Concord Cloud Fax

Fax Cover Page Guide:
Creation, Upload and Management

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Overview

Concord Cloud Fax users may elect to include **cover pages** with their **outbound** fax transmissions when sending from various Concord services. These cover pages may be **generic,** and created and managed by Concord, or **customized** with specific branding, department-level details, and/or strict disclaimers to suit varying needs.

Concord cover pages are created as **Microsoft Word** files, so they are easy to customize and upload via the **Concord Admin Portal**. This document provides instructions for the creation, upload, and ongoing management of customer-generated Microsoft Word cover pages.

You can also view our Cover Page **video tutorial** at the how-to section of our website, located at https://concord.net/cloud-fax-how-to-videos/.

If you have any questions about this or any other Concord related topic, please contact the **Concord Premium Support** department at premiumsupport@concord.net.
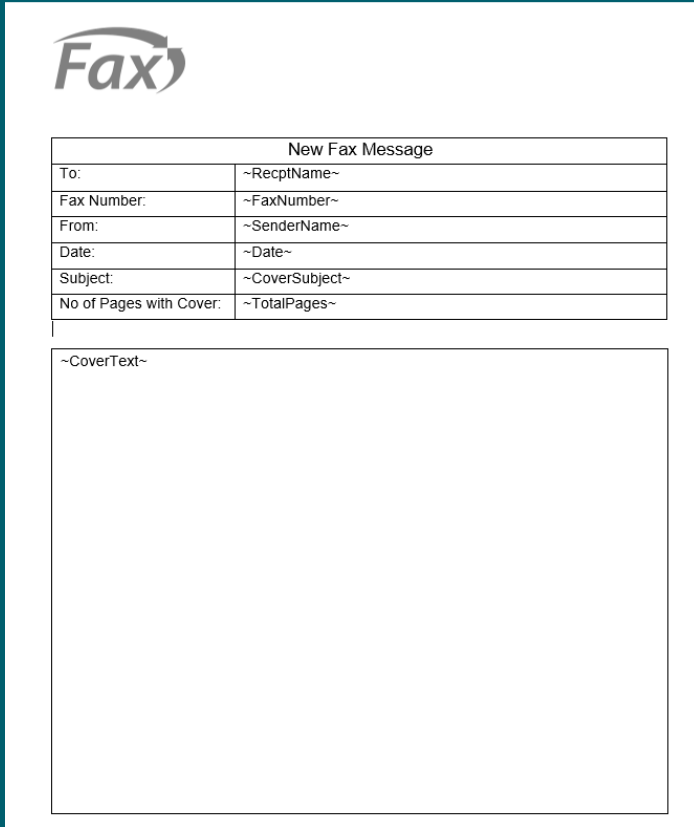
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Creating a Cloud Fax Cover Page

Concord cover pages are stored as **Microsoft Word** (.doc or .docx) files, and may be managed by a customer directly, using Concord's Admin Portal. Cover pages may be uploaded and enabled at a corporate **company** level, for specific **departments,** or for **individual user** accounts, as needed, to support various cover page requirements for user, application and device-based fax sending.

In this section of the Cover Page Guide we'll review how to **create** cover pages in the proper format and prepare them for upload. Microsoft Word has many fax cover page **templates** available as a starting point, though some are in color and these should be avoided. Any pre-existing Microsoft Word templates will not contain the proper tokens to add data to a cover and will need to be edited. You can also **download** a generic, black and white, cover page **Word template** directly from Concord **here**.

The Concord template displays as follows, and contains a black and white **logo** in the header and several **tokens** used to populate variable information such as the **recipient** name (To:), the **sender** name (From:), and the **subject** line, as entered by the user or application sending the fax:

Using the Concord cover page template as an **example**, it is recommended that you follow the below **guidelines** when creating your cover page Word documents:

Images / Logos

- **Images,** such as corporate logos, should be in **black-and-white** (and not color or greyscale), if possible. All faxes sent by Concord are rendered in black-and-white, and color or greyscale images will likely appear blurry or illegible when displayed on your fax cover. Similarly, shading, or any sort of photographic image, will likely not render clearly when transmitted as a fax.

- Consider placing **logos** and related images in the **header** section of your Word file to maximize space for content in the body.

Layout

- Use a **margin** size of 0.75" for each margin, to ensure all cover data fits on an 8.5"x 11" page.

- Use **tables** to organize your cover page into columns, labeling data in one column and inserting the necessary token for that data in another. Add rows as needed to account for the data you wish to display.

Fonts

- Use a "sans-serif" style **font** that is sized at 10-point, at minimum. "Serif" style fonts and small text may not render as clearly.

Tokens

- **Token** is the term Concord applies to the proprietary **insert fields** that may be added to a cover page to populate data when a fax is sent. Seven tokens have been added to the Concord cover page template, but many additional tokens exist. For a **full list** of tokens and their definitions, please see Appendix: Cover Page Token List at the end of this document.

- Tokens must be enclosed within **tilde** characters (~) on each side of the token text for the token to be overwritten with variable text (e.g. ~Date~ and ~RecptName~).

- Text boxes/cells that will contain variable information populated using tokens should be **sized** to ensure they can contain the full text they represent when the fax is transmitted. This is especially true of the **~CoverText~** token, which may be used to represent the email body of the sender and could contain multiple (or many) lines of text and possibly span multiple pages.

File / Cover Page Name

- The **name** of the Word document cover page **file**, when saved, will become the name of the cover page in Concord, minus the .doc or .docx extension. Choose a cover page name that is unique and descriptive but avoid long file names for your .doc or .docx files.

Once you have **created** and **saved** your Concord cover page as a .doc or .docx file, you can move on to **upload** and **assign** your new cover page.

Uploading a Cloud Fax Cover Page

New (or updated) Concord cover pages are typically uploaded via Concord's **Admin Portal**, though they can also be added to the platform using Concord APIs. In this section we'll focus on **uploading** cover pages as an Admin, using Concord's Admin Portal, which may be accessed **here** with the proper Admin credentials.

Note that, depending on the organization of your Concord account, cover pages may be uploaded to the **company** level, where they can be assigned to and accessed by any department or user in the entire account, or to a **department** or **sub-department** level, where access would be restricted to users in that Department only. It is also possible to load a cover page template directly to a **user** account, such that only that user account would have access to the cover page. It is important to add the cover at the level that will make the most sense for your use-case, but Concord **Premium Support** can assist in changing cover page ownership if needed.

To begin, you'll need to authenticate to **Concord's Admin Portal**. From the dashboard landing page, click **Settings/Account Administration** to access the Concord account settings for your organization or department:
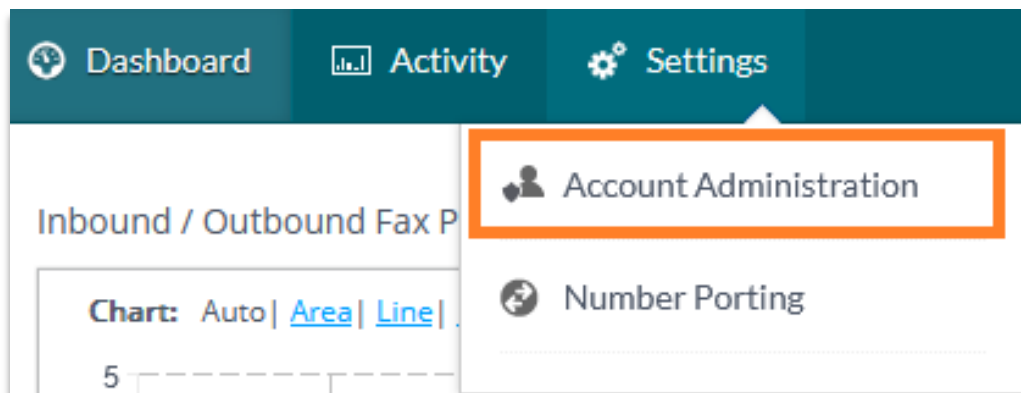
From here, you will navigate to where you want to load the cover page. The **top-level** entity, which may be your Company organization or a Department, will be shown in **blue**. Entities below this with a **triangle** next to them (if present), represent **departments**, where cover pages may be uploaded for a specific group of users:
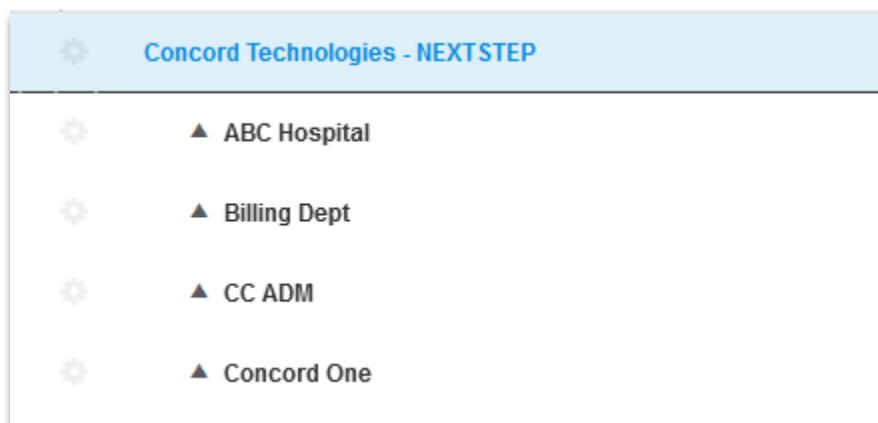
Click the name of the **entity** where you want to **upload** the cover page.

When the entity opens, click the **Coverpage** tab:

To upload a cover page .doc or .docx file, click **Browse**, navigate to your Word cover page template and click **Open**.
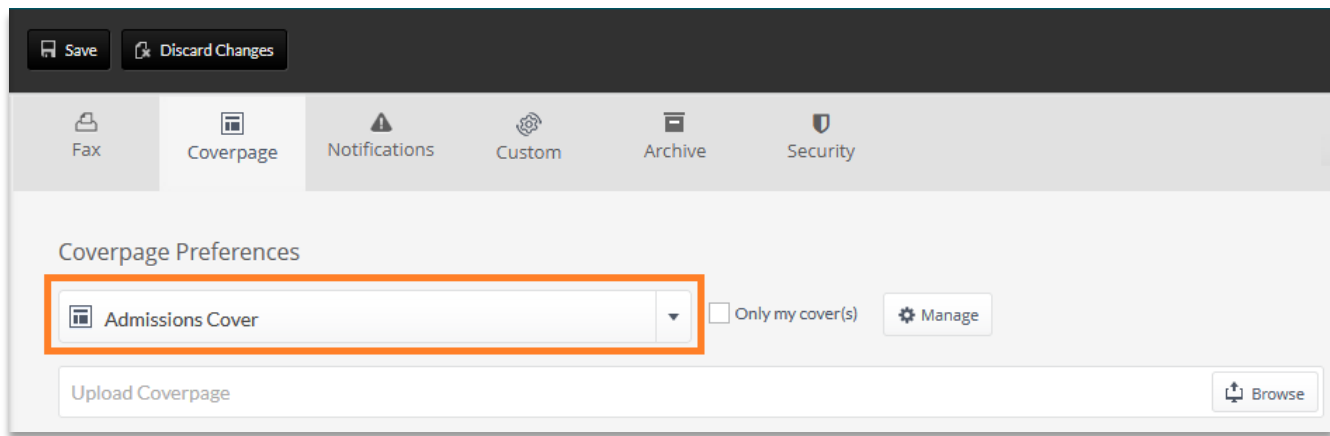
This will **upload** your cover page template to the Concord Admin Portal:

Click **Save** to complete the upload.

Click **Cancel** to clear the cover page name and return to Browse.

Once you have uploaded your cover page template, you have the option of making this the default **cover page** for the entity to which you have uploaded the cover page. To do this, **select** the newly uploaded cover page name from the **dropdown** list:

After you have selected your cover page, click **Save** to make your cover the default.

Note: Updating the cover page default (or any default setting) **will not** update this setting for **existing** users in the account entity (Company, Department, sub-Department) you are administering, and would only apply to users added *after* the default change is made. Please contact Concord **Premium Support** to have default changes pushed to existing users, if needed.

Cloud Fax Cover Page Behavior

In addition to uploading and managing cover page templates, Concord Administrators can also specify the **conditions** for which a cover page is added to a transmission. Options include **always** adding a cover page, **never** adding cover page, and allowing users to **select** whether a coverpage is added based on their actions during submission.

Cover page **behavior settings** (as with most account settings made within the portal) follow the settings made at the most granular level. If no overriding settings are made at the **user** or **department** levels, users will follow the default settings established at the **company** level. Should an underlying department require cover page behavior that is **different** than the company-level default, the company level settings can be **overridden** at the department level. Similarly, department-level settings can be overridden at the user-level.

Cover page behavior may be set via the **Coverpage** tab in the account entity (company, department or user) you want to edit:

The following **definitions** apply to the options listed in the Concord Admin Portal:

Automatic Coverpages dictates that a cover page will be included with **every** outbound fax, regardless of whether the user is actively electing to include one when sending a fax via the interface they are using to send.

On Demand Coverpages gives users the **option** of including a cover page or not. The **method** used by the user to enable or disable the cover page will vary according to the interface they are using to send faxes. Users sending via **email** must

include the command token **%{Cover}** in their subject line, while users submitting via **Print2Fax** or a Concord **portal-based** service can click a **button** within those applications.

No Coverpages dictates that a cover page **will not** be included in outbound fax transmissions, even if the user attempts to enable via the interface they are using to send faxes.

With Body Text provides cover control to users submitting via email and dictates that cover pages will be included whenever **any text** is detected in the **email body** of the outbound transmission, for email-based senders. This includes **email signatures**. The purpose of this setting is to ensure that users have a **simple** way to enable/disable cover pages when sending faxes via **email**, and that any text entered into the **body** of an email is passed along to the fax recipient in the "Body" section of the **cover page**. Note that this behavior setting will also allow users operating in Concord interfaces **outside email** to use an "On Demand" approach and toggle cover pages on/off via a **button**.

The settings that **Require Attachment** are also relevant to users that will be submitting faxes via email. Requiring attachment would **prevent** users from sending a **coverpage only** when sending an outbound fax. Users will need to include at least one attachment whenever they send a fax via email to avoid **rejection**.

Below this, you will find the option to **Restrict Submission to Use Assigned Coverpage Only**:

Checking this box will restrict user accounts so they **will not** be able to select any coverpages beyond the default they are specifically assigned. Coversheet selection in applicable Concord applications will be **disabled**.

Note that while these settings will dictate the **company defaults**, Concord Administrators with the appropriate rights will have the ability to edit these settings and/or create new cover page templates at **department** and user **levels**.

Managing Cloud Fax Cover Pages

Once cover pages have been established, admins can manage them via the **Concord Admin Portal**. Access to manage **rename**, **update** or **delete** covers will correspond to the account **level** of the admin (company, department or sub-department) and where in the account hierarchy the cover pages was **created**. **Company-level** admins will have rights to edit and manage **all** custom cover pages uploaded to the account, while admins within **departments** will have access to manage or edit covers that were **uploaded** specifically to that department or sub-department.

Note that **two** cover pages, **Concord Default** and **Concord Default (Healthcare)**, will be pre-loaded to your account at account creation and are available to be assigned and used by any Concord customer but **cannot** be edited or deleted via cover page management tools.

Note also that an easy way to understand what covers are **available** to manage at that account level, is to click the **Only my cover(s)** check box, which filters the dropdown list of selectable covers to only those that were uploaded at that level:
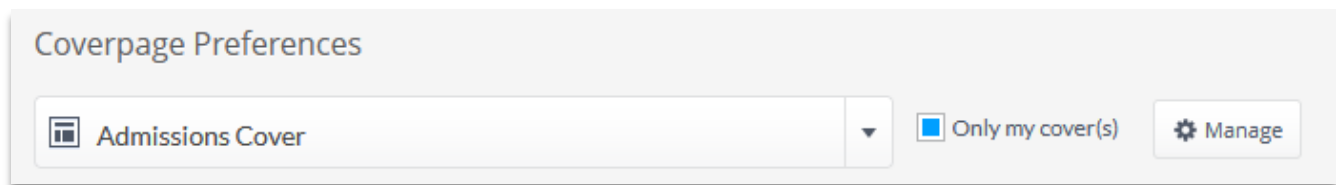
When you have selected the coversheet that you want to manage, click **Manage**.

This will open the **Cover Page Management** screen, which provides the following options:
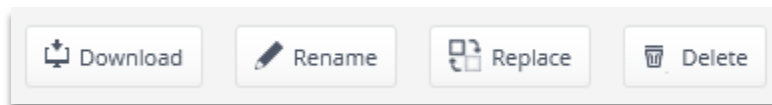
Download allows you to **export** the cover page template in its **original** .doc or .docx format. If you are planning to edit the cover page template, you can first download, then make your edits and then use the **Replace** function to update the edited cover page.

Rename allows you to **update** the **name** of the cover page template stored on the Concord platform.

Replace allows you to **overwrite** the existing cover page **template** with a **new** .doc or .docx cover page template. This is the best method to update the content, layout and/or tokens in a cover page.

Delete allows you to delete the cover page. As per above, this is not necessary if you are trying to update a cover page as you can use the **Replace** option for that. Use **Delete** only when you wish to completely remove a cover page from your account. Once you **delete** a cover page, it is **not** recoverable.

Note that you **cannot** delete a cover page that is actively assigned to any user, and you must update the users' designated cover page or delete the user(s) before deleting the cover page.

In addition to the above functions, the **Cover Page Management** screen also provides details on the coverpage, including when it was **created**, when it was last **edited**, where it was loaded in the **hierarchy** and what account entity (or entities) to which the cover page is **assigned** (company, department/sub-department and/or users):

DETAILS		
Id	32162	
Name	Admissions Cover	
Description		
Owner	Company (404961)	
Created	6/26/2024 6:05:08 AM	
Last Modified	6/27/2024 5:57:07 AM	
Document Type	1	
Document Description	MSWord	
ASSIGNED TO		
Company	Concord Technologies - NEXTSTEP (404961)	Status: Active

Getting Help

Concord **Premium Support** contact Information:

Hours: Monday–Friday from 6:00 AM to 6:00 PM Pacific Time

Phone: +1 (206) 441-3346

Emergency After Hours Phone: +1 (206) 467-4068

Email: premiumsupport@concord.net

Web: https://concord.net/technical-support/

Appendix: Cover Page Token List

Token Name	Description
~CoverSubject~ or **~Subject~**	Presents the subject line of the sender's email when faxes are sent via email. May also be populated via other Concord services as the subject of a Send Fax operation.
~CoverText~	The message body (possibly including signature) as captured from the sender's email when faxes are sent via email. May also be populated via other Concord services as the body of a Send Fax operation.
~Time~ or ~Date~ or ~DateTime~	The date and time of the fax transmission.
~TotalPages~ or **~NumPages~**	The total number of pages sent in the fax, including the cover page
~CurrentPage~	Presents a hard coded value of "1". Do not use if using a cover page that exceeds one page.
~MessageId~	Unique job identifier in format "X-Y", where X is JobPrefixId and Y is JobId.
~FullMessageId~	Unique job identifier in the format "brAhXrZjY" where A is last 3 digits of the IP, X is JobPrefixId, Y is JobId, and Z is RecipientId.
~FaxNumber~	The designated recipient's fax number.
~RecptName~	The designated recipient's full name.
~RecptFirstName~ or ~FirstName~	The designated recipient's first name.
~RecptLastName~ or ~LastName~	The designated recipient's last name.
~RecptTitle~ or	The designated recipient's title.

~Title~	
~RecptCompany~ or ~Company~	The designated recipient's company.
~RecptAddress1~ or ~Address1"	The designated recipient's address - field 1.
~RecptAddress2~ or ~Address2~	The designated recipient's address - field 2.
~RecptCity~ or ~City~	The designated recipient's city.
~RecptCountry~	The designated recipient's country.
~RecptState~ or ~State~	The designated recipient's state.
~RecptZip~ or ~Zip~	The designated recipient's zip code.
~RecptTelephone~ or ~Telephone~	The designated recipient's telephone number.
~RecptExtra1~ -> ~RecptExtra12~	Placeholders for 12 fields of custom recipient-oriented data, typically submitted via API.
~SenderName~	When faxes are submitted via email, the name will be pulled from the email header of the submitting sender. For other submission types this is typically populated from the user's account profile but may also be populated via API.
~SenderFirstName~	The fax sender's first name
~SenderLastName~	The fax sender's last name
~SenderEmail~	When sending via email, this displays the email address from which the sender submits a fax. When using other methods, this is typically populated via the user's profile.

~SenderCSID~	The fax sender's "Caller Station Identifier" which is a 20-character text field populated in the sender's user account. If this is not customized, it will read as "Fax Services."
~SenderDeptName~ or ~DeptName~	The fax sender's department.
~SenderAddress1~	The fax sender's address - field 1.
~SenderAddress2~	The fax sender's address - field 2.
~SenderCity~	The fax sender's city.
~SenderCompany~	The fax sender's company.
~SenderCountry~	The fax sender's country.
~SenderFax~ or ~SenderFaxNumber~	The sender's fax number. May be populated from the user's account profile or via a Concord Send Fax operation.
~SenderState~	The sender's state.
~SenderTelephone~	The sender's telephone number.
~SenderZip~	The sender's ZIP Code.
~ReferenceId~ or ~SenderExtra1~	Used to specify "reference" or tracking information when sending a fax.
~SenderExtra2~ -> ~SenderExtra12~	Placeholders for an additional 11 fields of custom sender-oriented data, typically submitted via API.
~EndCoverMsg~	Hard coded to add the text "End of Cover Page" where placed.