SGL DocuSend

Software Requirements

SGL DocuSend requires the following software configuration:

Microsoft .NET Framework 1.1 and/or above
Either one of these operating systems: Windows 98, ME, XP, 2000

Introduction

Do you spend too much time running between your printer and fax machine? Stop wasting your time and paper! With SGL's desktop faxing software, you can send faxes from your computer without tying up your phone or fax lines.

If you have groups of people you frequently fax to, no problem! SGL's DocuSend has an address book module that makes it easy for you to manage your fax groups. If you already have a database, the software also has an easy import feature that allows you to use your current lists with DocuSend. This service is especially ideal for those who need to fax letters and forms out to individuals, plus the report allows you to have proof of completion to the recipient.

SGL's DocuSend software makes it easy to send a lot of faxes or fax out a document to a large group of people. Either way, you will also be able to check on the status of your fax through the software as well. And just like our other services, we'll send you a detailed report once your fax job is complete. Once again, it's faxing made easy!

Prerequisite Setup

Since DocuSend requires Microsoft.NET Framework 1.1 and/or above, you will need to make sure that the software has been installed from the Microsoft's Windows Update Website.

Proceed to launch your Internet Explorer Browser and then go to 'Tools' → 'Windows Update'. Hit 'Scan for Updates' to have the software scan your PC for potential update from Microsoft (Figure 1).

Once the scanning process is complete, go to the left menu under 'Pick updates to install'. If you are running Windows 98, then click on 'Windows 98'. If you are running 'Windows 2000' then click on 'Windows 2000'. The right hand pane will present you with a list of updates. Go ahead and scroll down until you see 'Microsoft .NET Framework version x.x'. Select this option and follow the on screen instruction to proceed with the installation. If you cannot find the Microsoft .NET Framework option, your PC probably has the software installed already.
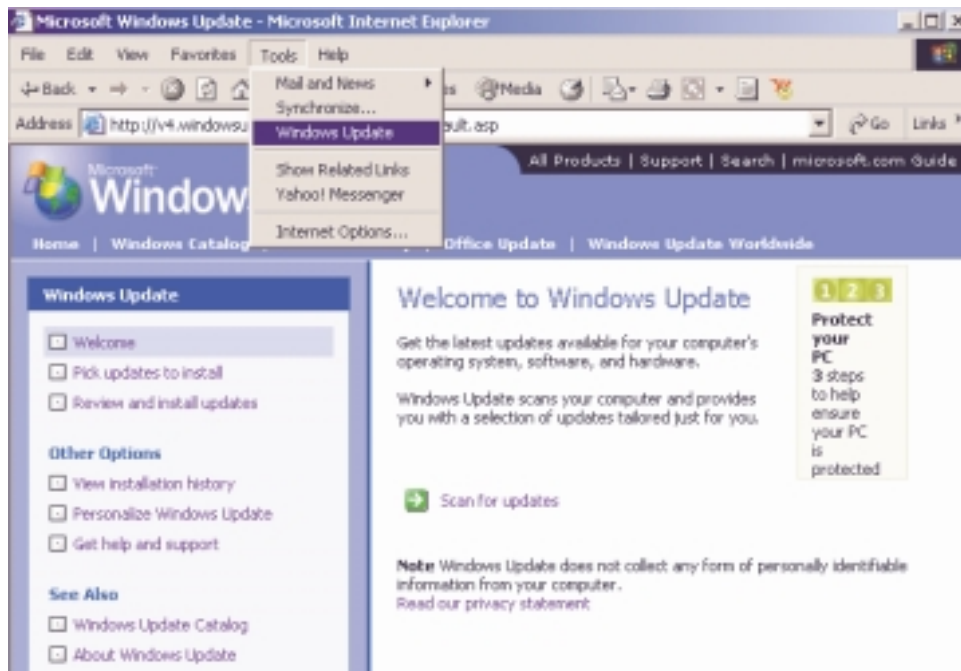
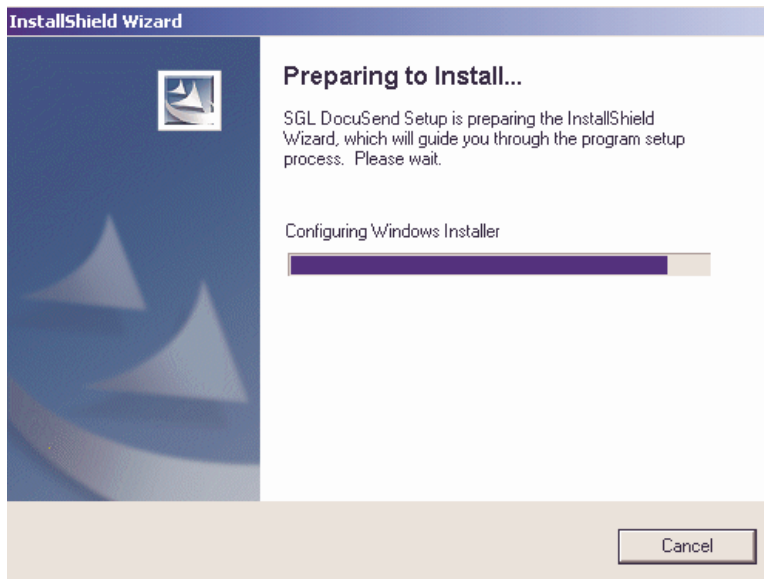Figure 1. Windows Update Screen

Installation

Figure 2. Installation Screen

Once you have successfully installed the Microsoft .NET Framework, you can proceed to double click on the DocuSend software you have previously downloaded on the hard disk. You will then be presented with a path to unzip the software. After the auto unzip process is done, the installation program will launch by itself (Figure 2).
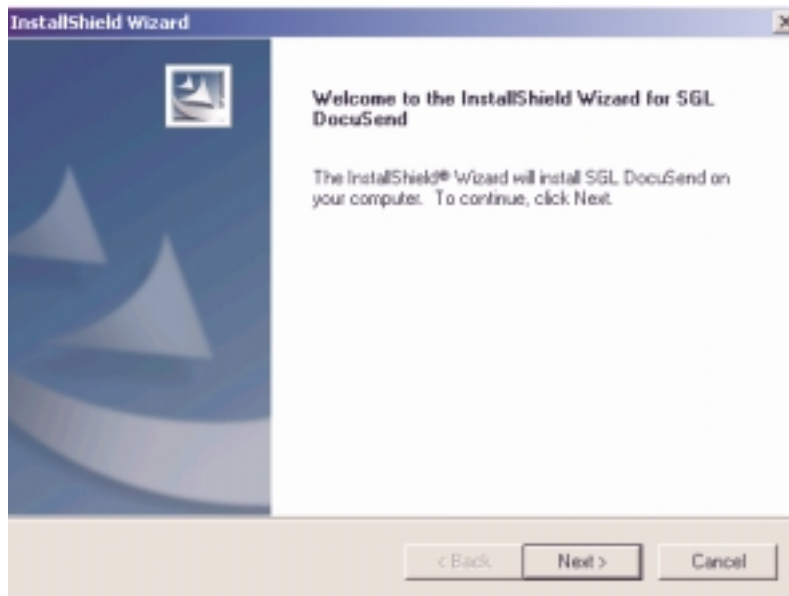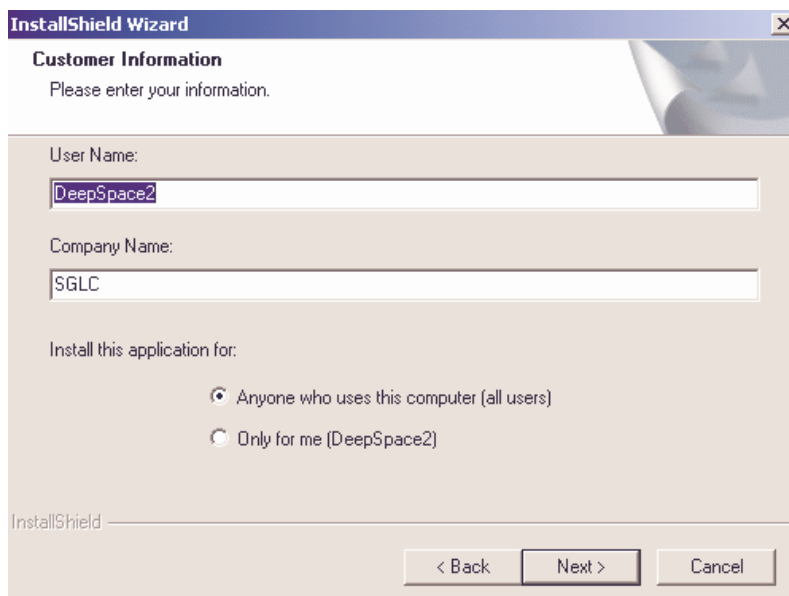
Figure 3. Installation Screen

Figure 4. Installation Screen

Figure 4 shows you the 3 stage of the installation process. Just type in your name and company name and then hit 'Next' to proceed.
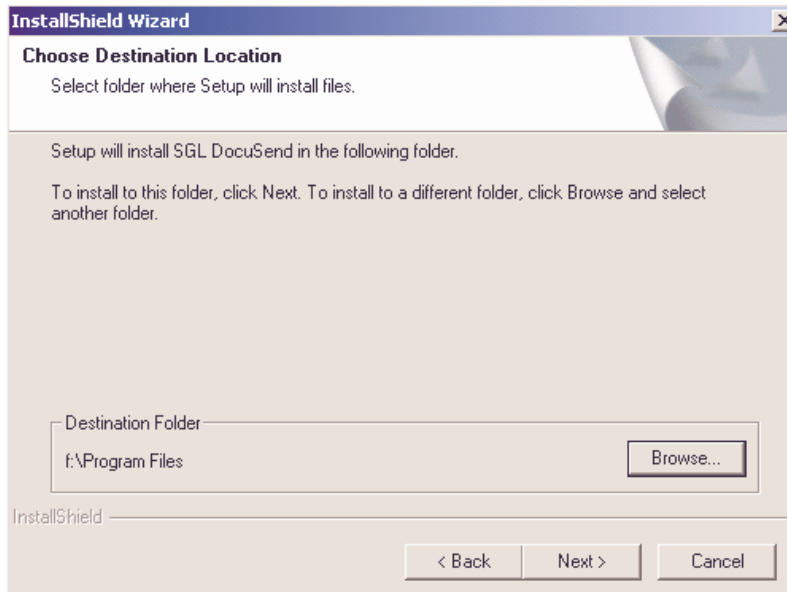
Figure 5. Installation Screen

On this screen, you can select a different folder to install the application on. Hit 'Next' when you are done selecting a destination folder.
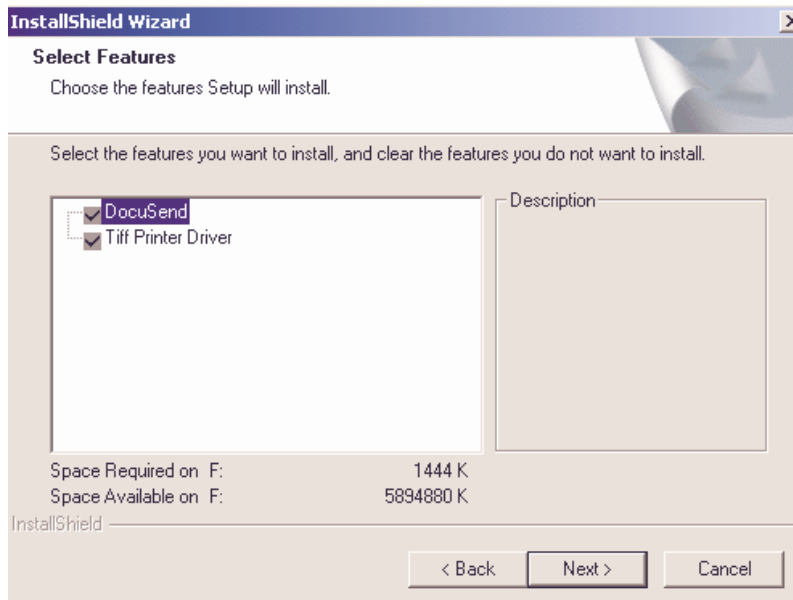

Figure 6. Installation Screen

There is nothing to configure on this screen, just hit 'Next' and the software will process the rest of the installation.

Once the installation process is complete, you might have to reboot your PC.

Setup

We are almost done! The next step is to configure the software to start sending faxes. Notice that there is a DocuSend Icon being placed at the right bottom corner of your PC. Go ahead and right click on the icon and select 'Show DocuSend'. You will then be presented with the DocuSend window.
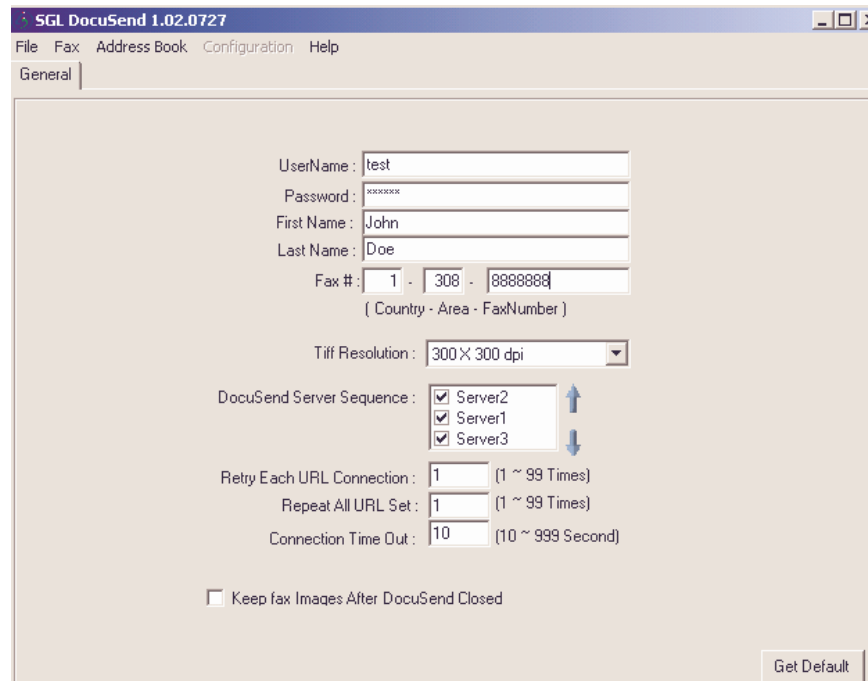

Figure 7. DocuSend Icon

Figure 8. Setup screen

Click on the configuration screen and enter your assigned UserName and Password. You can also enter your first name, last name and fax number (this information will automatically be pushed onto the cover page later). Please do not change any other configuration on this page. Doing so might result in failure to send any fax.

What documents can I fax out?

DocuSend installs a tiff printer driver on your PC and utilizing that driver, you are able to generate a fax from virtually every application that is capable of 'printing' through the driver. These include Adobe PDF, Microsoft Word, Excel, PowerPoint, Adobe Illustrator, QuarkXpress, HTML, any many others.

Getting Started

After you have composed your document, go to 'File' → 'Print' and then select the special 'Virtual TIFF pilot' printer driver from the drop by box. Press 'OK' when you have selected the driver.
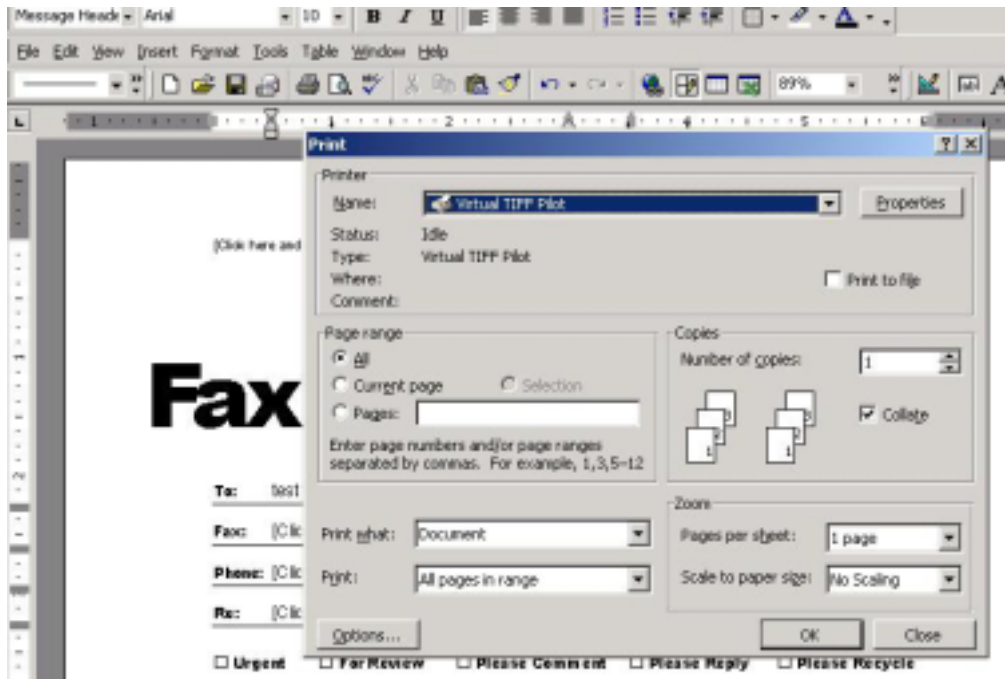
Figure 9. Print screen

Step 1: Preparing the fax image

The printer driver generates a TIFF file from the document. Be patient as sometimes it takes the driver a little longer to recreate the fax documents especially if the documents contain lots of graphics or is multi-page. DocuSend then displays the fax image (figure 3) as shown below. You can proceed to zoom into the fax image or remove the fax image from sending.

If you need to fax documents of different origin (Excel, Word, Adobe), then all you have to do is 'Print' each one of them in sequence utilizing the 'Virtual TIFF Pilot' printer driver. You will then be able to see a collection of TIF images being presented on the left side.
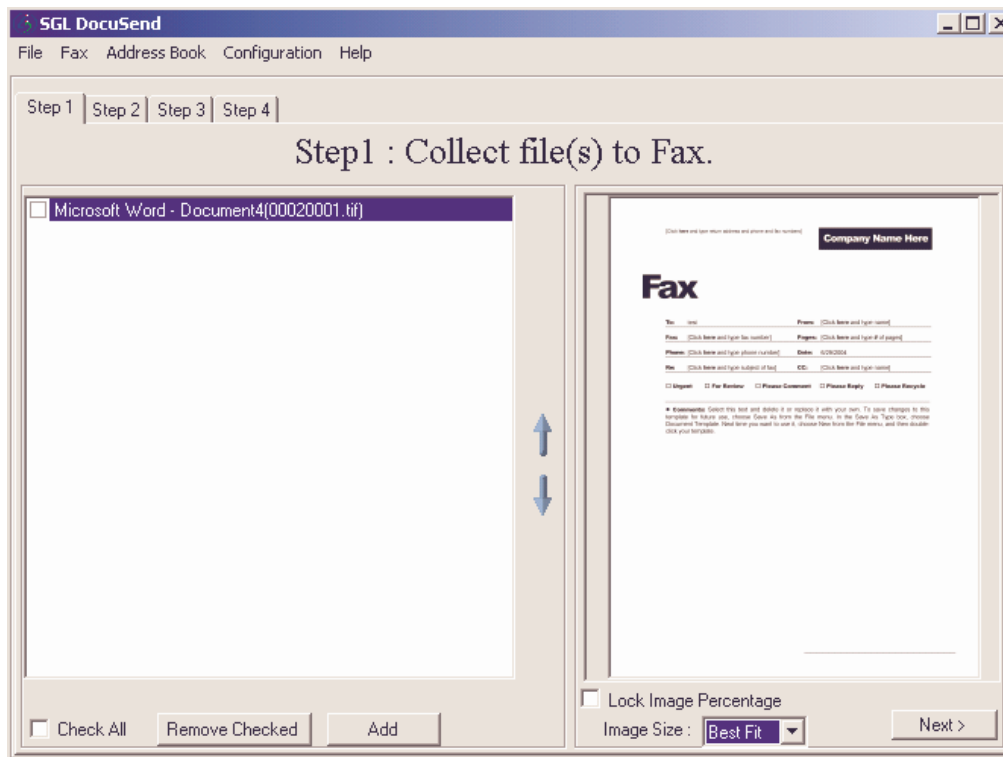
Figure 10. Step One

Configuring Fax Image Resolution

The default fax image converted is 150 x 150 dots per inch. You can change the default fax image by going to the Fax Configuration page (figure 8).

Step 2: Building your fax recipient list

On this screen, you can either type in the fax recipient information if you have a single fax to send or pick from a previously saved fax group. Please note that each fax must have the country code assigned even if you are faxing domestically.

One by One

Once you have entered the recipient information, press the '→' button to add it to the 'Recipient List'. Enter as many recipients as you like then press the 'Next' key to go to the next step.

From Address Group

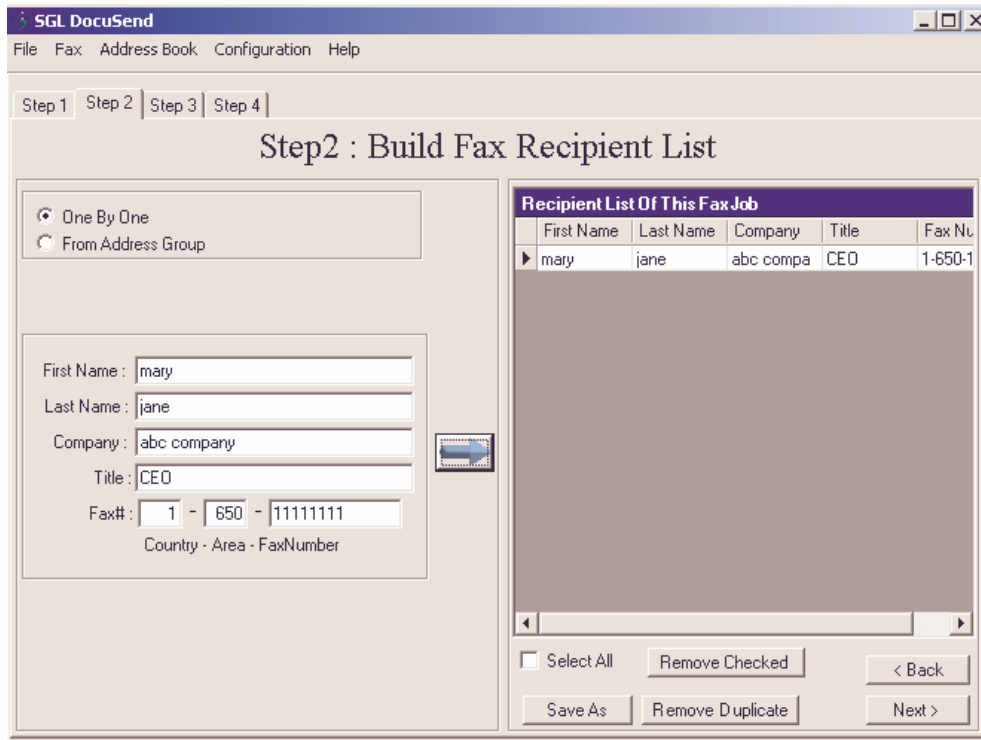Selecting this option enables you to select a group of fax numbers from the database.

Figure 11. Step Two Building Fax List

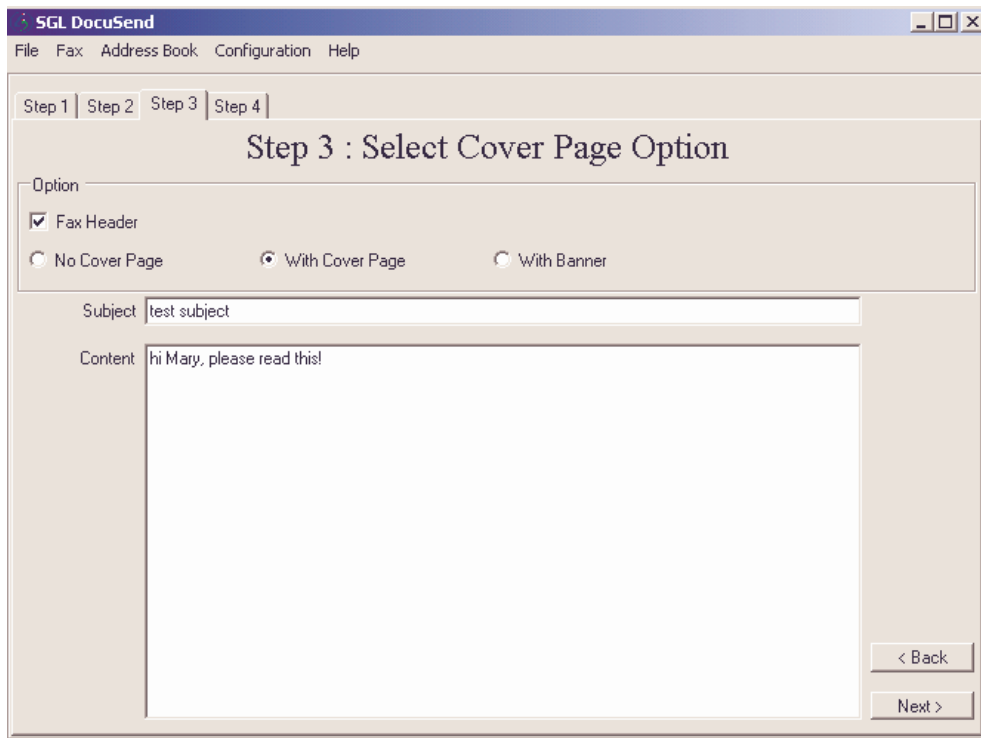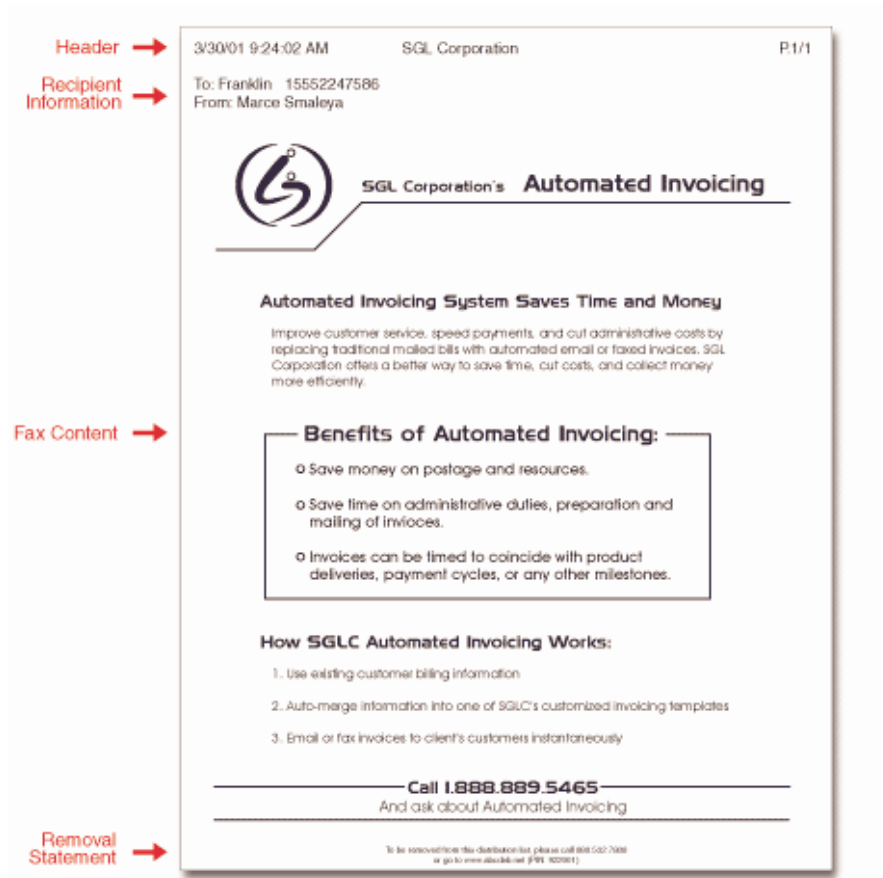**Step 3: Select other options**

Figure 12. Selecting Other Options

Fax Header: In some countries (eg. USA), it is mandatory that you include the fax header for all outgoing fax.

With Banner: Figure below shows how the fax header, fax recipient info (with banner) would look.

With Cover Page: Figure shows how the cover page would look.
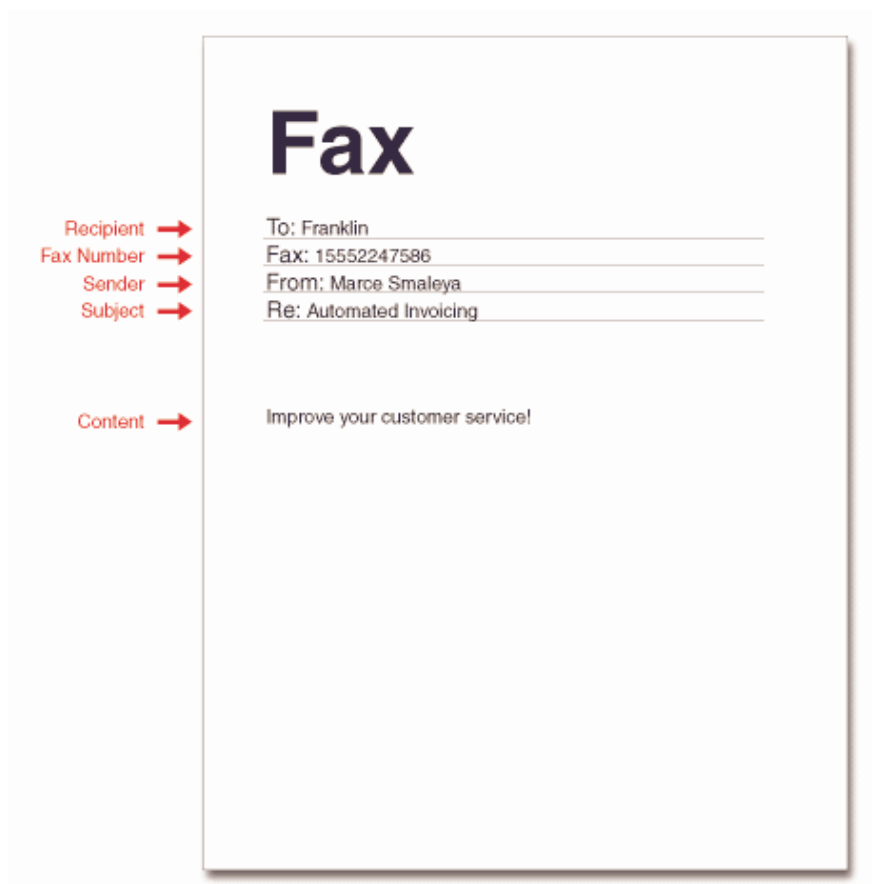

Figure 13. Sample Fax

Figure 14. Sample Fax

Step 4: Other Misc. Options

The last step of the fax process allows you to do the following:

Job Reference Name: Give the job a reference name that you can remember. You will be able to refer to the job status later on via this name.

Schedule Fax Job: Please ignore this option if you wish to have the fax transmit as soon as possible. Otherwise, you can proceed to schedule this job to go out at a certain time by checking the box and select the date and time from the drop down box. **Important**: The scheduled time is in US Pacific Standard Time so please allow enough time for the job to be scheduled.

Check recipient info: This option is only valid if you picked 'With Cover Page' or 'With Banner' in step 3. You essentially tell the fax service to include certain recipient field information into the fax banner or fax cover page.
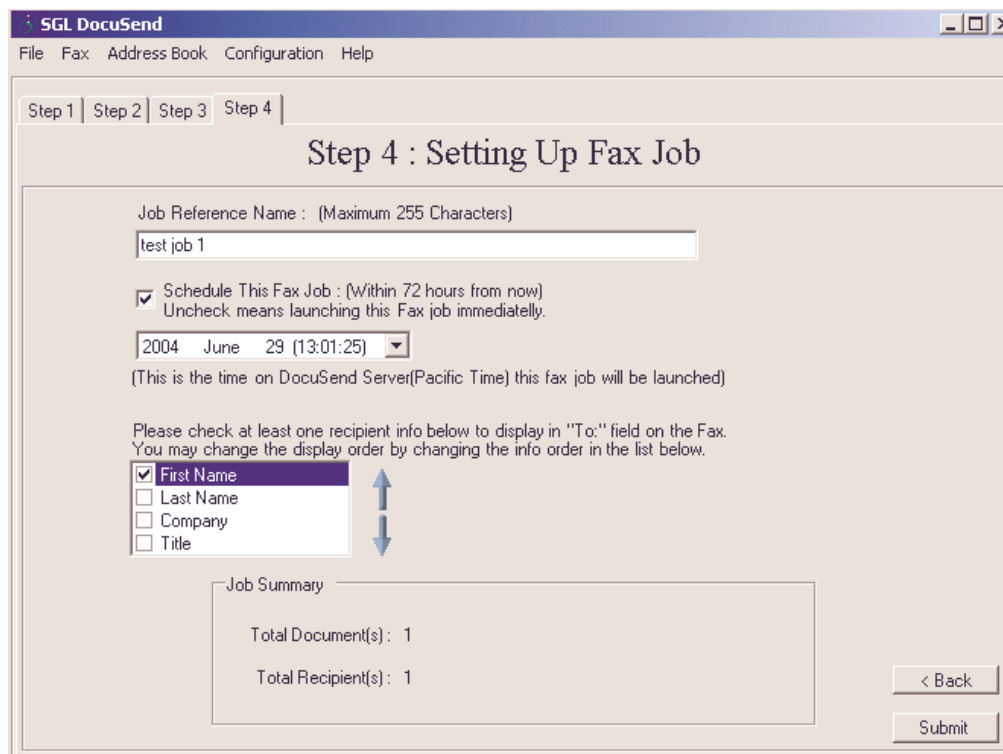
Figure 15. Step 4 Setting up Fax Job

Finishing up

After the job has been transmitted, you will be presented with a screen as shown below. You can proceed to check on the necessary radio button and hit 'OK'.

Clean up this job profile: If you are going to send in a different document, please select this.
Don't clean up this job profile: If you are going to 'resend' this document again, please select this.
Send one more fax job: Selecting this will bring you back to 'Step 1' of the fax process again.
Check Fax status: Selecting this will take you to the fax status screen where you can check the status of past jobs.
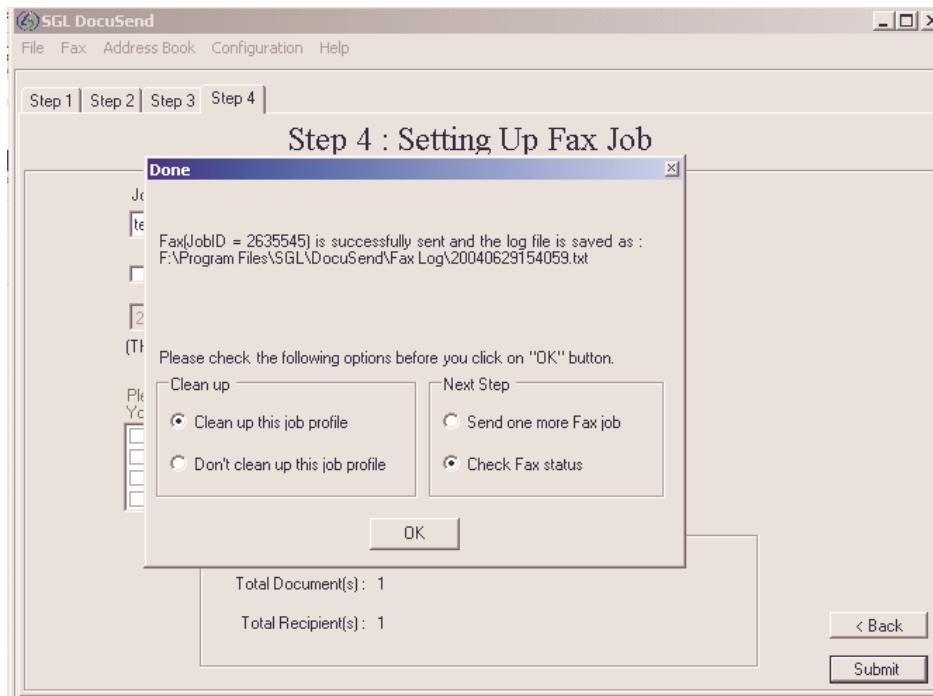
Figure 16. Finishing up

Checking Fax Status and/or Terminating a Job

To check the status of all your faxes, go to the 'Fax' → 'Check Fax' menu. Click on 'Check Fax' and the system will present to you all fax transactions completed over the past 6 days. You can double click on each JobID to get a more detailed report of each fax transaction. You can also 'Right click' on each JobID to terminate a job that has just been sent (if the job has not gone into the fax queue yet).
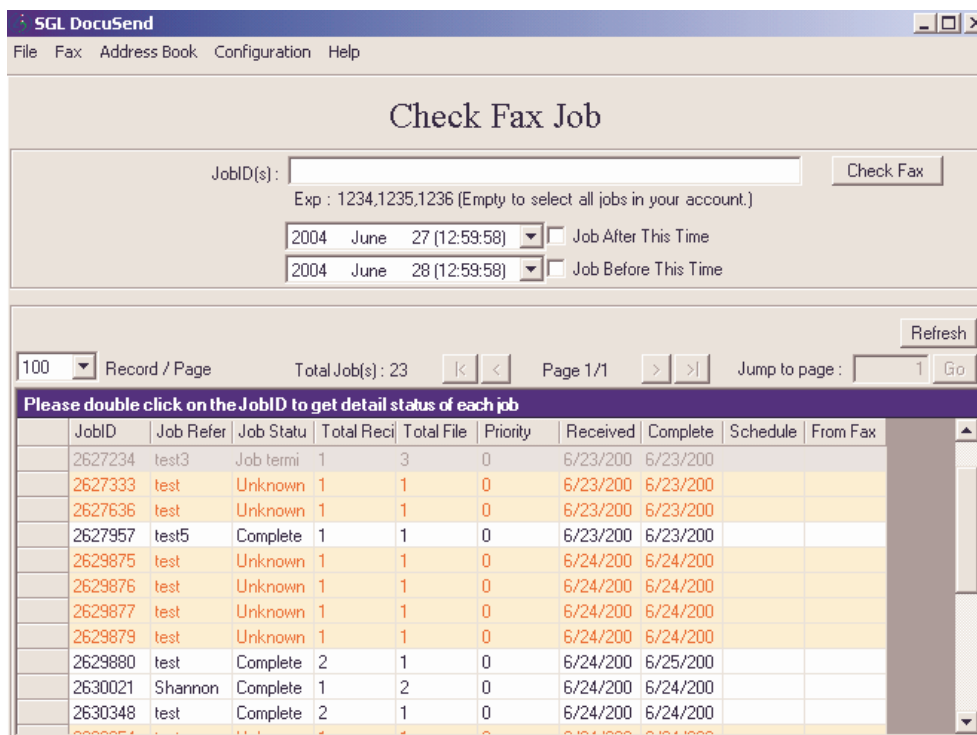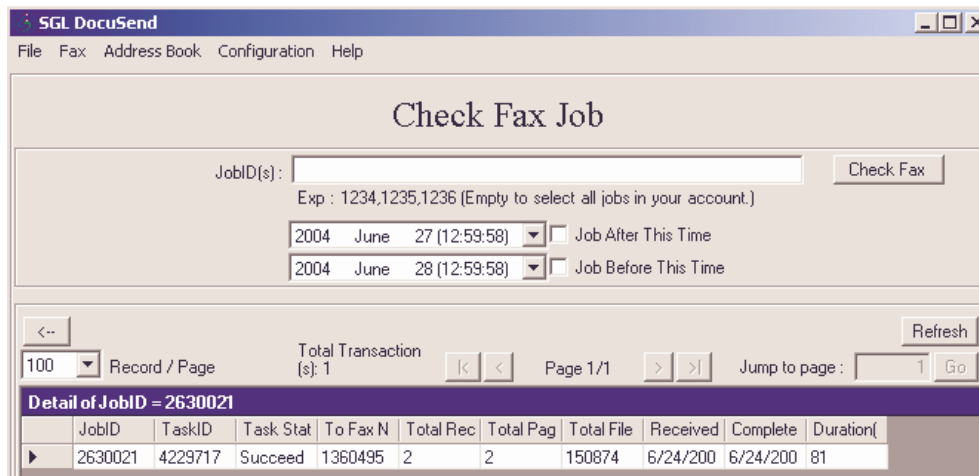

Figure 17. Check Status Screen

Figure 18. Check Status Screen

Adding New Fax Group

Before you import a new fax database, you must click 'Add New' to add a new fax group. Type a meaningful name for the 'Group Name'.
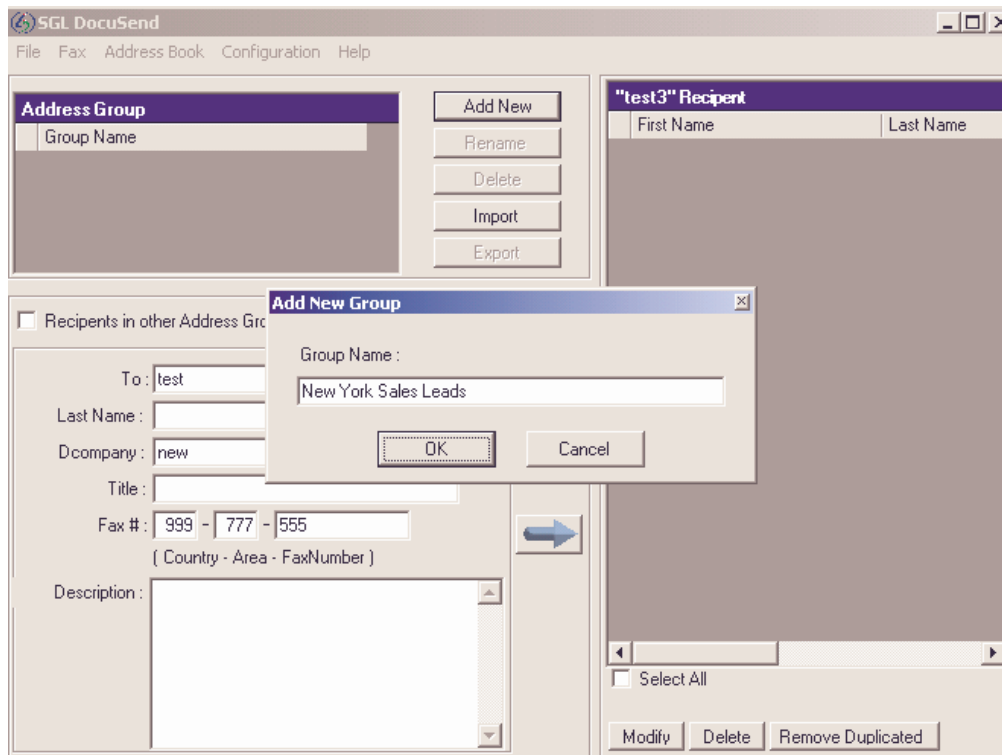

Figure 19. Adding New Group

Import Fax Database

When you are ready to import a new fax database, click 'Import' and you will be presented with a window pop-up asking you to browse for the file that you wanted to import. You can only import a text file so if your file is originally in Excel you would have to launch Excel and re-save the file as a MS-DOS Text file.

Once you have successfully browsed for the file you wanted to import, you will be presented with the 'Import TXT/CSV File' screen, proceed to hit 'Get Row' so that the program picks up the first row. You can then decide which field delimiter is appropriate for your file. If your file has previously been saved as a CSV file then selecting Comma (,) and then hitting 'Get Row' again will result in the program picking up all the fields contained within the CSV file.
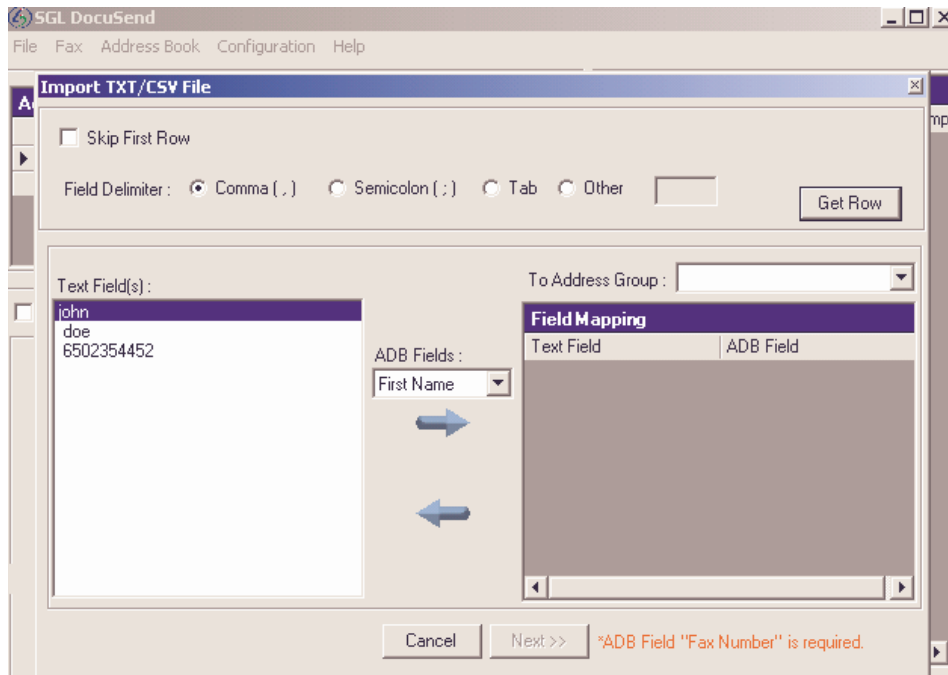

Figure 20. Import Process

In our example below, you can then proceed to map 'John' to 'First Name', 'doe' to 'Last Name' and '6502354452' to 'Fax Number'. Hit 'Next' when you are done.
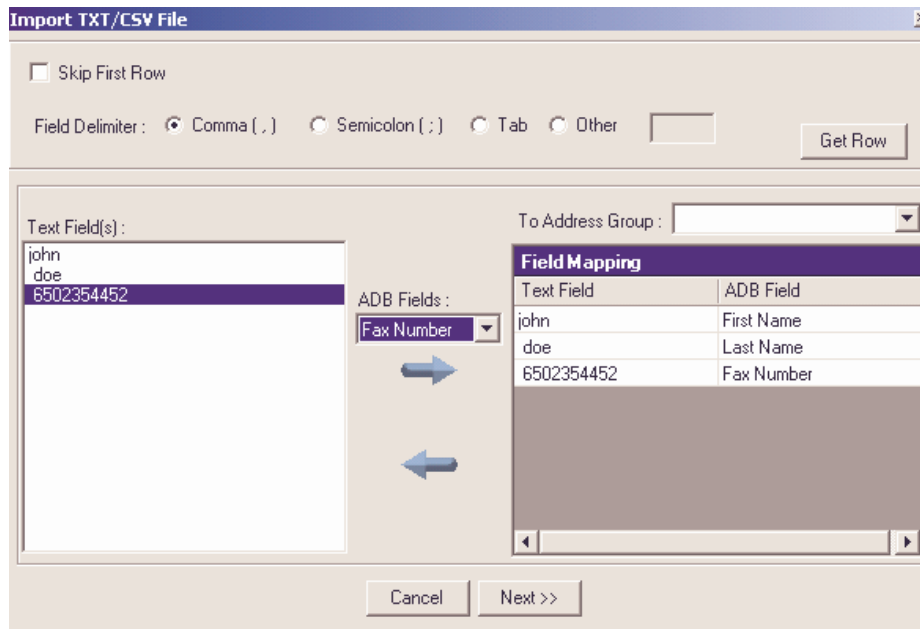

Figure 21. Mapping

On the next screen, you must let the program know if you had already included the country code for the fax numbers. In our example, all fax numbers are United States domestic numbers where'650 'is the area code and '2354452' is the phone number. In this case we know that we need to have the program automatically insert country code '1' (United States) so the second option 'Please help me add this country code to all these Fax numbers' is selected. If your fax list already had '1' in front of each numbers, eg. '16502354452', then please select 'Only import Fax Numbers containing this country code' and 'United States' so that they program can separate the country code '1' from each number as it imports all the fax numbers.
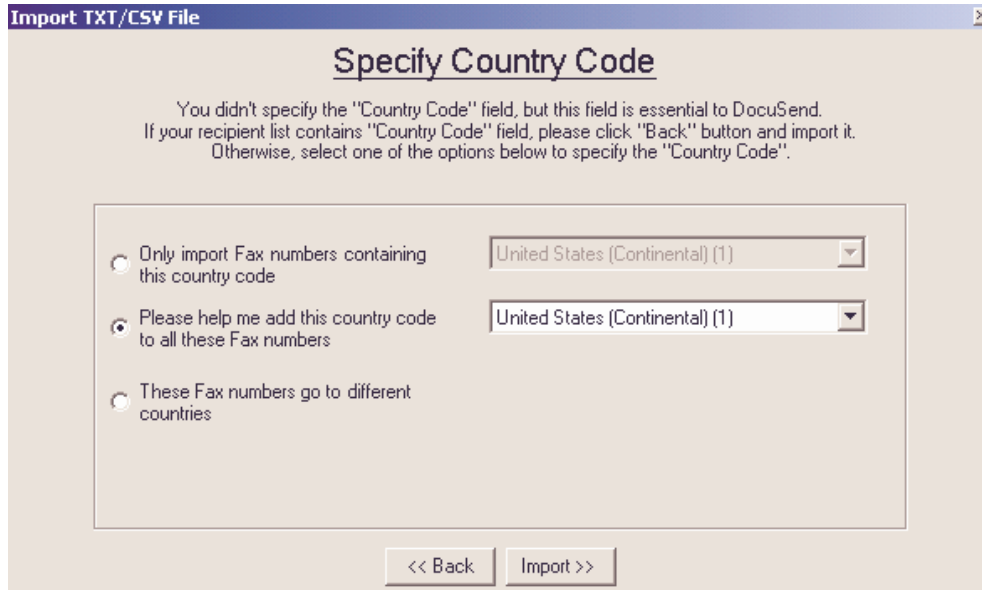

Figure 22. Import Process

Contact Information

SGL Corporation
4984, El Camino Real, Suite 101
Los Altos, California, USA

Tel: 1-650-237-0448
Fax: 1-650-237-0468

Website: www.sglc.com / www.ifaxbroadcaster.com
Email: customercare@sglc.com