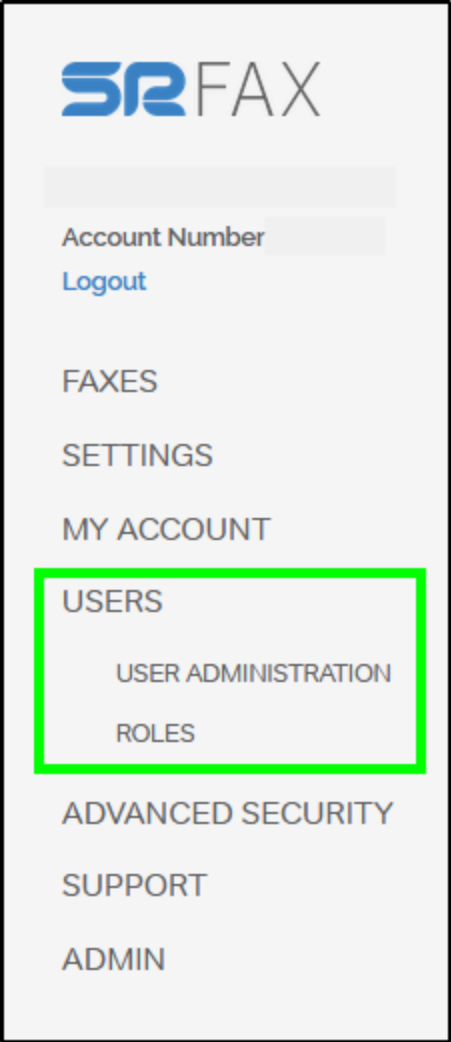


User Administration & Roles

To modify your User Administration and Roles for your account you will need to Log into your account.

You will see an option on the menu on the left called "Users."



Roles

This allows you to define what sort of access any specific roles may require, and allow you to assign sub-users and additional logins to these roles giving you the power to refine the access your staff, or users have to you head office account.

For example, you could create an "Accounts Payable" roll. As shown below.

Roles

















Role Name

AP

Description

Accounts payable access

Permissions

- + Faxes  NO ACCESS
- My Account  NO ACCESS
 - + SUMMARY  VIEW ONLY
 - Account Details  FULL CONTROL
 - + Billing Details  FULL CONTROL
 - + PAST INVOICES  FULL CONTROL
 - Login Email/Password  FULL CONTROL
 - Change Login Email  NO ACCESS
 - Password Expiry  NO ACCESS
 - PORT REQUEST  INHERITS NO ACCESS
 - Close Account  FULL CONTROL
 - Refer a Friend  FULL CONTROL
- + Settings  NO ACCESS
- + Users  NO ACCESS
- + Advanced Security  NO ACCESS
- + Support  FULL CONTROL

CANCEL >

UPDATE >

Or you could create a "Front End Staff" Role. As shown below.

Roles







Role Name

Front End Staff

Description




















Front desk staff access

Permissions

- Faxes  NO ACCESS
 - Send a Fax  FULL CONTROL
- Faxes Received  FULL CONTROL
 - Faxes Received Report  INHERITS FULL CONTROL
 - Delete Fax  INHERITS FULL CONTROL
 - Download Fax  INHERITS FULL CONTROL
 - Email Faxes  INHERITS FULL CONTROL
 - Block Fax  INHERITS FULL CONTROL
 - Forward Fax  INHERITS FULL CONTROL
 - Mark Fax  INHERITS FULL CONTROL
 - Fax Info  INHERITS FULL CONTROL
 - View Fax  INHERITS FULL CONTROL
- + Faxes Sent  FULL CONTROL
- + Faxes Queued  FULL CONTROL
- + Junk Faxes  FULL CONTROL
- + Edit Address Book  FULL CONTROL
- + Call Log Reports  FULL CONTROL
- BLOCK FAX (FROM EMAIL)  FULL CONTROL
- My Account  NO ACCESS
 - + SUMMARY  VIEW ONLY
 - Account Details  NO ACCESS
 - + Billing Details  NO ACCESS
 - + PAST INVOICES  NO ACCESS
 - Login Email/Password  FULL CONTROL
 - Change Login Email  NO ACCESS
 - Password Expiry  NO ACCESS

You can even be more reductive and restrict your role from being able to delete faxes in any inbox. This is highlighted below in blue.

Permissions

- Faxes  NO ACCESS
- Send a Fax  FULL CONTROL
- Faxes Received  FULL CONTROL
 - Faxes Received Report  INHERITS FULL CONTROL
 - Delete Fax  INHERITS FULL CONTROL
 - Download Fax  INHERITS FULL CONTROL
 - Email Faxes  INHERITS FULL CONTROL
 - Block Fax  INHERITS FULL CONTROL
 - Forward Fax  INHERITS FULL CONTROL
 - Mark Fax  INHERITS FULL CONTROL
 - Fax Info  INHERITS FULL CONTROL
 - View Fax  INHERITS FULL CONTROL
- + Faxes Sent  FULL CONTROL
- Faxes Queued  FULL CONTROL
 - Faxes Queued Table  INHERITS FULL CONTROL
 - Preview Fax  INHERITS FULL CONTROL
 - Fax Info  INHERITS FULL CONTROL
 - Cancel Fax  INHERITS FULL CONTROL
 - Delete Fax  INHERITS FULL CONTROL

















As well as whether you would like your staff to have the ability to see or modify the account settings menus. This is highlighted below in blue.

Permissions

- + Faxes  NO ACCESS
- + My Account  NO ACCESS
- Settings  NO ACCESS
 - General  VIEW ONLY
 - Account Preferences  INHERITS VIEW ONLY
 - Fax Format  INHERITS VIEW ONLY
 - Date Format  INHERITS VIEW ONLY
 - Default Page  INHERITS VIEW ONLY
 - Email Format  INHERITS VIEW ONLY
 - Default Retries  INHERITS VIEW ONLY
 - Faxes per Page  INHERITS VIEW ONLY
 - Timezone  INHERITS VIEW ONLY
 - Fax Retention Settings  INHERITS VIEW ONLY
 - Inbound  INHERITS VIEW ONLY
 - Outbound  INHERITS VIEW ONLY
 - + Fax Default View  INHERITS VIEW ONLY
 - SMS Text Notification  INHERITS VIEW ONLY
 - Support Staff Access  INHERITS VIEW ONLY
 - + Sending Faxes  VIEW ONLY
 - Receiving Faxes  VIEW ONLY
 - Notification Settings  INHERITS VIEW ONLY
 - Send notifications  INHERITS VIEW ONLY
 - Notification email addresses  INHERITS VIEW ONLY
 - Attach fax to email  INHERITS VIEW ONLY
 - Show preview  INHERITS VIEW ONLY
 - Send SMS notification  INHERITS VIEW ONLY
 - Push Notification  INHERITS VIEW ONLY
 - Junk Faxes Settings  VIEW ONLY
 - Junk Fax Settings  INHERITS VIEW ONLY
 - Caller Number or Remote ID match previous  INHERITS VIEW ONLY
 - Caller Number and Remote ID not available  INHERITS VIEW ONLY

You can also give all types of roles the ability to modify their own passwords within their accounts once they have logged in.

Permissions

- + Faxes  NO ACCESS
- My Account  NO ACCESS
 - + SUMMARY  VIEW ONLY
 - Account Details  INHERITS NO ACCESS
 - + Billing Details  INHERITS NO ACCESS
 - + PAST INVOICES  INHERITS NO ACCESS
 - Login Email/Password  FULL CONTROL
 - Change Login Email  INHERITS FULL CONTROL
 - Password Expiry  INHERITS FULL CONTROL
 - PORT REQUEST  INHERITS NO ACCESS
 - Close Account  INHERITS NO ACCESS
 - Refer a Friend  INHERITS NO ACCESS
- + Settings  NO ACCESS
- + Users  NO ACCESS
- + Advanced Security  NO ACCESS
- + Support  FULL CONTROL

User administration

Once you have defined roles that will fit your needs you can begin adding users, or additional logins.

When you navigate to the user administration screen you will first be shown a list of all of your sub-user accounts

User Administration

ADD USER >

Sub Accounts

Additional Login

Share Address Book

Share the master address book with ALL users. Users will not be able to edit the master address book entries

Below is a list of users who are either outbound only users or users with their own private fax numbers that are billed to your account. These users will be able to access our web site and administer their accounts individually. The monthly charges, if any apply, and the usage for each user in this list will be consolidated and billed to your account.

ACCOUNT # ^	CONTACT NAME	EMAIL	SRFAX #	ROLE	ACTIONS
257158	Ted P Smith	tps@j2.com	Outbound Only	Full Control	 

ADD USER >





While the additional login screen will show you the login credentials of the staff you have given account access to.

User Administration

ADD USER >

Sub Accounts

Additional Login

CONTACT NAME	EMAIL ADDRESS	LOGIN USER NAME	ROLE	ACTIONS
Front End Staff	tps@j2.com	tedpsmith	Front End Staff	 
AP	exceler.wrate@gmail.com	FinanceTeam	AP	 

ADD USER >

When you are ready to create your sub-users, or additional logins you will need to click on the "Add User" Button

User Administration

ADD USER >

On this page you will see 3 options.

User Administration - Add New User

Please select the type of user you wish to add to your account. All of the user's usage will be consolidated and billed to your account. All users will be provided with their own online login account for viewing faxes and modifying their preferences.

- User will only be sending faxes (No Monthly Fee - FREE)**
This type of user will only be able to send faxes. **NO** fax number will be provided with this account.
- User requires their own unique fax number (\$4.95 / Month)**
This type of user will be able to send and receive faxes from their own unique Toll-Free or Local fax number.
- Additional Login**
This type of user will be able to log into your account with only the permissions you specify

Option 1) Allows you to create an outbound only user, which will have its own account number. This type of user will use either their login email, or their account number, and the password for their user account to log into the sub-user account. This type of user can reset or change their user account password once they have logged into their account. Simply define their contact name, contact email, a password, and the roll permissions you would like this sub-user to have. Once you have, click "Add User" to create the Outbound Only sub-user.

Contact Name	<input type="text"/>
Contact Email Address	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Role	<input type="text" value="-- Select Role --"/>
<input type="button" value="CANCEL >"/>	<input type="button" value="ADD USER >"/>

Option 2) Allows you to create an inbound and outbound user. This user will have their own account number, inbox, outbox, and will be charged monthly as \$4.95. This type of user will use either their login email, or their account number, and the password for their user account to login to the sub-user account. This type of user can reset or change their user account password once they have logged into their account. Simply define the contact name, contact email address, password, roll, and select either a toll-free or local number for this user. Once you have, click "Add User" to create the Inbound/Outbound sub-user.

Contact Name	<input type="text"/>
Contact Email Address	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Role	<input type="text" value="-- Select Role --"/>
Notify Contact by Email	<input type="checkbox"/>
Select SRFax Number	<input checked="" type="radio"/> New Toll-Free Fax Number <input type="text" value="Select Prefix"/>
	<input type="radio"/> New Local Fax Number
<input type="button" value="CANCEL >"/>	<input type="button" value="ADD USER >"/>

Option 3) Allows you to create additional logins to access the account in which the account access roll is defined. This type of user has access to the main account, and can have access to user accounts as well, depending on how the role privileges are defined. Simply define the contact name, login username, contact email address, password, and role. Once you have, click "Add User" to create the additional login access.

Contact Name	<input type="text"/>
Username	<input type="text"/>
Contact Email Address	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Role	<input type="text" value="-- Select Role --"/>
<input type="button" value="CANCEL >"/>	<input type="button" value="ADD USER >"/>