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MESSENGER USER GUIDE

MESSENGER SOFTWARE VERSION: 6.4.4.45

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GENERAL INFORMATION

This document provides a detailed overview of the Messenger 6.x application (hereafter, simply Messenger) from a user perspective. It provides feature descriptions and usage instructions, as well as system requirements and limitations.

GUIDE OVERVIEW

The following information is included in this guide.

Section	Description
General Information	Describes the overall document layout and conventions; provides prerequisites for using and installing Messenger and the system requirements that the app needs to function properly, including allowable message sizes, attachment limits, and supported file types.
The Messenger Dashboard	Describes the layout of the Messenger UI.
Use Messenger	Describes how to use Messenger to compose and send a fax, how to view and organize messages, and how to use the address book. This section also describes application settings and how to send a fax using the print driver.

INSTALLING MESSENGER

Before installing Messenger you **MUST** download and run the .NET 8.0 Desktop Runtime Windows x64 installer. Messenger will not work properly without the .NET 8.0 Framework.

The following prerequisites also apply when installing Messenger:

- The install file **efaxmessengersetup.exe** requires Administrative Rights to install. During installation, the printer application requires additional Administrative Rights:
 - [Application Directory]/Installhelper.exe
 - [Application Directory]/VPDInstaller.x64.msi (Virtual Print Driver installation)
- Messenger requires internet access to Port 443 and <https://faxclientapi-sendworker.usw2.prod.ccs.biz>.
- Additional URL access required for Data Sovereign-enabled accounts.
 - **Europe:** <https://faxclientapi-sendworker.euw1.prod.ccs.biz>
 - **Canada:** <https://faxclientapi-sendworker.cac1.prod.ccs.biz>
 - **Australia:** <https://faxclientapi-sendworker.apse2.prod.ccs>

SYSTEM CHARACTERISTICS

This section contains an overview of the essential characteristics of the application, including allowable message sizes, attachment limits, and supported file types.

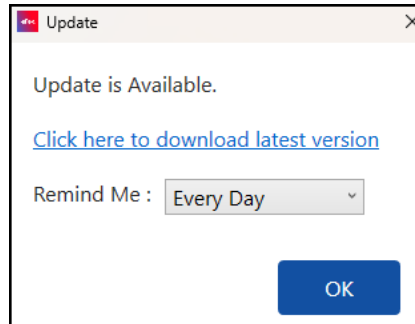
Parameter	Value	Notes
Maximum number of recipients per fax	50	The recipient address can be added directly to the compose page or through the address book.
Attachments per fax	Maximum of 10	The attachments should be from the list of supported files types shown below.
File size limit	100MB	This is the total maximum size of the fax payload, including base64 encoding.
Supported file types	doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf, .tiff	Only PDF and TIFF files are modifiable using Messenger.
Supported local cover pages	.rtf only	We recommend limiting the size of your RTF files to under 10MB.
Supported OS	Windows 10 and 11	<ul style="list-style-type: none">• .NET Framework 8.0 is required.• 64-bit installation available.

GENERAL NOTIFICATIONS

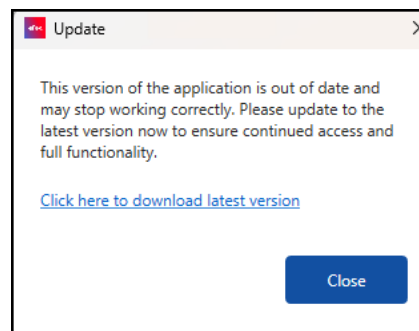
Messenger supports general notifications to the customer from Consensus. If a notification has been set, it displays after the user logs in to Messenger. The user may close the message using the **X** in the upper right hand corner of the notice.

VERSION UPDATE NOTIFICATIONS

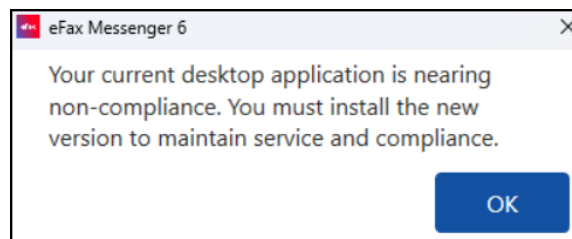
If your Messenger version is less than three minor versions out-of-date, you will receive popup notifications that a newer version is available for download. In this case, you can choose to update your instance using the download URL provided, or you may set a reminder for a set number of days or weeks. You may also select a **Do Not Notify** option. Select **OK** to confirm your choice, or use the **X** in the upper right corner of the dialog box to close.



If your Messenger version is greater than three minor versions out-of-date, you will receive popup notifications that a newer version is available for download. In this case, you can choose to update your instance using the download URL provided, or you may close the popup without taking any action. In this case, however, you will receive the notice each time you login until the version discrepancy is resolved. If not updating, select **Close** or the **X** in the upper right corner of the dialog box to exit this notification.



Under certain circumstances forced upgrades will occur. When this happens, the following warning is shown:



When **OK** is selected, the eFax Messenger application closes and the upgrade is performed.

The following table lists various upgrade scenarios:

Users Current Version	Newest Available Version	Forced Upgrade
6.X.X.X	7.1.X.X	No
6.X.X.X	7.4.X.X	Yes
6.7.3.2	7.2.3.1	No
6.22.1.3	7.4.3.34	Yes

THE MESSENGER DASHBOARD

The Messenger dashboard consists of two main menu bars, one at the top of the application and one down the left-hand side of the page.

TOP MENU

The top menu bar contains a drop-down menu for selecting which fax numbers associated with the account to use, a search bar for use when viewing messages, and controls for setting the page type font size as well as for selecting contrast (brightness) options. Customizing font and contrast options impacts all UI page views, but those options do not carry over to the actual fax display.



From left to right, the display buttons are:

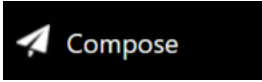
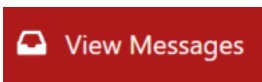
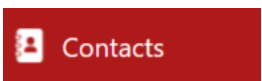



Button	Icon	Description
Decrease Font Size	A ⁻	Reduce 1px per click from the original font size (4px maximum reduction).
Default Font Size	A	The original default text size.
Increase Font Size	A ⁺	Add 1px per click from the original font size (4px maximum increase).
Contrast	☾	Toggle on/off. If on, light and dark features on the screen reverse.

NOTE: The search bar in the top menu is only available for use when you view messages. Enter full or partial subject line text or full or partial tags and click **Enter** to conduct your search. This search bar is not available in the other side menu tabs; the **Contacts** tab has its own dedicated search field that is separate from the top menu search bar.

SIDE MENU

The side menu contains options for using Messenger to compose and send faxes.

From top to bottom these functions are:

Button	Description
 Compose	Opens the Compose a Fax view, where you can add recipients, add and view attachments, and send your fax.
 View Messages	Opens the inbox where faxes may be viewed. Other folders such as Trash, Sent, and custom folders are also available for use. The folder structure here is synced between Messenger and the eFax Portal. This view refreshes every five minutes.
 Contacts	Opens the Contact view, where you can manage your Address Book/Contacts List.
 Settings	Provides the current application version, sign-in and application update options, language preferences, logging preferences, and additional account level information. Users change their Messenger application password here.
 Logout	Logs the current user out of the Messenger application without closing it.
 Exit	Closes the Messenger application completely.

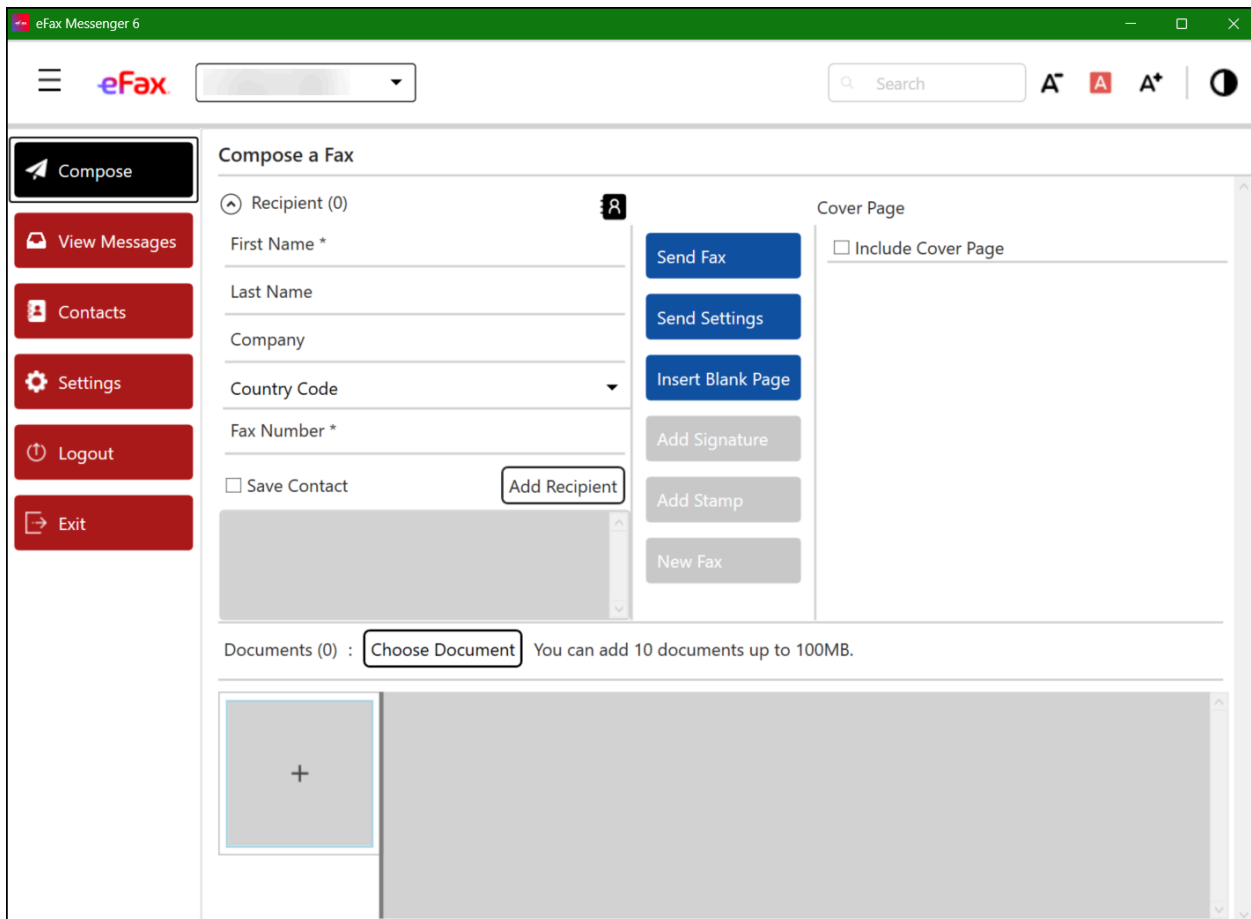
USE MESSENGER

This section describes how to use Messenger to compose and send a fax and how to use the address book. This section also describes how to send a fax using the print driver.

COMPOSE AND SEND A FAX

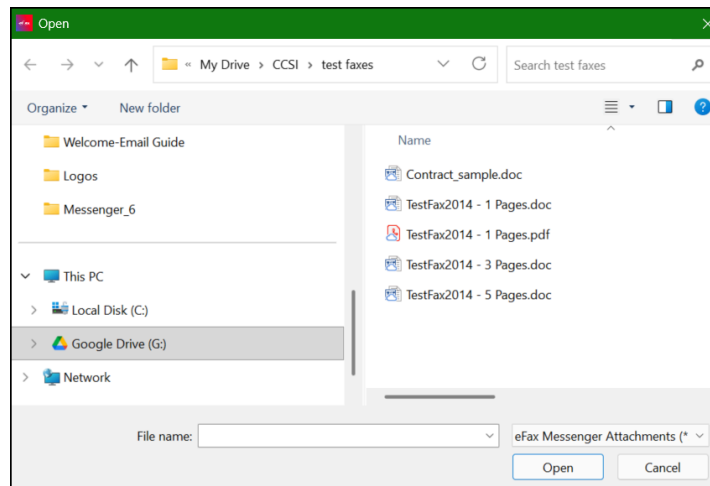
Follow these steps to send a fax:

1. Click **Compose**. The **Compose** page opens.



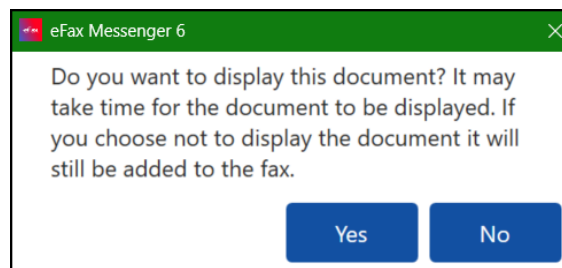
2. Provide the first and last name of a fax recipient, the company name, a country code, and the fax number. Required fields are noted with an asterisk (*). Use the drop-down menu above the **Fax Number** to select the desired **Country Code**. You can minimize the **Recipient** and **Cover Page** sections by toggling the small arrow immediately to the left of the **Recipient** section title.
3. Click **Add Recipient** to add the recipient to the **Recipient List** field. This field populates with the recipient information just provided (fax number and name, if the latter is entered). To remove this person from the fax, click the **X** next to their name and begin again.

4. Check the **Save Contact** box to save this recipient in your Contacts list (your address book will be updated once the fax has been successfully sent, confirming the recipient contact information you provided).
5. To add another recipient, repeat steps 2 and 3. If you wish, add recipient information using your Address Book; click **Contacts** to open your contacts list and add names and numbers to the fax simultaneously (refer to the [Use Your Contacts/Address Book](#) section for details). You may also use the small **Contacts** (person) icon above and to the far right of the **First Name** field to open the **Add Contact** wizard.
6. Continue to add recipient information until all recipient data is saved.
7. Click **Choose Document** to attach a document (or documents) to the fax, or use the **+** in the grey box to the left of the fax preview pane. A standard Windows open-file dialog opens where you can select the documents you wish to attach to the fax.



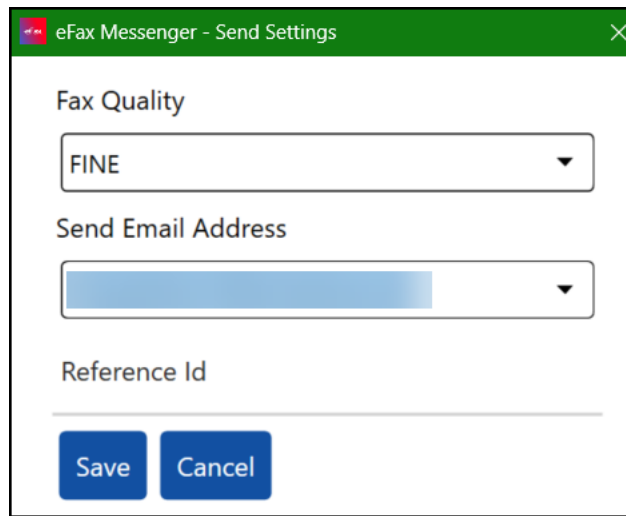
NOTE: You can also drag and drop the files you wish to send by dropping them in the grey **+** box.

8. For each PDF or TIFF file attached, the system asks if you wish to display that file. Click **Yes** to have the file display, or click **No** to have it attached with only the file name displayed. You will only be able to add stamps and sign documents that you choose to display.



NOTE: Previews are limited to 250 pages maximum; attachments larger than 250 pages will not display but will still attach to the fax. Faxes display/preview in black and white, even if the attachment is in full color.

-
9. Click **Send Settings** to open a module that allows you to indicate:
 - a. The quality you wish to use for your sent faxes (Fine, which is the default setting, or Standard)
 - b. The send email address you wish to use with this fax.
 - c. A Reference ID. Adding a value to this field will add the same value to the send email notification for the fax sent.



10. Click the **Insert Blank Page** button to add a blank page to the end of the attachment in the fax.
11. To add a cover page to your fax, check the **Include Cover Page** option to the right of the **Recipient** fields. If you use this feature, you must include text in the **Cover Page Subject** and **Message** fields; you may send a fax that only contains a cover page. Refer to the [Cover Pages](#) section for information about how to use custom rich text format (RTF) cover pages.
12. Add a stamp or a signature if needed. See the [Add Stamps to a Fax](#) and [Using the Signature Feature](#) for more information.
13. When you are ready to send your fax, click **Send Fax**. If for any reason the fax should fail to transmit, you will need to recompose the fax. There is no resend feature in this iteration of Messenger.

NOTE: Before sending your fax, if you want to start over, click the **New Fax** button to clear the **Compose a Fax** field and remove the recipients and attachments. (The **New Fax** button is inactive until the **Compose** page is in use.)

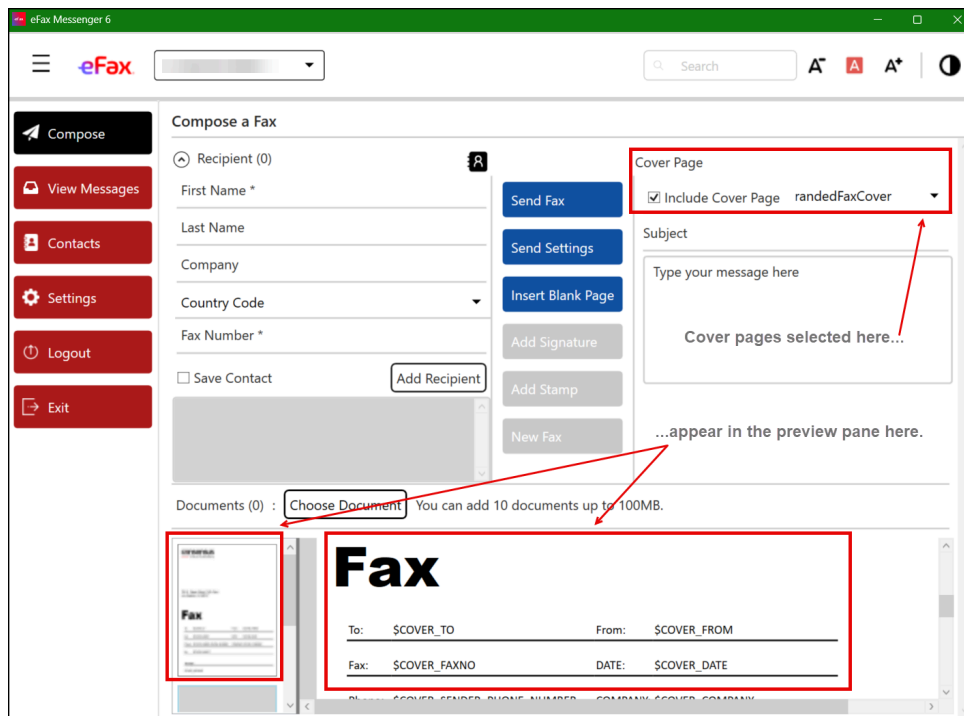
COVER PAGES

eFax Messenger supports the use of single-page rich text format (RTF) files as cover pages. To use this feature, create as many RTF files as you like to use as cover pages and store them in the following directory on your local drive: **C:\Users\{{User}}\Documents\eFax Messenger 6\ Cover Pages**.

- We recommend limiting the size of your RTF files to under 10MB.
- RTF files must be limited to one page.
- eFax Messenger will not read any subdirectories in the cover page folder.
- When RTF files are in use, a default cover page may be specified in the [Settings](#) tab, in the **Default Cover Page** field. The cover page selected as the default will be used for all of the fax numbers available in the account.

To use a local cover page:

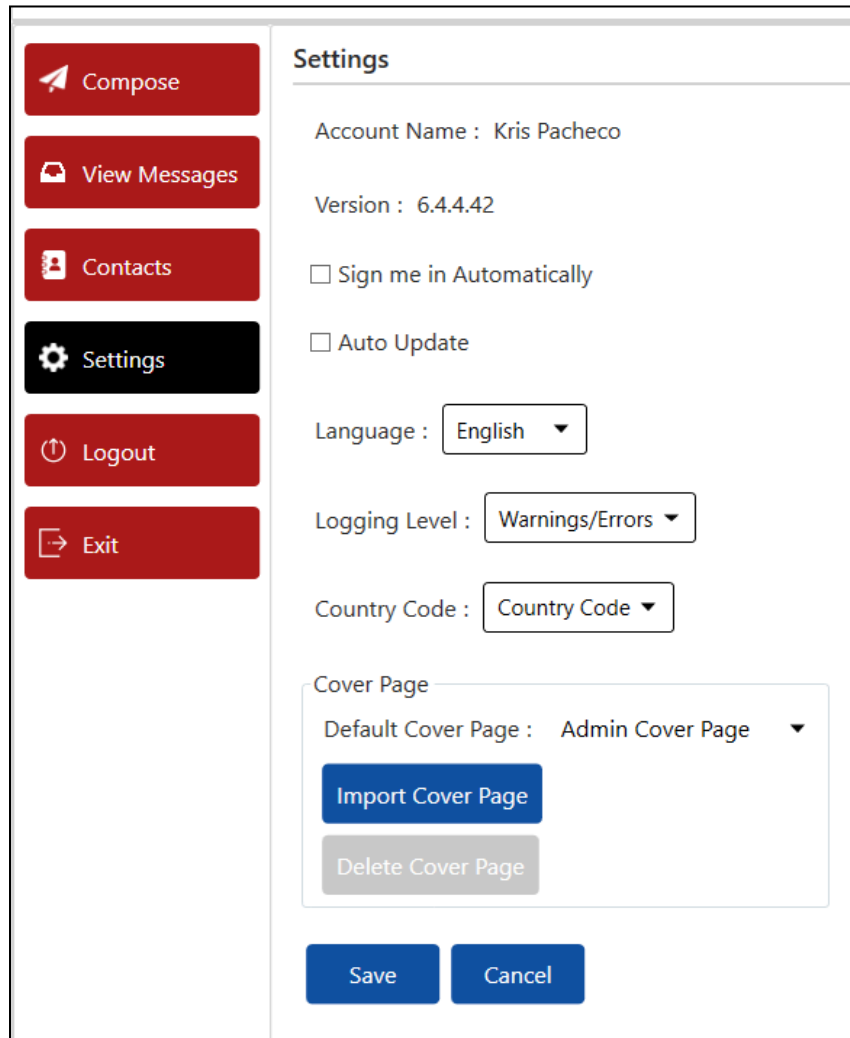
1. Check the **Include Cover Page** option to the right of the **Recipient** fields. If eFax Messenger finds available RTF files to use in the cover page folder, a dropdown menu will appear to the right of this checkbox.
2. Select the cover page you want to use from this dropdown menu; it appears as the first page of the fax in the viewing pane at the bottom of the screen. **NOTE:** All RTF files used as cover pages will appear in the preview pane; however, the Admin Cover Page will not display as the first page, as this is set on the backend when sending a fax.
3. Finish and send your fax as described in the [Compose and Send a Fax](#) section.



IMPORT COVER PAGES

Import cover pages via the **Import Cover Page** option in **Settings**. This opens a standard Windows open-file dialog. Select your RTF files to upload and click **Save**.

Once imported, you'll be able to select the cover page(s) in the compose view when sending a fax.

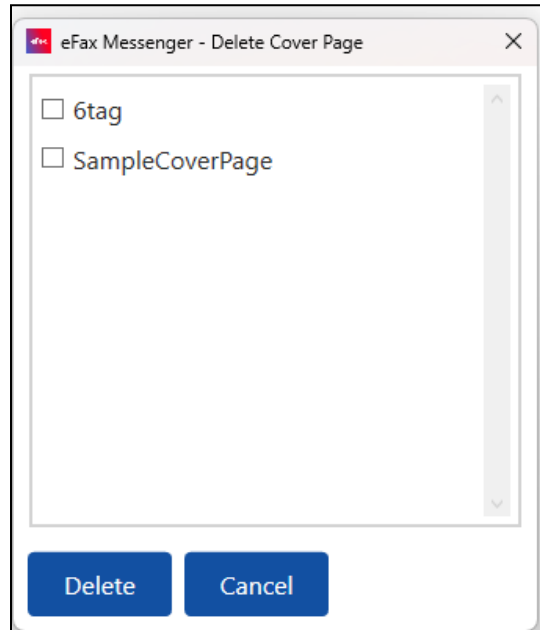


The screenshot shows a 'Settings' dialog box with a sidebar on the left containing navigation buttons: Compose, View Messages, Contacts, Settings (highlighted), Logout, and Exit. The main area is titled 'Settings' and contains the following information:

- Account Name : Kris Pacheco
- Version : 6.4.4.42
- Sign me in Automatically
- Auto Update
- Language : English (dropdown)
- Logging Level : Warnings/Errors (dropdown)
- Country Code : Country Code (dropdown)
- Cover Page section:
 - Default Cover Page : Admin Cover Page (dropdown)
 - Import Cover Page (button)
 - Delete Cover Page (button)
- Save (button) and Cancel (button) at the bottom.

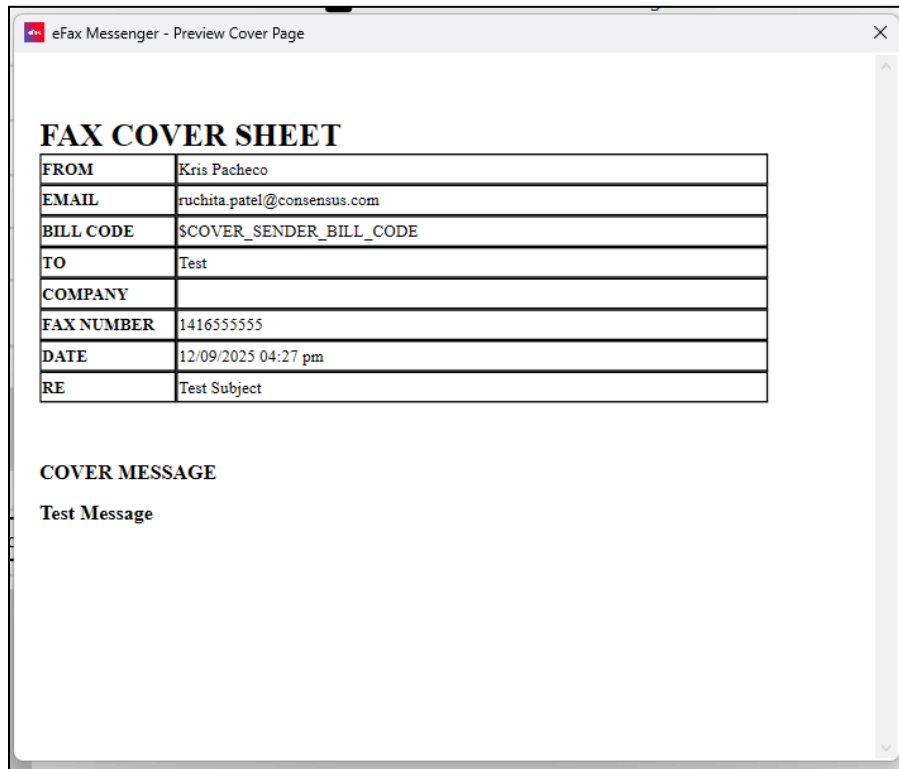
DELETE COVER PAGES

To delete a cover page from your directory, click **Delete Cover Page** in the **Settings** menu. This opens a dialog box with a list of cover pages to delete (the button is only enabled if there are cover pages available). Select the file or field you want to remove and click **Delete**; you'll be asked to confirm your choice. Once deleted, the cover page(s) will no longer be available for use when sending a fax.



PREVIEW COVER PAGES

When composing a fax, the **Preview Cover Page** button becomes visible when there is at least one recipient in the recipient list, and the subject and message are populated in the cover page field. Only custom cover pages can be previewed, not Admin Cover Pages. The cover page preview only displays one recipient's information.



FAX COVER SHEET	
FROM	Kris Pacheco
EMAIL	ruchita.patel@consensus.com
BILL CODE	\$COVER_SENDER_BILL_CODE
TO	Test
COMPANY	
FAX NUMBER	1416555555
DATE	12/09/2025 04:27 pm
RE	Test Subject

COVER MESSAGE

Test Message

USING TAGS IN RTF COVER PAGES

When using rich text format files, you may set the following variable tags in the document. These tags will be substituted with values set in the **Compose a Fax** page for the corresponding field.

- \$COVER_SENDER_PHONE_NUMBER
- \$COVER_FROM
- \$COVER_SENDER_EMAIL
- \$COVER_TO
- \$COVER_COMPANY
- \$COVER_FAXNO
- \$COVER_DATE
- \$COVER_SUBJECT
- \$COVER_MESSAGE

NOTE: When sending a fax to two different fax numbers at the same time, using a common cover page with tags, the cover pages will be unique for their recipient groups, based on the different values used in the **Compose a Fax** page.

USING THE RTF COMMAND LINE OPTION

During installation, you may specify the location of the cover page directory using the **COVERPAGE_TO_IMPORT** command line option. Refer to the **Messenger Command Line Options** guide for details.

ATTACHMENTS AND SYSTEM BEHAVIOR

Messenger behaves differently depending on the type of attachment used.

If you upload .PDF or .TIFF files, then the following features are available:

- View the current page.
- View thumbnail pictures of each page in the document.
- Change the order of a page by dragging and dropping the thumbnail for that page.
- Delete a page.
- Add a blank page. You may drag and drop this page to change its order in the fax.
- Add a stamp. There is a library of more than 30 stamps to choose from when this option is selected. You may drag the stamp to any location on a page. See [Add Stamps to a Fax](#) for more information.
- Add a signature. See [Using the Signature Feature](#) for more information.

If you upload any other file type, then the default system behavior is as follows:

- The document displays as a single page with the full file path and file size visible.
- The document attaches to the end of the fax.
- You cannot move the position of the attachment.
- You may delete the attachment if you wish.

USING THE SIGNATURE FEATURE

Messenger provides three types of signatures for you to use when sending or receiving faxes:

- You can type a signature
- You can import an image as a signature
- You can draw a signature freehand using your mouse

To use the signature feature:

1. Click **Compose**.
2. Choose a fax document to display.
3. Select a page to insert the signature.
4. Click **Add Signature**.
5. When the **Create Signature** dialog opens, select from the **Type**, **Image**, or **Draw** options at the top of the window.



TYPED SIGNATURES

For typed signatures, simply type your signature in the space provided. Messenger will use Windows fonts that are available on your computer.

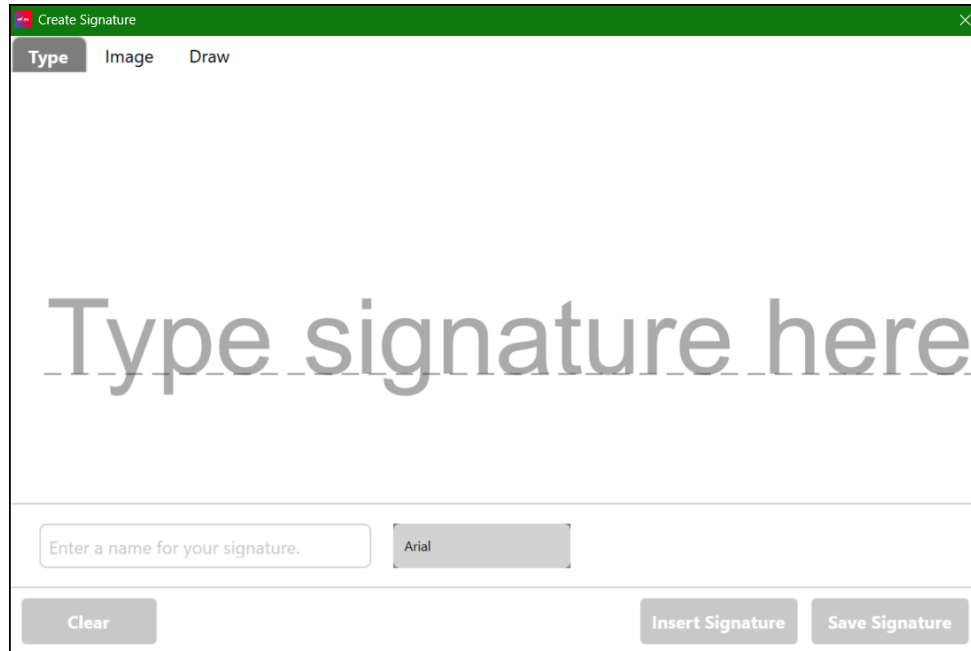
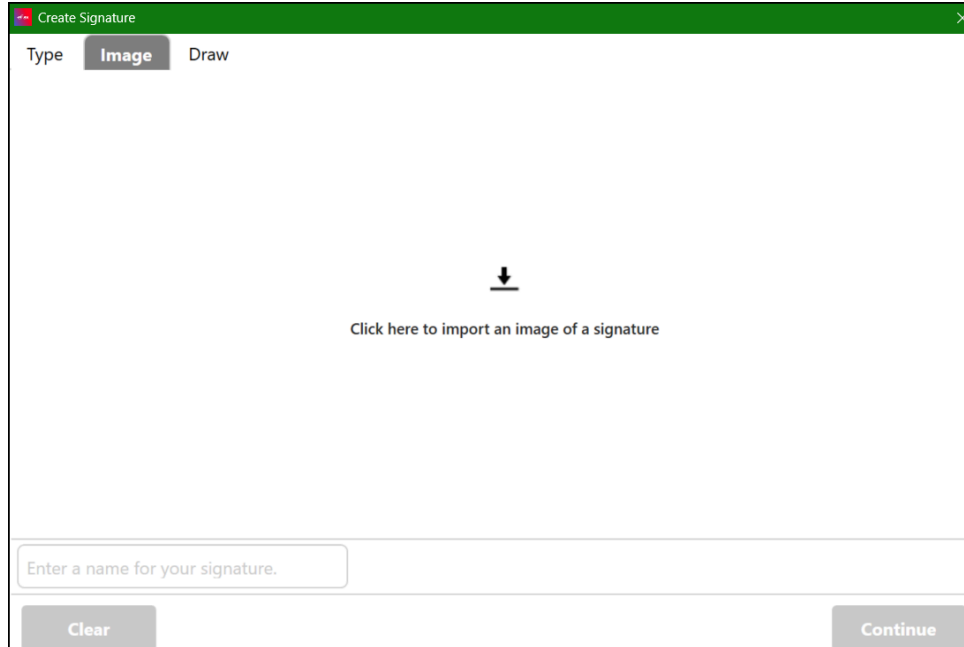


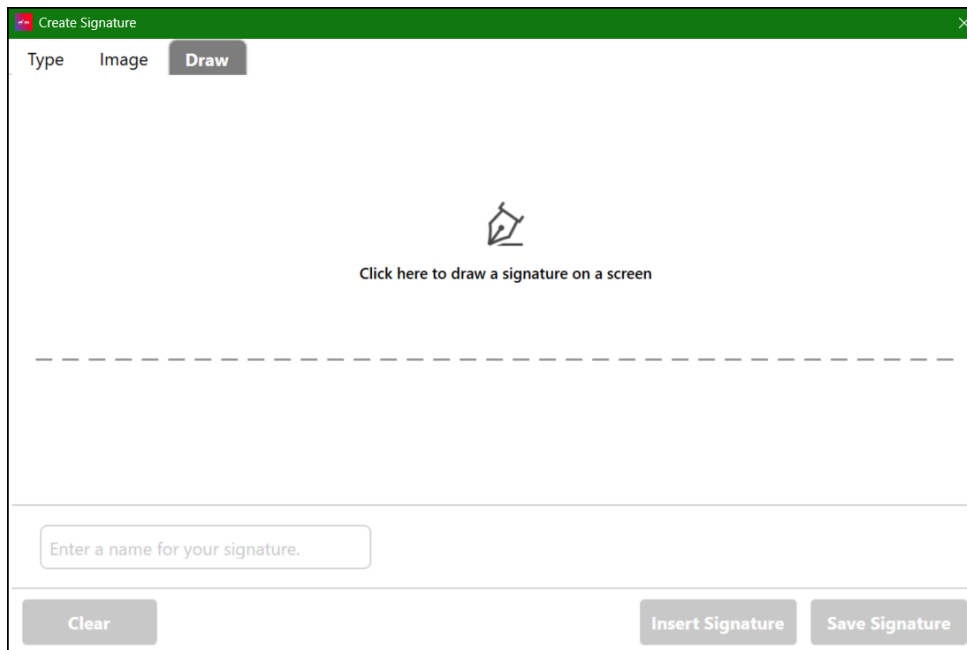
IMAGE SIGNATURES

This option allows you to open a file selection window and choose a signature that you saved outside of Messenger in .jpeg or another image format. Simply click in the space provided to open a file selection window.



DRAW A SIGNATURE

This option allows you to draw a signature in the space provided with your mouse.



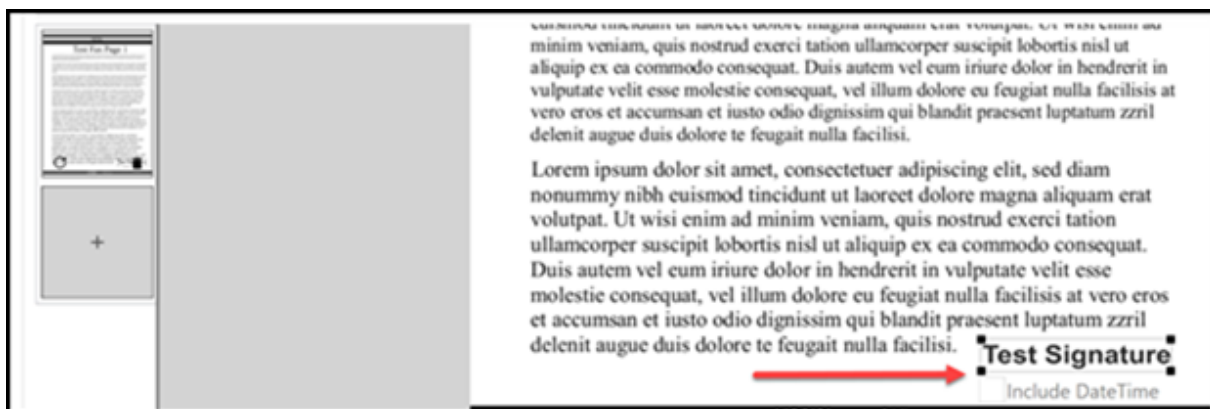
After you select your signature type, and you have provided the signature or image, if it is the first time you are using that signature, Messenger will ask you to provide a name for that signature so that it can be saved for future use.

Whichever signature type you use, when you are finished the following buttons activate:

- **Clear** - removes the draw area
- **Insert Signature** - adds the signature to the selected page
- **Save Signature** - does not add the signature to the current page but saves it for future use

MOVING YOUR INSERTED SIGNATURE ON THE PAGE

When selected, you may resize and/or move your inserted signature around the page.

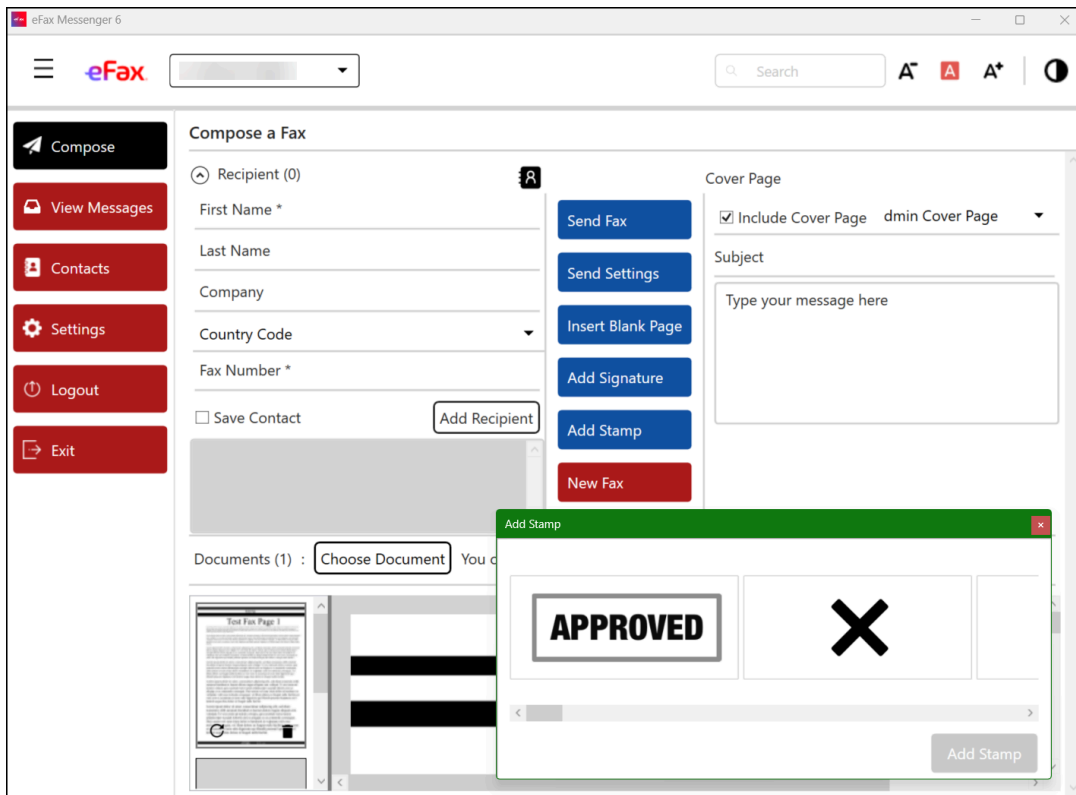


Click on the **Include DateTime** option underneath the signature to have a timestamp included when sending the fax. This is a toggle value; to remove it just click **Include DateTime** again.

To delete a signature, select the signature and click **Delete** on your keyboard.

ADD STAMPS TO A FAX

Each time you select a page for viewing, you may add a stamp to that page.



To add a stamp to a page, click **Add Stamp** and select a stamp from the list available options. To add your selection to the page, click the **Add Stamp** button directly beneath the list.

Once inserted on the page, select the stamp to move or resize it. To delete a stamp, select the stamp and click **Delete**.

The following stamps are available for use in Messenger.

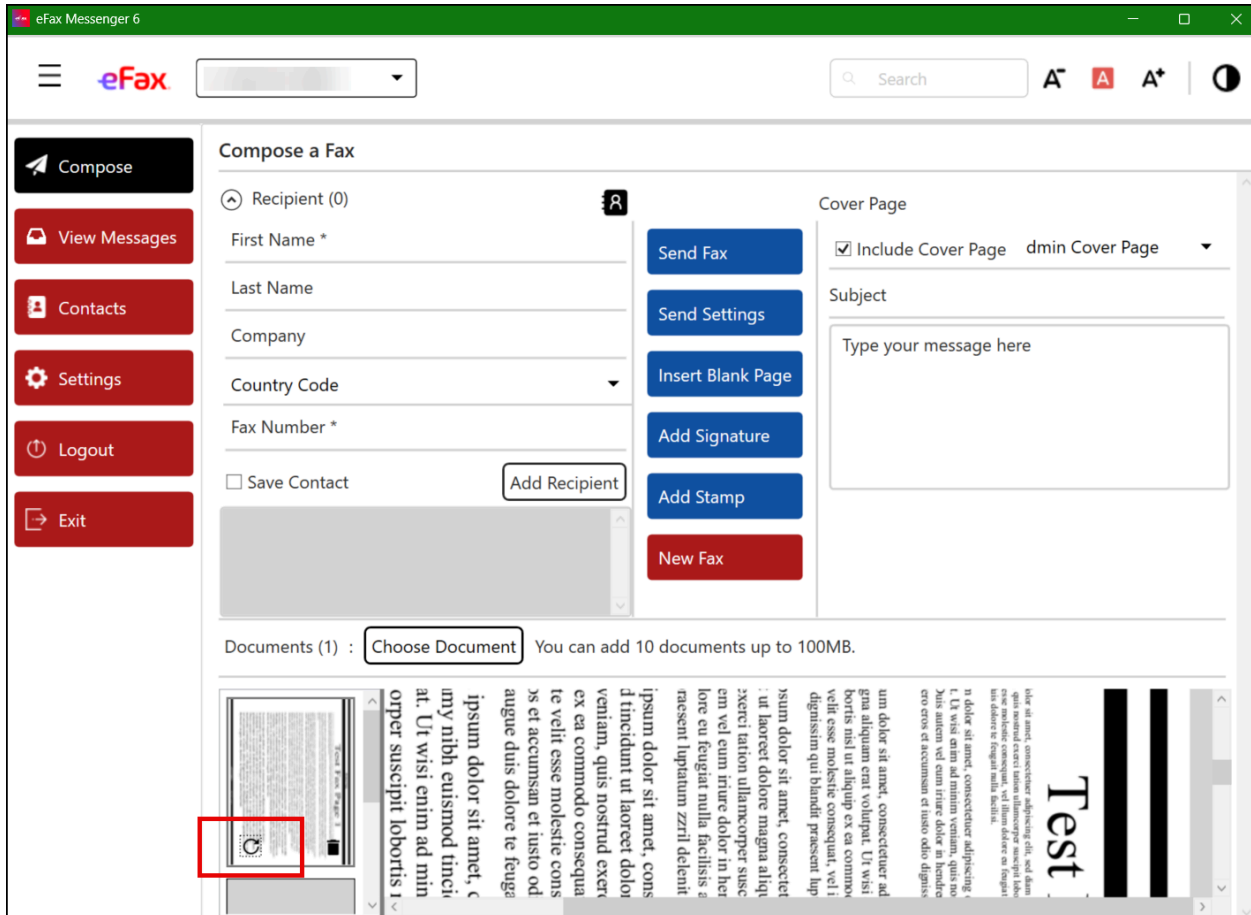
Approved	Check Mark	Confidential	Copy
Denied	Draft	Faxed	Final
Paid	Pending	Received	Urgent
X			

When selected, these stamps populate the indicated information.

Date	Time	Date and Time	Page Number
From	Subject	Sender Company	Sender Email Address
Sender Phone Number	Recipient Company	Recipient Fax Numbers	Recipient Email Address
Recipient Name	Sender Fax Number	Sender	Account ID
Client	Message		

ROTATE PAGE

You may rotate a single page in a fax 90 degrees by clicking the **Rotate Arrow** in the page tab next to the view panel. Each click rotates the page 90 degrees from the last orientation.



Any signature blocks you have on a page are not rotated with the page; as shown above, the signature block remained upright when the page was rotated clockwise 90 degrees.

VIEW MESSAGES

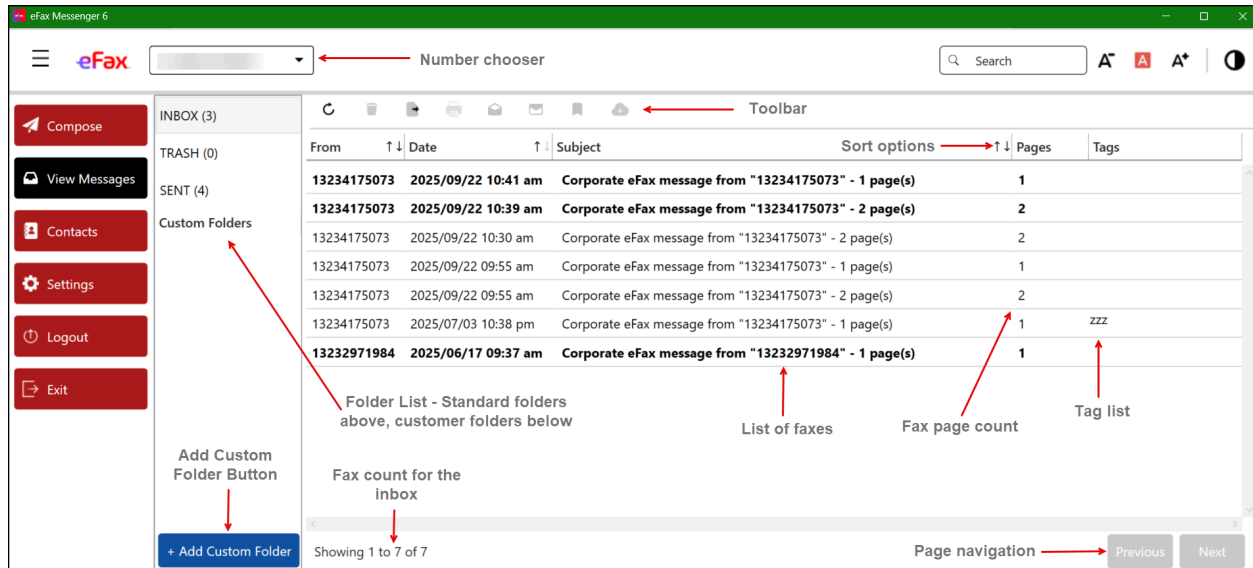
The **View Messages** page is where you access stored faxes that you have sent or received. Think of this page as your inbox. From here you can view, forward, download, print, tag, or delete faxes. You can also create custom folders in addition to the standard Inbox, Trash, and Sent folders.

The View page refreshes automatically every five (5) minutes.

NOTE: The folder structure in your main eFax or eFax Corporate account automatically synchronizes with Messenger. Any standard folder in those accounts, such as Signed Documents, will also appear in this lineup of folders.

VIEW MESSAGES PAGE LAYOUT

The following image highlights important components of the **View Messages** page.



Number Chooser

Accounts with multiple numbers can toggle between fax numbers using the **Number Chooser** field directly above the folders list. The page will refresh when a new number is selected.

Main Toolbar



From left to right, the three icons above the list of faxes are:

- **Refresh.** Refreshes the page.
- **Trash.** Puts the selected fax into your trash can. You must confirm your action before the fax is deleted. If you delete a fax from the trash then that fax is permanently deleted. You may select and delete multiple faxes from the trash.
- **Forward.** When selected, opens the **Compose** page with the selected fax attached. Follow the steps in [Compose and Send a Fax](#) to forward this document to a new recipient. You can also forward a fax by selecting this same icon when viewing any individual fax.
- **Print.** Prints the fax to a printer or to PDF. Select multiple faxes at once to print them as a single job.
- **Mark as Read.**
- **Mark as Unread.**
- **Tag.** Opens the **Tag** wizard. Provide your tag text and click **Add Tag**. Tags can be up to 31 characters in length. Tags display in the main **View Messages** page against the faxes they have been applied to. You may search by page tags.

Add a Custom Folder

To add a custom folder, click **Add Customer Folder**, provide a name for the new folder, and click **Create Folder**.

Rename a Custom Folder

To rename a custom folder, right-click on a customer folder and select **Rename Folder**. In the dialog box that opens, add the new folder name and click **Save**, or **Cancel** to close the dialog box and keep the original name.

Delete a Custom Folder

To delete a custom folder, click the X next to the folder name and confirm your choice. You will not be able to recover any faxes that remain in the folder being deleted. Standard folders cannot be deleted.

VIEWING AND WORKING WITH FAXES

The following sections contain instructions for viewing and organizing your faxes.

View Faxes

To view a fax, simply double-click on any fax in the inbox or in one of the folders. Faxes display/preview in black and white, even if the attachment is in full color.

When the fax opens, the following toolbar is available.



From left to right these icons are:

- **Forward.** When selected, opens the **Compose** page with the selected fax attached. Follow the steps in [Compose and Send a Fax](#) to forward this document to a new recipient. You can also forward a fax by selecting a fax in the main **View Messages** page and selecting this same action in the toolbar there.
- **Download.** Opens a standard Windows open-file dialog. Select where you want the fax downloaded and click **Save**.
- **Print.** Prints the fax to a printer or to PDF. Select multiple faxes at once to print them together.
- **Trash.** Puts the select fax into your trash can. You must confirm your action before the fax is deleted. If you delete a fax from the trash then that fax is permanently deleted. You may select and delete multiple faxes from the trash.
- **Tag.** Opens the **Tag** wizard. Provide your tag text and click **Add Tag**. Tags can be up to 31 characters in length. Tags display in the main **View Messages** page against the faxes they have been applied to. You may search by page tags.
- **Close.** Closes the selected fax and returns you to the **View Messages** page.

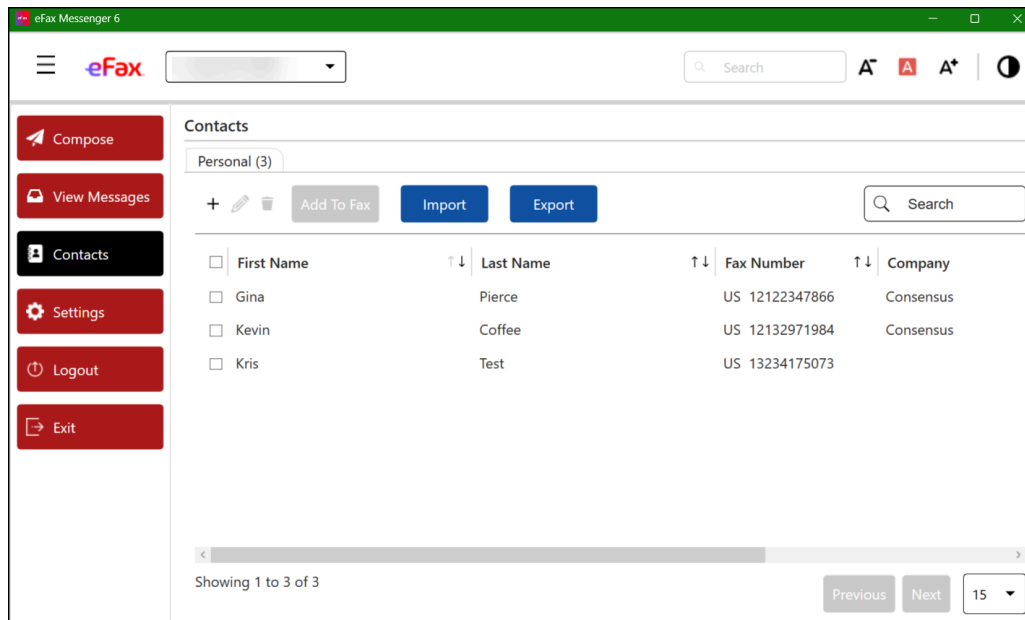
Folders

You can move faxes back and forth between standard and custom folders, as well as between these folders and the inbox, by selecting the fax (or faxes) and dragging and dropping them in the new location. You may not move faxes out of the **Trash** once they are in that folder, nor may you move faxes from the **Sent** folder.

NOTE: For this 6.3 release, it is not possible to recover a fax once it is in the trash. You may, however, open a fax in the trash and forward to yourself again so that it arrives in your inbox.

USE YOUR CONTACTS/ADDRESS BOOK

Messenger provides an integrated address book to help manage and organize contact information. Your personal address book is available in the **Personal** tab; the number in parenthesis shows how many contacts are in your book. The other tab (“filename.csv”) contains the shared address book available to your account.



Use the address book to:

- Upload contact records, either singularly or in bulk. Contacts in eFax MyAccount automatically synchronize with Messenger.
- Organize and manage contact information.
- Select recipients for your faxes.
- Maintain a list of frequently used (favorite) contacts.
- Export your contacts list to a .csv file.
- Use a shared address book.

Most of the features in the Address Book are inactive until you select a record. If you have no contacts, the **Add** icon (+) is active. When a contact is selected, as shown below, the **Add to Fax** button is activated.

Follow these steps to update and use your personal address book.

ADD A NEW CONTACT

1. On the Messenger dashboard, click **Contacts**.
2. When the address book opens, click the **Personal** tab, then click the + icon (**New**). The **Add Contact** page opens, as shown below.

The screenshot shows the 'Add Contact' form in the eFax Messenger 6 application. The form is titled 'Add Contact' and is located in the main content area. On the left side, there is a sidebar with several buttons: 'Compose', 'View Messages', 'Contacts' (which is highlighted), 'Settings', 'Logout', and 'Exit'. The 'Add Contact' form itself has the following fields: 'First Name *', 'Last Name', 'Country Code' (a dropdown menu), 'Fax Number *', 'Email Address', and 'Company'. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

3. Add information as needed for this contact (all fields are optional except those marked with an *). All fields have a 100-character limit, except the **Fax Number** field, which has a range of 8-18 digits.
4. Click **Save** to save the contact record, or **Cancel** to exit.

EDIT CONTACTS

To edit a contact record:

1. On the Messenger dashboard, click **Contacts**.
2. When the address book opens, click the **Personal** tab, then check the box next to the entry you wish to edit.
3. Click the pencil icon (**Edit**) and change whatever information you wish to update.
4. Click **Save** to keep the new record.

DELETE CONTACTS

To delete a contact record:

1. On the Messenger dashboard, click **Contacts**.
2. When the address book opens, click the **Personal** tab, then select a contact record, or records, by selecting the checkbox next to each record you want to remove from the book.
3. Click the trashcan icon (**Delete**) to remove the selected record or records.

USE A CONTACT RECORD AS A FAX RECIPIENT

To use a contact as the recipient of your fax:

1. On the Messenger dashboard, click **Contacts** to open the address book.
2. Click the **Personal** tab, then check the **Select** box next to the contact you wish to use and select **Add to Fax**.

SEARCH FOR CONTACTS

To search for a contact record:

1. On the Messenger dashboard, click **Contacts** to open the address book, then click the **Personal** tab.
2. In the active **Search** field at the right edge of the **Contacts** menu bar, enter at least three characters or numbers to search for a name or phone number and hit **Enter** on your keyboard.
3. To use an entry from the results as your fax recipient, check the **Select** box and then the **Add to Fax** icon.

BULK IMPORT (CSV) CONTACT RECORDS

Messenger permits the bulk import of contact records by using a .csv file upload. Before you can import your file, make sure that includes the information you want in your Address Book. Allowable fields include:

- First Name*
- Last Name
- Company
- Email Address
- Fax Number*

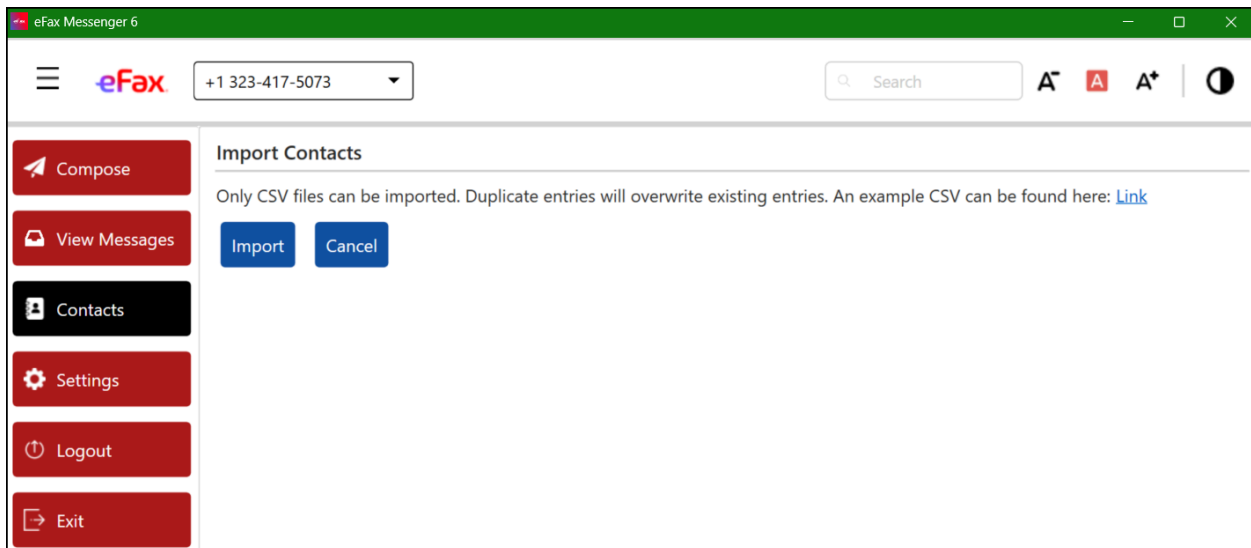
Fields marked with an asterisk (*) above must be included in the file for upload; the remaining fields are optional.

NOTE: Bulk import of contact records is for personal contacts only, and not for shared address books.

The fax number field should be formatted using the country and area code with no spaces or other characters (such as - or +). For example, if the contact's fax number is 1-555-222-3333, format it as 15552223333. Format fax number 44 (0)20 1111-2222 as 442011112222.

After formatting, import the file into Messenger. To Import a .CSV file:

1. In the address book, click **Import**.
2. When the **Import Contacts** window opens, click the blue **Import** button to locate the .csv file to use.



3. When you find the file you wish to use, click **Open** in the file manager.
4. Messenger automatically starts importing the entries in the selected file.

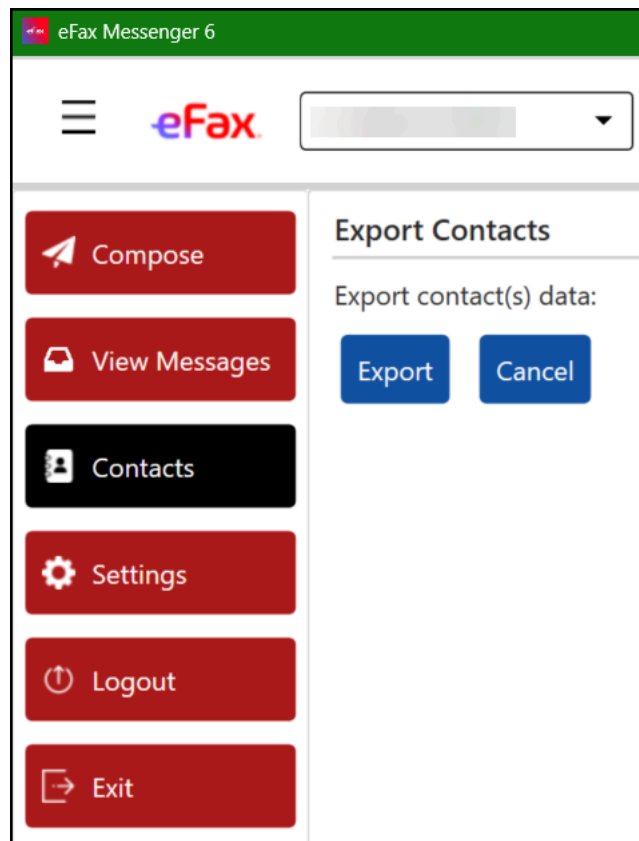
BULK EXPORT (CSV) CONTACT RECORDS

Messenger permits the bulk export of contact records as a .csv file.

NOTE: Bulk export of contact records is for personal contacts only, and not for shared address books.

To export a .CSV file:

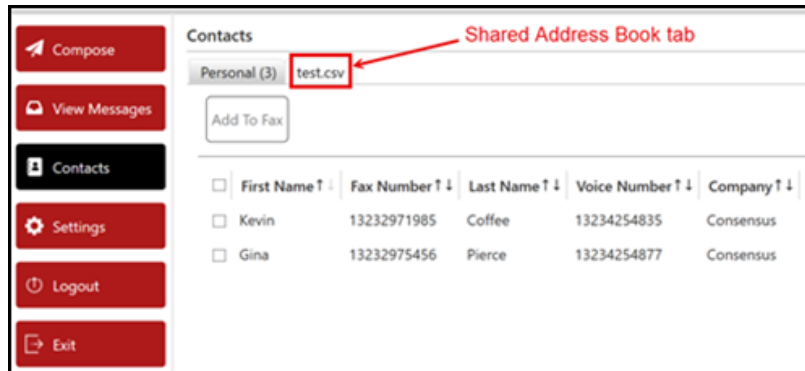
1. In the address book, click **Export**.
2. When the **Export Contacts** window opens, click the blue **Export** button to indicate the directory and filename of the .csv file you wish to export your contacts list to.



SHARED ADDRESS BOOKS

In addition to the standard personal address book, Messenger provides the ability to use a shared address book with others in your company. This allows for the convenience of maintaining only a single address book file for multiple users. Shared directories are shown in the tab with the “filename.csv” label.

NOTE: To use the shared address book feature you must add it during installation as a command line option. Refer to the *Messenger Command Line Guide* for details.



Your address book file can be hosted on a network drive or stored locally. Users will not be able to add, edit, delete, or import contacts for the shared directory; only the administrator or owner of the .csv file will be able to perform these update functions.

CREATE THE SHARED ADDRESS BOOK .CSV FILE

The shared contacts list must be formatted as a Comma Separated Value (.CSV) file. The list below contains the columns you may include in the .csv file; mandatory column headings are marked with an asterisk (*). These columns can be in any order. Any columns left blank will not be displayed in Messenger. If the First name and fax number match in multiple records then those records are considered duplicates but they are not filtered out of the list.

- First Name*
- Last Name
- Fax Number*
- Voice Number
- Company
- Address 1
- Address 2
- Address 3
- Group Name

As with your personal address book, fax numbers included in this shared directory should be formatted using the country and area code with no spaces or other characters (such as - or +). For example, if the contact's fax number is 1-555-222-3333, format it as 15552223333. Format fax number 44 (0)20 1111-2222 as 442011112222.

VIEW YOUR SHARED ADDRESS BOOK

When viewing the shared address book in the **Contacts** tab, columns are sortable alphabetically in either ascending or descending order using the arrows on the column headings. Larger lists are paginated using the dropdown in the lower right-hand corner of the page (15 is the default entry count, with options for 20, 25, and 30 records per page). If multiple pages of records are available the **Previous** and **Next** buttons are activated.

SEARCH YOUR SHARED ADDRESS BOOK

You can search for specific contacts in the shared address book separately from any personal contacts stored in Messenger.

To search for a contact record:

1. On the Messenger dashboard, click **Contacts** to open the address book, then click the “**filename.csv**” tab.
2. In the **Search** field, enter at least three characters or numbers to search for a name or phone number and hit **Enter** on your keyboard.
3. To use an entry from the results as your fax recipient, check the **Select** box and then the **Add to Fax** icon.

CHANGE THE SHARED ADDRESS BOOK LOCATION

Users have the ability to indicate where the shared address book is located on a network drive; this allows them to switch between multiple shared address books, for different departments, for example, or to use a new shared address book if the administrator changes the location where the .csv file is stored.

To change the location of a shared address book:

1. On the Messenger dashboard, click **Settings**.
2. Click the **Select Shared Address Book** option. A file chooser dialog opens; navigate to the file and click **Open**. The file appears in the **Shared Address Book Location** text field. (Refer to the [Settings](#) section to see an image of these options).
3. Click **Save** to keep this change.

NOTE: You may also alter the file directory path directly in the **Shared Address Book Location** text field if you wish. Click **Save** when the new location has been correctly indicated.

If the **UPDATE_SHARED_ADDRESS_BOOK_LOCATION** command line option is disabled, then the **Select Shared Address Book** button will be disabled. The location of the current address book will appear in the text field but the user will not be able to use that text field to change the location directly.

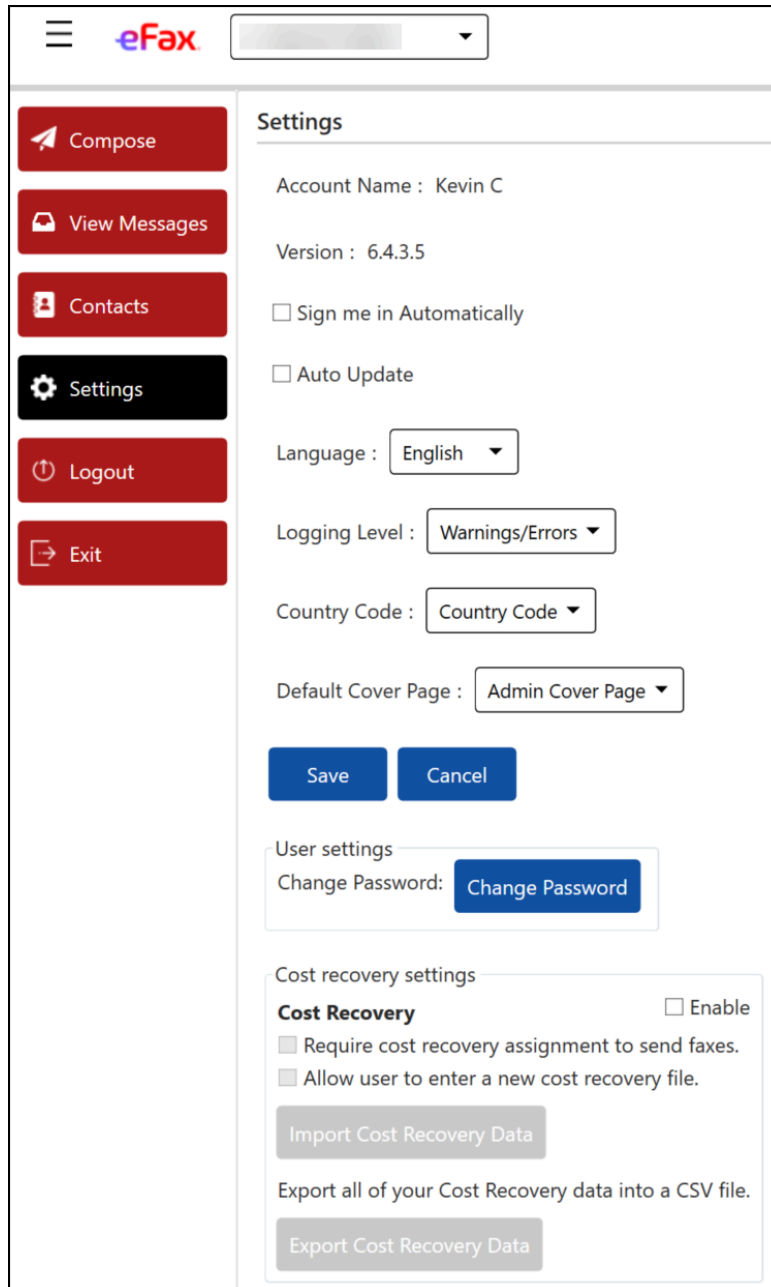
SETTINGS

The **Settings** page allows users to set a variety of Messenger system features, as described in the following table.

Setting	Description
Account Name	Displays the name of the Messenger account holder.
Version	Displays the application version in use.
Sign me in automatically	If checked, users are signed in automatically when logging in to Messenger.
Auto Update	If checked, newer versions of Messenger are automatically downloaded and installed. Updating is mandatory if your version of Messenger is more than three versions out-of-date.
Language	Toggle between English and French.
Logging Level	This feature only applies to system logs. The default value is Warnings/Errors. Other options include Debug, Trace, and None.
Country Code	Use the drop-down menu to select a default country code for use when composing faxes and creating new contacts.
Default Cover Page	Use this drop-down menu to select a default cover page, either the Admin-specified page or a rich text file page stored locally.
Select Shared Address Book	Allows the user to indicate the network or drive location of the .csv file containing the shared address book data. Refer to the Change the Shared Address Book Location section for details.
Change Password	Allows the user to change their Messenger password using a standard password reset wizard (current password + new password provided twice).
Cost Recovery Settings	For Corporate Accounts only. Refer to the Cost Recovery Settings section for details.

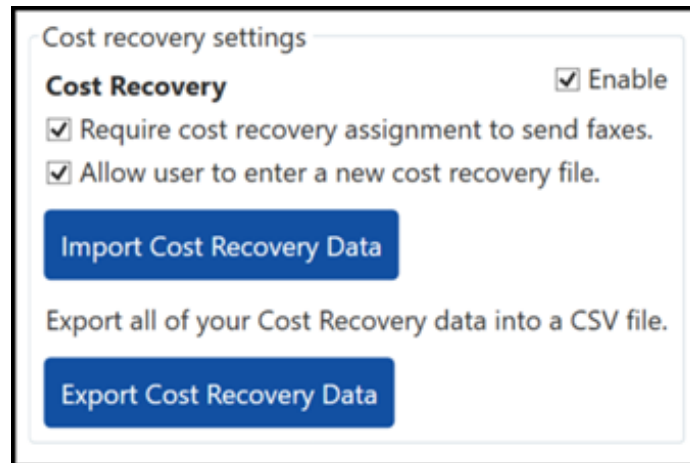
If any setting value is changed, the **Save** button activates. Use **Cancel** to leave the **Settings** page without making any changes.

The following image shows the **Settings** page (note that not all of the settings described in the table above are shown here).



COST RECOVERY SETTINGS

eFax Corporate users have the ability to set cost recovery parameters for sending faxes. This option appears directly above the **Change Password** option in the **Settings** page (**NOTE:** this feature is only for Corporate accounts; non-Corporate accounts will not display this feature).



Follow these steps to use this feature:

1. Check the **Enable** box.
2. Check either (or both) of the **Cost Recovery** checkboxes.
 - a. If the first box is selected, then a cost recovery .csv file must be in place in order for the user to send faxes.
 - b. If the second box is checked, the users for this Messenger account will be able to enter a new cost recovery data file.
3. Use the **Import** button to load a cost recovery .csv file, or use the **Export** button to download the cost recovery history of the account into a separate .csv file.

NOTE: Any .csv file you import as your cost recovery file must include the following column headers:

- ACCOUNT ID
- CLIENT
- MATTER
- MATTER DES

UNINSTALLING eFAX MESSENGER

If you uninstall eFax Messenger, we recommend deleting the following folder from your local directory:
Users\{{Username}}\Documents\eFax Messenger 6.

NOTE: Your faxes and contacts will be saved if you delete this folder, however your shared address book location will not be saved. We recommend backing up your stamps, signatures, and cover pages before you delete the folder, otherwise they will be lost if you reinstall Messenger.

USE THE PRINT DRIVER

The Messenger installation process in Windows exposes the application as a viable print destination; in other words, in any desktop application that can print, such as MS Word or Excel, “Messenger” appears as an available printer option.

When you select Messenger from the list of available printers, the output from the print spooler converts to a TIFF document. It then activates the app, which picks up the new file and imports it into a new fax.

Follow these steps to use this feature:

1. Open a document in another program.
2. In the **File** Menu, select **Print**. The **Print** dialog box appears.
3. Select **Messenger** as the printer.
4. Click **OK** or **Print**.

Messenger opens and the file displays in a new **Compose Fax** page. From there, you can add further attachments, use the address book, and send the fax.