

Getting Started with Nextiva Virtual Fax

Step 1 Accessing Your Account

After you have purchased Nextiva's Virtual Fax Service, it takes approximately 24 hours to activate. After it has fully activated, you will receive login information for the Virtual Fax portal at www.nextivafax.com.

Welcome

Username:
[Text Input Field]

Password:
[Text Input Field]

Remember My Username

Log Me In Automatically

[Password Recovery](#)

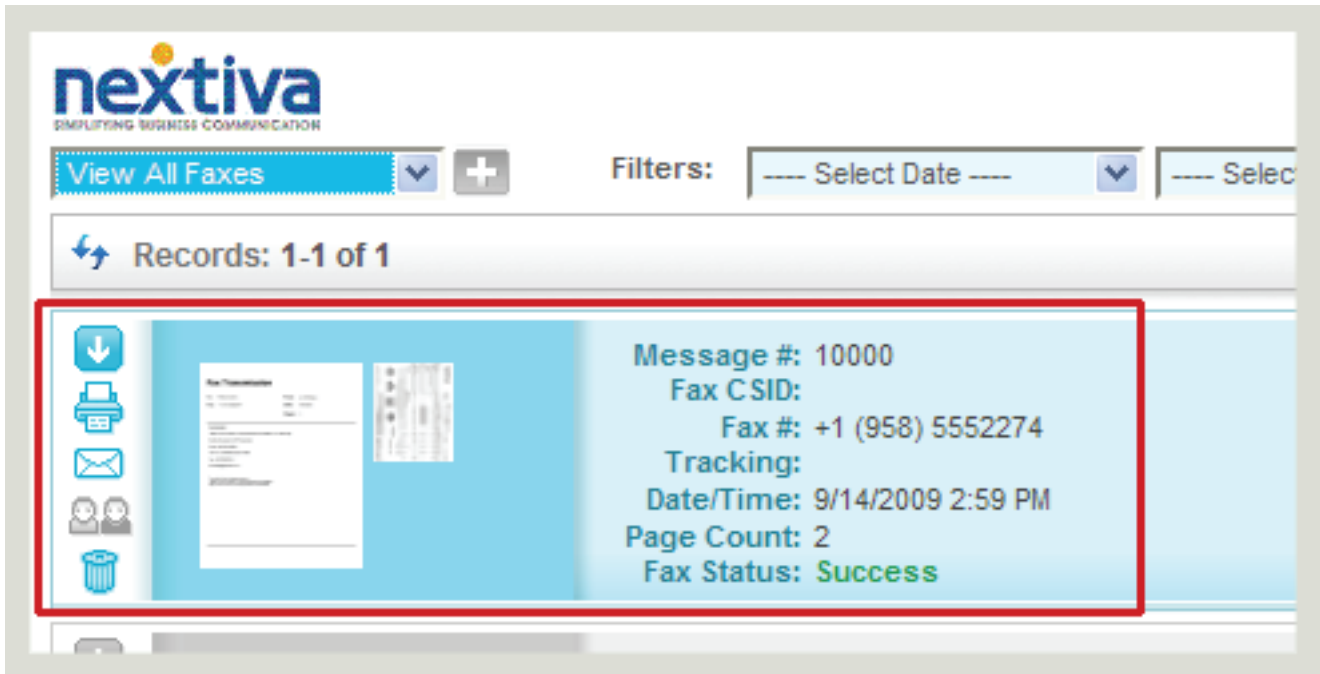
SUBMIT

Welcome
Please log in by entering your username and password.

Don't forget to check your email for login information within 24 hours of activation.

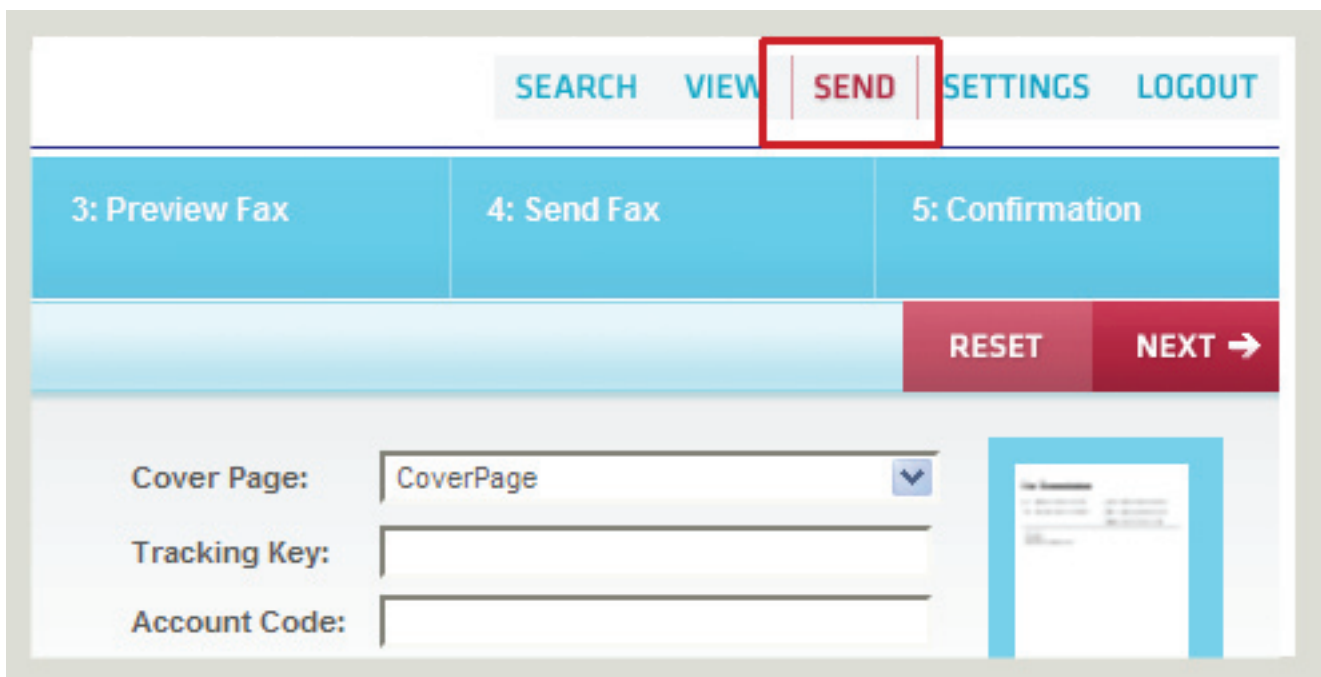
Step 2 Organize Your Portal Screen

Once successfully logged in, you will be presented with the main portal screen. On this screen you will see any recent faxes. Both sent and received. On this screen you can organize all of your faxes by type, and organizational folders that you can create through the settings area.



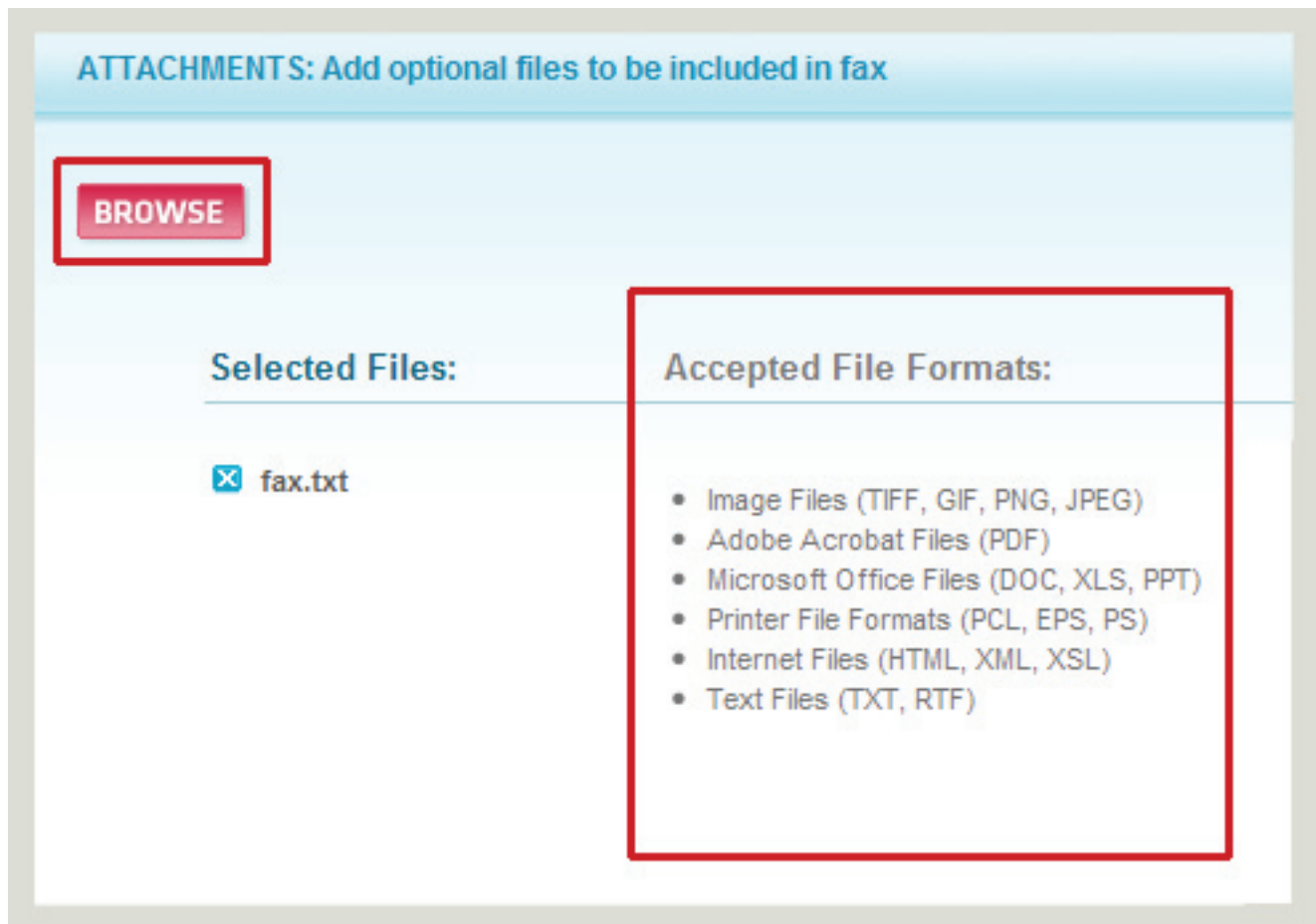
Step 3 Sending Faxes

To send a fax, click 'Send' from the menu at the top of the page. Most of the settings on this page are pretty straight forward. The only required field, is the phone number. The rest of the fields are completely optional based on how the receiver wants the fax to be sent. Click 'Next' once you have filled in the desired fields.



Step 4 Uploading Your Fax Document

On the next screen is where you will choose the file you want to send. As you can see from the “Accepted file list’ it can accept most standard media. Simply click ‘Browse’, then select the file you wish to send from your computer. Please also note that you can attach as many files as you wish, you are not limited to one file per fax. Once done, click next.



ATTACHMENTS: Add optional files to be included in fax

BROWSE

Selected Files:

- ✕ fax.txt

Accepted File Formats:

- Image Files (TIFF, GIF, PNG, JPEG)
- Adobe Acrobat Files (PDF)
- Microsoft Office Files (DOC, XLS, PPT)
- Printer File Formats (PCL, EPS, PS)
- Internet Files (HTML, XML, XSL)
- Text Files (TXT, RTF)

Step 5 Fax Transmission Detail

This screen will give you a preview of the fax that's being sent, along with the header. Don't worry about the code in the fields of the header page. Those are filled in based on what you included in Section 1 of the send fax wizard. If you did not fill in those areas, the code will be blank on the recipients side. Also note that not all of your attachments will be viewable when you click on them for a preview.

COVER PAGE REVIEW:

← EDIT

NEXT →



Fax Transmission

To: \$\$MESSAGE.HEADER.SUBJECT\$\$

Fax: \$\$DELIVERY.DISPLAY_ADDRESS\$\$

Step 6 Filter Settings

Settings filters helps to keep your faxes organized. Once you have setup Folders, and other ogranizational rules, you can quickly select them before sending the fax. This will make it easier to find and organize your fax later. The options on this screen are completely optional. If you do not use them, click next to proceed to send your fax.

OPTIONAL: Set Filters for Easy Archiving

Filters allow faxes to be quickly located in the future. You can switch over modify filter options. Your fax send session will not be reset.

Type:

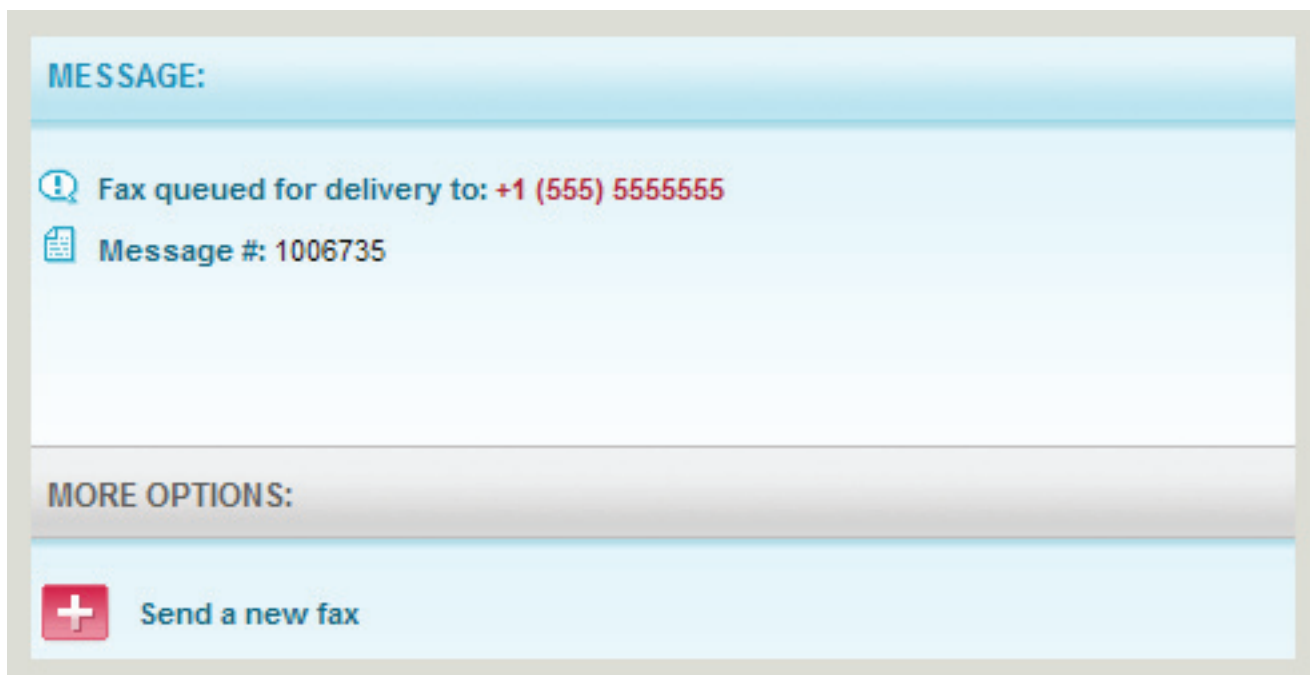
Folder:

Note:

If needed, you can send a copy of the fax transmission to the following re

Step 7 Fax Confirmation

The fax confirmation page displays details about the fax transmission. It will let you know that the fax has been processed and is now currently trying to transmit to the recipient. From the menu at the top of the page, you can click the 'View' tab, and view the status of faxes to make sure they were sent successfully, or if there were any errors.



Account Settings

The settings page is where you can drill down and get the exact type of notifications and organization that you want with your Virtual fax account.

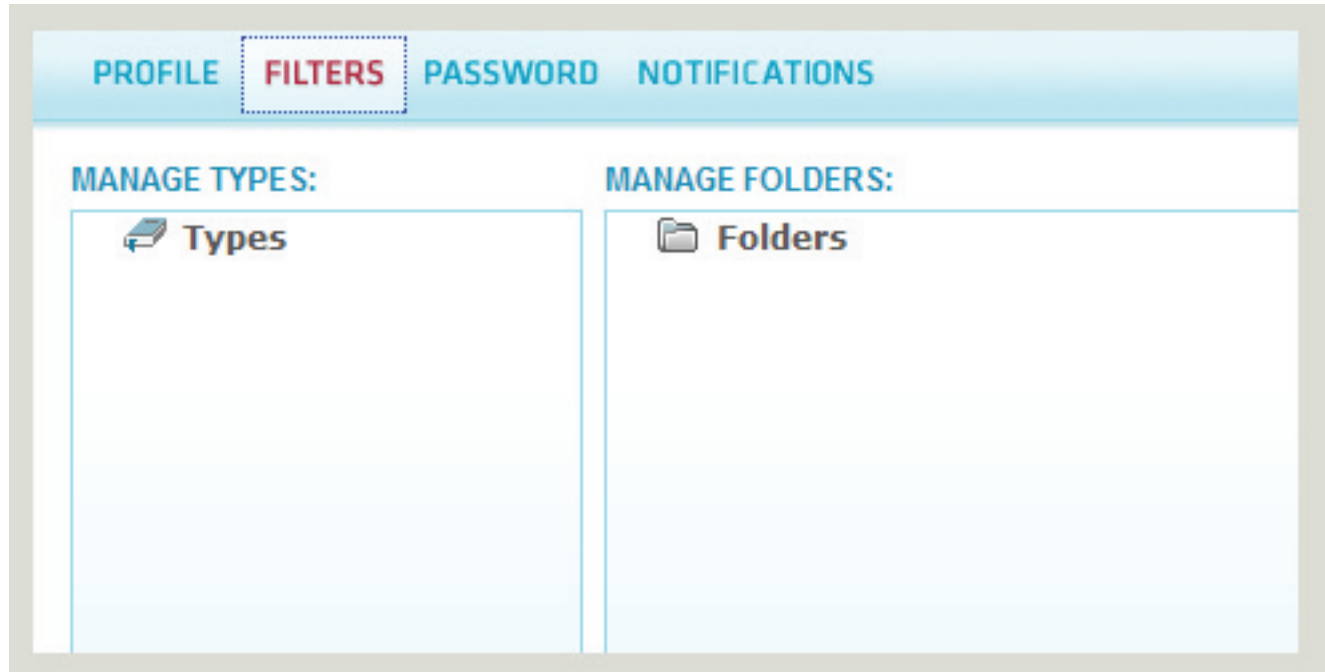
The Profile Tab

This is where you enter your name, phone, company and primary email address that you want fax notifications to be sent to. This is also where you can choose how you want to be notified. Such as on all faxes, only on successful or only on failed fax transmissions. Also you can choose if you want the notifications to be as a .tiff file, a .pdf, or no attachment at all. You can do these notifications for both sent and received faxes. You can also add your cellphone number so that you can be notified of faxes while your out in the field.

PROFILE	FILTERS	PASSWORD	NOTIFICATIONS
Name:	Phone:	Company:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Primary Email:	Notify On Send:	Notify On Receive:	
<input type="text"/>	all pdf	all pdf	
Primary SMS:	none all success failure	Notify On Receive:	
<input type="text"/>	:	none	
FaxBridge Receive Device:	FaxBridge Send Behavior:	FaxBridge Receive Delivery	
<input type="text"/>	do not print	no	
Default Cover Page:	Default Account Code:	Dialing Behavior:	
-- use default --	<input type="text"/>	normal	

The Filters Tab

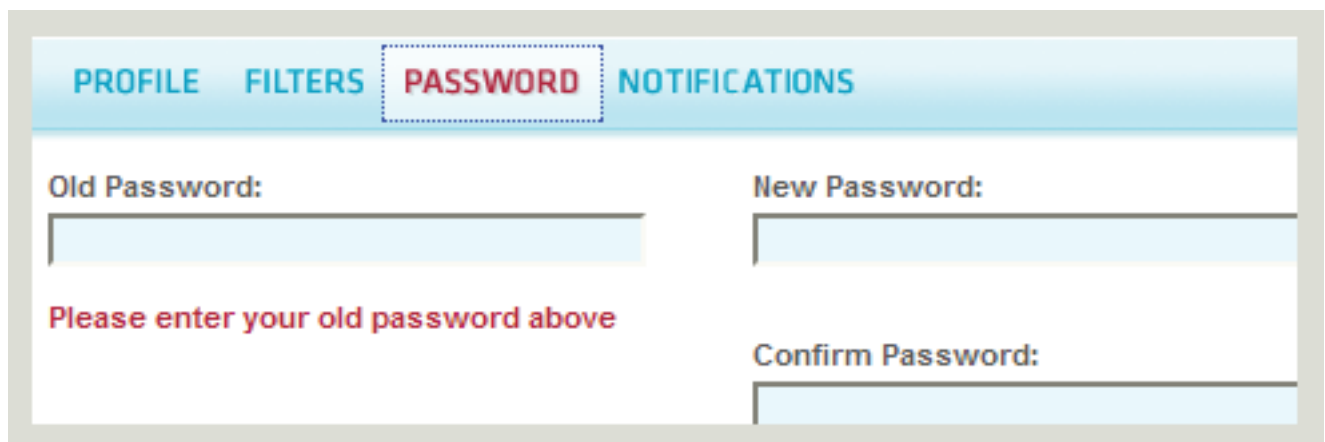
The filter tab is where you can create the organizational rules for your faxes. You can create type rules such as 'Personal' and 'Business' or 'Follow up' and folders that can further those organizational types.



The screenshot shows a navigation bar with four tabs: PROFILE, FILTERS (highlighted with a red dashed border), PASSWORD, and NOTIFICATIONS. Below the navigation bar, there are two main sections: 'MANAGE TYPES:' and 'MANAGE FOLDERS:'. The 'MANAGE TYPES:' section contains a sub-section titled 'Types' with a folder icon. The 'MANAGE FOLDERS:' section contains a sub-section titled 'Folders' with a folder icon. Both sections are currently empty.

The Password Tab:

Change your password for the login into this portal



The screenshot shows a navigation bar with four tabs: PROFILE, FILTERS, PASSWORD (highlighted with a red dashed border), and NOTIFICATIONS. Below the navigation bar, there are three password input fields. The first field is labeled 'Old Password:' and has a red error message below it that says 'Please enter your old password above'. The second field is labeled 'New Password:'. The third field is labeled 'Confirm Password:'. All fields are currently empty.

The Notifications Tab

This is where you can specify additional SMS or e-mail addresses if you want multiple people listed on the notifications

The screenshot shows a user profile interface with a navigation bar at the top containing 'PROFILE', 'FILTERS', 'PASSWORD', and 'NOTIFICATIONS'. The 'NOTIFICATIONS' tab is selected and highlighted with a red border. Below the navigation bar, there is a 'Notification Type:' dropdown menu currently set to 'standard notifications'. A horizontal line separates this from a table of notification settings. The table has three columns: 'Notification Address:', 'Notify On Send:', and 'Notify On'. Each row in the table starts with a blue 'x' icon in a square, followed by a dropdown menu set to 'email', an empty text input field, and three more dropdown menus, each set to 'none'.

Notification Address:		Notify On Send:		Notify On
<input checked="" type="checkbox"/>	email		none	none
<input checked="" type="checkbox"/>	email		none	none
<input checked="" type="checkbox"/>	email		none	none