a template. Adding the data fields will be shown in step 7.

2. Save your cover page template into a PDF file

- a. Select Print from the program Menu (see below)

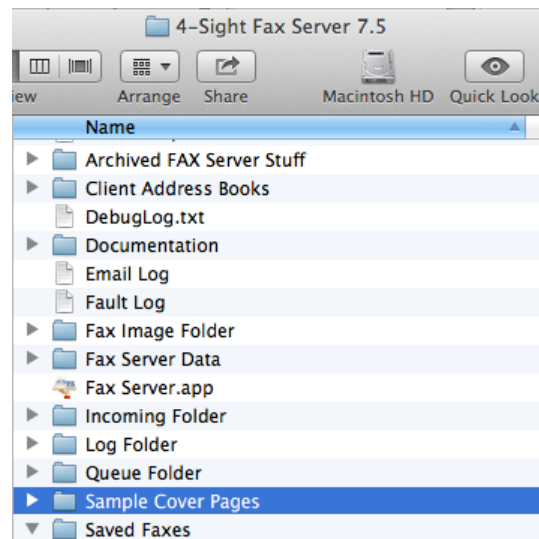


- b. Then choose the PDF option and name the file (see below).



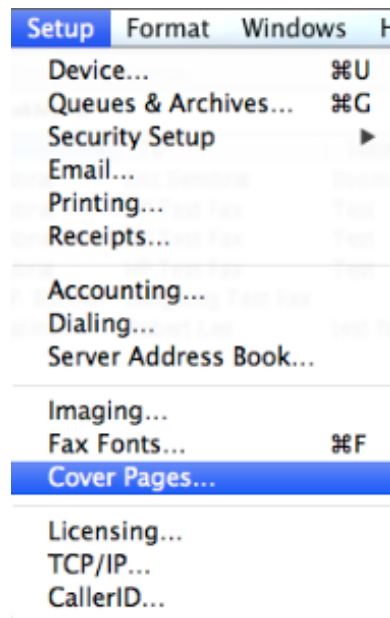
3. Transfer your PDF cover page file to the 4-Sight FAX Server

- a. Store file in the 4-Sight FAX Server 7.x -> Sample Cover Pages Folder (see below).

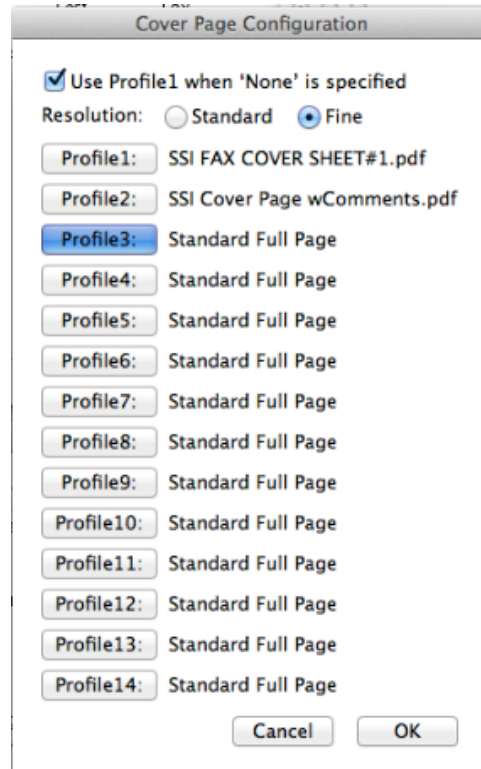


4. Assign the Fax Cover Page within the 4-Sight FAX Server program

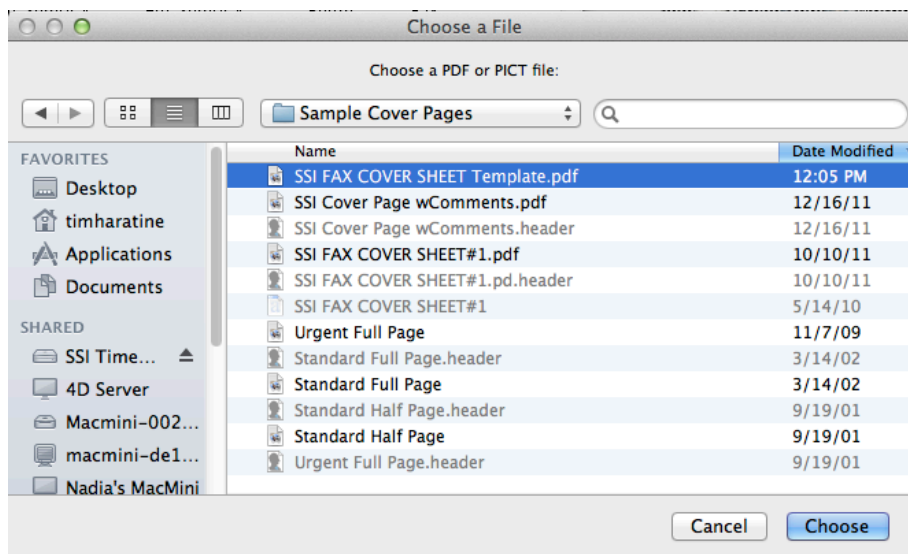
- a. Go to the Setup -> Cover Pages option (see below):



- b. Click on the first available Cover Page Profile button (see below)

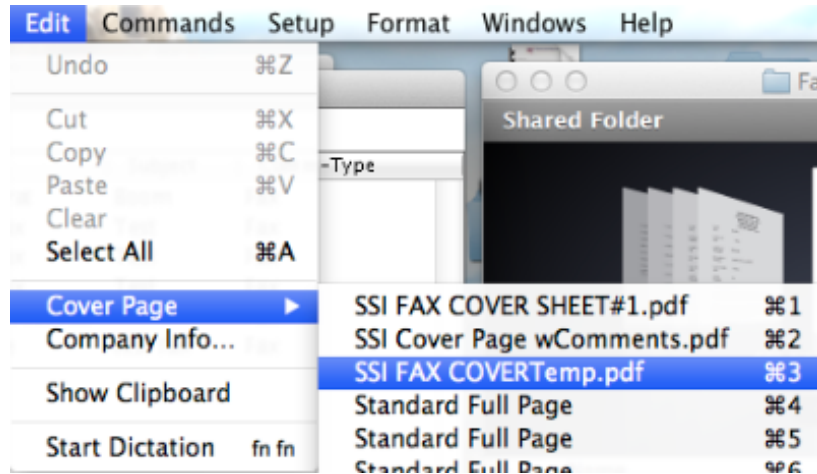


- c. Locate the Cover page created and select it (see below).



5. Edit the Cover Page to complete the field assignments:

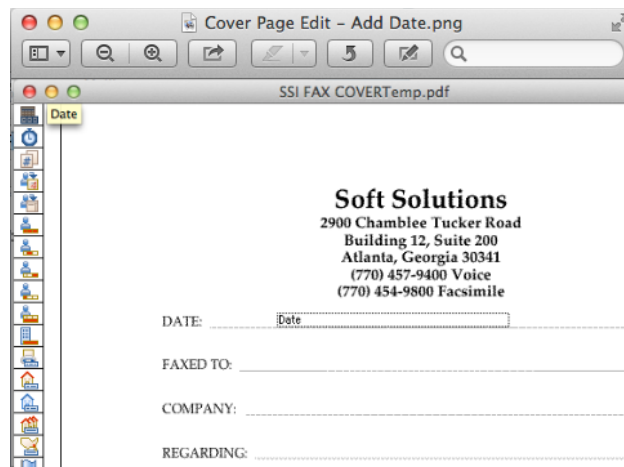
- a. Select the Edit Menu. Then select the “Cover Page” menu item and select the cover page you just created that you want to assign fields within (see below).



6. **Select, Drag and Drop the Cover Page fields.** For each field, it will be necessary for you to select, drag and drop the appropriate field icon on to the cover page template.

The following examples show adding common fields to the cover page:

- a. Adding the Date field (see below):



- b. Adding the Recipient (Faxed To) field (see below):

Soft Solutions
 2900 Chamblee Tucker Road
 Building 12, Suite 200
 Atlanta, Georgia 30341
 (770) 457-9400 Voice
 (770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

c. Adding the Company field (see below):

Soft Solutions
 2900 Chamblee Tucker Road
 Building 12, Suite 200
 Atlanta, Georgia 30341
 (770) 457-9400 Voice
 (770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

d. Adding the Subject Field (see below):

Soft Solutions
 2900 Chamblee Tucker Road
 Building 12, Suite 200
 Atlanta, Georgia 30341
 (770) 457-9400 Voice
 (770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

REGARDING:

e. Adding the Fax # field (see below):

Cover Page Edit - Add Fax#.png

SSI FAX COVERTemp.pdf

Soft Solutions
 2900 Chamblee Tucker Road
 Building 12, Suite 200
 Atlanta, Georgia 30341
 (770) 457-9400 Voice
 (770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

REGARDING:

FAX NUMBER:

Fax Number

f. Adding the From field (see below):

Cover Page Edit - Add From.png

SSI FAX COVERTemp.pdf

Soft Solutions
 2900 Chamblee Tucker Road
 Building 12, Suite 200
 Atlanta, Georgia 30341
 (770) 457-9400 Voice
 (770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

REGARDING:

FAX NUMBER:

FROM:

From

g. Adding the # Pages field (see below):

SSI FAX COVERTemp.pdf

Soft Solutions
 2900 Chamblee Tucker Road
 Building 12, Suite 200
 Atlanta, Georgia 30341
 (770) 457-9400 Voice
 (770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

REGARDING:

FAX NUMBER:

FROM:

PAGES INCLUDING THIS ONE:

Pages

- h. Adding the Comments field (see below):

SSI FAX COVERTemp.pdf

Soft Solutions
2900 Chamblee Tucker Road
Building 12, Suite 200
Atlanta, Georgia 30341
(770) 457-9400 Voice
(770) 454-9800 Facsimile

DATE:

FAXED TO:

COMPANY:

REGARDING:

FAX NUMBER:

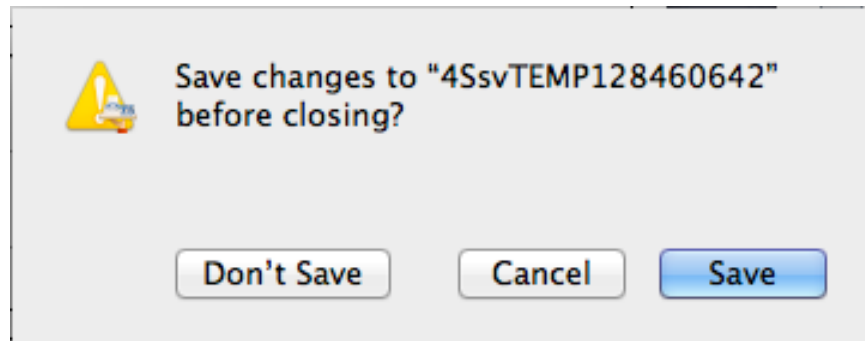
FROM:

PAGES INCLUDING THIS ONE:

If you do not receive the number of pages specified above, or if you have any questions, please contact me at (770) 457-9400. Our FAX number is (770) 454-9800.

Comments

7. When exiting the Cover Page editor, you will be prompted to **save the edited file**. Click on Save (FYI, the file name may appear different, but it will be ok). See below



8. You are now ready to **access the newly created cover page from the 4-Sight FAX Client software**. Please restart the FAX Client if it was running when the Server cover page was added. This will allow the cover page list to refresh.