



Concord FaxAssist

Complete User Guide

Version 5.x

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The fax service who provided the software reserves the right to make changes without notice to this publication. The fax service provider and software shall not be responsible for any damages, consequential or otherwise, caused by reliance on the materials presented herein, including typographical errors.

More Information

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Preface

Welcome to Concord FaxAssist: a Windows utility that routes selected incoming fax communications to printers (for automatic printing) or to specific folder(s) or document management systems for storing.

For each account that is configured to retrieve faxes, the documents can be routed to any of the following three options:

- Print to a local or network printer
- Store in one or more folders
- A combination of the above

Who is this guide for?

The Concord FaxAssist User Guide provides helpful information for any administrator tasked with installation and/or the configuration of service utility applications.

Getting Started

This chapter provides information required to get started with the FaxAssist application. The following topics are included:

- System Requirements
- Installation and Upgrade Procedures
- License Agreement
- Getting Familiar with the Interface

System Requirements

- To use Concord FaxAssist, you must have a Concord Fax account.
- Supported operating systems (64bit only): Windows Server 2012, Windows Server 2016, Windows Server 2019, Windows Server 2022, Windows 10, and Windows 11.
- Concord FaxAssist requires a .Net version 4.8 or higher.
- Concord FaxAssist requires at least 300 megabytes (MB) of RAM (500MB is recommended).
- Concord FaxAssist requires at least 1 gigabyte (GB) of available space on the hard disk (more may be required based on the level of traffic to handle).

Installation and Upgrade

If you are installing FaxAssist for the first time, please skip to the [step-by-step installation procedures](#). If you are upgrading FaxAssist to the latest version, please follow the instructions directly below.

Upgrading an Existing Install

To upgrade FaxAssist, you will first need to uninstall the current version of the application from your workstation. Note: You will have the ability to migrate current settings to the new version, during the install.

The following screenshots will guide you to start this process:

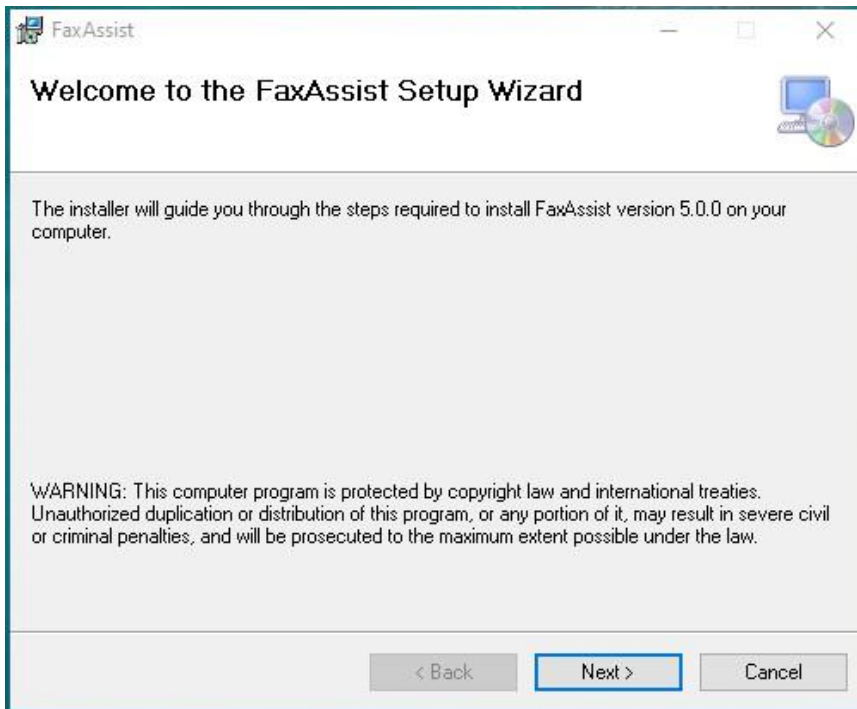
- ➔ Go to **Control Panel -> Add Remove Programs/ Programs and Features**
- ➔ Right click on the **FaxAssist** and click on **Uninstall/Change** to remove the application from the workstation.
- ➔ Click **Uninstall**.



- ➔ Then follow the step - by - step instructions as discussed in [Step - by - Step Installation Procedure](#) section below.

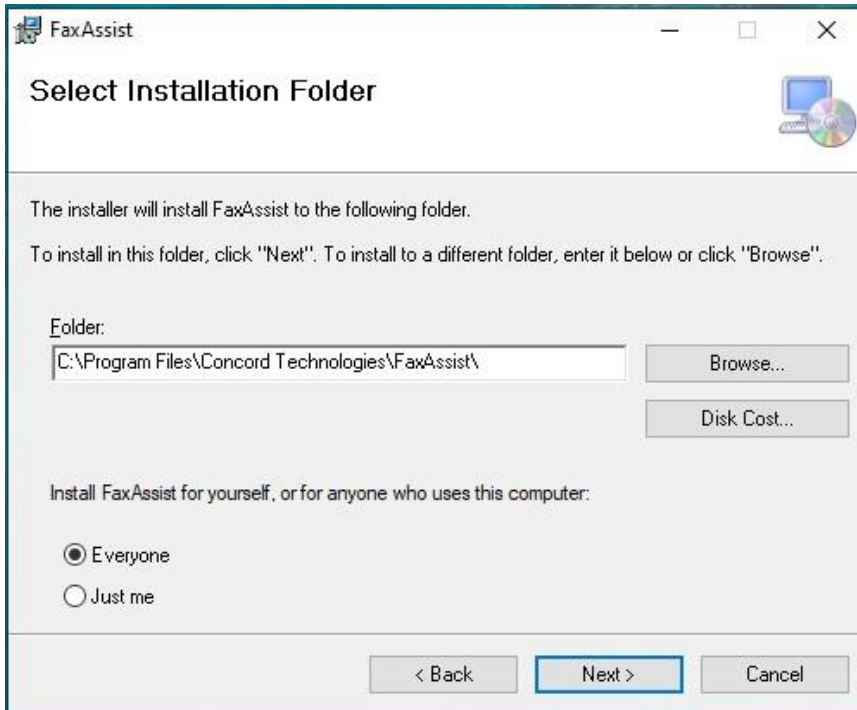
Step-by-Step Installation Procedure

- ➔ Download the FaxAssist Installer
- ➔ Disable any anti-virus software before installing FaxAssist.
- ➔ Run the install package by double clicking the **FaxAssistInstall.msi** file.
- ➔ Click **Next** to initiate the install.

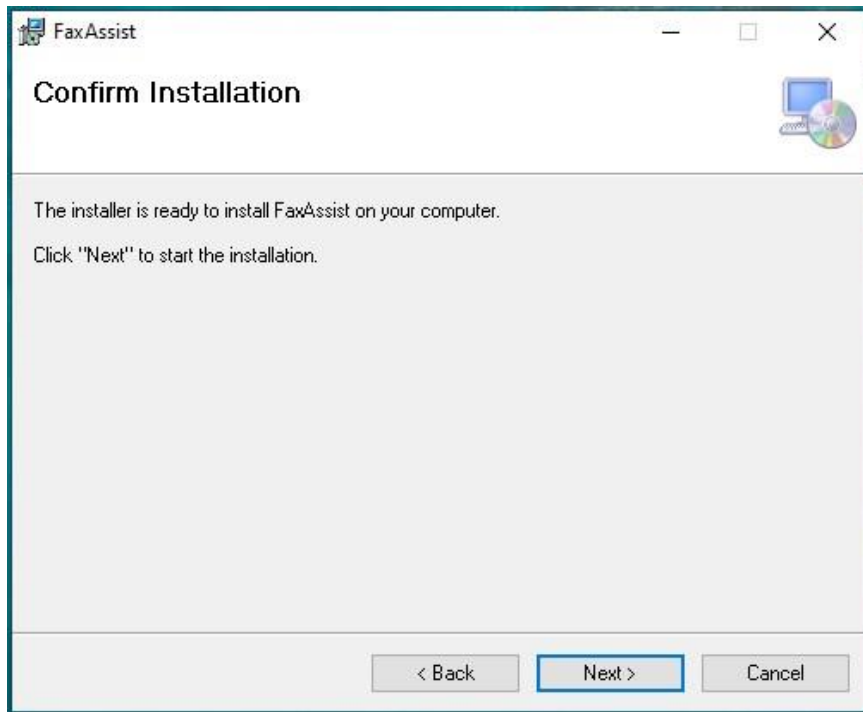


- ➔ Accept the default **Destination Folder** and click **Next**.

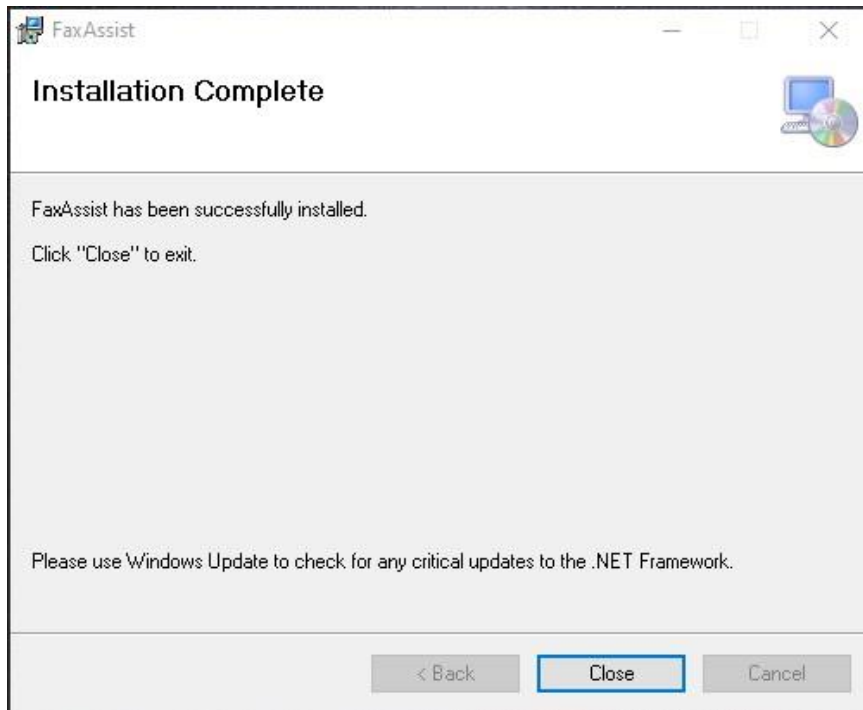
Note: If preferred, you can change the installation location.



➔ Click **Next** to start the installation.






- ➔ A progress bar will display your installation progress.
- ➔ Once finished, you will get the successful installation notification, click **Close** to exit the installer.



Windows Service Security Settings (optional)

If this application needs windows permissions to print or save files to disk, then you must set the permissions for the Windows service using the username/password that has access to the resources.

To set permission go to **Start > Control Panel > Administrative Tools** and open **Services**. Find the service Concord FaxAssist as shown below.

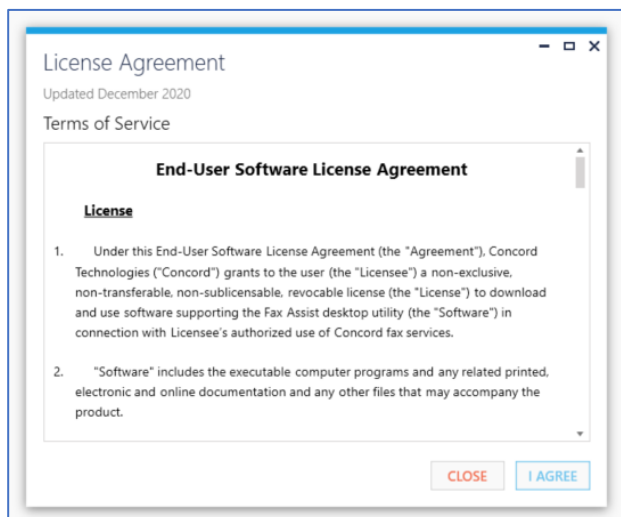
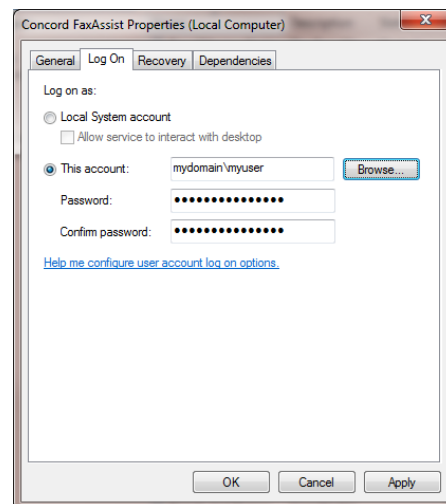
	Computer Browser	Maintains an updated list of computers on the network an...	Started
	Concord FaxAssist	Processes email accounts and delivered to share/printer	Started
	Concord Folder Fax	Concord Folder Fax	Started

Right click on the service and select **Properties**. Click on the **Log On** tab and change the "Log on as" to "This account" and type in the windows account that is required to access the remote resources such as printer or file storage. Note this is only required if the remote resource requires windows permissions to access.

License Agreement

On the first launch of the FaxAssist application after installation, the software license agreement will be displayed. Confirm acceptance by clicking on **I AGREE**.

Note: This is a one-time notification and will no longer appear after installation.



Getting Familiar with the Interface

As a first-time user, it is recommended to take a few minutes to get familiar with the user interface.

The screenshot displays the Fax Assist web application interface. The top header includes the 'FA Fax Assist' logo, 'A Concord Technologies Product', and navigation links for 'SETTINGS', 'VIEW STATUS', and 'ABOUT'. The main content area is divided into two sections: 'Accounts' on the left and 'Account Info Options' on the right. The 'Accounts' section lists configured accounts: 'Billing Email', 'Marketing', '12125551212', and '12125551002'. The 'Account Info Options' section contains fields for 'Account Name' (Billing Email), 'Type' (InboundWS), 'Username' (mbx35051902), 'Password' (masked), 'Server Address' (https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx), 'Printer Name' (OneNote (Desktop)), and 'Storage Location' (C:\Users\Concord-A9\Documents\FA DOCS\). There are also checkboxes for 'Enable Mailbox' and 'Do not store metadata file', and buttons for 'VALIDATE MAILBOX', 'VALIDATE OUTPUT', 'DELETE ENTRY', 'CLOSE', 'SAVE', 'STOP', and 'REFRESH'. A status bar at the bottom indicates 'Service is Running'.

Accounts	Account Info	Options
CONFIGURED ACCOUNTS : 5	Account Name	Type
Billing Email	Billing Email	InboundWS
Marketing	Username	Password
12125551212	mbx35051902
Accounts	Server Address	
12125551002	https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx	
	Enable Mailbox	VALIDATE MAILBOX
	Printer Name	
	OneNote (Desktop)	
	Storage Location	
	C:\Users\Concord-A9\Documents\FA DOCS\	
	Do not store metadata file	VALIDATE OUTPUT
	DELETE ENTRY	CLOSE SAVE

The main screen is divided into 2 sections. On the left side of the screen is a list of configured accounts with an indicator if an account is currently not receiving faxes. Below this list are controls for starting and stopping the service. On the right side, will be the details associated with the account selected. Above the account information you will see a few additional options: **Add Account**, **Setting**, **View Status**, and **About**.

Add Account

Click on the **Add Account** button, to bring up a new screen to configure a new account. For more information about the account record please see the [Account Configuration](#) section of this document.

The screenshot shows the 'Add Account' configuration window in Fax Assist. The window has a title bar with standard OS controls. The top navigation bar includes the 'FA Fax Assist' logo, 'A Concord Technologies Product', and links for 'SETTINGS', 'VIEW STATUS', and 'ABOUT'. The main content area is divided into two tabs: 'Account Info' (selected) and 'Options'. On the left, a sidebar shows a list of accounts under the heading 'Accounts' with a '+ ↕' icon. Below this, it says 'CONFIGURED ACCOUNTS : 5'. The list includes 'Billing Email', 'Marketing' (with a red envelope icon), and 'Accounts' (with a red prohibition icon). Each account has a number: '12125551212' and '12125551002'. At the bottom of the sidebar, there's a status bar with a green indicator, 'Service is Running', and buttons for 'STOP' and 'REFRESH'. The 'Account Info' tab contains several input fields: 'Account Name' (empty), 'Type' (dropdown menu set to 'InboundWS'), 'Username' (empty), 'Password' (empty), 'Server Address' (text field with 'https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx'), 'Printer Name' (dropdown menu set to 'None' with a refresh icon), and 'Storage Location' (text field with 'Storage location...'). There are also checkboxes for 'Enable Mailbox' (checked) and 'Do not store metadata file' (unchecked). Action buttons include 'VALIDATE MAILBOX', 'VALIDATE OUTPUT', 'DELETE ENTRY', 'CLOSE', and 'SAVE'.

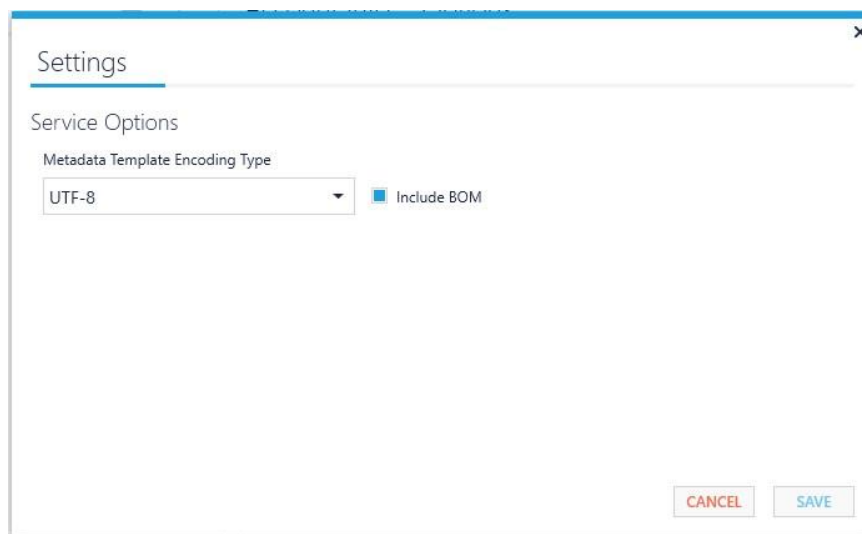
View Status

The View Status button will display the log viewer which allows you to monitor FaxAssist application activity, research problems or provide to technical support. For more information about the logs, please see the [Troubleshooting](#) section of this document.

Settings

The **Settings** screen allows you to choose the following configuration setting:

- Select the **Metadata Template Encoding type** you want to encode the Metadata file. You can choose from: UTF-8, UTF-16LE and UTF-16BE. You may also choose to include a Bite Order Mark (or endianness)



About

For version and licensing information, as well as instructions for requesting technical assistance, click on the **ABOUT** button.



FaxAssist Account Configuration

The Concord FaxAssist application is designed to retrieve faxes to be processed by one of two methods. Either by checking an IMAP email account, or directly through your Concord account which is setup with forwarding settings set to Inbound Web Services.

Not sure whether to use **IMAP**, **Office 365 IMAP**, or **InboundWS**? Please refer to the [FAQs](#) for more information on this topic.

The **Account Info** screen will display the necessary items for configuring an account using the selected retrieval method (**InboundWS**, **Office 365 IMAP** or **IMAP**).

The screenshot displays the FaxAssist web application interface. On the left, a sidebar shows the 'Accounts' section with a list of 'CONFIGURED ACCOUNTS : 5'. The main content area is titled 'Account Info' and 'Options'. It features several input fields and dropdown menus for configuring an account. The 'Type' dropdown is currently set to 'Imap', with 'Office 365 IMAP' and 'InboundWS' also visible. Other fields include 'Account Name', 'Username', 'Server Address', 'IMAP Port', 'Printer Name' (set to 'None'), 'Storage Location', and a checkbox for 'Do not store metadata file'. There are buttons for 'AUTO DISCOVER', 'VALIDATE MAILBOX', 'VALIDATE OUTPUT', 'DELETE ENTRY', 'CANCEL', 'SAVE', 'STOP', and 'REFRESH'. A status bar at the bottom indicates 'Service is Running'.

This chapter provides information on the FaxAssist Configuration Settings applicable for each method, as well as the settings required for printing and/or storing the documents.

Inbound Web Services Setup (InboundWS)

Selecting **InboundWS** from the **TYPE** drop down list will set the FaxAssist service up for retrieving faxes from your Concord account using the Concord Inbound Web Services Interface. The window will look like the screenshot below. The information required for retrieving faxes is contained in the first section of fields.

The screenshot shows the 'Fax Assist' application window. On the left is a sidebar with 'Accounts' and 'CONFIGURED ACCOUNTS : 5'. It lists 'Billing Email', 'Marketing' (12125551212), and 'Accounts' (12125551002). The 'Accounts' entry is selected. The main area is titled 'Account Info' and 'Options'. It contains several input fields: 'Account Name' (empty), 'Type' (dropdown set to 'InboundWS'), 'Username' (empty), 'Password' (empty), 'Server Address' (pre-filled with 'https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx'), 'Printer Name' (dropdown set to 'None'), 'Storage Location' (empty), and a checkbox for 'Do not store metadata file'. There are buttons for 'VALIDATE MAILBOX', 'VALIDATE OUTPUT', 'DELETE ENTRY', 'CLOSE', 'SAVE', 'STOP', 'REFRESH', and 'Service is Running'.

Account Name

The **Account Name** field is used to identify the account profile you are creating. The only requirement for this alphanumeric field is that it must be unique. Some sample account names are the fax number, or the department associated with that fax account.

Username

Enter your Concord Fax Online **Username** here. *Example: mbx1234567*

Password

Enter the **Password** that will be used to login to the Concord Fax account listed above.

Server Address

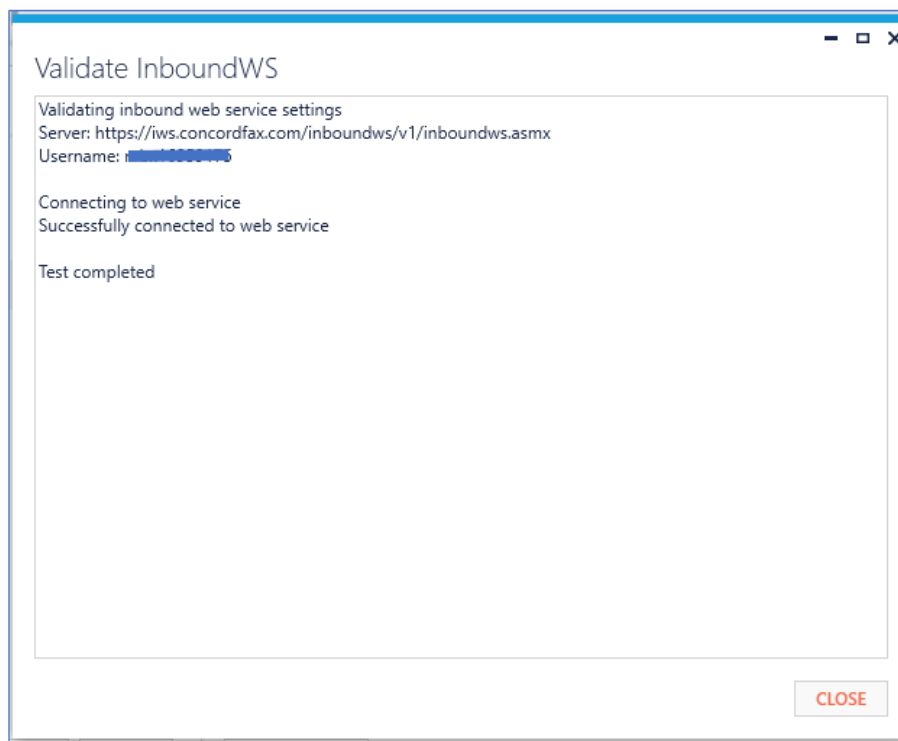
The **Server Address** is pre-populated with the URL to access Concorde's Inbound Web Services.

Enable Mailbox

Selecting the **Enable Mailbox** checkbox will enable this account to retrieve messages. You can add additional entries and selectively enable or disable each.

Validate Mailbox

By clicking the **Validate Mailbox** button, FaxAssist will validate the credentials entered, confirming that it can access your faxes stored on the Concord network. A pop-up window will appear displaying the results of the validation.



IMAP Setup

The IMAP solution is intended for users who choose to have their inbound faxes delivered to an email account and want to route them to a printer or storage location. FaxAssist supports both IMAP Basic Authentication and Office 365 IMAP.

IMPORTANT!!! – Do not set up this service to check against email accounts used by anything other than the FaxAssist service as all messages that are processed are moved from the INBOX or deleted depending on the setup.

IMAP Basic Authentication

Selecting **IMAP** from the **TYPE** drop down list will set the FaxAssist Manager interface up for retrieving faxes from your IMAP email address.

The **Account Info** window will look like the screenshot below. The information required for retrieving faxes is contained in the first section of fields.

The screenshot displays the FaxAssist web interface. On the left, a sidebar shows a list of accounts under the heading 'Accounts' (CONFIGURED ACCOUNTS : 5). The accounts listed are 'Billing Email', 'Marketing' (12125551212), and 'Accounts' (12125551002). The 'Accounts' entry is selected. The main area is titled 'Account Info' and 'Options'. It contains several input fields: 'Account Name', 'Type' (a dropdown menu set to 'Imap'), 'Username', 'Password', 'Server Address', and 'IMAP Port'. There are checkboxes for 'Use SSL' and 'Enable Mailbox', along with 'AUTO DISCOVER' and 'VALIDATE MAILBOX' buttons. Below these are fields for 'Printer Name' (a dropdown set to 'None') and 'Storage Location' (a text field with a browse button). A 'Do not store metadata file' checkbox and a 'VALIDATE OUTPUT' button are also present. At the bottom, there is a status bar showing 'Service is Running' with 'STOP' and 'REFRESH' buttons, and a 'DELETE ENTRY' button. On the far right, there are 'CLOSE' and 'SAVE' buttons.

Account Name

The **Account Name** field is used to identify the account profile you are creating. The only requirement for this alphanumeric field is that it must be unique. Some sample account names are the fax number, or the department associated with that fax account.

Username

Enter the **Username** that will be used to login to the email account.

Password

Enter the **Password** that will be used to login to the IMAP account listed above.

Server Address

Enter the **Server Address** that the IMAP account resides on.

IMAP Port

Leaving the **IMAP Port** field blank will use the default ports for SSL or non-SSL based on the Use SSL checkbox setting (993 or 143 respectively).

Note: If you use a non-standard port be sure to enter it here.

Use SSL

Checking this will set FaxAssist to use SSL (Secure Socket Layer).

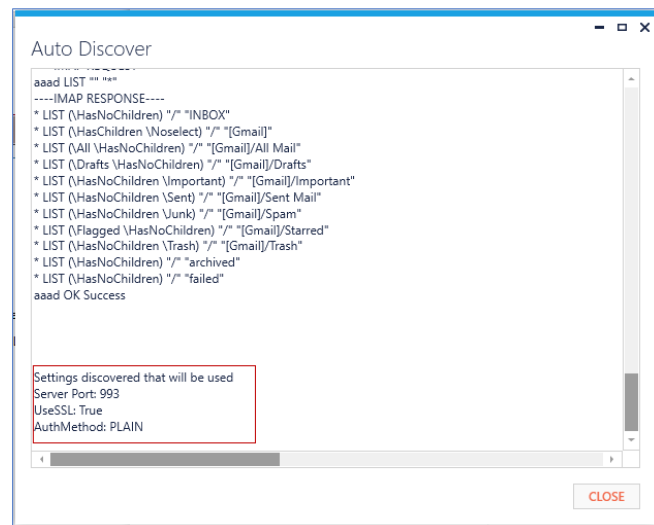
Enable Mailbox

Selecting the **Enable Mailbox** checkbox will enable this account to retrieve messages. You can add additional entries and selectively enable or disable each.

Auto Discover

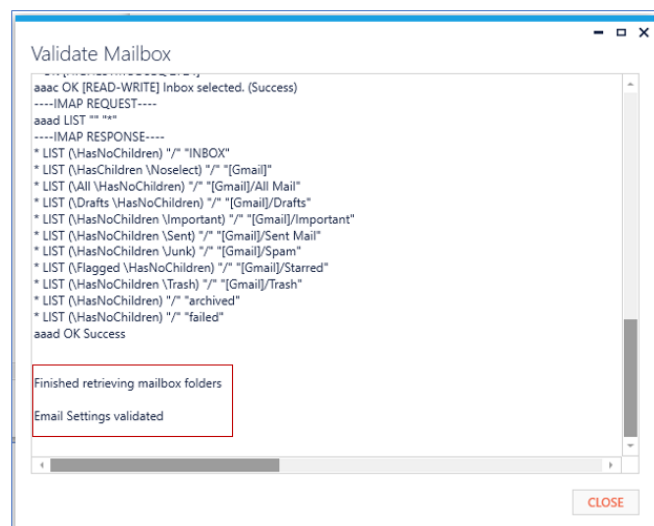
FaxAssist can automatically detect the most secure settings supported by your IMAP server. Fill in the **Username**, **Password**, and **Server** and then click **Auto Discover**.

An **Auto Discover** dialog will open and if permitted, it will automatically detect the settings necessary and upon closing will populate the necessary settings.



Validate Mailbox

By clicking the **Validate Mailbox** button, FaxAssist will validate the credentials entered, confirming that it can access your faxes stored on the Concord network. A pop-up window will appear displaying the results of the validation.



Office 365 IMAP

As Microsoft has discontinued Basic Authentication, it is necessary to use modern authentication for Office365. With this approach users will be prompted to provide their password in a web browser, and Fax Assist will no longer retain passwords.

Selecting **Office 365 IMAP** from the **TYPE** drop down list will set the FaxAssist Manager interface up for retrieving faxes from your IMAP email address.

The **Account Info** window will look like the screenshot below. The information required for retrieving faxes is contained in the first section of fields.

Account Name

The **Account Name** field is used to identify the account profile you are creating. The only requirement for this alphanumeric field is that it must be unique. Some sample account names are the fax number, or the department associated with that fax account.

Username

Enter the **Username** that will be used to login to the email account.

Server Address

Enter the **Server Address** that the IMAP account resides on.

IMAP Port

Leaving the **IMAP Port** field blank will use the default ports for SSL or non-SSL based on the Use SSL checkbox setting (993 or 143 respectively).

Note: If you use a non-standard port be sure to enter it here.

Use SSL

Checking this will set FaxAssist to use SSL (Secure Socket Layer).

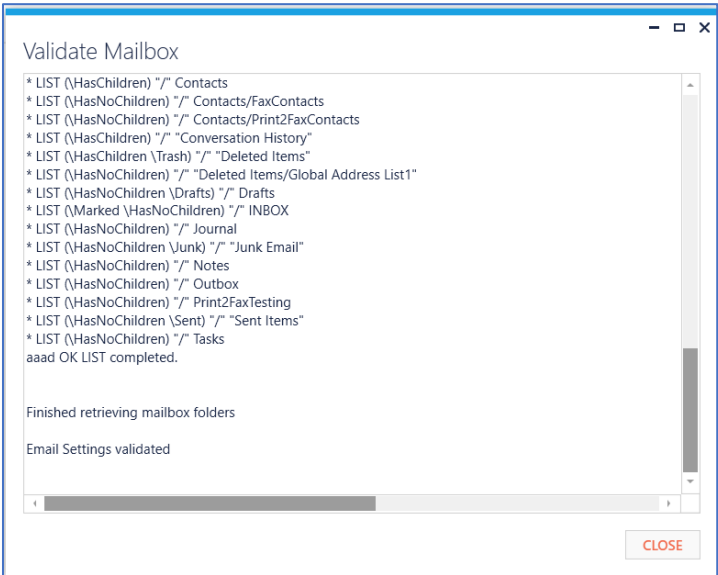
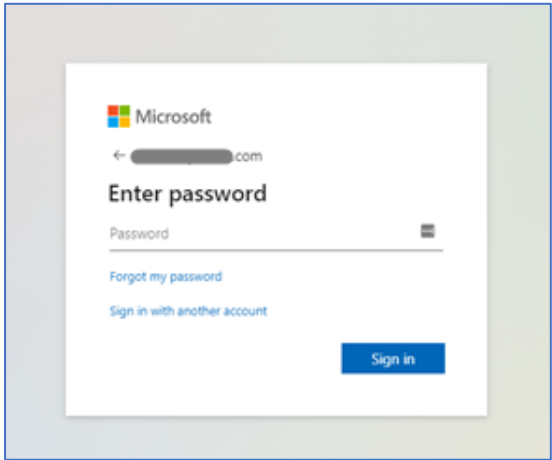
Note: SSL is required for Office 365 IMAP

Enable Mailbox

Selecting the **Enable Mailbox** checkbox will enable this account to retrieve messages. You can add additional entries and selectively enable or disable each.

Validate Mailbox

By clicking the Validate Mailbox button, FaxAssist will open a browser window to validate credentials, confirming that it can access the email account. A pop-up window will then appear displaying the results of the validation.



Routing Faxes

The information required for routing faxes is contained in the lower section of fields and applies to **all** retrieval methods (**InboundWS**, **Office 365 IMAP** and **IMAP**).

The screenshot displays the Fax Assist web application interface. On the left, a sidebar shows a list of accounts under the heading 'Accounts'. The accounts listed are 'Billing Email', 'Marketing' (with a red envelope icon), and 'Accounts' (with a red circle icon). The 'Accounts' section is currently selected. The main area is titled 'Account Info' and 'Options'. It contains several input fields: 'Account Name' (empty), 'Type' (dropdown menu set to 'InboundWS'), 'Username' (empty), 'Password' (empty), 'Server Address' (text field containing 'https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx'), and 'Enable Mailbox' (checkbox, checked). There is a 'VALIDATE MAILBOX' button. Below these fields, there is a 'Printer Name' dropdown menu set to 'None', a 'Storage Location' text field, and a 'Do not store metadata file' checkbox (unchecked). There are 'VALIDATE OUTPUT' and 'DELETE ENTRY' buttons. At the bottom, there is a 'Service is Running' status indicator, a 'STOP' button, a 'REFRESH' button, and 'CLOSE' and 'SAVE' buttons.

For each account that is configured for retrieving faxes, these documents can be routed to any of the following three options:

- Print to a local or network printer
- Store in one or more folders
- A combination of the above

By default, FaxAssist when storing faxes in a folder location, will also store an accompanying **Metadata File**. This file includes the metadata associated with the incoming fax, such as Concord Message ID, Received Time, Duration of the fax call, Fax Number, the CSID of the sending fax machine, etc. You can choose to disable the storing of the metadata file or the metadata file can be customized to meet the needs of your workflow. Please see [Appendix B](#) for more information about customizing the **Metadata File**.

Notes: If you wish to have faxes both printed and placed in a storage location you can simply define both a printer and a storage location. When both are defined both actions will be performed for every fax processed.


Printer Name

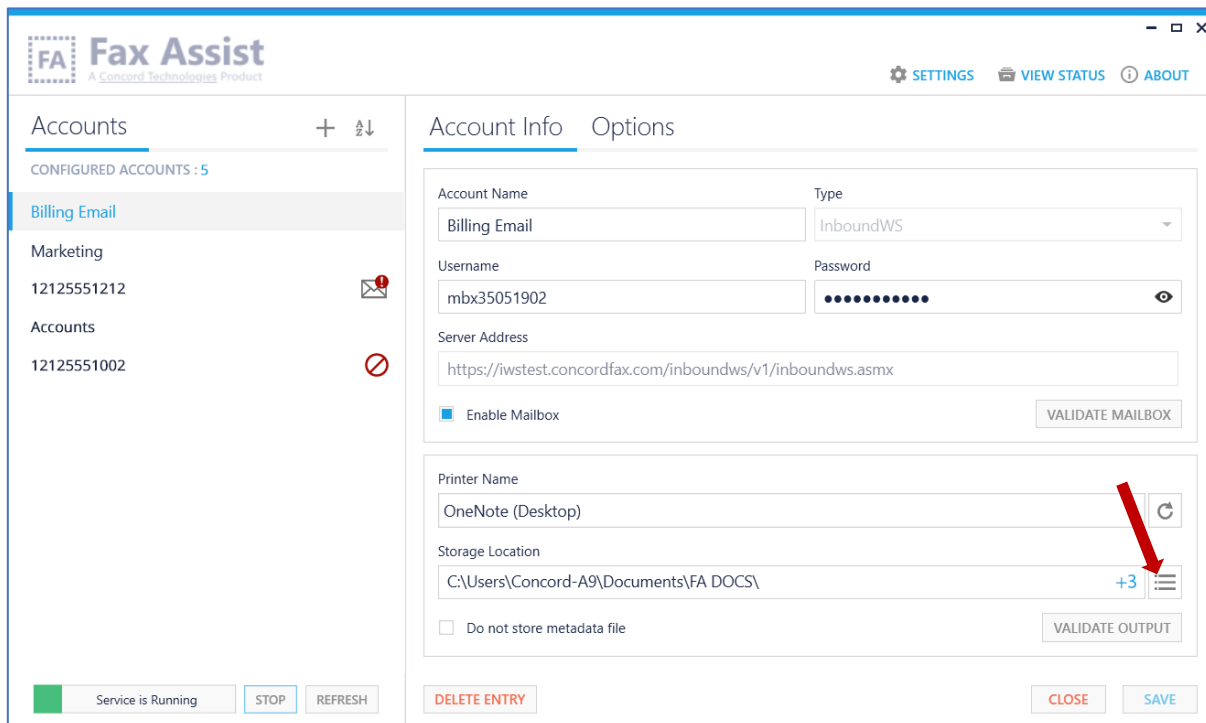
The FaxAssist service can print TIFF documents to a printer defined in the **Printer Name** field. Currently only TIFF attachments are supported so be sure that your Concord accounts are setup to forward the attachments to your email account as a TIFF attachment.

Note: If the Printer Name field is left empty then the print process will be skipped.




Storage Location

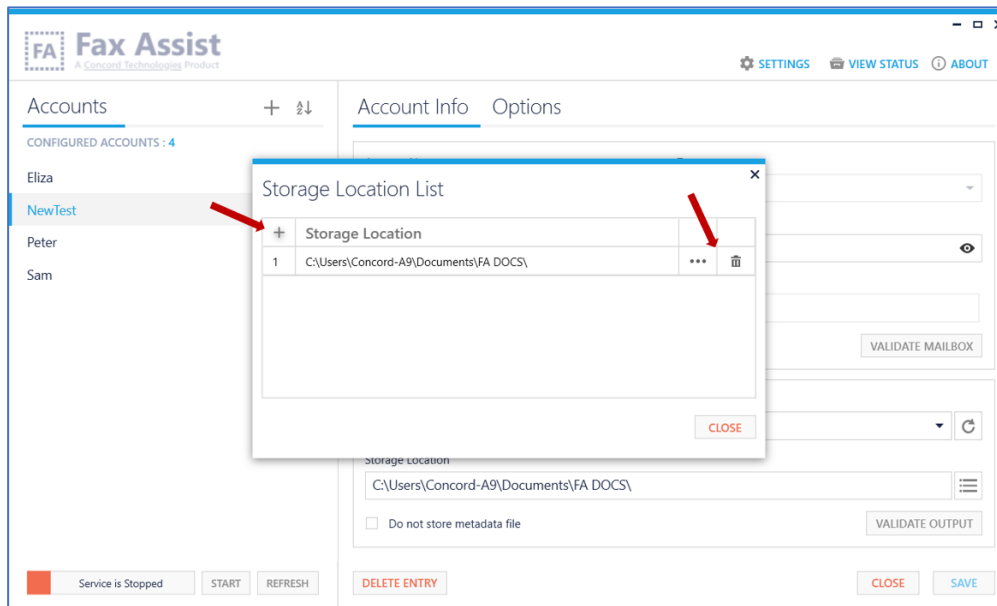
The FaxAssist service can store documents in a folder location. If you wish to have documents stored to a folder location, be sure to define the **Storage Location** with a path to a folder that the service running has permissions to write to.

On the right side of the screen is an Add Storage Location icon  to add additional storage locations for a single account.



The screenshot displays the Fax Assist web application interface. On the left, a sidebar shows 'Accounts' with a list of configured accounts: 'Billing Email', 'Marketing', '12125551212', and 'Accounts', '12125551002'. The main content area is titled 'Account Info' and 'Options'. It contains several input fields: 'Account Name' (Billing Email), 'Type' (InboundWS), 'Username' (mbx35051902), 'Password' (masked), and 'Server Address' (https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx). There is a checkbox for 'Enable Mailbox' and a 'VALIDATE MAILBOX' button. Below these, the 'Printer Name' field is set to 'OneNote (Desktop)'. The 'Storage Location' field is set to 'C:\Users\Concord-A9\Documents\FA DOCS\'. A red arrow points to a '+3' icon next to the Storage Location field, which is used to add additional storage locations. At the bottom, there are buttons for 'DELETE ENTRY', 'CLOSE', and 'SAVE'. A status bar at the bottom left indicates 'Service is Running' with 'STOP' and 'REFRESH' buttons.

To enter multiple locations, click on Add Location icon  in the Storage Location List dialog box. From here, you can also change the storage location by clicking on Browse icon  or delete a location by clicking on the Delete icon .



This can be defined as a UNC path \\server\folder or as a local folder location c:\folder\.

Notes:

- If the field is left empty, the file storage process will be skipped.
- If you are saving to a Network Storage location you will need to use the full UNC path (e.g. [\\server\<user>\Faxes\FaxAssist](#))

Do Not Store Metadata File



If you are retrieving faxes via inbound web services, or if you have metadata enabled on forwarded emails then you have the option to disable the storage of the received XML file. If you do not wish to have metadata files stored enable this feature.

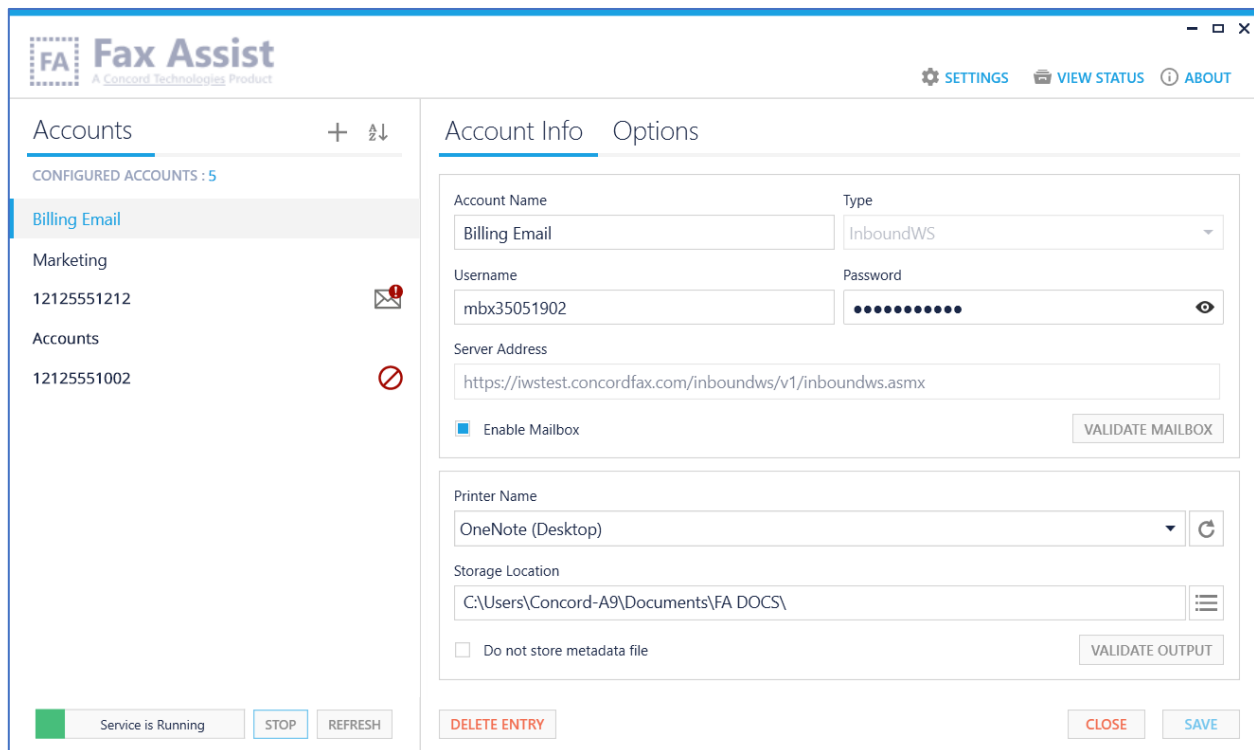
Validate Output

The **Validate Option** feature will test to ensure it can access your configured destination(s), whether that is a printer, or a folder location.

Accounts Panel

The Accounts panel displays a sortable list of configured accounts. Warning icons indicate the account is not currently receiving faxes:

-  Mailbox is not enabled
-  Invalid Credentials



The screenshot shows the Fax Assist web interface. On the left is a sidebar with the 'Accounts' section expanded, showing a list of configured accounts: 'Billing Email', 'Marketing' (with a warning icon), and 'Accounts' (with an invalid credentials icon). The main area is titled 'Account Info' and 'Options'. It contains form fields for 'Account Name' (Billing Email), 'Type' (InboundWS), 'Username' (mbx35051902), 'Password' (masked), and 'Server Address' (https://iwstest.concordfax.com/inboundws/v1/inboundws.aspx). There is a checkbox for 'Enable Mailbox' and a 'VALIDATE MAILBOX' button. Below these are fields for 'Printer Name' (OneNote (Desktop)) and 'Storage Location' (C:\Users\Concord-A9\Documents\FA DOCS\), with a 'VALIDATE OUTPUT' button. At the bottom, there is a 'Service is Running' status bar with 'STOP' and 'REFRESH' buttons, and a 'DELETE ENTRY' button.

Fax Assist
A Concord Technologies Product

SETTINGS VIEW STATUS ABOUT

Accounts + ↕

CONFIGURED ACCOUNTS : 5

Billing Email

Marketing

12125551212

Accounts

12125551002

Account Info Options

Account Name: Billing Email Type: InboundWS

Username: mbx35051902 Password: [masked]

Server Address: https://iwstest.concordfax.com/inboundws/v1/inboundws.aspx

☒ Enable Mailbox VALIDATE MAILBOX

Printer Name: OneNote (Desktop)

Storage Location: C:\Users\Concord-A9\Documents\FA DOCS\

☐ Do not store metadata file VALIDATE OUTPUT

Service is Running STOP REFRESH DELETE ENTRY CLOSE SAVE

Advanced Options

There are additional advanced features that can be configured in FaxAssist, which are accessible under the **Options** tab. As some of these features are specific to the retrieval method chosen, they are documented separately.

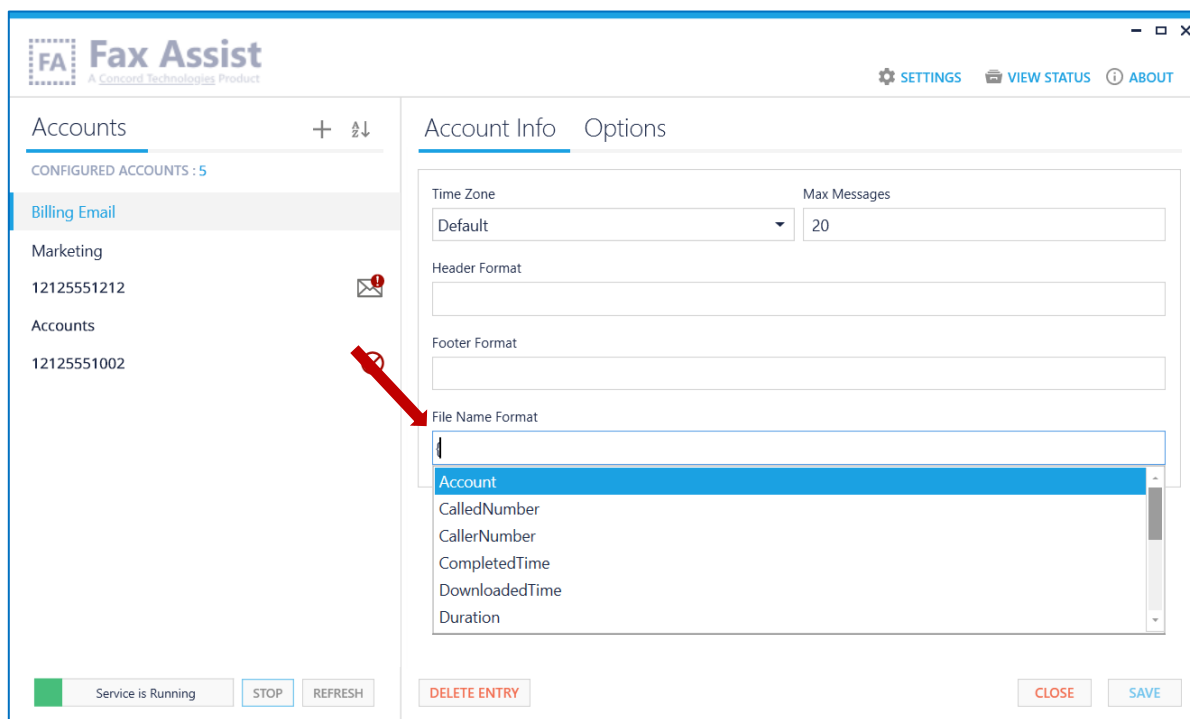
InboundWS Advanced Options

File Name Format

The following feature **only** applies to InboundWS retrieved faxes.

By specifying a **File Name Format** in the FaxAssist Manager you can enable a custom filename to be saved on each account. The filename can contain text and/or values based on the tokens chosen.

To enter tokens, start by entering a left curly bracket `{` and the list of available tokens will be displayed.

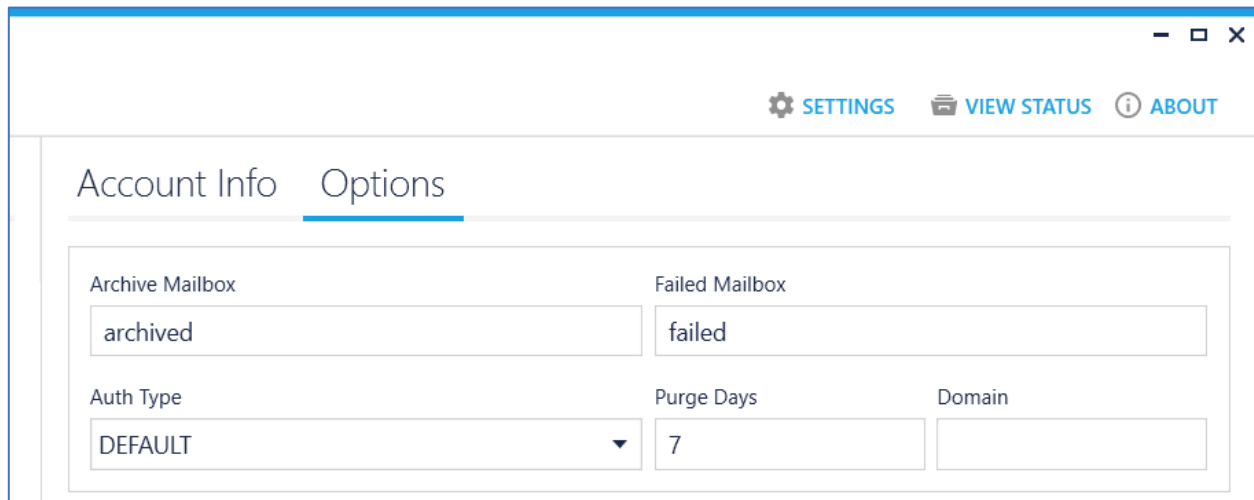


The screenshot shows the FaxAssist web application interface. On the left, there is a sidebar with 'Accounts' and 'CONFIGURED ACCOUNTS : 5'. Under 'Accounts', there are 'Marketing' (12125551212) and 'Accounts' (12125551002). The 'Accounts' section is selected. The main area is titled 'Account Info' and 'Options'. The 'Options' tab is active. It contains several fields: 'Time Zone' (Default), 'Max Messages' (20), 'Header Format', 'Footer Format', and 'File Name Format'. The 'File Name Format' field is highlighted with a red arrow, and its dropdown menu is open, showing a list of tokens: 'Account', 'CalledNumber', 'CallerNumber', 'CompletedTime', 'DownloadedTime', and 'Duration'. At the bottom, there are buttons for 'Service is Running', 'STOP', 'REFRESH', 'DELETE ENTRY', 'CLOSE', and 'SAVE'.

*Note: If you are using a date token in the File Name Format, invalid folder/file characters will be removed for you. Invalid characters are: \ / : * ? " < > |*

IMAP Advanced Options

The following features **only** apply to IMAP retrieved faxes.



The screenshot shows a web application window titled "Account Info" with a sub-tab "Options". At the top right of the window are three links: "SETTINGS" (with a gear icon), "VIEW STATUS" (with a folder icon), and "ABOUT" (with an information icon). The "Options" section contains four input fields arranged in a 2x2 grid. The top-left field is labeled "Archive Mailbox" and contains the text "archived". The top-right field is labeled "Failed Mailbox" and contains the text "failed". The bottom-left field is labeled "Auth Type" and is a dropdown menu currently showing "DEFAULT". The bottom-right field is labeled "Purge Days" and contains the number "7". There is also an empty field labeled "Domain" to the right of the "Purge Days" field.

Archive Mailbox

Archiving moves emails to a secondary folder as they are processed. This allows you to review faxes that have been processed in case of an error. To alleviate this folder from filling up you can set the **Purge Days** setting to automatically clean up this folder of messages older than the number of purge days.

Note: It is recommended that you set the archive folder so that processed emails can be accessed should something not work correctly. If you do not configure an Archive Mailbox, emails will be deleted after they are processed.

Failed Mailbox

By configuring a **Failed Mailbox**, emails that fail to be processed will be moved to a secondary folder. This allows you to take the necessary action.

Auth Type

This setting allows you to override the default authentication type.

When pointing to a Microsoft Exchange server, NTLM authentication is required. Valid values are LOGIN (default setting), NTLM, CRAM-MD5 and PLAIN.

When using Office 365 IMAP the only supported Auth Type is XOAUTH2, which is configured by default.

Purge Days

If the **Archive Mailbox** has been setup, then this setting will determine the number of days that messages will remain in the **Archive Mailbox** folder before getting removed.

This will default to 7 days if left blank and **Archive Mailbox** is defined.

Domain

The **Domain** is only required if enabling NTLM authentication which is typically used by Microsoft Exchange.

Available Filename Tokens

Token	Description	Sample Value
{account}	Concord Account ID assigned to the receiving account	68985
{calledNumber}	Number that received the fax call	12065772972
{callerNumber}	Caller Identification of the calling fax machine	12063745000
{completedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
{currentPage}	Current page being processed	1
{downloadedTime}	Date and Time the fax was processed by FaxAssist	02/26/2018 8:00 AM
{duration}	Number of seconds it took to receive the fax	15
{messageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
{randomid}	Random generated unique identifier	TDIAA8QHUG
{receivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
{resolution}	Resolution of the received fax	1
{senderCSID}	CSID received from sending fax machine	TESTCSID1
{speed}	Speed the fax was received at	26400
{timeZoneOffset}	Time Zone offset of received fax	-07:00
{totalPages}	Total number of pages in received fax	9

Example File Name Format:

{messageID}_{receivedTime}_{callerNumber}_{calledNumber}_{totalPages}

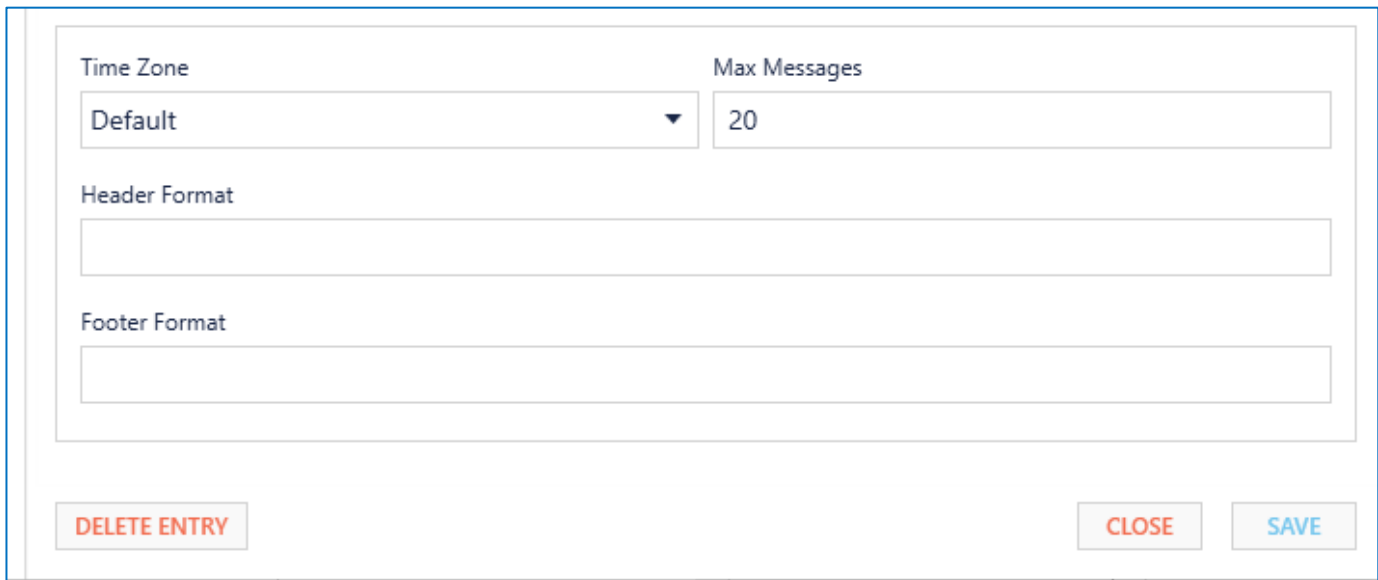
Resulting file will be saved as:

d:\faxes\<account>\archived\ct12065772972-20180226112513028-321-1_02262018 800 AM_12063745000_12065772972_1.tif

Note: The DateTime tokens used in the Header, Footer and File Format fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens. Please see the Appendix A for more information.

Additional Advanced Options

The following features apply to **both** InboundWS and IMAP retrieved faxes.



The screenshot shows a configuration window with the following elements:

- Time Zone:** A dropdown menu currently showing 'Default'.
- Max Messages:** A text input field containing the number '20'.
- Header Format:** An empty text input field.
- Footer Format:** An empty text input field.
- Buttons:** 'DELETE ENTRY' (red text), 'CLOSE' (red text), and 'SAVE' (blue text).

Time Zone

The **time zone** field is a drop-down list of available time zones. By setting this value you can control the time zone on all date-time stamps that are displayed within the document header, document footer, document filename, and also within the XML file.

Max Message

This field sets the maximum number of messages that the service will process for each mailbox at one time. If this field is left blank, the default value is 20 messages.

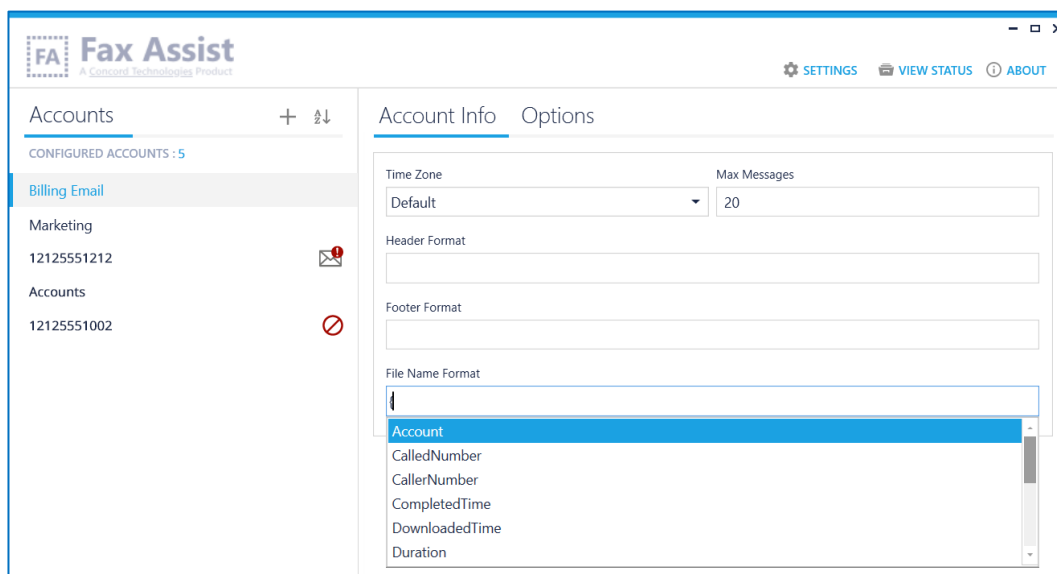
Note: If set to 0 this will force the application to retrieve all messages on every poll. Not recommended for high volume accounts as the memory required can be quite large.

Header Format

By specifying a **Header Format**, you can enable a custom header to be printed on each document. The header can contain text and/or values based on the tokens chosen.

Note: The custom header only applies if the document type you are receiving is a PDF or TIFF.

To enter tokens, start by entering a left curly bracket { and the list of available tokens will be displayed.



The screenshot displays the Fax Assist web application interface. On the left, a sidebar shows a list of accounts under the heading 'Accounts'. The 'Accounts' section is expanded, showing two accounts: '12125551212' and '12125551002'. The '12125551212' account is selected, and its details are shown in the main panel. The main panel has two tabs: 'Account Info' and 'Options'. The 'Account Info' tab is active, showing fields for 'Time Zone' (set to 'Default'), 'Max Messages' (set to '20'), 'Header Format', 'Footer Format', and 'File Name Format'. The 'File Name Format' field is open, showing a list of available tokens: 'Account', 'CalledNumber', 'CallerNumber', 'CompletedTime', 'DownloadedTime', and 'Duration'. The 'Account' token is highlighted in blue.

Available Header Tokens

Token	Description	Sample Value
{attachmentName}	Name of fax file	ct12065772972-20180226112513028-321-1.tif
{account}	Concord Account ID assigned to the receiving account	68985
{calledNumber}	Number that received the fax call	12065772972
{callerNumber}	Caller Identification of the calling fax machine	12063745000
{completedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
{currentPage}	Current page being processed	1
{downloadedTime}	Date and Time the fax was processed by FaxAssist	02/26/2018 8:00 AM
{duration}	Number of seconds it took to receive the fax	15
{messageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
{randomid}	Random generated unique identifier	TDIAA8QHUG
{receivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
{resolution}	Resolution of the received fax	1
{senderCSID}	CSID received from sending fax machine	TESTCSID1
{speed}	Speed the fax was received at	26400
{timeZoneOffset}	Time Zone offset of received fax	-07:00
{totalPages}	Total number of pages in received fax	9

Example Header Format:

Received {receivedTime} from {callerNumber} to {calledNumber} Pg {currentPage} / {totalPages}

Resulting Header will display as:

Received 02/26/2018 from 12063745000 to 12065772972 Pg 1/1

Note: The DateTime tokens used in the Header, Footer and File Format fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens. Please see the Appendix A for more information.

Footer Format

By specifying a **Footer Format**, you can enable a custom footer to be printed on each document. The footer can contain text and/or values based on the tokens chosen.

Note: The custom footer only applies if the document type you are receiving is a PDF or TIFF.

To enter tokens, start by entering a left curly bracket { and the list of available tokens will be displayed.

The screenshot displays the Fax Assist web application interface. On the left, a sidebar shows a list of accounts under the heading 'Accounts'. The 'Billing Email' account is selected, and its details are shown: 'Marketing', '12125551212', and 'Accounts', '12125551002'. To the right, the 'Account Info' tab is active, showing configuration options for the selected account. The 'Time Zone' is set to 'Default' and 'Max Messages' is set to '20'. The 'Header Format' field is empty. The 'Footer Format' field contains a left curly bracket '{', which has triggered a dropdown menu of available tokens. The tokens listed are: 'AttachmentName', 'Account', 'CalledNumber', 'CallerNumber', 'CompletedTime', and 'CurrentPage'. The 'AttachmentName' token is currently selected and highlighted in blue.

Available Footer Tokens

Token	Description	Sample Value
{attachmentName}	Name of file being printed or stored	ct12065772972-20180226112513028-321-1.tif
{account}	Concord Account ID assigned to the receiving account	68985
{calledNumber}	Number that received the fax call	12065772972
{callerNumber}	Caller Identification of the calling fax machine	12063745000
{completedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
{currentPage}	Current page being processed	1
{downloadedTime}	Date and Time the fax was processed by FaxAssist	02/26/2018 8:00 AM
{duration}	Number of seconds it took to receive the fax	15
{messageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
{randomid}	Random generated unique identifier	TDIAA8QHUG
{receivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
{resolution}	Resolution of the received fax	1
{senderCSID}	CSID received from sending fax machine	TESTCSID1
{speed}	Speed the fax was received at	26400
{timeZoneOffset}	Time Zone offset of received fax	-07:00
{totalPages}	Total number of pages in received fax	9

Example Footer Format:

Received {receivedTime} from {callerNumber} to {calledNumber} Pg {currentPage} / {totalPages}

Resulting Footer will display as:

Received 02/26/2018 from 12063745000 to 12065772972 Pg 1/1

Note: The DateTime tokens used in the Header, Footer and File Format fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens. Please see the Appendix A for more information.

Using the FaxAssist Service

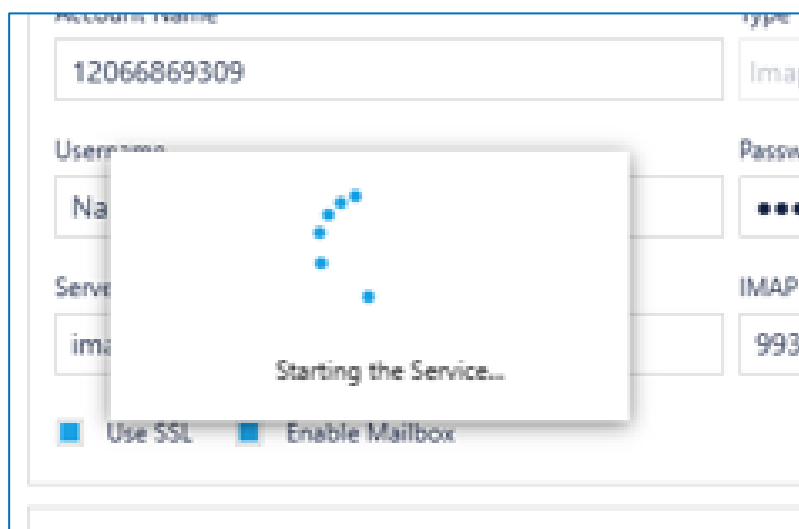
Controls for starting, stopping, and refreshing the service are provided on the bottom left corner of the interface.

The screenshot displays the Fax Assist web interface. On the left, a sidebar lists 'Accounts' with a sub-section 'CONFIGURED ACCOUNTS : 5'. Under this, 'Billing Email' is selected, followed by 'Marketing' with ID '12125551212' and 'Accounts' with ID '12125551002'. At the bottom left, a red square icon and the text 'Service is Stopped' are circled in red, with 'START' and 'REFRESH' buttons nearby. The main area is titled 'Account Info' and 'Options'. It contains fields for 'Account Name' (Billing Email), 'Type' (InboundWS), 'Username' (mbx35051902), 'Password' (masked), and 'Server Address' (https://iwstest.concordfax.com/inboundws/v1/inboundws.asmx). There is a checkbox for 'Enable Mailbox' and a 'VALIDATE MAILBOX' button. Below this, 'Printer Name' is set to 'OneNote (Desktop)' with a refresh icon, and 'Storage Location' is 'C:\Users\Concord-A9\Documents\FA DOCS\' with a folder icon and a 'VALIDATE OUTPUT' button. At the bottom, there are 'DELETE ENTRY', 'CLOSE', and 'SAVE' buttons.

Starting the FaxAssist Service

FaxAssist is intended to run as a service. Once you have configured your accounts, the service should run continuously collecting and processing your inbound faxes. You can configure FaxAssist to automatically start when your computer boots (see the [FAQs](#) section for more information), or you can manually start the service.

To start the service manually, click on the **Start** button. You may see an in-progress message, while the service is starting.



Once started, the status will turn green and display the service is running.

Stopping the FaxAssist Service

To stop the service, click on the **Stop** button, and the status will turn red and display that the service is stopped.

Refreshing the FaxAssist Service

Click on the **Refresh** button to refresh the status of the FaxAssist service.

Installation Verification

The FaxAssist application keeps a log of all actions that are performed by the service. This is a good starting point should things not appear to be working properly.

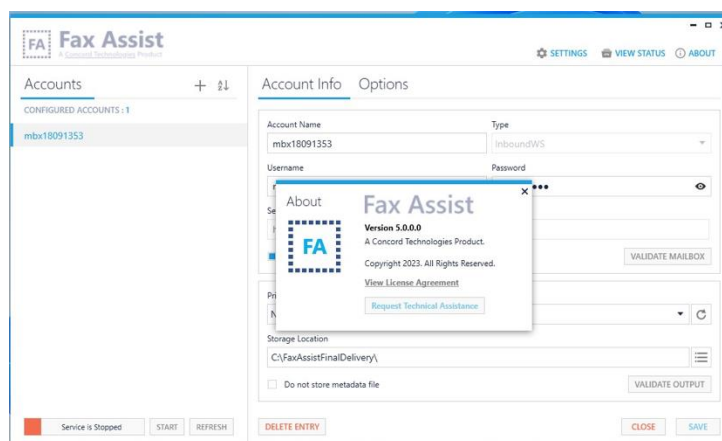
You can access the log files by clicking on the View Logs button in the upper right-hand corner. Look for the word **ERROR** in the log file for any configuration issues or problems in processing email accounts.

Note: The logs will not be generated until the service has been started.

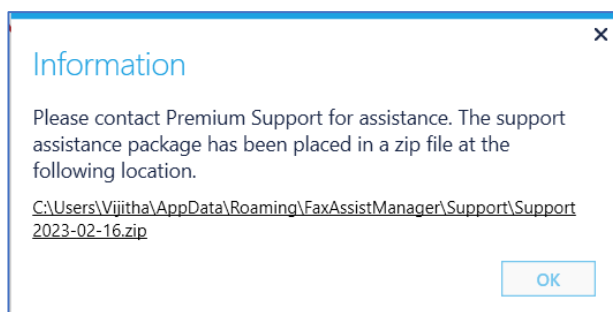
Troubleshooting / FAQs

Question: I need help with Concord FaxAssist, what do I need when I contact you?

FaxAssist will create log files for all interactions, and any potential errors that may occur. If you experience any problems using the application, the Concord Support team will require these log files to troubleshoot the issue.

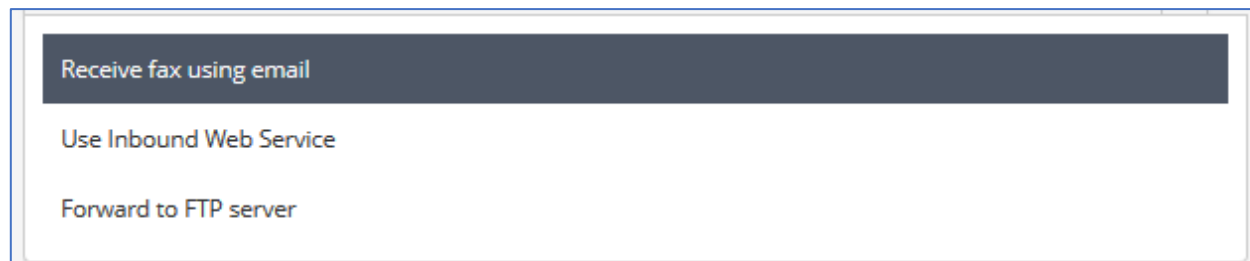


You can find these log files bundled in a zip file by simply clicking on the **Request Technical Assistance** link found in the About screen.

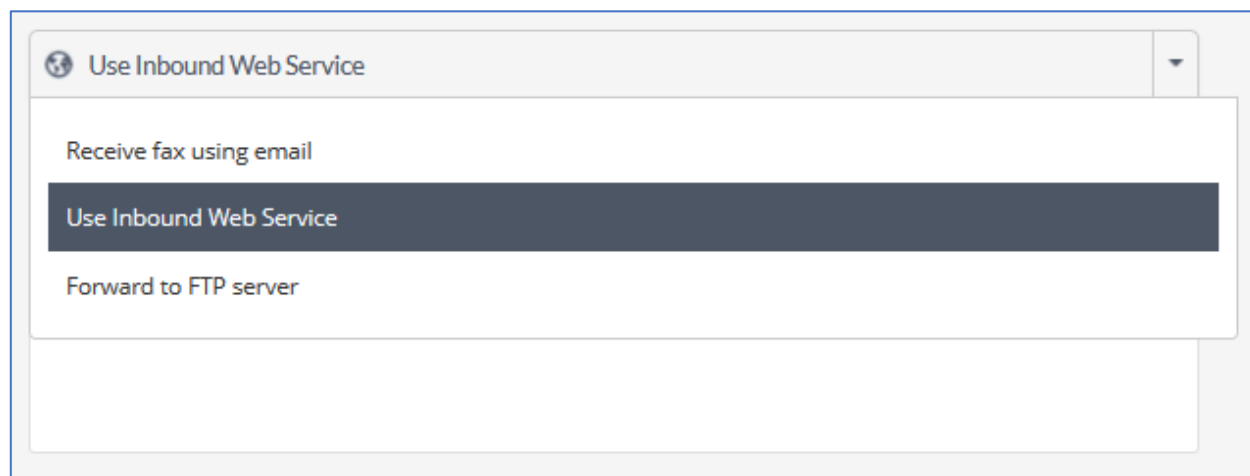


Question: Should I use IMAP or InboundWS?

The IMAP solution is intended for users who choose to have their inbound faxes delivered to an email account and want to route them to a printer or storage location. This approach provides an easy way to archive the faxes to an email archive folder. To accomplish this, your inbound fax account must be configured on the Concord network to **Receive Faxes Using Email**.



The InboundWS solution is a direct retrieval of inbound faxes from the Concord network. This approach also supports routing faxes to multiple storage locations to allow for both a workflow process and an archive directory. To accomplish this, your inbound fax account must be configured on the Concord network to [Use Inbound Web Services](#) for receiving faxes.



Question: *How can I have FaxAssist Service start automatically when my computer boots?*

By default, the Fax Assist Service will be a manual start (meaning you will need to start the service from the UI, or from the Services Manager). However, you can configure this service to automatically start when the computer boots. To do so, go into the Services Manager (type **Windows+R** keys to open the Run dialog, type **services.msc** and press Enter), and right click on the **Concord Fax Assist** service, and select **properties**.

Question: How can I have FaxAssist Manager start automatically when my computer boots?

- ➔ If you do not already have a shortcut to FaxAssist, you will need to create one, and drag it to the desktop.
- ➔ Next, open **Run** command box by simultaneously pressing **Windows logo** and **R** keys (Windows logo + R). In the Run command field, type **shell:startup** and then press Enter key to open **Startup** folder.
- ➔ Finally, copy and paste or cut and paste the app shortcut from the desktop to this **Startup** folder to add the app to startup.

Question: My faxes aren't saving to my mapped drive, why?

If you are saving to a Network Storage location, you will need to use the full UNC path (e.g. \\server\<user>\Faxes\FaxAssist) and will need to configure the FaxAssist service with a set of domain credentials that have permissions to write to the directory.

Question: Can I print any document type from FaxAssist?

If you are setting up a printer as the destination, the User Account in the Portal must be configured to deliver TIFF files, other file types will not work at this time.

Question: Does FaxAssist work with FIPS?

As part of the 3.0.26.0 upgrade, FaxAssist will not work on a server that has FIPS enabled.

Question: Does FaxAssist support TLS?

FaxAssist was built on .Net 4.8 which by default supports TLS.

Concord Support

Should you need any assistance with FaxAssist or any other Concord product or service, please contact our Premium Support Team.

- Email: premiumsupport@concordfax.com
- Telephone: +1 (206) 441-3346, option 2
- Fax: +1 (206) 441-7965

Premium Support hours are Monday – Friday, 6:00am to 6:00pm (Pacific Time)

Appendix A: DateTime Tokens

The DateTime tokens used in the **Header**, **Footer** and **File Format** fields have the ability of using the .Net DateTime formatting for customizing the output of those tokens.

If no DateTime formatting is used the output of the token will make use of the current culture settings.

Please refer to the Microsoft documentation regarding DateTime formatting options:

[Standard DateTime formatting](#) or [Custom DateTime formatting](#).

*Note: If you are using a date token in File Format, invalid folder/file characters will be removed for you. Invalid characters include: \ / : * ? " < > |*

Valid date and time tokens:

- completedTime
- downloadedTime
- receivedTime

Examples using the date and time, 02/26/2018 8:17:23 AM:

Example Token	Example Output
{receivedTime}	02/26/2018 8:17:23 AM
{receivedTime:yyyy-MM-dd hhmmss}	2018-02-26 081723
{receivedTime:yy-MMM-dd h:m:s t}	18-Feb-26 8:17:23 A
{receivedTime:dd-MMMM-yyy hh:mm:ss tt}	26-February-2018 08:17:23 AM
{receivedTime:D}	Thursday, February 26, 2018
{receivedTime:o}	2018-02-26T08:17:23.0000000-7:00

Appendix B: Metadata Customization

As stated above, when storing faxes in a folder location, FaxAssist will also store an accompanying metadata file. This **ONLY** applies to faxes retrieved via InboundWS.

The **MetadataTemplate.xml** file found in the application folder for FaxAssist, can be customized, and is used in the output of any metadata file that FaxAssist creates for a fax document. The filename **MetadataTemplate** is required, however the contents of the file and the file extension can be customized to better fit your workflow.

IMPORTANT!!! – Only 1 MetadataTemplate file should exist in the application folder (regardless of the extension).

Below is the default **MetadataTemplate.xml**, which can be customized:

```
<?xml version="1.0" encoding="UTF-8"?>
- <faxdetails>
  <messageId>%{MessageID}</messageId>
  <messageType>%{ContentType}</messageType>
  <contentType>%{ContentSubType}</contentType>
  <attachmentName>%{FileName}</attachmentName>
  <account/>
  <senderCSID>%{RemoteCSID}</senderCSID>
  <callerNumber>%{CallerNumber}</callerNumber>
  <calledNumber>%{CalledNumber}</calledNumber>
  <userId>%{UserID}</userId>
  <receivedTime>%{ReceivedTime}</receivedTime>
  <timeZoneId>%{TimeZoneId}</timeZoneId>
  <timeZoneDisplayName>%{TimeZoneDisplayName}</timeZoneDisplayName>
  <timeZoneOffset>%{TimeZoneOffset}</timeZoneOffset>
  <numPages>%{NumPages}</numPages>
  <duration>%{Duration}</duration>
  <resolution>%{Resolution}</resolution>
  <speed>%{Speed}</speed>
  <status>%{Status}</status>
  <attachmentCount>1</attachmentCount>
- <attachments>
  <attachmentName1>%{FileName}</attachmentName1>
  </attachments>
</faxdetails>
```

For example, if your workflow uses the INI file format, you could rename the MetadataTemplate file to **MetadataTemplate.ini** and set the Tokens (as listed below) to the fields your workflow expects.

Example of the MetadataTemplate as an INI file, [MetadataTemplate.ini](#):

```
[Fax Details]
MessageId=%{MessageID}
MessageType=%{ContentType}
Contenttype=%{ContentSubType}
AttachmentName=%{FileName}
SenderCSID=%{RemoteCSID}
CallerNumber=%{CallerNumber}
CalledNumber=%{CalledNumber}
UserId=%{UserID}
ReceivedTime=%{ReceivedTime}
TimeZone=%{TimeZone}
NumPages=%{NumPages}
Duration=%{Duration}
Resolution=%{Resolution}
Speed=%{Speed}
```

Available Metadata Tokens

Token	Description	Sample Value
%{CalledNumber}	Number that received the fax call	12065772972
%{CallerNumber}	Caller Identification of the calling fax machine	12063745000
%{CompletedTime}	Date and Time the fax call ended	02/26/2018 8:00 AM
%{ContentSubType}	The file format of the attachment	image/tiff/TIFFG4
%{ContentType}	Type of content	Fax
%{Duration}	Number of seconds it took to receive the fax	15
%{FileName}	Name of file being printed	ct12065772972-20180226112513028-321-1.tif
%{MessageID}	Unique Concord identifier of the message	ct12065772972-20180226112513028-321-1
%{NumPages}	Total number of pages in received fax	9
%{ReceivedTime}	Date and Time fax call started	02/26/2018 7:59 AM
%{RemoteCSID}	CSID received from sending fax machine	TESTCSID1
%{Resolution}	Resolution of the received fax 1 – Standard Resolution 2 – High Resolution	1
%{Speed}	Speed the fax was received at	26400
%{TimeZone}	Time Zone offset of received fax	-07:00
%{UserID}	Concord Account ID assigned to the receiving account	68985