

Pre-Installation Questions for FaxFinder® Fax Servers

Work with your customer to identify the following information prior to the installation of a FaxFinder Fax Server.

FAXFINDER CONNECTIVITY

If Connecting the FaxFinder to a PBX-based Phone System...

Identify the brand name and model number of the PBX system: _____

Identify the number of analog stations available on the PBX system: _____

If Connecting the FaxFinder to PSTN Lines...

Identify the phone system carrier: _____

Identify the number of PSTN lines that will be connected to the FaxFinder: _____

FAXFINDER SETUP

SMTP Server Address: _____

Identify the SMTP port that will be used by the FaxFinder and the username and password if authentication is required. (FaxFinder default is port 25): _____

FaxFinder IP Address

The FaxFinder requires a static IP address on the network. Identify the:

FaxFinder hostname: _____ IP address: _____

Subnet mask: _____ IP address of default gateway: _____

Primary DNS: _____ Secondary DNS: _____

Fax Direction

Define the direction for each FaxFinder port: _____

Port Number	Inbound Only	Outbound Only	Both Inbound & Outbound

FaxFinder Users

Create a CSV file for all FaxFinder users:

Type (User)	Username	Password	Full Name	Email	Phone Number	Fax Number	Organization

CONTACTS

Global Contact Lists

In order to load a global contact list into the FaxFinder, create a CSV file with the following information:

Contact Name	Fax Number	Organization	Phone Number

Global Groups

In order to load global groups into the FaxFinder, identify the Group Name, Description, and which contacts belong in the group.

INCOMING FAXES

Fax Format

Identify if incoming faxes should be formatted in PDF or TIFF file format: PDF TIFF

Routing Incoming Faxes

- Back-up: Provide the network share destination where all incoming faxes can be routed for back-up: _____
- Routing by Port: Provide the destination for each port: _____
- Routing by Recipients DID Number: Create a CSV file with the following information:

Extension	Name	Destination ⁽¹⁾ -Share ⁽²⁾ -Email -Printer ⁽³⁾	Destination Value -UNC path -Email address -Printer Name

(1) For fax numbers with more than one destination, create multiple entries with different destinations.

(2) Sending incoming faxes to a network share: Identify the FaxFinder domain and the UNC/location, username, and password for each network share.

(3) Sending incoming faxes to a networked printer: Identify the printer make, model, name and description, and URL for each printer.

OUTBOUND FAXES

Using the Print Client for Outbound Faxing

Will the client be loaded individually or through MSI install? _____

Identify the operating system: 64-bit 32-bit

Using Email for Outbound Faxing

When using email to send faxes, the administrator selects a global setting for the following:

Email Receipt: Always Never Failed Faxes Only

Fax Attachment with Receipt: PDF TIFF

Cover Page: A template will be used The body of the email will be used

Cover Page Editing

Determine if the customer has access to Adobe® Acrobat® writer. This program is required in order to edit fax cover pages.

Placing Outbound Calls

Identify if a dial prefix is required in order to place outbound calls: _____

Archiving Outbound Faxes to a Networked Folder

Identify the UNC/Location for the networked folder: _____

Identify if faxes should be saved in PDF or TIFF file format: PDF TIFF

Purging Fax Logs

How often should the log of outbound faxes be purged? _____

Should the log be emailed to the administrator before purging? _____