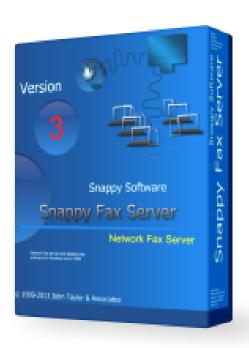
# **Snappy Fax Server Help**

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# **Table of Contents**

	Foreword	0
Part I	Introduction	4
1	Windows Server Versions - Special Considerations	4
2	Getting Started	5
3	Importing from Prior Version	7
4	Configuring the Client Software	
Part II	Fax Server Settings	11
1	General	11
2	Network Clients	14
	Client Notifications	15
	Client Priorities	
3	Modem Settings	17
4	Fax Options	24
	Fax File Storage	
	Junk Fax Filters Publish to Web	
5	Fax Forwarding	
•	To Email	
	To Fax Machines	
6	Printing Options	29
7	Email Settings	30
8	Automatic Purge	31
9	Automatic Archive	32
10	Application Security	33
11	Remote Assistant	34
12	Permissions	35
13	Software Updates	36
14	Database Server	
15	Internet Fax Service	
Part III	Navigating the Main Window	39
1	Main Window Views	40
	Pending Jobs	40
	Faxes Received	41
	Faxes Sent	
	Junk Faxes	
	Fax Archives	
	Faxes ReceivedFaxes Sent	

	Network Clients	45
	Client Status	45
	Client Statistics	
	Modems	
	Modem Status	
	Threads	
	Thread Status	
	Thead Messages	49
	Thead Errors	50
	Utilities Menu	
	Import Prior Version	
	Import From Snappy Fax client	
	Relocate Data Files	
	Purge Fax Records	
	Clear Checked Out Status	
	Change Client Computer Name	57
Part IV	Purchase and Pricing	57
Part V	Applying your license after purchasing	59
Part VI	Technical Support	59
Part VII	Sending tech data	60
art VIII	Transmission logs	61
Part IX	Database server	62
Part X	Show / Hide data view columns	64
Part XI	Sorting and Filtering data views	66
Part XII	Changing image thumbnail sizes	67
Part XIII	Frequently Asked Questions	69
1	Can it run as a service ?	69
2	Do I need the fax server ?	72
3	How do I add additional clients ?	
		_
4	Fax Jobs are just sitting in the queue and not sending, why?	
5	Run in Virtual Machine ?	73
	Index	74

### 1 Introduction



## **Welcome to Snappy Fax Server**

### version 3.0

Version 3 of the fax server includes some notable improvements including:

- Update database engine
- Improved User Interface
- Expanded client capabilities allowing administrative procedures to be performed from the client software
- "super G3" high speed fax with error correction (G3 Edition only)

and more...

## 1.1 Windows Server Versions - Special Considerations

With Windows Server Versions (Server 2003, 2008, 2012 and Small Business Server) special considerations may need to be given, depending on the 'Roles' you have configured in Windows Server. Note that snappy fax server does not require Windows Server, it can be installed on any computer running any version of windows. These instructions only apply to Windows Server versions.

#### **Fax Server Role**

To use snappy fax server with Windows server versions, it is not necessary to have the 'Fax Server' Role installed and configured in Windows Server. If you have the 'Fax Server' Role installed and configured in Windows Server then you should take 1 of the following 2 actions:

- Remove the 'Fax Server' Role from Windows Server. From the Server Manager, right click on the top node in the left pane 'Server Manager' and select 'Remove Roles' from the popup menu. Remove the 'Fax Server' Role.
- If removing the role is not desired then you will need to disable the devices (modems) that have been configured. Expand the nodes beneath the 'Fax Server' until you see

the 'Devices' node, your modem(s) may be shown in subnodes beneath this node. If so, right click on each modem and uncheck the 'Auto Receive' and 'Send' items in the popup menu or select 'Properties' from the popup menu and disable the device for receiving and sending on the Properties page.

If the 'Fax Server' Role is installed and devices are configured and you do not disable the devices or remove the Role, snappy fax server will be denied access to the modems' comports and will not be able to send or receive faxes.

#### **Network Policy and Remote Access Role**

If the 'Network Policy and Remote Access Role' is installed and configured to have Windows server listen for incoming network connections on a dialup modem connection, this must be disabled. If this is not done, snappy fax server will be prevented from using the modem(s) for sending and receiving faxes.

Expand the 'Network Policy and Remote Access Role' node and look for 'Routing and Remote Access', expand further and examine the 'Ports' node. Right click on the 'Ports' node and select 'Properties' from the popup menu. Select each fax modem on your computer and click the 'Configure...' button and then disable (uncheck) the 'Remote access connections (inbound only)' and 'Demand dialing routing connections (inbound and outbound)' checkboxes.

### 1.2 Getting Started

Note: If you cancel Express setup you will not be able to run it later and you must use the settings button to configure the fax server.

# Note: Before you run the fax server software for the first time, perform these 2 preparatory steps:

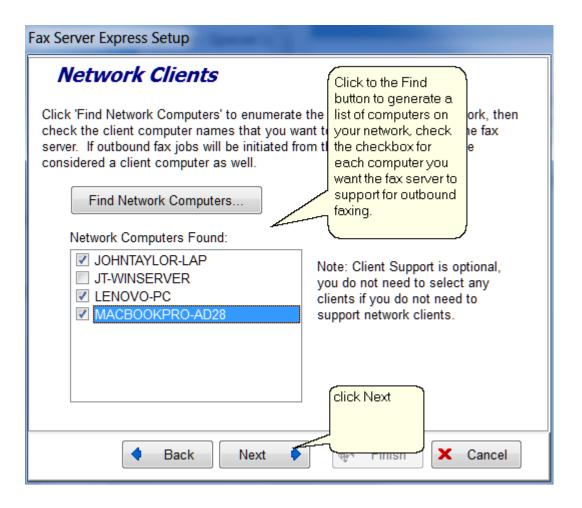
- 1. Open TCP ports 12005 through 12008 in your firewall (incoming and outgoing)
- 2. Make sure that you can ping the server machine from each client and that you can ping each client computer from the server machine.

The database server uses ports 12005 and 12006 for data and admin operations and the fax server and client software communicate over ports 12007 and 12008 for interapplication message notifications.

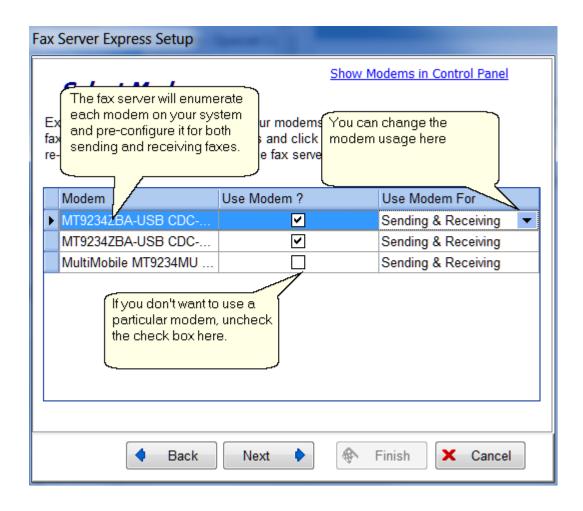
If you are new to the fax server software, the first time you launch it you will be presented with the Express Setup screen (shown below).

If you have previously installed version 2 of the fax server software, the Express Setup screen will not be shown and you should use 'Utilities | Import Prior Version Data' from the menu to import your settings and fax data from version 2 of the fax server.

The first step in Express Setup is to choose the network client computers that you want the fax server to support



The second and final part of Express Setup is to choose the modems you want the fax server to use and configure the com port, use type and fax class for each modem.



The next page will detail any errors you may have made in configuration options, if there are no errors, click the 'Finish' button to apply your settings and exit Express Setup. You are ready to use the fax server now, but be aware there are other options that you may want to apply. You can use 'Settings' on the main menu or click the settings button to access the additional settings categories.

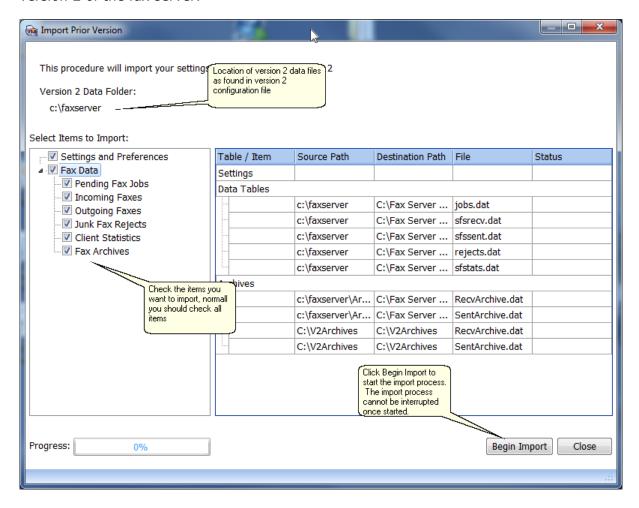
There are many other available options, the express setup only configures the clients and modems which are essential to send and receive faxes. You can use the Settings menu item to access the various settings categories in the fax server.

## 1.3 Importing from Prior Version

If you are a current version 2 fax server user, you should use 'Utilities | Import Prior Version Data' from the fax server's menu to import your settings and fax data from version 2.

Note that while version 2 fax data can be import into version 3 of the fax server, there is

no provision for exporting version 3 data to a format that can then be imported back to version 2 of the fax server.



#### Note:

The data folder for data files in version 3 is initially c:\faxserver3, you may later change the data location after you have imported your prior version data using 'Utilities | Relocate Data' from the main menu.

It is recommended that you keep the default location. If you relocate your data files you will need to manually set the share name of SFSERVER3 on the new data folder and reconfigure the client software to point to the new data location. The fax server will set the share name on the default data folder and attempt to set the share name on the new data folder, however, be aware that Windows will not allow it to do so if you have selected a network drive for the data location.

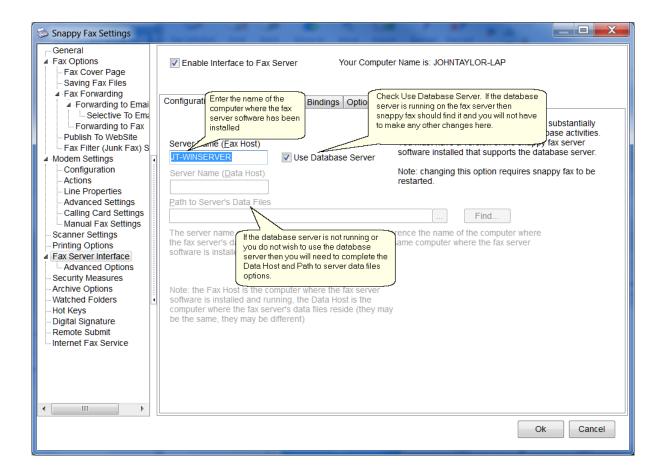
## 1.4 Configuring the Client Software

The question is often asked 'what is the client software'? The client software is snappy

fax desktop/client version 5. When configured as a client to the fax server software, it is referred to as 'Snappy Fax Client'. The client software should be installed on any client computer on your network that needs to originate fax jobs or otherwise interact with the fax server software.

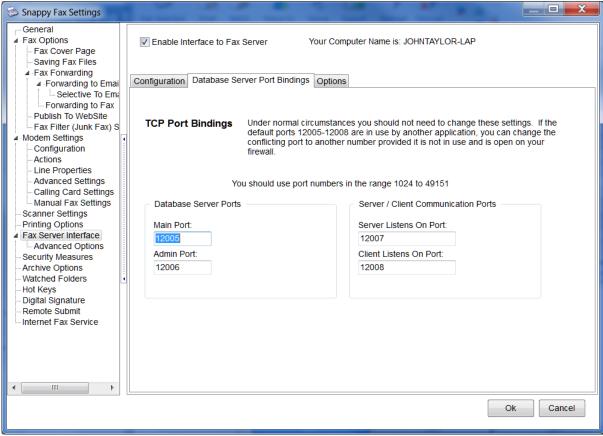
The fax server software cannot originate outgoing fax jobs on its own, it only processes outgoing fax jobs that are submitted to it by the client software.

The configuration screen *in the client software* is shown below and is accessed from Settings->Fax Server Interface in the client software.

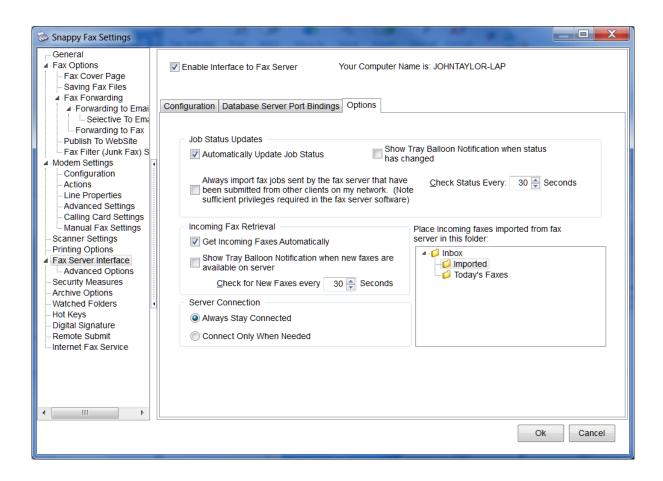


#### **Database Server Port Bindings**

You should not have to make any changes to the options on this screen. The options are exposed so that in extreme situations , where ports are already in use, the port bindings may be changed.



**Fax Server Other options** 

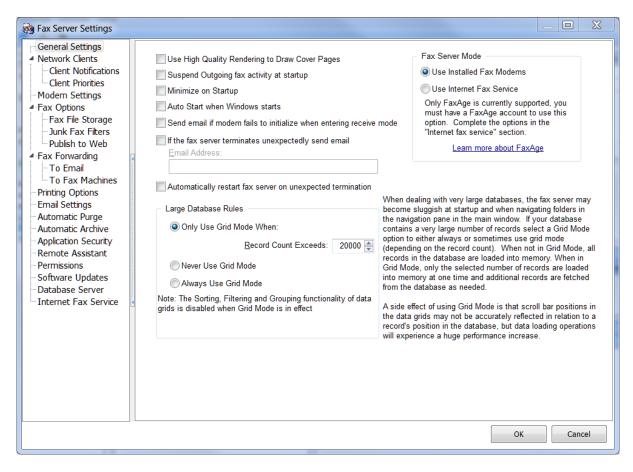


Set the above options as desired, they are self-explanatory.

## 2 Fax Server Settings

#### 2.1 General

The fax server's General Settings screen:



#### Suspend Outgoing fax activity at startup

When the fax server is started it will automatically begin looking for outgoing fax jobs to process. If this option is checked, it will not begin scanning for outgoing jobs until you click the Resume button on the main window's toolbar.

#### **Auto Start when Windows starts**

If you check this option, the fax server will record a registry entry which will cause Windows to start it automatically when your system is restarted.

#### If the fax server terminates unexpectedly send email

If the fax server should shutdown unexpectedly you can have it send an email to a specified email address. Check this option and enter the email address in the box provided. Note that if a sudden power loss occurs, the email cannot be sent. This option is intended to alert someone that the fax server terminated due to an unexpected program error.

#### Automatically restart fax server on unexpected termination

Check this option to have the fax server automatically restarted after an unexpected shutdown occurs.

#### **Large Database Rules**

The grid controls that present database records in a tabular format for the user include many useful features like sorting, grouping and filtering the grid data which is easily accomplished by clicking a column header, dragging a column header or clicking the down arrow on the column header. In order to provide this functionality, the grid control loads all database records into memory so that is can be quickly accessed for sorting, grouping and filtering operations.

If your fax database contains many thousands of records then snappy fax will take a performance hit in loading these records into memory. The problem will manifest itself with slow startup times or slow performance when populating a grid when a folder is selected in the navigation pane. By default, when a database contains more than 5,000 records the grid related to that particular data table (incoming faxes for example) will be put in 'Grid Mode' which means that the sorting, grouping and filtering functionality will be disabled. This is to avoid a huge performance hit when loading or navigating data. When a grid is in 'Grid Mode', all data records are not loaded into memory, rather a specified number of records are loaded and other records are fetched from the data table as needed. A side effect of 'Grid Mode' is that that scroll bar may not accurately reflect the true position of the record in the data table. For example, if you grab the scroll bar's thumb with the mouse and pull it to the bottom of the scroll bar, the last record in the grid view will not necessarily be the last record in the data table. You will need to use the navigator bar that is positioned at the bottom left of the data grid to navigate to the first or last record in a data table.

If you have a very fast computer, you can increase the record count to a higher number, some systems may be able to efficiently handle 10,000 records or more without using 'Grid Mode'. You will need to experiment to see at what level you experience a degradation in performance with very large data sets.

The best alternative to avoid 'Grid Mode' is to manage your database to move older items to an archive when your record count grows excessively large. Note that you can create any number of archives in snappy fax and that you will also need to ensure that no one particular archive grows excessively large. If for example, your main database has 4,000 records but the default archive has 60,000 records, you will experience a substantial performance hit when loading snappy fax. You can use the 'Move to Another Archive' feature to move records from the default archive to another archive. Note that you can create a new archive 'on the fly' when moving records from one archive to another or when moving records from the main database to an archive.

Note: when a grid has been put into 'Grid Mode', the group panel will not be visible.

#### **Fax Server Mode**

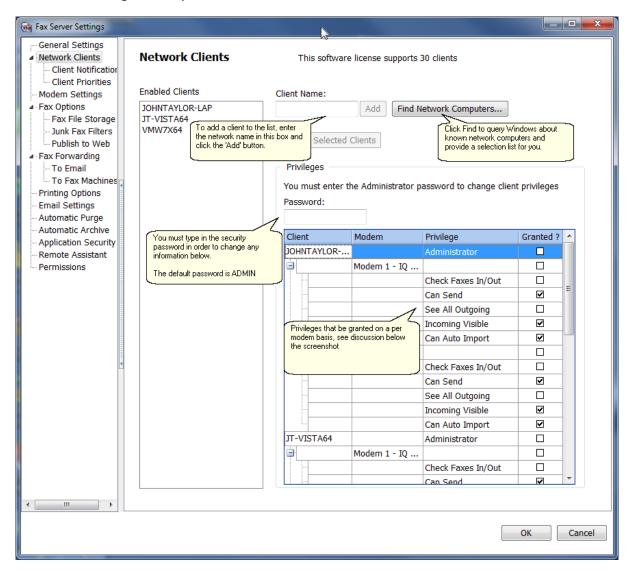
Snappy fax server can process faxes by either using your installed fax modems or by using your FaxAge internet fax account. Most commonly, you will use your installed fax modems. FaxAge is an internet fax processor and it has been singled out for use with our fax server for one important reason: it uses secure REST services to send and receive fax job data and image data over the internet. The other services we have researched use ordinary unsecure email services for this purpose. You must have a FaxAge account to use this option and you will be responsible for any charges incurred from using their service. You can learn more at: http://www.faxage.com.

Note: we are not affiliated with FaxAge in any way and do not receive any referral fees

from them.

#### 2.2 Network Clients

Use this section to add or delete network clients from the fax server's support list. Note that a fax job submitted to the fax server from a client computer that is not enabled in this list will be ignored by the fax server.



#### **Client Privileges**

The following client privileges can be granted to a client on a per modem basis, however

granting Administrator privileges to a client grants all privileges on all modems.

#### **Check Faxes In/Out**

A client can 'check out' a fax, meaning that he/she is working on that fax. When a fax is checked out by a client, it is marked in the fax server's database as checked out and by whom. A checked out fax cannot be moved to trash, purged, archived, imported by other clients, etc. until is has been checked back in by the client from the client software.

#### **Can Send**

This privilege grants to the client the ability to send faxes on the indicated modem.

#### **See All Outgoing**

This privilege grants to the client the ability to see all outgoing faxes processed on the indicated modem regardless of which client submitted the fax job to the fax server.

#### **Incoming Visible**

Grants to the client the ability to see from the client software, faxes received on the modem.

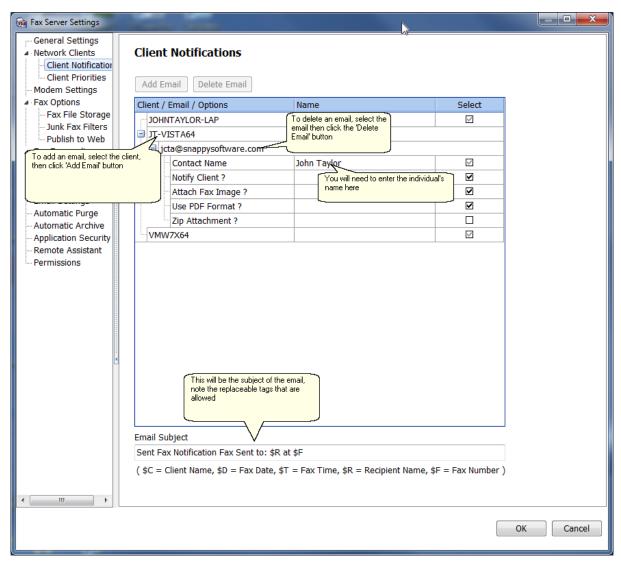
#### **Can Auto Import**

Grants the privilege of automatically importing incoming faxes received on this modem.

#### 2.2.1 Client Notifications

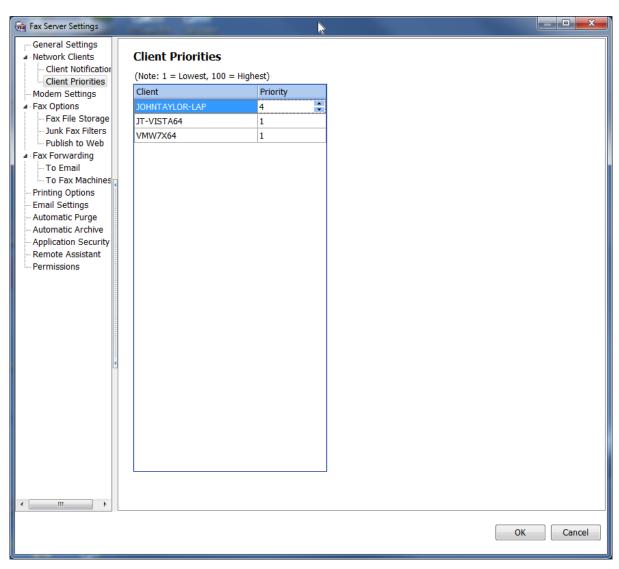
Specify here contact information for each network client supported by the fax server.

These settings refer to the sending of notifications by email when an outgoing fax job has been processed.



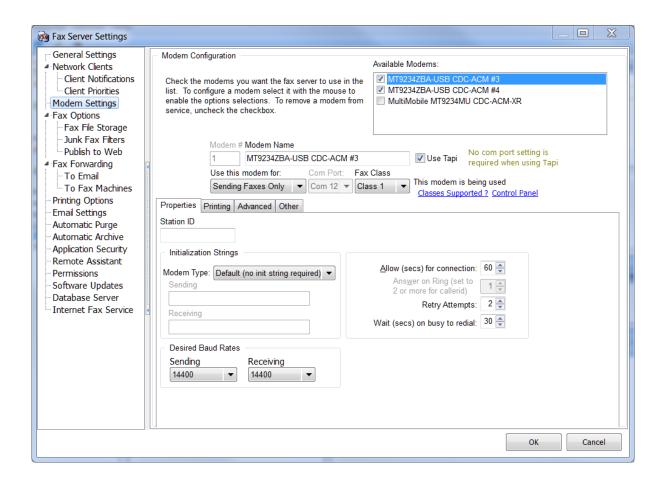
#### 2.2.2 Client Priorities

Specify client priorities here. Fax jobs from clients with higher priorities will be processed ahead of those with lower priorities:



## 2.3 Modem Settings

Configure your modems in this section:



The modem settings page includes some general information and four tab pages (shown separately below).

All known modems connected to your computer will be shown in the Available modems list. Check the modems you want to use, the modems will be numbered starting with '1' in the order that you check them.

#### <u>Use Tapi</u>

Tapi is the "telephony application programming interface" included in the Windows operating system. If you choose this option, you do not need to select a Com port (see below) as Windows will take care of this for you. If you do not select Use Tapi, then you will need to select the com port since access to the modem will be direct to port and the fax server needs to know what port to use. You can consult control panel by clicking the 'Control Panel' link to see what com port the modem is installed on.

#### **Use this modem for:**

Select the way you want to use the modem, the available selections are Sending only, Receiving only or Sending and Receiving.

#### **Com Port**

If you have select Use Tapi then this item will be disabled as the port number will be

discovered and managed by Tapi. If Use Tapi is not selected then select the proper comport from the drop down list.

#### **Fax Class**

The available fax classes are Detect, Class 1, Class 2, Class 2.0 and Class 2.1. Class 2.1 will not be included in the selection list unless you are using the SG3 edition of the fax server software. If you are unsure what classes your modem supports, select 'Detect' from the list. Most of the cheaper modems on the market support only class 1.

#### **Properties Tab Page (shown above)**

#### **Station ID**

This is the phone number of the phone line the modem is connected to.

#### **Modem Type:**

The modem type selection controls the initialization strings for sending and receiving. In most cases the 'Default (no init string required)' setting will do and that is the default. One notable exception is the US Robotics model 5637 modem, there is a modem type selection for it and the associated init string (AT&F1) will cause the hardware flow control stored profile to be used for that modem. Some other modems may need special init strings to enable hardware flow control which is essential in fax session control. If you have problems sending or receiving faxes, try changing the modem type or consult your modem manual for the correct init string which enables hardware flow control. To enter a custom init string(s) select the 'Custom' modem type

#### **Desired Baud Rates**

Select 14400 for the desired baud rates or if using Class 2.1, 33600 will be forced for this selection. Note that some modems may have difficulty receiving faxes from some machines at 14400. This is due to an improper implementation of V.17 to V.29 transition. If you have difficulty receiving from some fax machines, set the receiving baud rate to 9600.

#### Allow (secs) for connection:

This is the amount of time the modem will wait until it gives up on the remote fax answering a call. 60 seconds should be ample time for this selection, if the remote cannot answer and start emitting fax tones in 60 seconds the call is not likely to be answered at all.

#### Answer on Ring

This is the number of rings that must occur before the fax server tells the modem to answer a call. If you have callerid on your phone line, set this to 2 or higher. The callerid information is processed between the first and second ring on most phone systems.

#### **Retry Attempts**

This is the number of times the fax server will retry a fax transmission if it encounters a busy or no answer condition.

#### Wait (secs) on busy to redial

The amount of time to wait after a busy condition before redialing.

#### **Printing Tab Page**



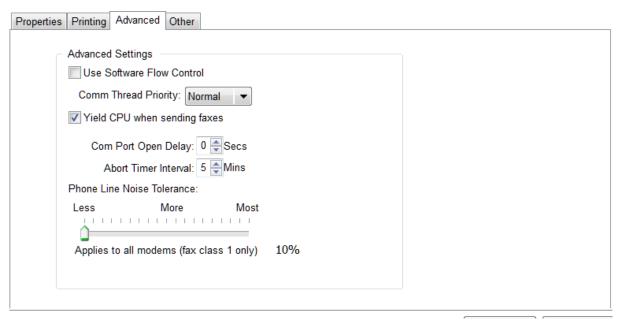
#### **Printing Options**

Printing options are controlled for each modem since you may want faxes on one phone line directed to certain printers. You can select print options for incoming and outgoing faxes, the options are:

- Do not print
- Print Image Only
- Print Confirmation Page Only
- Print Image and Confirmation

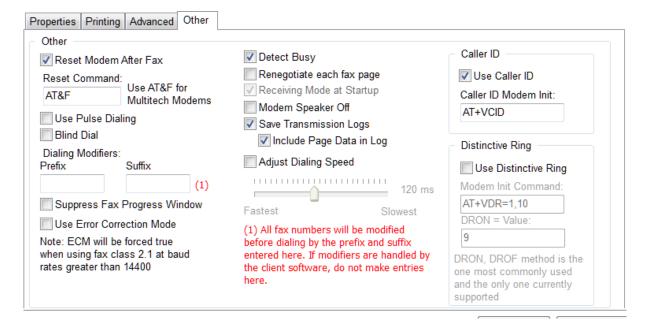
Select the desired option and click the Printers button to select the printer(s) to which you want the print job directed.

#### **Advanced Tab Page**



Under normal circumstances you should not need to change these options. It is recommended you not change the default options unless you are directed to do so by technical support.

#### **Other Tab Page**



#### **Reset Modem After Fax**

You should always set this option, it is checked by default.

#### Reset Command

ATZ and AT&F are the most common modem reset commands. Use ATZ unless you are

using a Multitech modem, in which case AT&F is recommended.

#### **Use Pulse Dialing**

Obsolete with modern phone systems. If you have are in a rural area with ancient phone technology check this option. This is intended for old style rotary dial phone lines.

#### **Blind Dial**

Checking this option will cause the modem to ignore the dial tone altogether. If this option is not checked and there is no dial tone on the line, the fax transmission will fail with 'No dial tone' error. This condition indicates a problem on the line, the phone system emits a dial tone when it is ready to accept the dialing of the fax number. If there is no dial tone then either the modem cannot detect it, there \*really\* is no dial tone, meaning the line is not properly connected to the modem or is connected to the wrong jack on the modem or the wall jack is not "live". Issues like this cannot be overcome by simply checking this option. If you have a modem that periodically does not detect the dial tone when you are certain the line is ok check this option, otherwise it is recommended that you leave this option unchecked as 'no dial tone' indicates a problem that needs to be addressed.

#### **Dialing Modifiers**

If you phone system requires dialing 9 to obtain an outside line (for example) enter a 9 in the prefix box followed by a comma like this: "9," (do not enter quotes). The comma causes the modem to wait for 2 seconds after dialing the 9, which should give the phone system plenty of time to engage and emit the dial tone. The suffix is available for more sophisticated phone systems that allow logging of some phone activity.

#### Suppress Fax Progress Window

Check this option to suppress the display of fax progress windows for this modem

#### **Use Error Correction Mode**

Error correction is never used unless you are using the SG3 edition of the fax server and have a class 2.1 modem and have selected class 2.1 for the fax class. Error correction is mandatory when using class 2.1 and will be forced.

#### **Detect Busy**

This option is checked by default and causes the modem to detect busy signals on the line. In cases where your modem is detecting busy under conditions where you are certain the line is not busy, you can uncheck this option.

#### Renegotiate each fax page

You should probably never check this option unless tech support has directed you to do so.

#### Receiving Mode at startup

For modems configured as receiving or both sending and receiving, check this option to

have fax receive mode started for this modem when the fax server software is started. If for whatever reason you do not want receive modem at startup, uncheck this option.

#### **Modem Speaker Off**

Check this option to silence the modem speaker. If your modem has a speaker (mostly external modems only) the noise on the line is useful in troubleshooting failed sessions, so if you have problems with fax sessions, unchecking this option will assist in determining the cause of session failures.

#### **Save Transmission Logs**

Transmission logs are vital to diagnosing fax session failures, you should leave this item checked.

#### Include page data in log

Checking this option enables additional logging information in the transmission logs. This increases the size of the transmission logs and is sometimes needed to expose more detail for troubleshooting failed sessions.

#### Adjust dialing speed

Some modems may send the dialing command to the phone line at speeds that cannot be handled by the phone equipment. This is common on some PBX systems. Move the slider to the right to slow down the speed of dialing by the modem.

#### Caller ID

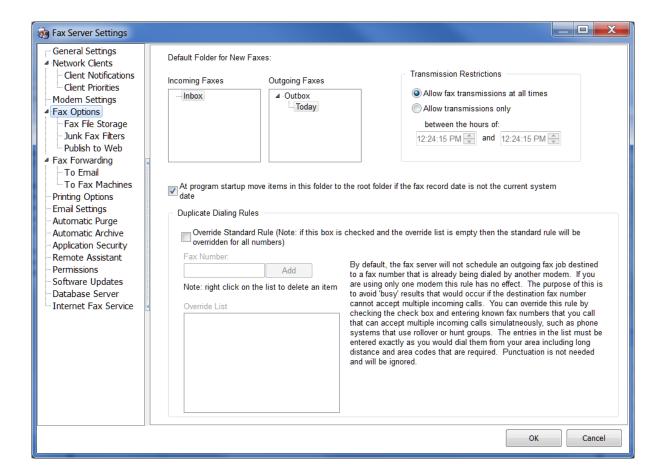
If you have caller id on your phone line, check use caller id. There are several types of caller id modem init commands AT+VCID and AT#CID are the most common. Consult your modem documentation and enter the appropriate command for your modem. AT +VCID is the default.

#### **Distinctive Ring**

Distinctive ring that is reported by the modem in DRON and DROFF messages is supported. If you have DR on your phone line, enter the modem init command to enable distinctive ring and the DRON value. The DRON value will differ from one phone provider to another and depend on whether the DR line has short rings or long rings. Your phone provider will likely NOT be able to tell you this information. The best way to determine what the value should be is to send a transmission log to snappy technical support. When receive modem is on, call the DR number on the modem line, let the call be terminated by the fax server and then send the transmission log. Note: you must check the 'Include page data in log' option (above) so that the log will contain all relevant information.

To access the transmission log, select the line item in the inbox, click the 'View transmission log' button on the toolbar above the inbox data view. You can save the log to a .txt file and send to snappy support. We will be able to give you the DRON value to be used.

### 2.4 Fax Options



#### **Default Folder for New Faxes**

If you want newly processed faxes to be routed to a special folder in the fax server's database, select the folder here. You must have already created a new folder on the main window by right clicking on the folder pane in the incoming and/or outgoing fax data view.

The default is the root folder of each view.

#### **Transmission Restrictions**

If you want to restrict fax transmissions to a certain time of the day complete this section.

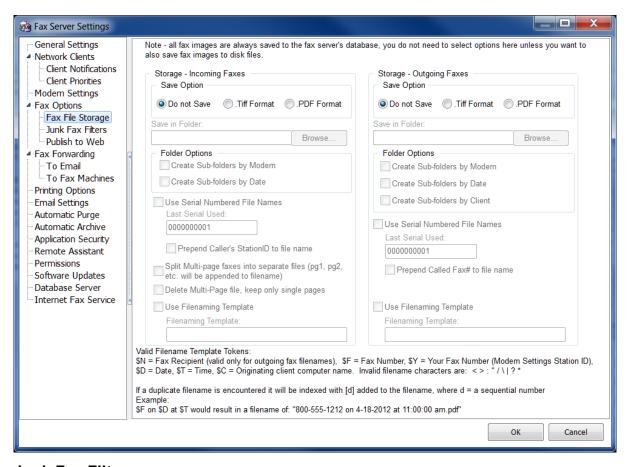
#### **Duplicate Dialing Rules**

The text in this section is self-explanatory, complete the options as desired.

#### 2.4.1 Fax File Storage

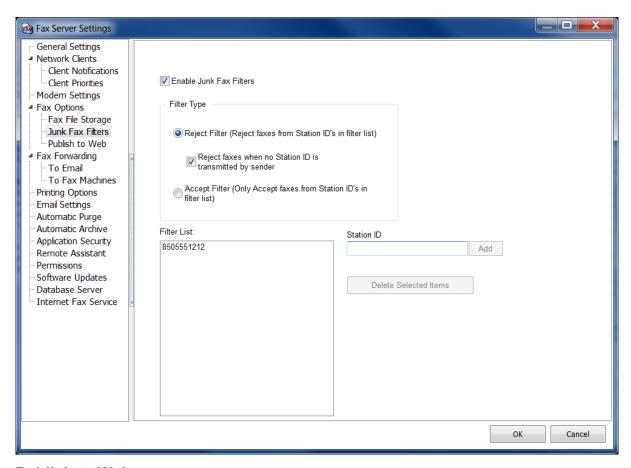
The fax server *always* stores fax images as a BLOB (binary large object) field in its database. These fax images can be retrieved at any time. If you want to *additionally* save fax images to a folder as either a tiff file or a pdf file, complete this section. The options are self-explanatory.

Note that you can create sub-folders beneath the designated folder by date, or modem and also by network client (for outgoing faxes).



#### 2.4.2 Junk Fax Filters

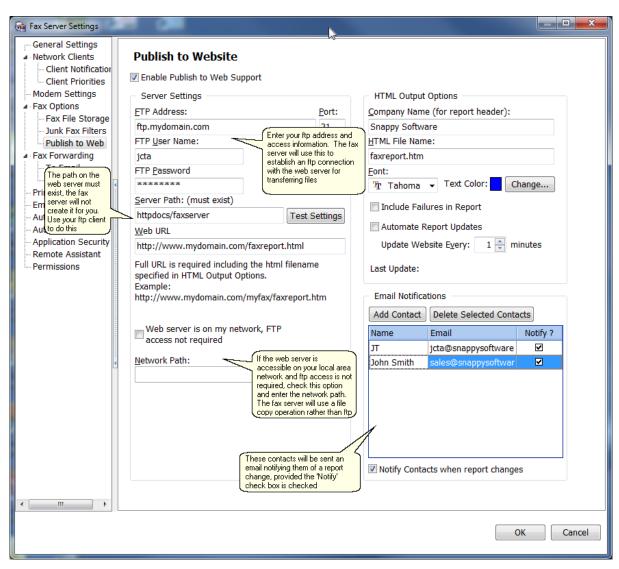
If you want to setup junk fax filters do so in this section, options are self-explanatory.



#### 2.4.3 Publish to Web

The fax server can publish to a website or webserver a report of incoming faxes along with fax images in html format.

To enable this functionality, you must configure your ftp information here.



## 2.5 Fax Forwarding

#### 2.5.1 To Email

Forwarding faxes to email:

The fax server can forward incoming faxes to any number of email accounts. There are two types of forwarding.

General Forwarding - All incoming faxes are forwarded to the email addresses enabled Selective Forwarding - Only incoming faxes where the transmitted CSID (fax number) of the caller matches a pattern will be forwarded

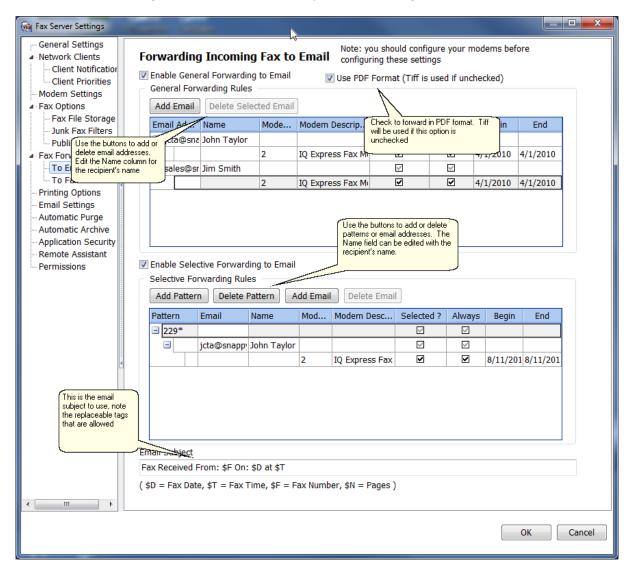
Patterns can include wildcards as follows:

- \* matches any number of characters in the position
- ? matches any one character in the exact position indicated

#### Pattern Examples:

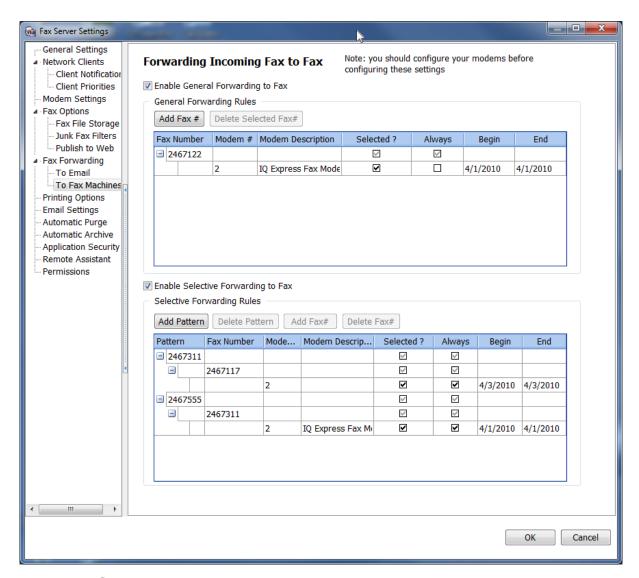
Pattern	Matches	Non-Matches
229*	2292449999, 229, 229-249-	2289876767, 2275556789
	0988	
22924?98??	2292469800, 2292479888	2282489800, 2292469780
*246*	229246,6700, 2282469000,	8009998888
	2467800	

Use this section to enabled either or both types of forwarding. Check the 'Selected?' column to select an item and check the 'Always' column to always forward to that email address or select begin and end dates to respect forwarding to that email address.



#### 2.5.2 To Fax Machines

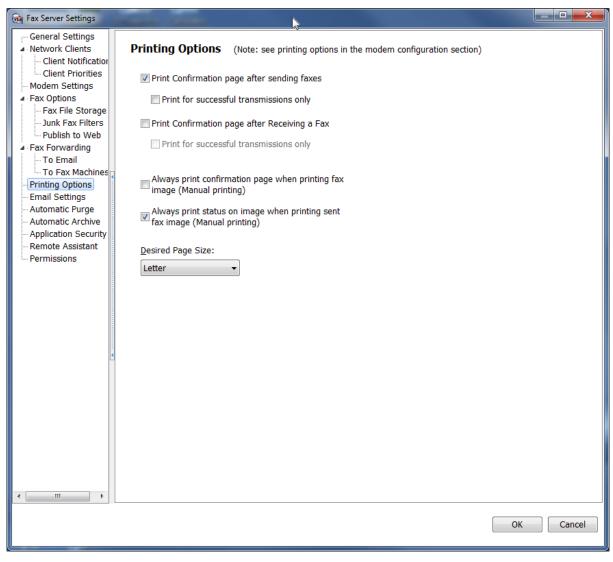
The fax server can forward incoming faxes to other fax machines based on the following definitions:



## 2.6 Printing Options

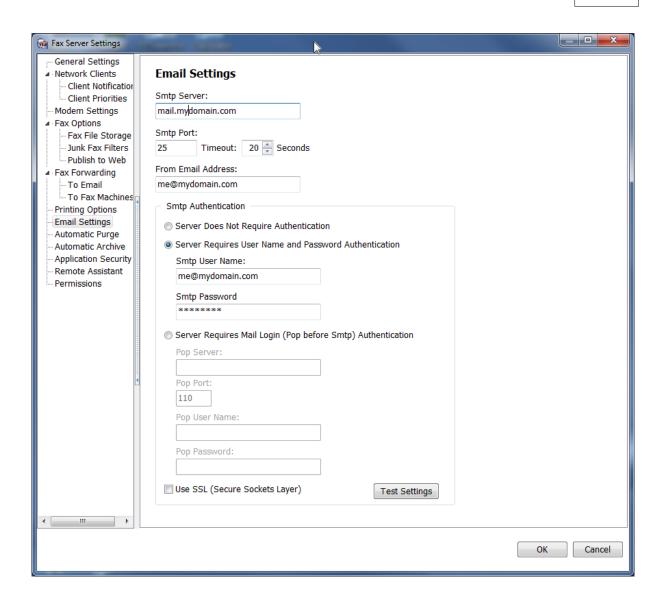
Configure your desired printing options on this screen.

Do not forget to also configure printing options in the modem configuration record.



## 2.7 Email Settings

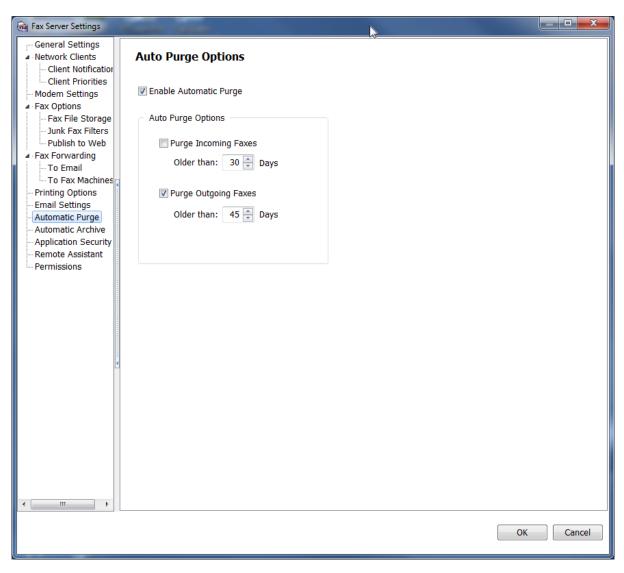
You must configure your email account in the fax server for any of the forwarding or notification features to succeed. You should refer to your regular email program (Outlook or whatever you use) for the correct settings. Every internet provider has their own requirements and there is no standard settings that will work for everyone.



## 2.8 Automatic Purge

The fax server can automatically purge its fax database based on the age of the fax records. If you want to use automatic purge please note that *purge* means exactly that. The records will be deleted from the database and thereafter irretrievable. This purge activity will not delete external files that were saved by the fax server in response to settings in the section 'Fax File Storage'. The purge activity only acts on records in the fax server's database.

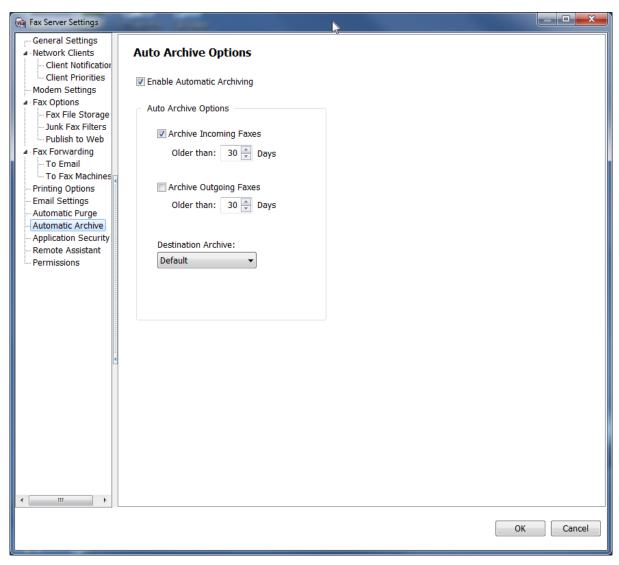
The auto purge activity is handled efficiently by a background thread. When the fax server is started, the auto purge operation will run approximately 5 minutes after startup. Once completely the thread will go to sleep until exactly 24 hours later when it will be run once again.



#### 2.9 Automatic Archive

You can configure the fax server to automatically move records from the primary database to the archive database.

The auto archive operation is handle very efficiently by a background thread. The auto archive operation will run approximately 3 minutes after the fax server software is started and then the thread will go into a sleep state until exactly 24 hours later when it will run once again.



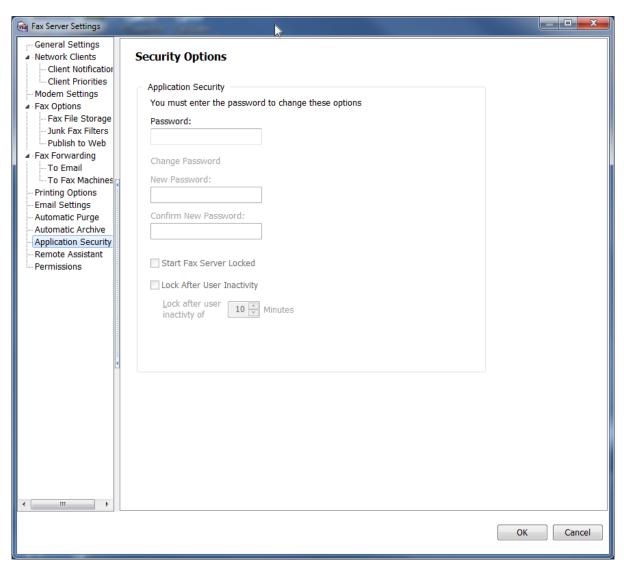
## 2.10 Application Security

The fax server can be configured to start in a locked state whereby no user interaction is possible or to enter a locked state after a specified period of inactivity or both. When the fax server is in a locked state, it must be unlocked in order to respond to user interaction. Unlocking the fax server requires entry of the security password.

#### Note:

The default security password is ADMIN. This password will remain in effect until you change it. If you will be using the security feature, you should change the default password. If you change the password, please record it somewhere, snappy fax tech support has no way to recover your password once you have changed it.

The security password must be entered here to change these options.

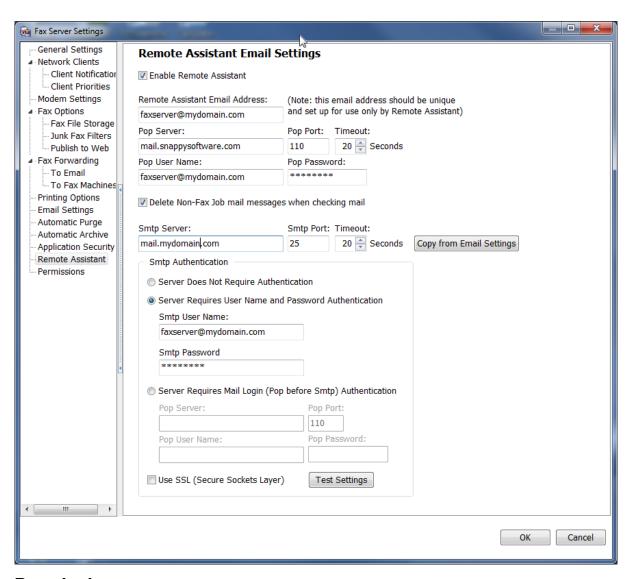


#### 2.11 Remote Assistant

Remote Assistant is a feature of the fax server which creates a background thread that monitors an email box looking for fax jobs that might be submitted by the client software via email. This functionality in the client software is called *Remote Submit*.

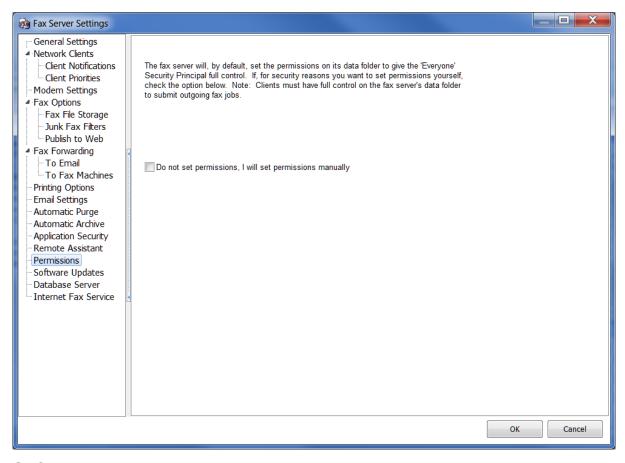
You must set up a special email account with your internet provider to be used exclusively by Remote Assistant. Do not attempt to use your regular email account for this purpose. The reason is that when you check your email from your regular mail client (Outlook, etc) any fax jobs in the mailbox will be retrieved and then deleted by the mail client, accordingly they will possibly never be processed by Remote Assistant.

Remote Assistant will retrieve the mail jobs, process the submission to the jobs table and send a reply to the submitter that the mail job has been submitted. Once the job has been processed, it will send another status email to the submitter informing of the success or failure of the transmission of the fax job.



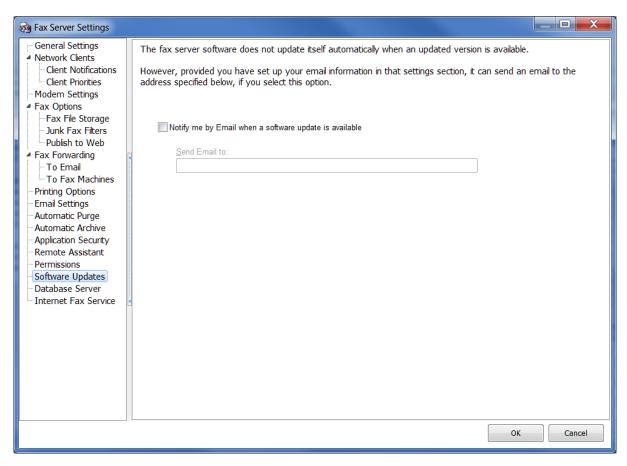
### 2.12 Permissions

If you check the option on this page you should know how to set access permissions on the fax server's data folder.



## 2.13 Software Updates

You can have the fax server software check for updates and notify you by email. The fax server does not have an auto-update facility, you will need to download the update from our website and install it.



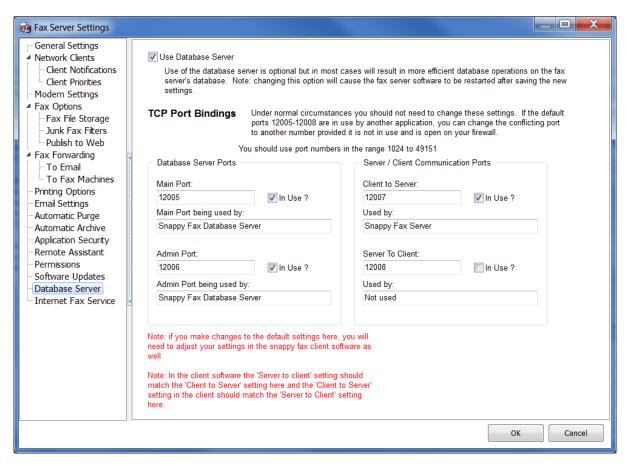
### 2.14 Database Server

Snappy fax database server can be used for network file access. Using the database server will provide much improved performance with network database file access operations. The fax server software installation includes the database server and if the option in this section is selected, the database server will be started when the fax server software is launched. In addition, a RUN registry entry will be created so that the database server will be started when windows is started, thereafter.

You should make sure that TCP ports 12005 through 12008 are open in your firewall. The installer runs a script that attempts to do this but Windows is very peculiar in this regard and may not allow this operation to succeed, depending on certain group policy settings. This may be especially true if you are using a third party firewall or anti-virus solution that also manages your firewall.

You should not need to change any of the TCP Port Bindings in the section.

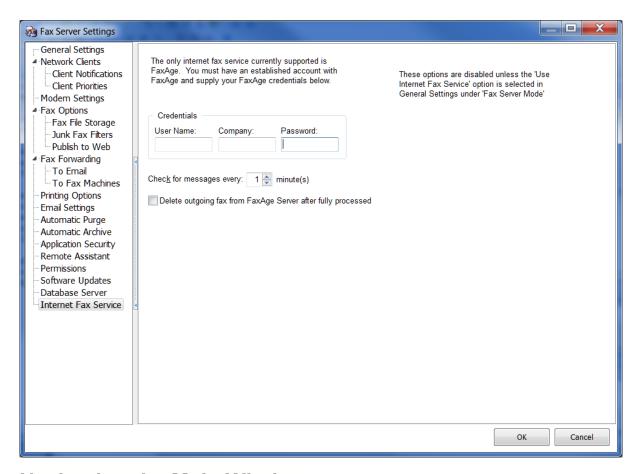
Note: if you are using the fax server without support for any network clients then using the database server will be of limited value.



### 2.15 Internet Fax Service

Enter your FaxAge credentials here. This page will be available if you have selected the Internet fax service option in the 'Fax Server Mode' section in general settings.

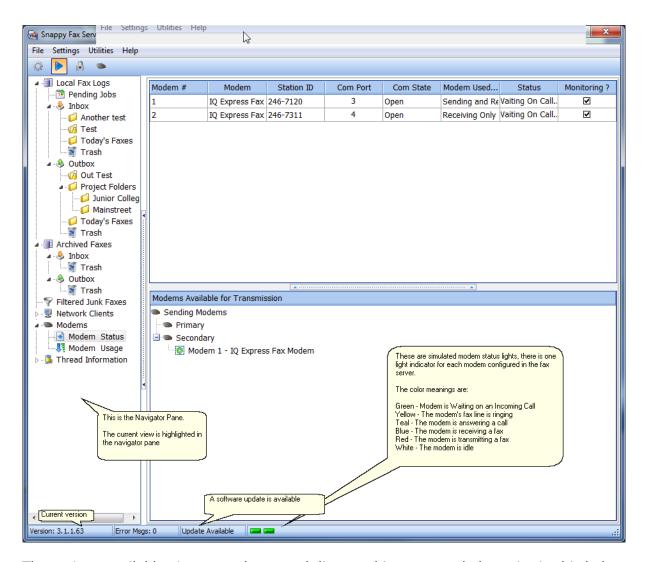
Your credentials are supplied by FaxAge. If you check the 'Delete outgoing...' checkbox, the fax server will perform a 'clear' operation with fax age to clear an outbound fax job from FaxAge's server after it successfully updates its database. Consider whether this is appropriate for you. If you check this option, FaxAge will not send you email confirmations for the outgoing fax.



# 3 Navigating the Main Window

The fax server's main window consists of a number of views that can be access from the navigator. Click the navigator to expand it and expose the available views.

This is the navigator:



The various available views are shown and discussed in separate help topics in this help file

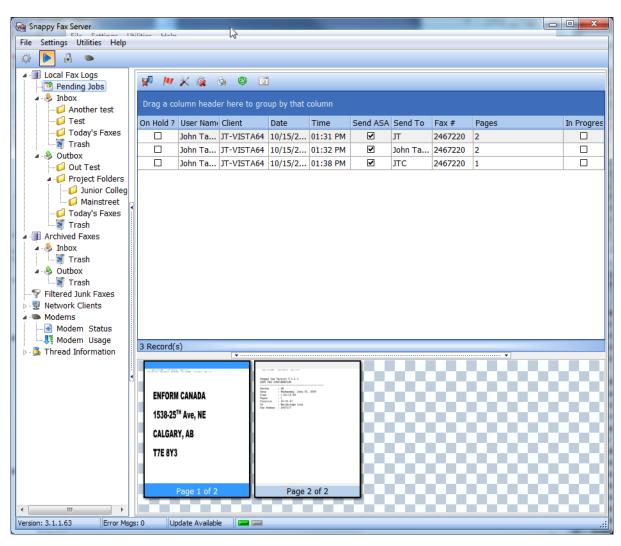
### 3.1 Main Window Views

### 3.1.1 Pending Jobs

The Pending Jobs view contains a grid or log showing outgoing fax jobs that have been submitted from the various clients that have not been processed.

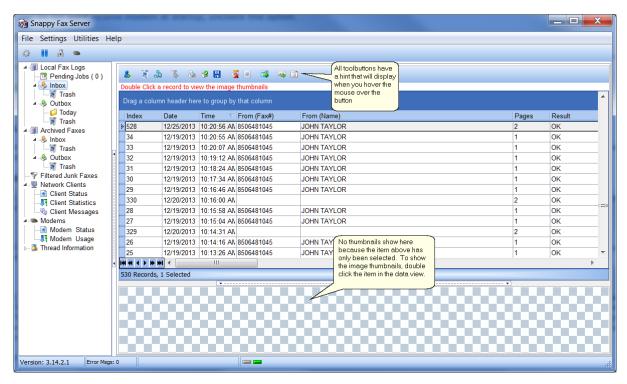
The lower pane shows thumbnails of the selected item. You can move the splitter bar by grabbing it with the mouse and sliding it up or down.

This grid or log in the upper pane and thumbnails in lower pane are typical of the other data views as well. You will notice that all data views have a toolbar above the grid. Park the mouse over a button to expose a hint as to the button's function.



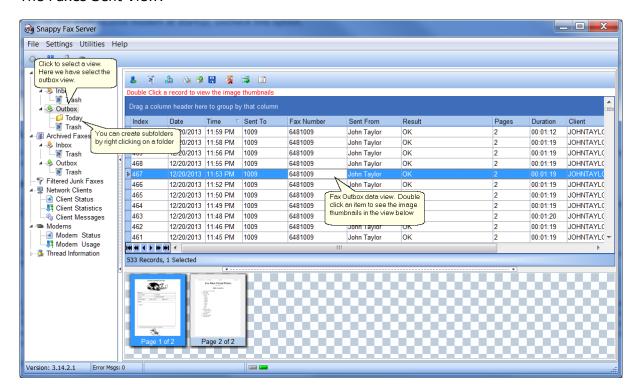
#### 3.1.2 Faxes Received

The Faxes Received View:



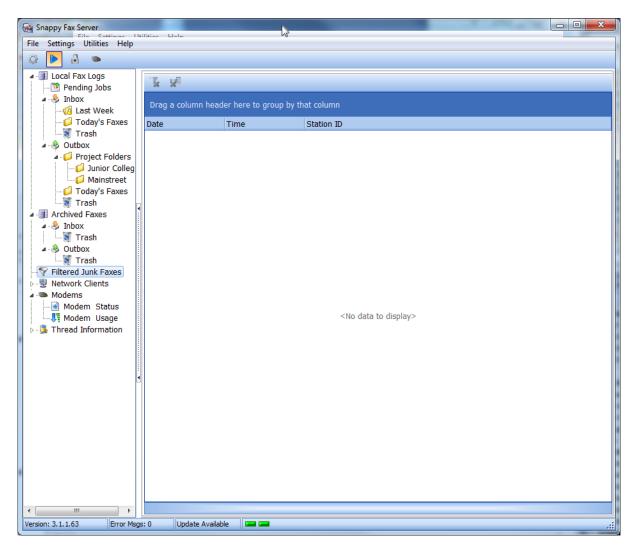
#### 3.1.3 Faxes Sent

The Faxes Sent View:



### 3.1.4 Junk Faxes

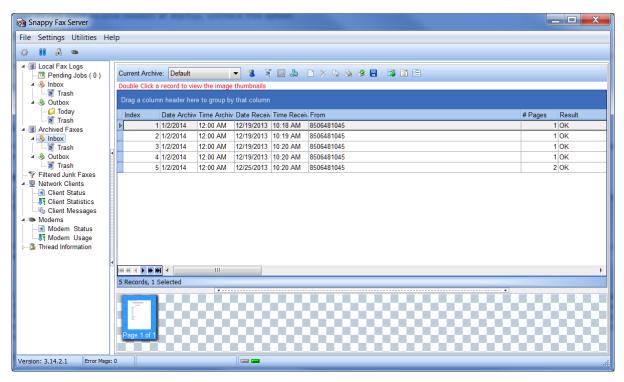
The Junk Faxes View: This view shows faxes that were rejected if a reject filter is in place. There is, of course no image associated with junk faxes since they were rejected and not received.



### 3.1.5 Fax Archives

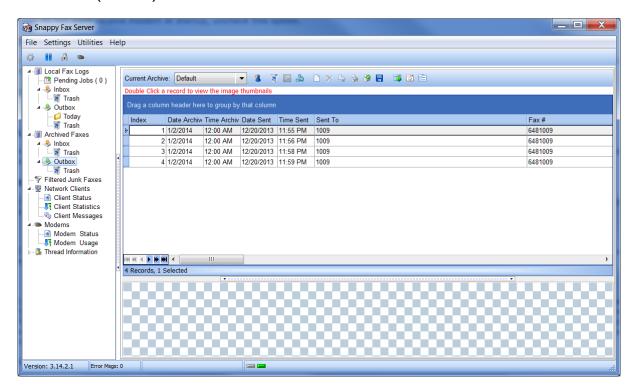
#### 3.1.5.1 Faxes Received

Faxes Received (Archives):



#### 3.1.5.2 Faxes Sent

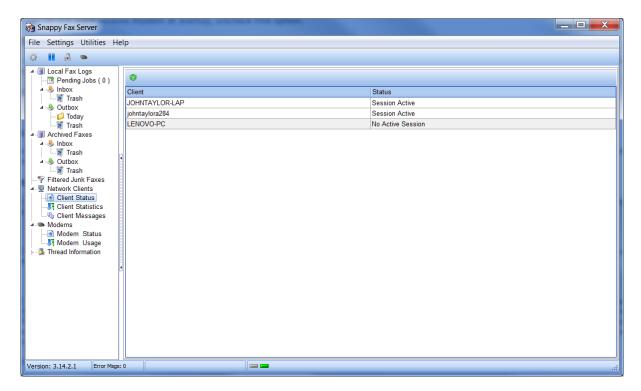
#### Faxes Sent (Archive):



### 3.1.6 Network Clients

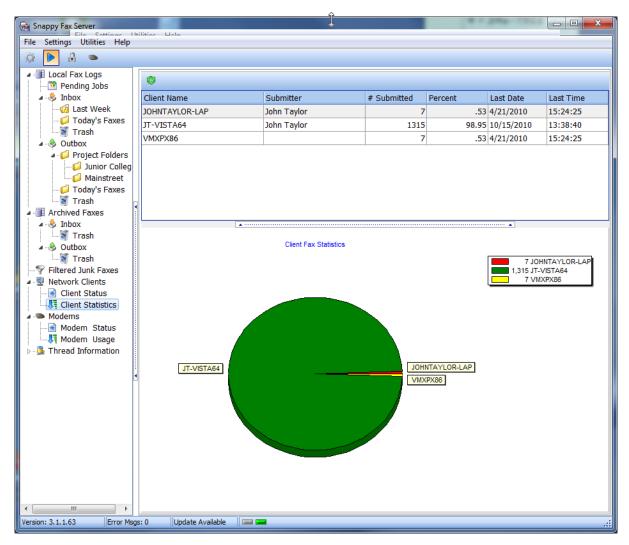
#### 3.1.6.1 Client Status

The client status view:



#### 3.1.6.2 Client Statistics

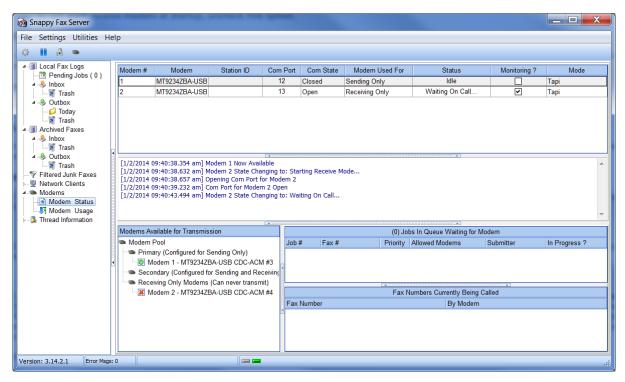
Client Statistics View:



### **3.1.7 Modems**

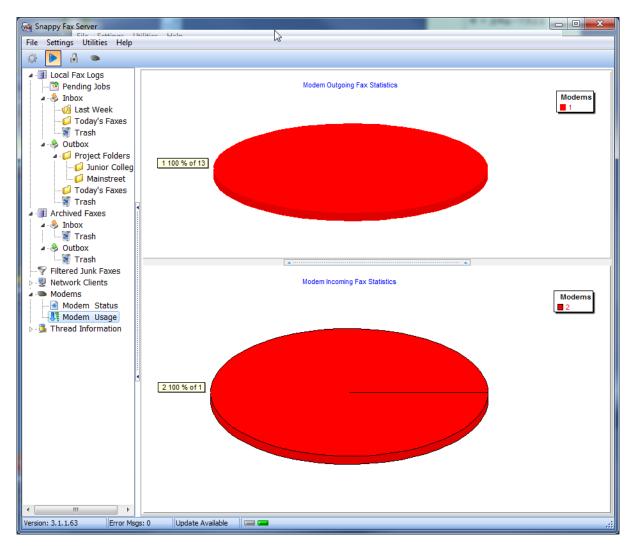
#### 3.1.7.1 Modem Status

The Modem Status View:



#### 3.1.7.2 Modem Usage

The Modem Usage View:

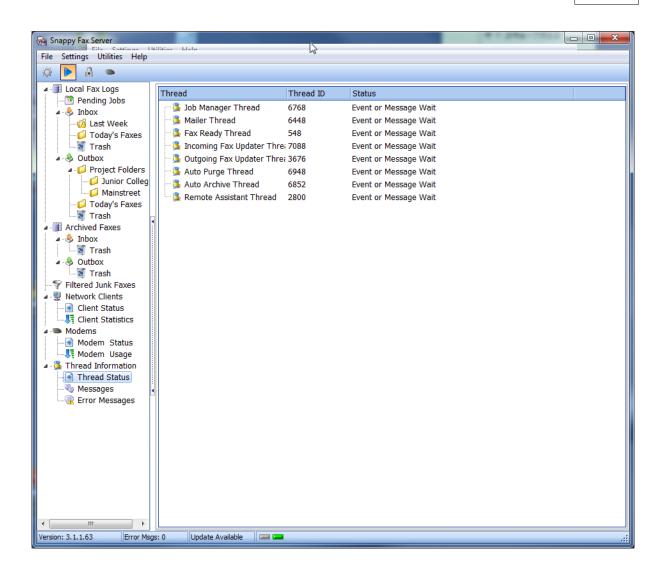


### 3.1.8 Threads

#### 3.1.8.1 Thread Status

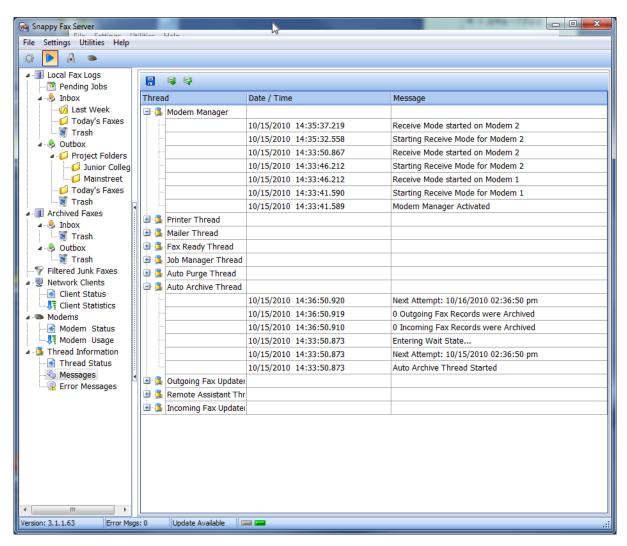
Thread Status View:

This view shows the state of various background threads.



#### 3.1.8.2 Thead Messages

Thread Message View: (informational purposes only)

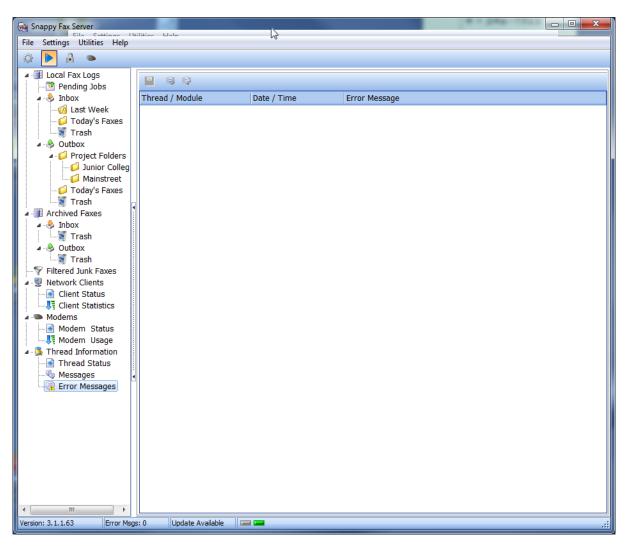


#### 3.1.8.3 Thead Errors

#### Thread Errors View:

If background threads encounter an error they will communicate the message to the main thread with will log them in this view.

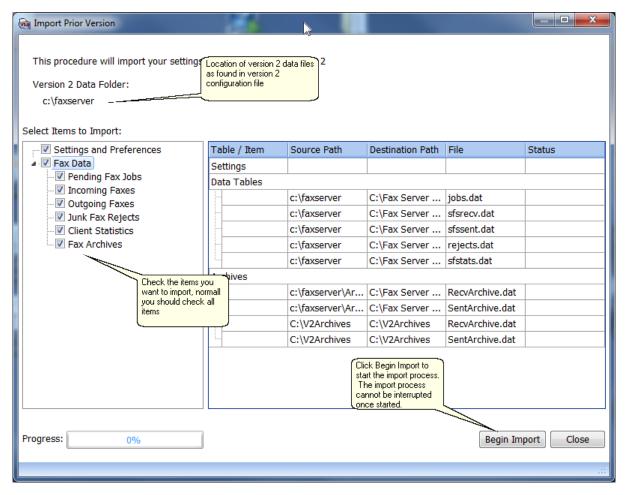
You can save the message to a file from the 'Save' toolbar button. This log might be useful to tech support should they ask you for it.



### 3.1.9 Utilities Menu

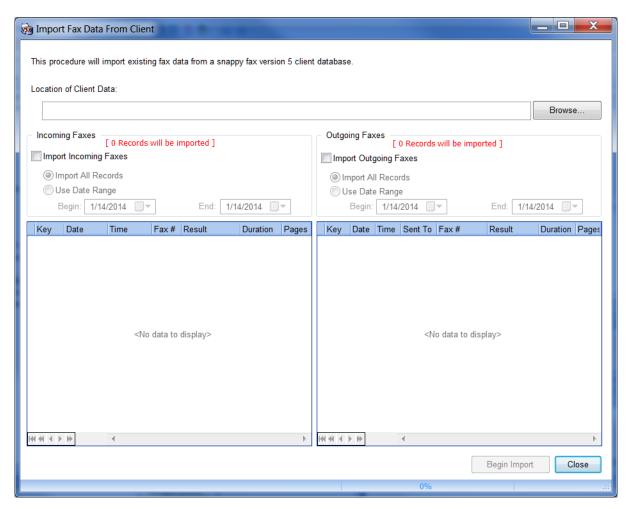
### 3.1.9.1 Import Prior Version

I you have snappy fax server version 2 installed, use the Utility menu item to import your data from version 2.



#### 3.1.9.2 Import From Snappy Fax client

If you have migrated to the fax server software after using snappy fax desktop, you can use this utility to import your fax records into the fax server.

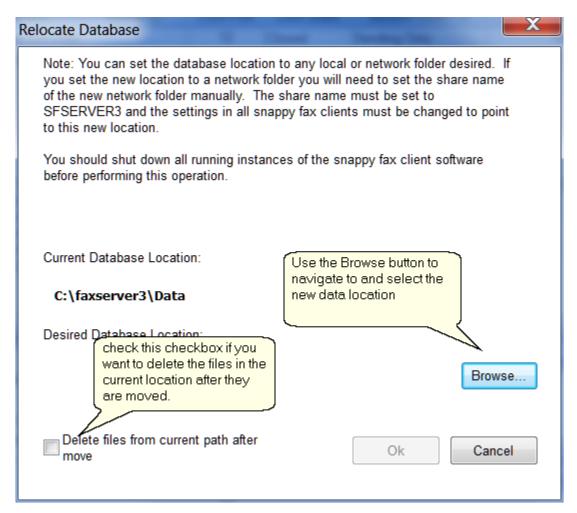


#### 3.1.9.3 Relocate Data Files

By default, the fax server creates its data files in c:\faxserver\data

If you want to change the location of the data files, use Utilities | Relocate Data on the main menu.

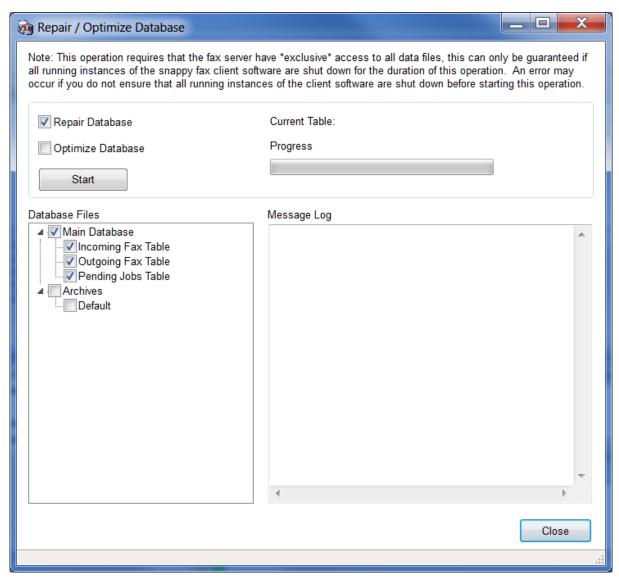
You will need to shutdown all running instances of the snappy fax client software while performing this operation.



#### 3.1.9.4 Repair / Optimize Data files

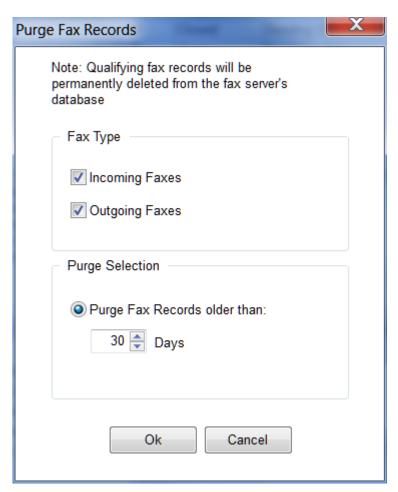
Although rare, the need to repair a corrupt database file may arise. Data files may become corrupt if you have a sudden power loss during database operations. In order to repair damaged files, click 'Utilities | Repair / Optimize Data files from the main menu.

The fax server needs exclusive access to the files to perform the repair operation. Before repairing, make sure that all running instances of the snappy fax client software on all computers on your network have been shutdown.



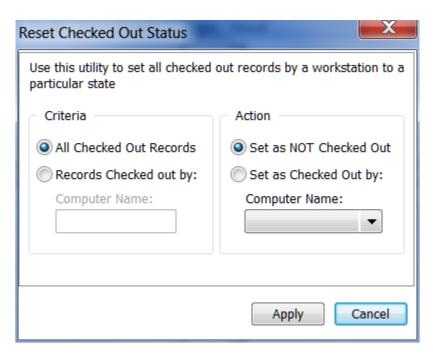
### 3.1.9.5 Purge Fax Records

Caution: Purge means **PURGE**, do not use this utility unless you want to permanently delete fax records from the database



#### 3.1.9.6 Clear Checked Out Status

Fax records that are checked out by a client become restricted as to access by other clients. If you have disabled a client, removed it from your network or renamed it to another computer name, use this utility to clear or reset the checked out status.



#### 3.1.9.7 Change Client Computer Name

This utility is useful if you have changed the network name of a client computer on your network. Enter the old computer name and the new computer name and the fax records previously tagged with the old workstation name will be changed.



### 4 Purchase and Pricing

The fax server software is free to use for 30 days, there are no feature limitations whatever during this evaluation period. At the end of the evaluation period, you will need a license file to continue using the fax server.

#### **Pricing**

The fax server (standard edition) is priced at a base price of \$99.00 USD. The fax server (G3 Edition) is priced at a base price of \$149.00 USD. This is for the fax server only, the client packages are \$49.99 each.

There are *no additional charges* per fax line supported.

Pricing example (standard edition):

If you need a 5 user configuration, you will need to purchase:

1 fax server license @ \$99.00 5 client pkgs @ \$49.99

Total: \$ 348.95

If you later decide you need to support additional clients, you only need to purchase the additional client pkgs that you need @ \$49.99 each. Your will receive a new license file for the fax server to add support for the additional clients and a license file for each additional client.

We have volume discounts available for configurations of 20 users or more.

Our volume pricing schedule is posted on our website here.

You can purchase our software securely online at http://www.snappysoftware.com/paypalorders.htm

If you prefer to purchase by check or money order you can mail your payment to:

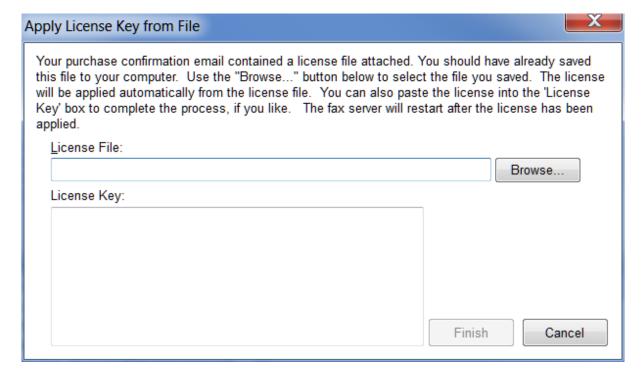
John Taylor & Associates 233 Nannook Rd Mexico Beach, FL 32456

If you prefer to purchase by bank or wire transfer, please email us at sales@snappysoftware.com for our banking details for executing a bank or wire transfer. If you intend to purchase by wire transfer, please note that you will need to include a \$18.00 fee in the wire amount as our financial institution charges us a fee for wire transfers.

### 5 Applying your license after purchasing

After purchasing the fax server software, you will receive a license email. The email will contain a file attachment containing your license. You DO NOT need to open the license file, simply save the license file to your hard disk and then from the apply license screen, navigate to that file.

To apply the license click Help | Apply License key from file on the main menu.



Use the Browse button to locate the license file you saved then click Finish.

If you have managed to open the license with Notepad then copy it to the clipboard and then paste into the License Key area and click Finish.

### 6 Technical Support

To obtain technical support for our software please send email to:

support@snappysoftware.com

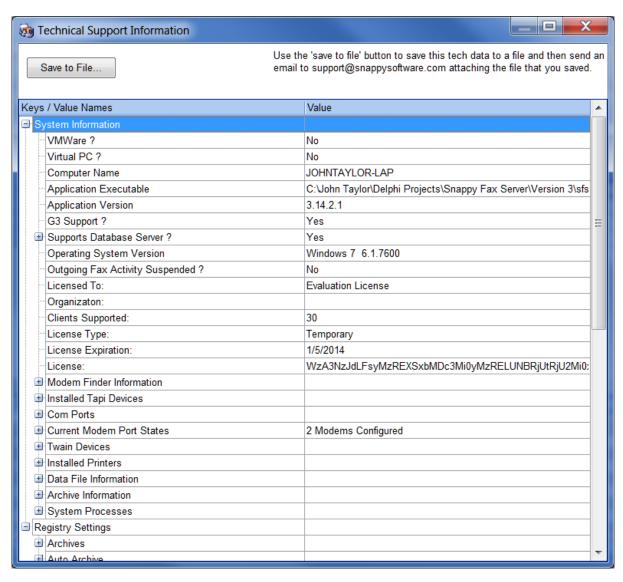
Note that we provide free support via email for one year from your purchase date. You will find that you will receive a timely response to your tech support emails the same day and even on weekends and most holidays. After one year , you will need to purchase an annual maintenance/renewal license (50% of fax server license cost plus \$10 per supported client).

When asking for tech support please include the tech support file that is generated by the fax server from its menu item 'Help | Technical Support'. When sending tech support email, please describe your problem as completely as possible so that we can resolve your issue as quickly as possible. Sending tech support emails with descriptions like 'won't send faxes' or 'doesn't work' are a waste of your time and our time and will only serve to generate unneeded exchanges of email to determine what the problem is. If you are getting an error message, quote the error message EXACTLY, please don't say 'I got an error message'! We need to know what the error message was exactly. It will be extremely helpful if you include the exact steps in 1,2,3 fashion to reproduce the issue.

### 7 Sending tech data

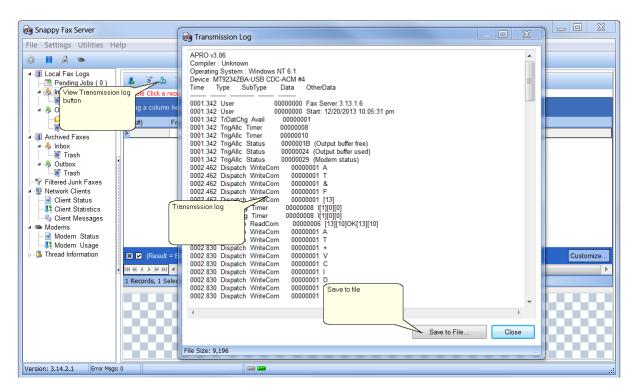
Whenever you send a tech support email to us please include your current configuration report (tech data).

To do so, select Help | Technical Support on the menu, save the tech data to a .tsd file and attach to an email.



### 8 Transmission logs

In order to diagnose failed fax sessions, a transmission log is essential. The transmission log contains all data sent to and received from the modem during a fax session along with other essential information showing the status of the session. To send a transmission log of a failed item, select the item of interest in the outbox or inbox, then click the 'View transmission log' button on the toolbar. Save to a .txt file and attach to email.



### 9 Database server

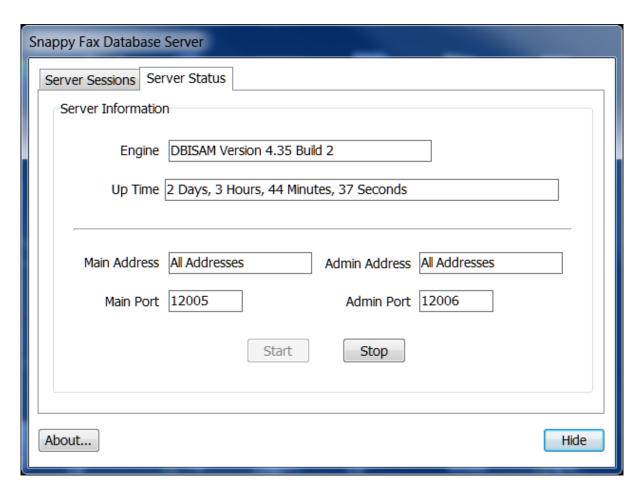
The fax server installer installs the snappy fax database server into the same program files folder. When the fax server is configured to use the database server, it will start the db server and also make a RUN entry in the registry so that windows will start the db server at boot time.

#### Prerequisites:

- 1. TCP Ports 12005 through 12008 should be open on the fax server and all network computers where the snappy fax client software will be used.
- 2. Make sure you can ping the fax server from each network client \*and\* that you can ping the fax server computer from each network client.

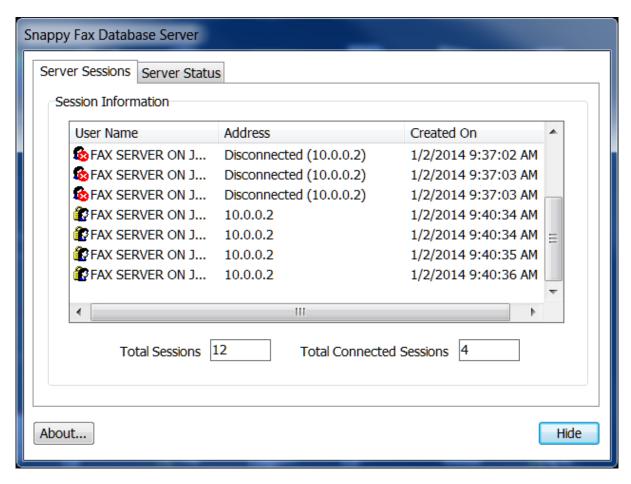
The fax server installer will run a script to open the necessary ports, but due to windows group policy restrictions this may not be successful. If you are using a third party firewall or anti-virus software that manages your firewall, configure it to allow connections (both incoming and outgoing) on these ports.

The database server represents itself as an icon in the system tray, you can view the main screen by double clicking on the icon in the system tray, the main window looks like this:



Note the Hide button, you can hide the screen by clicking this button but you cannot terminate the db server without using Task Manager to kill it.

The database server 'server sessions' tab looks like this:



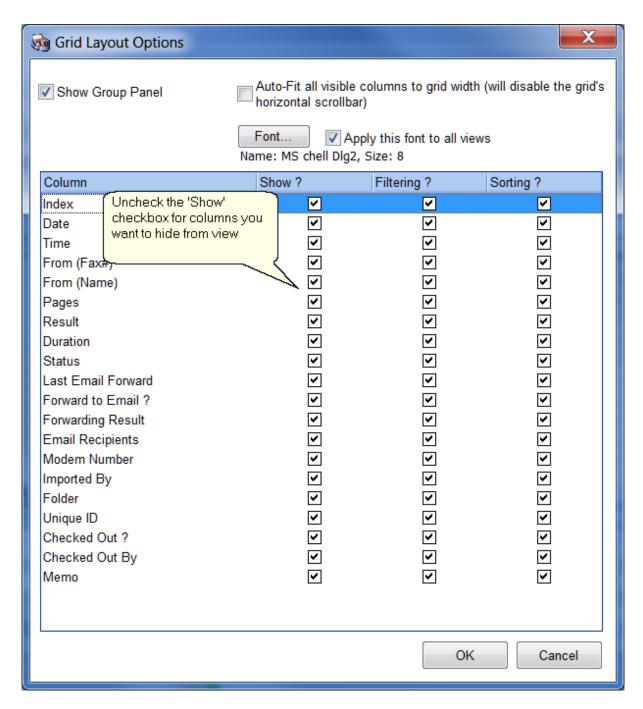
This status view shows 4 connected sessions from the fax server software. Other sessions that have been disconnected are also shown.

User Names are constructed like this:

For the fax server software the user name will be FAX SERVER ON {computername}, for client software connected sessions, the name will be FAX CLIENT ON {computername}

### 10 Show / Hide data view columns

There are quite a few columns in the data views that are not normally useful and if all columns are displayed it is difficult, if not impossible to see the column headers. You can show or hide columns in any view by navigating to that page (inbox or outbox view for example) and then click the 'Grid Layout options' button on the toolbar.



You can also turn filtering and sorting on or off for any column. You can change the font as well, check the check box to have the font applied to all views.

### See Also:

Sorting and Filtering

### 11 Sorting and Filtering data views

Data views can be sorted and filtered in any number of ways.

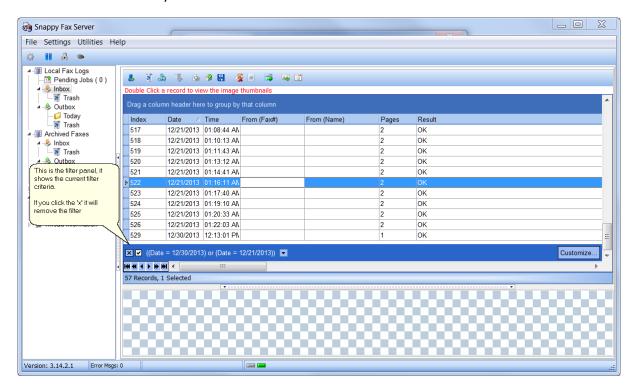
#### **Filtering**

If you hover the mouse over the right edge of any data column a drop down filter button will appear, the one below is an example if you click the filter button for the date column:

You can check one or more dates in the filter box to show only records for the selected dates.

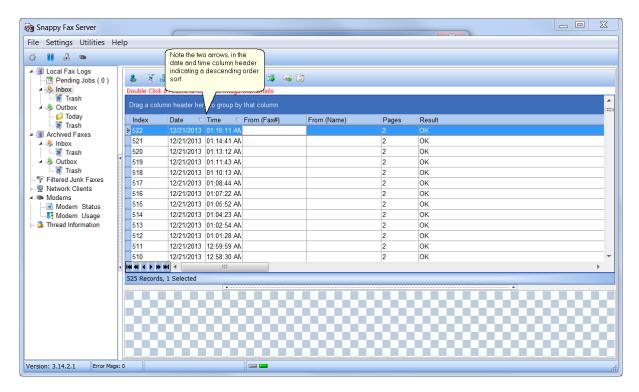
(All)
(Custom...)
12/18/2013
12/19/2013
12/20/2013
12/21/2013
12/22/2013
12/30/2013
12/31/2013

A Data view filtered by date:



You can also sort data views on one or more columns. Example: Click the date column

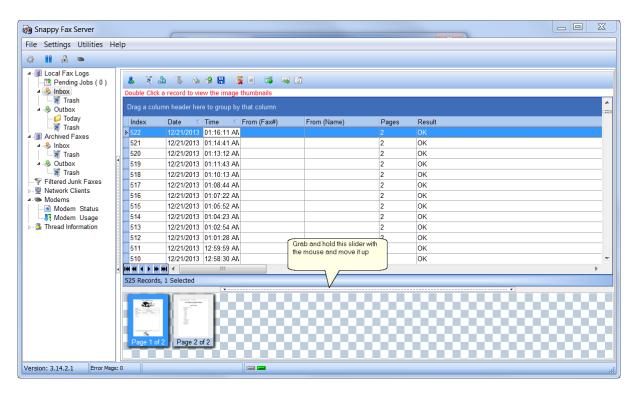
header to sort by date. If you click it again , the sort order will be reversed. You can sort on multiple columns by holding down the shift key when clicking the column header. Example: Click the date column header, hold down the shift key and click the 'Time' column header to sort on time within date as shown below:



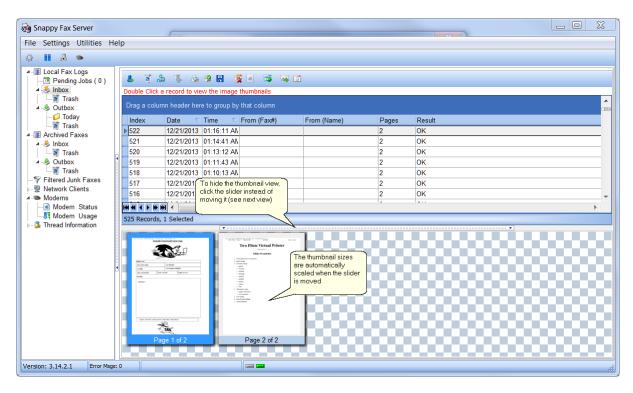
### 12 Changing image thumbnail sizes

You can change the size of the image thumbnails in the data views by sliding the slider bar up or down.

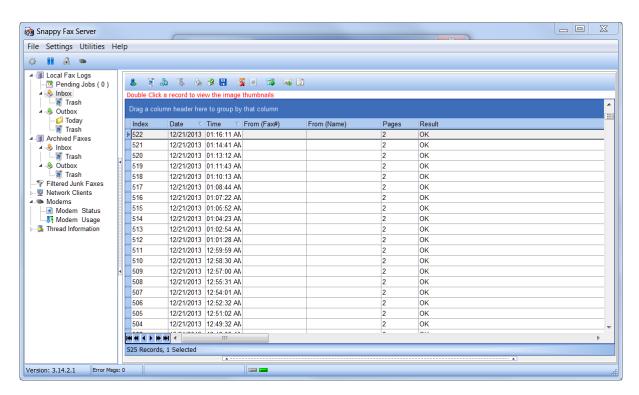
View 1:



#### View 2:



View 3:



### 13 Frequently Asked Questions

### 13.1 Can it run as a service?

For years Microsoft has discouraged service applications that interact with the desktop. This discouragement has turned into down right taboo in the latest versions of Windows.

The fax server software cannot be run as a service.

It will not become fully functional and able to send and receive faxes until a logon occurs. Similarly, it will not survive a logoff.

We are going to offer you an alternative way to accomplish the same thing, providing both an immediate functional environment for the fax server and the security offered by a service that runs without the necessity of a logon.

A few easy steps is all it takes, summarized here and discussed in detail below.

- 1. Create a new user account in Windows from within which the fax server software will
- 2. Configure Windows so that this account will be automatically logged on at system startup
- 3. Install the fax server software, configure your settings and enable the 'auto start when windows starts' option
- 4. Provide a protection mechanism that will lock the user account at startup requiring password access

### **Step 1** Create a new user account in Windows

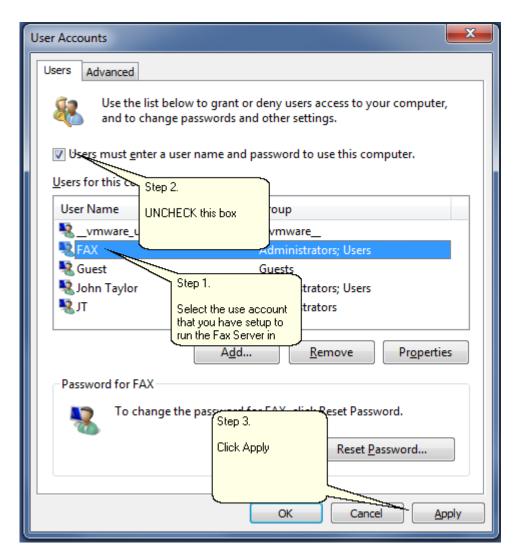
Create a new user account in Windows using Control Panel->User Accounts. Call this account anything you want, you might opt for something like 'Fax' or 'Fax Server'. Create this account with a password.

# <u>Step 2 Configure Windows so that this account is logged on automatically at startup</u>

The following steps are specific for Windows 7 but the process is the same for Windows Vista and Windows XP:

- Click the Start button on the task bar
- In the run box type in netplwiz

The following Window will appear (follow the instructions in the callouts on the screenshot below):



After you click Apply, you will be presented with a password dialog for the user account. Enter the password you have previously established when creating this Windows user account.

#### Step 3 Install the fax server in this user account

Switch to this user account and install the fax server software and complete all modem and settings configuration. In the general settings section, make sure that you have CHECKED the 'auto start when windows' starts option.

#### **Step 4 Create a Protection Mechanism**

What we will do here is create a shortcut and put it in the Startup folder so that it runs at startup. Note that the fax server also runs at startup, so what will happen is that when the auto logon occurs, the fax server will be started and the protection shortcut will also be started which will lock the user account at the password prompt requiring password entry for access.

Here's how to create the shortcut...

- 1. Right click on the desktop in this new user account and select 'New->Shortcut' from the popup menu
- 2. In the edit box captioned 'Type the location of the item:' type in the following line:

rundll32.exe user32.dll, LockWorkStation

Type it in exactly as above observing the case for LockWorkStation

- 3. click the Next button
- 4. Enter a name for the shortcut, you might opt for something like 'Lock Workstation'
- 5. Click Finish

You will see the shortcut on your desktop.

Now, use Windows Explorer and navigate to:

c:\users\FAX\AppData\Roaming\Microsoft\Windows\Start Menu\Programs\Startup

Note: if you named your user account something other than fax then substitute that for FAX in the above line.

Drag the shortcut from the desktop into this folder

If you do not see the AppData folder in Windows Explorer then you will need to go to control panel->folder options and on the View tab, check the 'show hidden files, folders and drives' radio button.

#### You are done!

Now when you restart your computer, the FAX (in our example) user account will be automatically logged on, the fax server software started, the user account will then be locked at the password prompt.

### 13.2 Do I need the fax server?

You only need the fax server software if you need to:

1. Support multiple modems/fax lines

OR

2. Support modemless workstations on a local area network

Note that snappy fax desktop is perfectly capable of sending and receiving faxes without the fax server, the only things the fax server offers is network support and support for multiple modems/fax lines.

### 13.3 How do I add additional clients?

If you have licensed the fax server and later decide that you need to add support for additional clients, all you need to do is purchase additional client pkgs (\$49.99 each) for the additional clients. You will receive a new license file for the fax server to support the additional clients and license files for each additional client.

### 13.4 Fax Jobs are just sitting in the queue and not sending, why?

If one or more fax jobs are sitting in the pending jobs table and the fax server is making no attempt to send the job then the most likely reason is that the network name of the client computer that submitted the fax job is not enabled in the fax server's list of supported network clients.

If, in the pending jobs data view, a client computer name is shown in the 'client' column in red, then it is not an enabled network client. To resolve the problem, go the settings-network clients and add the computer name to the list and make sure you are giving privileges to the client for sending faxes on at least one modem.

Another reason might also be that you have suspended outgoing fax activity by clicking the 'Pause' button on the main window's toolbar or you have set the option in settings>general to start in suspended state. To resolve this , click the 'Pause/Resume' button on the main window's toolbar.

### 13.5 Run in Virtual Machine?

We have tested the fax server software as well as snappy fax client running in VMWare virtual machines. There are no known problems running in a virtual machine. If you have options in the software set to start fax receive mode at startup when you need to ensure that your virtual machine settings are set to connect the com port(s) when the virtual machine is started.

We have also tested our software on a MacBook Pro running Windows 8 in a Parallels virtual machine and under Windows 8 running in VirtualBox virtual machine.

These are the only virtual environments we have actually tested but we believe running in any virtual environment will be fine.

# Index

### - A -

add additional clients 73

Application Security 33

apply license screen 59

Applying your license after purchasing 59

Auto start when windows starts 11

Automatic Archive 32

Automatic Purge 31

### - B -

baud rate 17 BLOB (binary large object) 25

### - C -

caller id 17 callerid 17 Can it run as a service Change Client Computer Name 57 Changing image thumbnail sizes 67 check for updates **Checked Out Status** 56 Client Notifications Client Priorities Com Port 17 Configuring the Client Software

### - D -

Database server 37, 62
default security password 33
distinctive ring 17
Do I need the fax server 72

### - E -

email account 30
error correction mode 17
exclusive access 54

Express Setup 5

# - F -

Fax class 17 Fax File Storage 25 Fax Jobs are just sitting in the queue and not sending 73 Fax Options 24 'Fax Server Mode' 38 Fax Server Role 4 FaxAge credentials 38 Faxes Received Faxes Sent filter button 66 filtering and sorting 64 firewall 5, 37 Forwarding faxes to email 27

# - G -

General Forwarding 27 General Settings 11 Getting Started 5 Grid mode 11

### - | -

Import From Snappy Fax client 52
Import Prior Version 51
Importing from Prior Version 7
Internet Fax Service 38

### - J -

Junk Fax Filters 25 Junk Faxes 43

### - L -

Large database rules 11 license file 59

### - M -

Minimize on Startup 11
Modem Settings 17
Modem Status 46
modem type 17
Modem Usage 47
Move data to new location 53

### - N -

Navigating the Main Window 39

Network Clients 14

Network Policy and Remote Access Role 4

### - P -

Pattern Examples 27 Patterns 27 Pending Jobs 40 Permissions 35 5, 62 ping **Printing Options** 29 Printing options modem 17 Publish to Web Purchase and Pricing 57 Purge Fax Records 55

### - R -

Relocate Data Files 53
Relocating Data Files 53
Remote Assistant 34
Remote Submit 34
Repairing Corrupt data files 54

### - S -

Selective Forwarding 27
Sending tech data 60
SG3 edition 17
Show / Hide data view columns 64
slider bar 67
'Snappy Fax Client' 8
Software Updates 36

sort on multiple columns 66
Sorting and Filtering data views 66
station id 17

## - T -

Tapi 17 **TCP Ports** 62 TCP ports 12005 through 12008 5 **Technical Support** 59 Thread Errors Thread Messages 49 **Thread Status** To Fax Machines 29 Transmission logs 61

### - U -

Utilities | Repair / Optimize Data files 54

# - V -

'View transmission log' 61 Virtual Machine 73

### - W -

wildcards 27
Windows Server Versions 4