

PROTUS[®]

Web Fax Word Merge
User Guide

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Protus® Web Fax Word Merge User Guide

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About Web Fax Word Merge

Web Fax Word Merge gives you the tools to leverage the fax broadcasting features of Protus® with the mail merge customization capabilities of Word.

Once you've created the Word document you wish to fax, and compiled your recipient list and customized content in an Excel file, you can define several advanced quality, start and finish time, and tracking settings. Then, begin your broadcast.

To get started, go to "Access Web Fax Word Merge" on page 5

Access Web Fax Word Merge

To access the interface for preparing and sending a Web Fax Word Merge broadcast:

1. Log in to Protus® at <https://www.protusfax.com>.
2. On the home page, under "Access Services," click **Web Fax**.
3. On the Web Fax page, in the "Web Fax Word Merge" section, click **New**.

Steps for Performing a Web Fax Word Merge Broadcast

A Web Fax Word Merge broadcast involves three required steps (and one optional step if you wish to apply advanced settings):

1. Select your recipient list. See "Select Your Recipient List" on page 7.
2. Select the Word file you want to fax. See "Select Your Word File" on page 8.
3. Apply any optional advanced settings you wish. See "Apply Advanced Settings" on page 9.
4. Click **Send** (or **Preview Document** if you wish to first view the fax as it will appear for the first recipient in your recipient list).

You will see the Web Fax Word Merge Request Status page with your Tracking Number. You should receive a confirmation email at the address indicated in your Protus® customer profile.

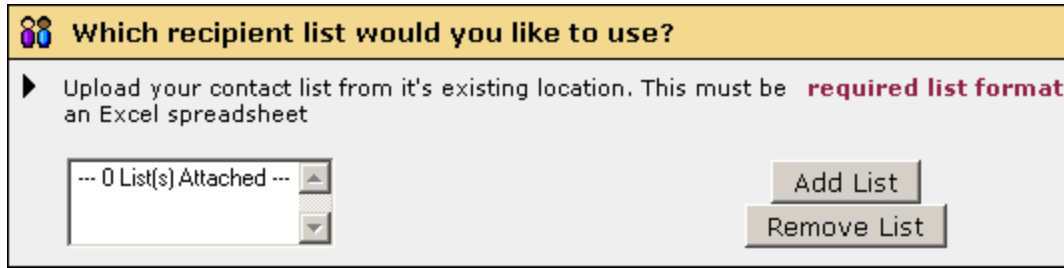
The screenshot shows the Protus Web Fax Word Merge interface. The top navigation bar includes 'Home | Contact Us' and user information: 'User Name: Peter Choo', 'User ID: 13918', 'Fax Number: (613) 248-4631', and a 'Log Out' link. A left sidebar contains a menu with 'Services', 'MyAccount', 'List Management', 'Reports', and 'Log Out'. The main content area is titled 'Web Fax Word Merge' and contains three sections:

- Which recipient list would you like to use?**: Includes instructions to upload a contact list from an existing location in Excel spreadsheet format. It features a dropdown menu for selecting a list, an 'Add List' button, and a 'Remove List' button.
- Which document would you like to fax?**: Includes instructions to upload a document from an existing location as a MS-Word (.doc) file, with a maximum of 1 attachment and a limit of 2MB each. It features a dropdown menu for selecting a document, an 'Add Document' button, and a 'Remove Document' button.
- Advanced Settings**: A section where users can customize settings. It includes a list of options with checkboxes: 'Select Fine Resolution' (unchecked), 'Edit the Fax Header' (checked), 'Schedule a Date & Time' (unchecked), 'Add a Billing Code' (unchecked), and 'Save Fax Document for future use' (unchecked). An 'Advanced Settings' button is located to the right of the list.

At the bottom of the form, there are 'Send' and 'Clear All' buttons.

Select Your Recipient List

Your recipient list must comply with several formatting requirements. Please see "Appendix A: Create Your Recipient List" on page 15 for those requirements.



To select your Excel (.xls) recipient list:

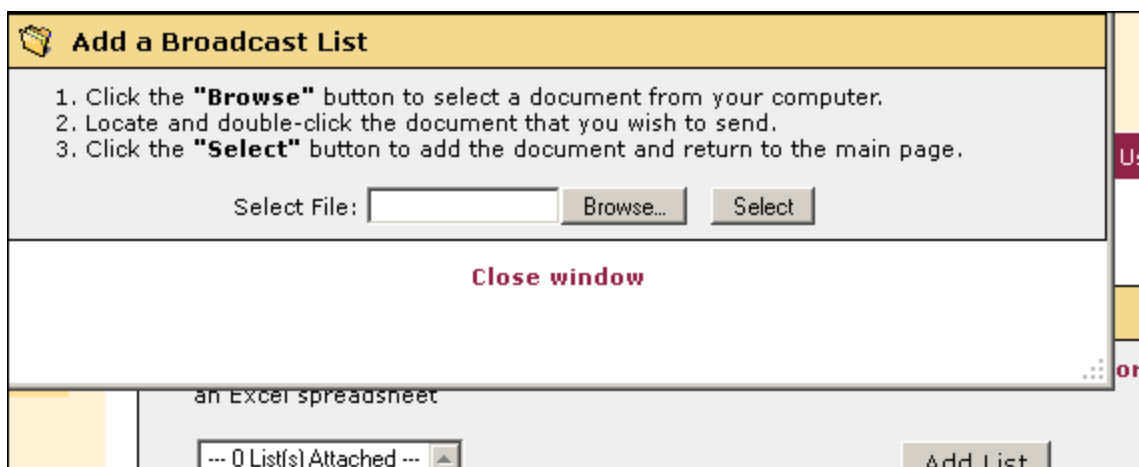
1. On the Web Fax Word Merge page, click **Add List**.

See "Access Web Fax Word Merge" on page 5.

2. In the Add a Broadcast List dialog box, click **Browse**.

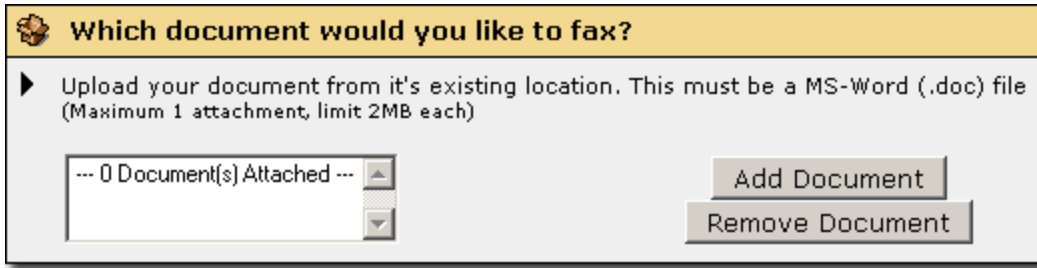
Select the .xls file from your hard drive or network drive.

Click **Select**. A pop-up indicating the upload progress will be displayed. Wait for it to complete and close.



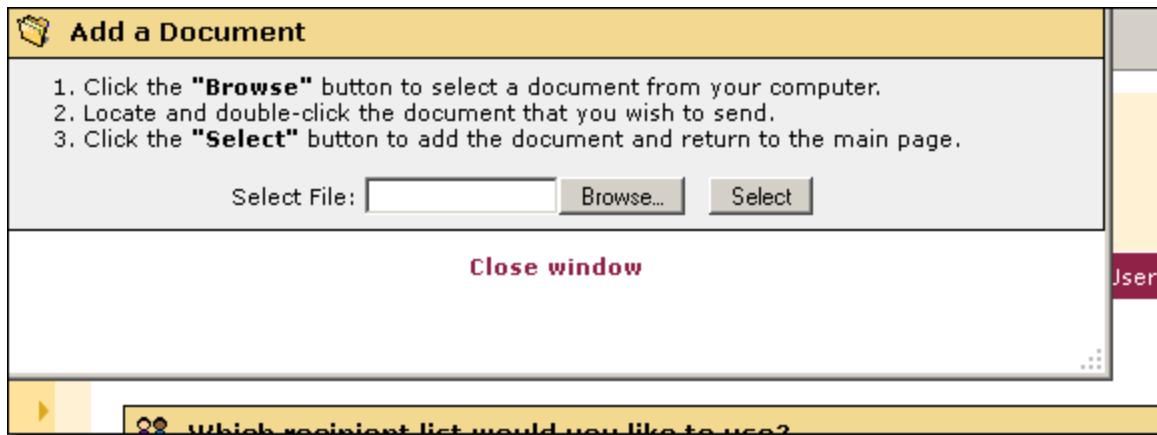
Select Your Word File

Your Word file must comply with several formatting requirements. Please see "Appendix B: Create Your Word File" on page 17 for those requirements.



These are the steps for selecting the Word document you want to fax:

1. On the Web Fax Word Merge page, click **Add Document**.
See "Access Web Fax Word Merge" on page 5 for steps on getting to this page.
2. In the Add a Document dialog box, click **Browse**.
Select the .doc file from your hard drive or network drive.
Click **Select**. A pop-up indicating the upload progress will be displayed. Wait for it to complete and close.



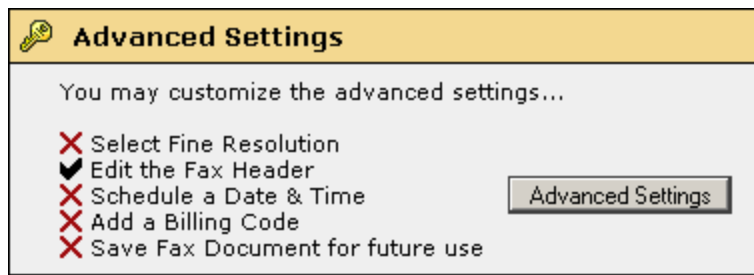
Apply Advanced Settings

The Advanced Settings dialog box offers several advanced settings for your Web Fax Word Merge broadcast. Below is a short description of each, along with steps for configuring it.

But, first, to access the Advanced Settings dialog box:

1. On the Web Fax Word Merge page, click **Advanced Settings**.

See "Access Web Fax Word Merge" on page 5 for steps on getting to the Web Fax Word Merge page.



Fax Image Resolution

This setting dictates the resolution (i.e. "fineness") of the faxes. The options are:

- **Draft Resolution (204 x 98 dpi)** (default) - This is the lower of the two resolution settings. While faxes may not appear as "fine," they will likely be transmitted more quickly than with the Fine Resolution setting.
 - **Fine Resolution (204 x 196 dpi)** - This is the higher of the two resolution settings. While faxes may appear "finer" than with the Draft Resolution setting, they will likely take longer to transmit.
1. Select the corresponding radio button and click **Apply** at the bottom of the dialog box or go to another advanced setting.

Fax Header

This setting allows you to customize what displays in the **from** field at the top of the received fax.

1. To change this, edit the text field.
2. Click **Apply** at the bottom of the dialog box or go to another advanced setting.

NOTE: It's the law that you accurately represent yourself or your company as the sender of your faxes.

Schedule your Broadcast

This setting lets you dictate a date and time range for when you'd like your broadcast to occur.

NOTE: If the **Check here if you would like to schedule your fax for a future date and/or time** checkbox is *not* checked, your broadcast will begin as soon as you click **Send** on the Web Fax Word Merge page.

To select a date and start time for the broadcast:

1. Select a date in the **Start Date and Time** fields.
2. Select start time (EST) in the **Start Date and Time** fields.
3. Ensure the **Check here if you would like to schedule your fax for a future date and/or time** checkbox is checked.
4. Click **Apply** at the bottom of the dialog box or go to another advanced setting.

To select a date, start, and finish time for the broadcast:

1. Select a date in the **Start Date and Time** fields.
2. Select the start and finish times (EST) in the **Deliver Faxes Between** fields.
3. Ensure the **Check here if you would like to schedule your fax for a future date and/or time** checkbox is checked.
4. Click **Apply** at the bottom of the dialog box or go to another advanced setting.

Billing Code

The information you enter in this field will be displayed in the **Billing Code** column of your table of saved fax jobs.

See "Save Your Broadcast Settings" on page 13.

To change this setting:

1. Enter your billing code, or any information, in the text field.
2. Click **Apply** at the bottom of the dialog box or go to another advanced setting.

Save This Fax Document


This setting allows you to save all the settings of your Web Fax Word Merge broadcast -- the directory locations of the Excel recipient list and Word file, and your advanced settings -- for future use.

To save your broadcast settings:

1. Check the **Check here if you wish to save this FAX document for future use checkbox**.
2. Enter a name for your settings in the text box. This will appear in the **Description** column of the table of saved fax jobs.


See "Save Your Broadcast Settings" on page 13.
3. Click **Apply** at the bottom of the dialog box or go to another advanced setting.

Apply Advanced Settings

 Fax Image Resolution

Draft Resolution (204 x 98 dpi)


Fine Resolution (204 x 196 dpi)

 Fax Header

You may edit the assigned name of who is sending this fax using the From field below (50 characters max):

From:


Note: it is a legal requirement that you accurately represent yourself or your company as the sender of this fax.

 Schedule your Broadcast


Check here if you would like to schedule your fax for a future date and/or time. Please set the date and times below.

Start Date and Time: at : E.S.T.

Deliver Faxes Between: :00 and :00 E.S.T.

 Billing Code

If you would like to track your faxes based on a billing code, please enter the code of choice below.

 Save This Fax Document

Check here if you wish to save this FAX document for future use. Provide a descriptive name in the box below.

Close window

Save Your Broadcast Settings

Protus® allows you to save all the settings of your Web Fax Word Merge broadcast -- the directory locations of the Excel recipient list and Word file, and your advanced settings -- for future use.

1. To save your broadcast settings, before you click **Send**, click **Advanced Settings**, scroll down to the Save This Fax Document setting, check the checkbox and enter a name you wish to assign the broadcast settings. Click **Apply**.

To Use Saved Broadcast Settings

If you wish to perform a broadcast with a set of saved settings, or settings similar to a set you've saved:

1. Log in to Protus® at <https://www.protusfax.com>.
2. On the home page, under "Access Services," click **Web Fax**.
3. On the Web Fax page, in the "Web Fax Word Merge" section, click **Saved**.
4. In the first column of the table of saved fax jobs, click the reference number of the settings you wish to use or edit.
5. The Web Fax Word Merge page is displayed with all of the saved settings.
6. Edit any settings you wish and click **Send** to initiate your broadcast.

Web Fax Word Merge

Retrieve a Saved Web Fax Word Merge Broadcast Job

Reference #	Broadcast Date	Description	Billing Code	Delete
466767259	3/22/2012 3:21:11 PM	Lecture invite	13918	<input type="checkbox"/>
466767603	3/22/2012 3:22:30 PM	Seminar attendance reminder	13918	<input type="checkbox"/>

Delete selected items

To Delete a Set of Saved Settings

1. Log in to Protus® at <https://www.protusfax.com>.
2. On the home page, under "Access Services," click **Web Fax**.
3. On the Web Fax page, in the "Web Fax Word Merge" section, click **Saved**.
4. In the last column of the table of saved fax jobs, check the **Delete** checkbox of the set of saved settings you wish to delete.
5. Click **Delete selected items**.

Appendix A: Create Your Recipient List

To ensure a seamless merge process at the time of broadcast, your Excel (.xls) file must comply with some specific format rules:

- It must be an Excel (.xls) file.
- Your recipient list must reside in the "Sheet1" tab of the .xls file.
- The names of the columns must be in the first row of the recipient list.
- The names of the first three columns of your recipient list must be "faxnumber," "to," and "id," respectively.
 - The values in the "faxnumber" column are the fax numbers to which Protus® will fax the document; each fax customized per the information provided in the corresponding rows.
 - The values in the "to" column will be displayed in the **to** field at the top of the received fax.
 - The values in the "id" column are for your own reference. This column **must be included** even if you decide to not include any values in it.
- You may include any number of additional, customized content columns after the third column. If you do add columns, the names of those columns must correspond to the names of the mail merge fields you've included in the Word document.

The values in these columns will populate the corresponding merge fields of the Word document. See "Appendix B: Create Your Word File" on page 17.

Example: If the value in the "greeting" column in the row corresponding to "fax-number" 1-333-4444-1111 is "Karen," "Karen" will be displayed in that number's fax in place of the Word document's "greeting" merge field.

If the recipient list does include one or more of these columns, but some of their cells are blank, the fax will display blanks where the corresponding merge fields were located in the Word document.

Appendix A: Create Your Recipient List

Recipient List

	A	B	C	D	E
1	faxnumber	to	id	greeting	size
2	111111111111	Robert	1	Rob	XL
3	122233333333	Seth	2	Seth	L
4	144444444444	Meagan	3	Meg	M
5					

Word Document

To %greeting%,

Per your order, we will send you a %size% t-shirt.

Thank you,
Jonathan Bruce



To Rob,

Per your order, we will send you a XL size t-shirt.

Thank you,
Jonathan Bruce

Appendix B: Create Your Word File

To customize your faxes per recipient, you can insert any number of merge fields in your Word document. As long as the names of those fields are also the names of the columns in your recipient file, the information associated with each recipient will populate the merge fields of his/her fax.

See "Appendix A: Create Your Recipient List" on page 15.

Recipient List

	A	B	C	D	E
1	faxnumber	to	id	greeting	size
2	11111111111	Robert	1	Rob	XL
3	12223333333	Seth	2	Seth	L
4	14444444444	Meagan	3	Meg	M
5					

Word Document

To %greeting%,

Per your order, we will send you a %size% t-shirt.

Thank you,
Jonathan Bruce



To Rob,

Per your order, we will send you a XL size t-shirt.

Thank you,
Jonathan Bruce

To insert a merge field into the broadcast Word file:

1. In the Word file, place the cursor where you wish to insert the merge field.
2. Type *%(field name)%*.