

The Definitive Guide to Corporate Fax Solutions:

A Plan for Companies Using Multiple Fax Lines

Global Access Inc. 660 Fitzhugh Boulevard Smyrna, Tennessee 37167

(615) 333-2577 Phone (866) 809-0399 Toll-Free (615) 312-0803 OnLine Fax www.onlinefax.com support@globalaccessinc.com

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Overview

This guide has been constructed as a reference for company IT or operations managers seeking to upgrade their multi-line fax systems to a solution that serves corporate level requirements. Contained in this guide is a 10 point checklist, integration options, security considerations, usability points, recommendations on sending various document types and sources where proprietary software integration options can be obtained.

The Definitive Guide to Corporate Fax Solutions will be useful in helping you make informed decisions about your fax system needs. If you would like more information on using OnLineFax.com as your fax service supplier, please contact us:

Phone: (615) 333-2577 Toll-Free: (866) 809-0399 OnLine Fax: (615) 312-0803

Message: http://www.onlinefax.com/contact.html

Thank you,

Walter Campbell President OnLineFax.com

"Just the Fax, mam. Just the Fax."

"Just the fax..." is a bit of a homonym twist from Sergeant Friday's famous line, "Just the facts, mam. Just the facts." The approach used to select a mulit-line fax solution will determine the end result of the effectiveness, speed, security and cost. There's more to a corporate fax solution than the simple process of send and receive.

Corporations will have multiple fax lines, possibly multiple locations with varying needs of user access, distribution controls, information security requirements, the ability to send and/or receive from a particular line, access to existing contact entries or an Exchange server and so on. Personal users and single line users have different upgrade needs and do not have the complexities of a corporate solution.

The process of selecting a corporate fax solution might be compared to a phone network. A corporate phone system solution would be considered from the PBX options, allowing a full in-house network whereas a small office would likely use the standard key system. Differentiating a corporate fax solution from a personal or small business fax solution can be made with a similar consideration.

There is one decision that will have to be made before a corporate fax solution is considered. This is *the way this decision will be approached*. Many internet fax systems are pre configured to work a certain way. The only real options are the packages which contain more or less bells and whistles and options based on volume and number of fax lines.

The right approach for a corporate solution is to assess the companies requirements based on your software, usability, privacy, security, transmission speeds, document types, multi-location networks and all the other particulars. Determine your requirements, needs and questions then you can find a supplier that will offer solutions based on what your company needs rather than shopping fax systems from a menu board. Deciding that your fax communications vendor will make it to your order specifications will possibly change the outcome of your corporate fax solution.

Important Questions to Consider Before Upgrading a Fax System

Once you've decided that your approach to finding a solution will be based on your business requirements, you will need to identify your fax needs on a per line, per location, per user basis while keeping the macro view of your global network.

The 10 point checklist is designed to help you get started building an information outpost as an assessment of your company fax requirements. This Is not an exhaustive index of questions to cover every possible scenario. The answers to the checklist will be an exercise to help reveal the possibilities, concerns and requirements needed. The checklist will also serve as a tool to help anyone prepare the necessary information for a candidate vendor to understand your company requirements.

10 Checkpoints for Corporate Fax System Requirements

1. What fax equipment are you currently using?
Check all that apply, note quantity and location of each. □ Fax Machines No. of machines No. of property locations
☐ Fax Server No. of fax servers No. of lines per fax server
☐ Internet Fax Service No. of lines or users
2. Which departments will be using fax services? Total number of users
Note the number of users in each department.
Accounting
Consumer / business credit
Customer service
Distribution
Executive management
Field service technicians
Finance
Human resources
Legal
Maintenance / repair
Marketing / sales
Order entry
Outside sales
Purchasing
Quotations / Contracts
Receiving
Shipping

Estimated monthly page volume: all users, all locations, all fax lines, both

Your best guess will do fine.

sending and receiving

3.

© 2011 Global Access Inc.		5		
 □ Over 1,000 pages/ mo. □ Over 3,000 pages/ mo. □ Over 10,000 pages/ mo. □ Over 20,000 pages/ mo. 4. Which email server are you using the you using the server are you using the your areas are your areas areas are your areas areas are your areas are your areas are your areas are	ng?	version		
5. Which email desktop clients are you using? Which versions? (Outlook, Outlook Express, Windows Live Mail, Lotus Notes, Zimbra, Sylpheed, Evolution, KMail, etc)				
Email Client	versio	_ version		
Email Client	versio	version		
Email Client		version		
Email Client		_ version		
Contact Database Interface Requirements 6. What software are you using to store all customer contacts?				
☐ CRM software? ☐ Contact management software? ☐ Accounting software? ☐ Custom in-house software? 7. What software are you using to	☐ Desktop based☐ Des	□ Web based□ Web based□ Web based□ Web based		
Software Desktop based Web based 8. Do you have personnel that needs to send and/or receive faxes on mobile devices such as a PDA or smart phone?				
☐ Yes How many mobile users not How many not have a secure Documents How many users will need secure How many fax numbers (lines) we documents over? ☐ Fax Caller ID	sers need to receive faxes? bility) ire. s e fax document capability?			

10. List the users by department, noting fax capability per user: send, receive, send and receive.

User List Worksheet Download

OnLine Fax has a resource tool that organizes this by department, notes security requirements, user email address and fax number. You may download it for free here:

http://www.onlinefax.com/OnLineFax-User-List-Worksheet.xls

Considerations for an On Demand Fax Solution

As corporations adopt digital fax file systems as part of their standard business communications processes, a critical question facing IT is how to achieve enterprise-grade standards. Due to the demands for software customization options, contact integration and the importance of your business-critical data, your corporate fax solution must be just as robust as the rest of the enterprise. While it may be the instinct of IT to achieve this with an in-house fax server, this **Definitive Guide for Corporate Fax Solutions** will discuss how an on-demand, desktop fax system will provide a more robust solution.

The 5 keys to delivering enterprise-grade, multi-line fax solutions are:

- 1. Security
- 2. Usability
- 3. Integration
- 4. Scalability
- 5. Performance

Common Mistakes to Avoid

- <u>Leaving loopholes</u> in the security of your fax system is one of the biggest mistakes that can be made during the selection and transition to a new fax solution. If full considerations are not made, the results could be costly.
- Neglecting to factor in user friendliness and accessibility is probably the most common mistake made by corporations moving to a new fax system. User requirements to access and process fax data should be the litmus test used to measure the advantages you expect to see from a fax solution. Forget the way the daily user uses the system and you've built yourself a "bridge to nowhere."
- <u>Disregarding the need to integrate your contact database(s)</u> is a surefire way to
 integrate buyer's remorse. At the very least try to avoid making a long term
 commitment to maintenance and updates for dual database management.
- Resolve to adapt to a plan without flexibility and you've lost the greatest part of the benefit a new fax solution should have delivered. What do you do when you can't route incoming faxes to multiple receivers? Why should you loose operational controls by enabling send and receive where you may only require one or the other?
- Assumptions of immediate fax document transmit either sending or receiving. This is a point particularly not considered when moving from a system of fax machines where faxes through the phone line are customarily pretty immediate. Or when moving to an internet fax server solution, where it is easily assumed that faxes will travel at the speed of email. Is timely transmission of information crucial to your business? Faxing

business contracts, legal forms, medical records or signature deals usually require something close to immediate transmission where as personal fax solutions may be okay with a variance of fax speed, even willing to wait up to 20 minutes.

The Security Key: Your Enterprise-Grade Solution

What is the first thing that comes to mind when you hear "fax security"? An officer standing next to the fax machine? Maybe a password protected document? That's a good start, but in order to have a truly secure solution, every stage and condition of your information through the fax system must be accounted for.

<u>Document Security:</u> It is not enough that you would need the option to send your data as an encrypted PDF document. An enterprise grade solution should be able to assign this option on a per user basis and allow that user the option to send each document as secured or unsecured. Make sure that the secured data is encrypted before it is transmitted from your computer; before it is routed to a server.

<u>Network Security:</u> Your fax network servers will need to be behind a firewall. The key here is that there should NOT be any public access to the web servers where your data is stored. Even with the best of secured servers, there's always a better hacker out there (Wiki Leaks?). If you're the server where your data is stored has log-in access, then that data is compromised and you do not have an enterprise-grade security solution.

Some corporations require custom solutions such as having faxes received sent to an administratively controlled server for in-house distribution or having inbound faxes land on an SFTP server for retrieval. The important thing is to consider the nature of the content that will be moving inbound and outbound. Determine your network security requirements but do not set yourself up with the loophole of having your faxes go to an outside server with public login access.

It is also imperative that your outbound faxes would be sent from your service provider through secure internet lines (SSL); just as the service provider should be using a secured server (HTTPS, SFTP, SSH).

<u>Hardware Security:</u> Just as you would ensure redundancy, power backup and other precautions for your computer system, your fax communications provider should have appropriate measures in place to account for electrical power failure, server power supply failure, WAN fail over redundancy and RAID to protect your data in case of hard drive failure.

<u>Security of Premises:</u> The premises of your off site fax solutions provider should also be considered. Your data transmission and storage equipment may be secured but how do you know who may have access to the vendor facilities? What is the risk factor there? Is the facility guarded by a qualified security guard? What hours is the guard on duty? Is there video monitoring of the facility? Is the video monitored live, for immediate response? What kind of after hours access is there to the building; to the servers?

<u>Client Side Security:</u> It is a good idea to consider what kind of information access you will need on a per user basis. Will there be areas where an open terminal is used that will need fax access? The fax machines are no longer acceptable technology for receiving faxes due to security compromises. Employees will inadvertently pick up the wrong fax or the faxes will

eventually be delivered to the wrong in boxes. How about the embarrassing follow-up to these problems, calling and asking that the fax be re-transmitted? What is the cost of lost confidence, lost orders, misplaced contracts or poor customer service? An enterprise-grade, fax solution should eliminate these problems.

The Usability Key: Your Enterprise-Grade Solution

Why should the user experience weigh in so heavily on the fax solution decision? Even the most astute executives and employees will avoid using a tool that doesn't benefit their needs and purpose when trying to get the job done. Your fax system should serve your business as a means to an end....a solution.

<u>Sending a Fax:</u> Sometimes walking through the process will help clarify what needs to happen and pinpoint the questions that need to be addressed. The natural order of initiating the process of a fax send is to create and compile the information to be transmitted. You no longer need to leave your desk, wait for a common fax machine to complete a long send or receive that started ahead of you, or deal with machine limitations such as error messages, jams or full memory.

With all the digitization, how do you send an original that may be of odd size, in poor condition or has a hand written signature? No matter which system you choose, those documents will still have to be scanned.

Very Important Enterprise-Grade User Features:

- 1. Does your fax system allow the user to send a fax directly from their desktop without logging into a website?
- 2. Does your fax system enable a user to initiate a new fax from your current contact database?
- 3. Does your fax software allow the user to fax straight from the document file menu without opening another window and browsing to locate it first?
- 4. Does your fax software allow the user to fax anything from the computer regardless of file types (accounting, sales or inventory software)?
- 5. Does your fax solution allow the user to combine select files of various sources and file types into one, page sequenced, fax ready document?

6. Does your fax solution provide the user an automatic PDF converter when they're ready to fax without having to process conversions though outside software?

- 7. Does your fax service secure the document and transmission for the user automatically?
- 8. Does your fax system have the option to pre configure a standardized coversheet that will attach to the user fax without the user creating one?

If you can answer YES to all 8 User Send questions then you are working with an Enterprise-Grade Fax Solution.

Receiving a Fax: When upgrading to a new fax solution you should have the option for caller ID support on incoming faxes. This could be particularly useful to help identify those highly anticipated faxes received, especially if that user receives a high volume of email.

The biggest benefit if you are moving from fax machines is prompt delivery of incoming faxes to the intended recipient. This eliminates the loss of documents, time and potentially embarrassing situations that would arise from faxes received on a fax machine. You won't be missing anymore faxes from paper run-outs, waiting on a co-worker using a shared fax, running out of toner, a bad drum, error codes, or faxes that were unknowingly received into the machine memory. Your faxes will now arrive in your email.

Notifications: You may be on the go while you're expecting a time sensitive fax. You should not have to slave your time to the technology. A fax solution would offer mobile text notifications for designated or all incoming faxes at any given time. The user should have the tools they need to succeed.

The Integration Key: Your Enterprise-Grade Solution

Integration is key to finding a fax solution that is built around your company systems rather than adopting your systems to a fax communication service.

<u>Contact Database Integration:</u> A corporation with multiple fax lines is likely to have a robust contact database already in play. Besides the sheer volume of contact entries, these are usually segregated into something like: prospects, customers, vendors, manufacturer sales reps, and employees (active and inactive). Whether you have a Microsoft Exchange server or any other server/platform, the mark of an enterprise-grade fax solution is one that will integrate with your contact database.

<u>Brand Management:</u> Most of the time we think of integration as a merge of technology. What about integrating your company brand message? Here are a few points to consider about what your fax solution should provide in a fax coversheet:

Quality – The coversheet should be of the same quality as the rest of your document.
 Fax machines would often skew to orientation of a coversheet, especially half page sheets. This problem can still occur in the digital realm if the coversheet was scanned in. There is also the issue of legibility from handwriting quality, ink flow of the pen or choosing a colored ink instead of black. This problem is not isolated to handwritten cover sheets. Have you ever seen bad choices of fonts, font kerns set so tight that all the letters run together or font sizes so small that all the letters are plugged up?

The primary quality issue that applies to the digital realm is that of resolution. Your fax service may offer a consistent resolution quality, but the real question is where did the coversheet originate from? Was it something found online that the sender found? Just because the resolution looks good on the monitor screen does not mean that it will print on the receiving end with the same resolution. In fact, it most usually will show up significantly degraded.

Consider the effort and expense you've invested to present your company products and services with credibility and professionalism. The quality of your coversheet should reflect that In print resolution, page orientation and readability of user entered information.

• Uniformity – How many times have you seen a Dilbert comic, a quote of the day or some busy design graphics plastered all over a coversheet that you've received? Some of those may get a smile, but have you considered what may be on your outbound cover sheets? I'm not suggesting that all chance of appropriate humor and personality of the sender be stripped way. If it really is appropriate, then those things will work well within the contents of the faxed document. Do you really want to leave this as a subjective judgment for what is appropriate to your entire employed staff at all locations?

The real takeaway here is less about what might go wrong and really about what you should be doing right. A surprising number of mid-size and larger corporations are

not taking this opportunity to communicate their marketed identity: your corporate logo/slogan. This opportunity delivers something beyond an impression. If all of your outbound faxes are accompanied by your corporate branded coversheet, then the receiver will be able to identify the source of a printed document at a glance. This increases the likeliness of a quicker response or faster processing.

Uniformity doesn't stop with logos and slogans, it's about your page layout and consistent sizing. It's much like the menu board at a brand of service center or fast food restaurant. All their locations have the same exact pictures, categories and sequence of listing. You'll not find the prices on the left and one location and prices on the right at another location. Why? Because they're trying to deliver a consistent customer experience, which increases customer satisfaction and the likeliness for repeat business.

This is your outbound menu board, so don't put the responsibility on the sender to copy/paste logos, re size graphics or reorder the layout; the coversheet is not the appropriate place to show user creativity. This is the way you dress your information as it enters your receivers workspace. An enterprise-grade solution will feature a pre configured coversheet built into the fax software that aids the sender with proven font choices and a company brand message formatted in a layout with appropriate page margins and information placement.

Control – Consider having the option to flip the switch on the IT side to force all
documents to send with your company coversheet or leave the coversheet attachment
as an individual user option. The latter is usually preferred but you may like to have
that option as a potential problem solving solution, especially if you have multiple
property locations.

The Scalability Key: Your Enterprise-Grade Solution

Scalability is a critical factor in today's business. As departments are reconfigured, staff sizes change and new locations are established it is important that your fax solution can be applied as your business scales.

Receiving Flexibility: An enterprise-grade fax solution will allow your incoming faxes to be delivered to one or multiple staff members. The capability of routing inbound faxes from a single line to multiple users will have benefits to your business in cost, communications and scalability. You will want there to be flexibility with that feature as well so it may be scaled to your business needs.

<u>Send</u>, <u>Receive or Both</u>: Examine the way each user will need to use fax for business. It is usually easier to approach this on a department basis. You may be surprised at how many users do not need to send and receive faxes. Many users will only use fax as a receive only or send only function. Evaluate if there might be benefit to in-house administrative distribution. This option may change your receiving requirements. The flexibility to scale your

send and receive functions is an indicator if your fax solution is of enterprise-grade or a personal fax service.

Remote Locations: Companies that use a fax network across multiple property locations or remote field staff, are sure to require a fax solution designed for corporate level business. The important thing here is to keep your buy options scalable. Even if you are buying into a package price, make sure your service provider will allow for downgrades without penalty. Your fax service should be a solution to your business communications, designed to work with your needs and not requiring your business to conform to fax technology.

The Performance Key: Your Enterprise-Grade Solution

The performance points of a corporate fax solution need to account for measurable metrics, information flow and the performance advantages of an enterprise-grade solution.

<u>Fax Size</u>: There are two components of the size of a fax document to consider:

- File Size The upside to larger files is better resolution quality. The downside of larger files is the challenge they can impose on your service providers fax boards. A corporate fax solution should be able to deliver high resolution fax imaging, providing PDF enlargement capability with a usable magnified view. Make sure that your service provider can deliver faxes of any size without transmission delay, both incoming and outgoing.
- 2. <u>Document Length</u> An performance measure of an enterprise-grade fax solution will be the limitations set with file types, the ability to combine multiple file types in a single document and *HOW LONG YOUR FAX DOCUMENT CAN BE*. Most of the time, this is not an issue because the most of the time users will send standard length faxes. By the very definition of averages, a usual and standard length is determined. When things get pressing is when on that rare occasion you have this ultra long fax that is of critical importance and you have to send all....100, 200, 300 pages! If you can imagine it, it can happen. Make sure that your ceiling is high enough to get that one ball in the air. You don't need undue stress added from technology ceilings being built too low.

<u>Fax Speed:</u> One of the advantages of using fax communication is the immediacy that it provides. How many times have you been on the phone where you are discussing and watching the fax send or receive with the party on the other end of the line? It's the process of ensuring that everything is transmitting okay, pages are not missing and even allows you to continue a live conversation while reviewing a hard copy.

Fax transmission speed has been a big advantage of fax machines. Internet fax services usually render a slower transmittal speed than that of the fax machine. This may be due to firewalls, ISP speed, server connections, etc... Consider the value of time and the importance of immediacy when selecting a fax solution provider.

Are you dealing with faxed orders, customer service faxing, or contracts? Fast fax transmission is probably of utmost importance. An enterprise-grade fax solution can really shine in this area by offering many advantages over a fax machine system or an in-house fax server. You should consider the benefits in the following areas:

Enterprise-Grade Online Fax Advantages over Fax Machine Systems

- Elimination of shared fax machines Faxes can be sent and received directly from the desktop, saving the company man-hours and increasing productivity.
- Fax papers no longer need to be distributed to in boxes Saves time for assistants and eliminates the risk of misplaced as well as accidental faxes picked up by coworkers.
- <u>Multi-tasking</u> Fax machines cannot send and receive at the same time. Expedite your business communications by enabling information to flow freely.
- <u>User limitations</u> Only one person at a time can use a fax machine. Enterprise-grade solutions enable users to access fax capability as they need. Waiting time is over.
- Reconfigurable with virtual numbers Whether it's an office remodel, a change in staff sizing or someone moving from one office to another, your fax solution should allow for a virtual number reconfiguration. Having to schedule a phone company technician to come out and move fax lines can be costly and hamper the performance of productivity.
- Remove the need for peripheral hardware A real advantage of an enterprise-grade fax solution is the elimination of a need for a fax machine at every receiving point. This also speeds up the work process and reduces cost by eliminating the need for fax toner, machine maintenance, and paper.

Enterprise-Grade Online Fax Advantages over In-House Fax Servers

- <u>Uninterrupted Workflow</u> Fax servers may occasionally need to be rebooted. This
 adds burden to the IT department and could cause for a disruption in the work flow of
 your company employees and executives.
- No Hardware Headaches An enterprise-grade fax solution will eliminate the need for specialized fax boards and software.
- Economy of Scale Using an online fax solution provider means you get the advantages of bigger servers at a fraction of the cost on the front end and the ongoing.
- <u>Direct Support</u> Use the manpower and knowledge base of your online fax solution provider rather than using internal support
- Eliminate Faxes Sitting in Queue Periodic spikes in fax volume will often cause faxes
 to move to a queue due to under sourced fax boards and the lack of open fax lines in
 an in-house fax server system. Your enterprise-grade online fax solution would
 eliminate this bottle neck in your system and allow your staff to take full advantage of
 speedy send and receive.
- Available fax lines 24/7 An in-house fax server may have busy signals but an online fax solution would ensure open fax lines all the time.

How to Implement Your OnLine Fax Solution

Once you've made a decision to outsource your fax services and maintenance, there are a number of ways to proceed. The choices vary with user requirements, confidentiality and security requirements, send and/or receive capability, and other fax options. There are also the budget and roll out requirements.

1. Use the 10 Point Checklist included in this Guide

The checklist will serve as a consolidated list of everything you'll need to establish where your system is and where it needs to go. This will be information that you will need to refer to as you locate a solution provider.

2. List your requirements

Note the technical, support and service options that you require and another list of which ones you would like to have, but may not be a deciding factor. It's important to decide on what you will not compromise before you start shopping.

3. Download the User List Worksheet

This may seem a bit tedious, but the free worksheet will provide you a template map to capture all the information and help you understand exactly which services are needed at each terminal and user. This will help your prospective service provider give you an accurate quote.

4. Consider future upgrade paths

Remember, you don't just want to satisfy your current upgrade needs, but you'll want to find a service provider that has the capability to grow with you. Check and see if the service provider has a history of being at the forefront of new technology. It's good to know that your service provider will be ready to do business your way.

Considerations for a Corporate Fax Solution

1. Security

Your fax documents may contain confidential, financial or legal information. Make sure that your fax documents are not being stored on a public access, log-in web server. Network security, document security, hardware security, client-side security and security of facility are all areas that need to be addressed.

2. Usability

Ensure that your corporate fax solution meets the 7 Enterprise-Grade User Functions criteria.

3. Integration

Your fax solution should integrate with your current contact database. Corporate solutions should also be able to be customized to tie into your accounting and sales system software.

4. Scalable

Multiple locations; multiple users per fax line; multiple fax lines per user; pick up faxes on a mobile or from the office: your corporate solution should be scalable to your business needs, not forcing you to work with prepackaged options. Adjust your technology to suit your business, not the other way around.

5. Performance

Fax transmission speed can often be critical to close a deal or when waiting on documents during professional billing hours. This is often overlooked. Corporate solutions should be optimized for speed performance, quality performance and not restrict your document sizes.

Online Fax Guarantees Complete Satisfaction

In a world of contracts and subscription agreements, few solution providers guarantee anything, but OnLine Fax guarantees complete satisfaction with their fax solutions, or you can opt out without further obligation. We have bundled our services in packages for your convenience, but our corporate fax solution services for multiple location or software integrated needs can be customized to your specific requirements. We simply ask that you fill out the 10 Checkpoints list and the User List Worksheet (included in this guide) for all enterprise-grade custom services. Integrate a fax solution in your software or move forward with one of our corporate packages and add-on options – either way, we guarantee your complete satisfaction! You can't lose.

What To Do Next

Call or Email Walter Campbell at (866) 809-0399 / support@globalaccessinc.com and ask for an Enterprise-Grade Fax Application. Someone will be happy to discus your specific requirements and any aspect of your corporate fax concerns that may still be unclear. OnLine Fax prides itself on outstanding service and support. We look forward to serving you as you move ahead with this important technology for your business.

Don't let a questionable economy, configuration confusion or fear of the unknown keep you from participating in communication and security upgrades! OnLine Fax can be an important part of your success story, too.