

Cleo Stream[®]

Cleo Stream[®] Fax User Guide

Version 7.3



April 2017

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Introducing Cleo Stream® Fax

Cleo Stream® is a Microsoft Windows-based fax processing platform that provides a complete range of advanced voice and fax capabilities. This guide focuses on the fax capabilities of Cleo Stream, which we refer to as Cleo Stream Fax. These features include:

- Fax/email integration - allows you to send a fax via email using Microsoft Exchange, Lotus Notes, GroupWise and any SMTP compliant email system.
- Fax messages - allows you to fax the same document to multiple destinations or multiple documents to multiple destinations.
- Fax from print driver - allows you to send a document to a fax destination as if you were sending it to a printer.
- Support for faxing from MFPs - allows you to use Cleo Stream to process faxes originating from MFPs (Multi Function Printers.)

System monitoring and operation are handled centrally, from anywhere on the network, using the Cleo Stream graphical user interface.

Technical Support

To request technical support:

- Use the request form at: <http://www.cleo.com/support/request.php>
- Call the automated support line at 1-866-444-CLEO(2536) or 1-815-282-7894

Cleo Technical Support is available from 7am to 7pm Central Time, Monday through Friday. Requests are handled on a callback basis in the order they are received. The Cleo automated support line or web form will collect your information and your request for support will be placed in our callback queue.

A support subscription is required to work with a Cleo technical support analyst. Find information about Cleo support options at <http://www.cleo.com/support/supsub.php>.

To ensure that your support process goes quickly and smoothly, note your place in the setup or installation process as well as any diagnostic measures taken.

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Faxing with Cleo Stream[®] from your desktop

With Cleo Stream Fax, you can send, receive, print, archive, and track faxes quickly and easily from your desktop.

Cleo Stream Fax integrates with virtually any email service to send and receive faxes electronically.

Cleo Stream Print enables you to send faxes as if you were sending a file to a printer from a desktop application.

Sending a fax from your email client

Use your Cleo Stream Fax application system to send a fax from your email client.

While details of sending a fax depend on the email client, the basic steps remain the same across email clients.

1. Open your email client and create a new email message.
2. Specify recipients. Use either of the following methods:
 - Type one or more recipient fax numbers in a semicolon-separated list. The format used to enter fax numbers depends on your email client. See [Fax number email format](#) on page 5.
 - Select recipients from an address book.
3. Type a subject in the **Subject** field.
4. Optionally, type a message in the body of the email. This message will be a note on the fax cover page.
5. Optionally, add attachments to your fax.

The procedure for attaching files depends on your email client.
6. Click **Send**. The recipient receives the cover page first, followed by the main document, and then any attachments in the order that they were attached.

After the recipients receive your fax, you receive a confirmation email.

Fax number email format

To send a fax from your email client, specify a fax number in the **To** field. The format used to specify the fax number is specific to the email client.

Outlook

For Outlook, use this format:

```
fax_number@app.fax
```

Use semi-colons to separate multiple fax numbers. For example:

```
fax_number1@app.fax; fax_number2@app.fax
```

Optionally, you can use this format:

```
"To Name" <faxnumber@app.fax>
```

Lotus Notes

For Lotus Notes, use this format:

```
optional_name@fax_number@fax
```

GroupWise

For Groupwise, use this format:

```
fax_number@app.fax
```

Sending a fax from your desktop application

With Cleo Stream Print, you can send a fax from any desktop application that you can print from.

Configuring Stream Print

If you are a new user, use the Cleo Stream **Print Preferences** to configure Cleo Stream Print.

On the Cleo Stream Print screen, go to **Files > Preferences** or click **F5** to open the **Preferences** dialog box. There are four tabs in which you can specify your preferences:

- [Cleo Stream Center Connection](#)
- [Cover Pages](#)
- [Templates](#)
- [Options](#)

Cleo Stream Center Connection

Specify the information that your Cleo Stream Print application needs to connect to the Cleo Stream server.

Field Name	Description
Default From Name	The name entered here appears on the cover page as the individual the fax was sent from.
From Email Address	The email address entered here receives fax receipts and confirmations.
Default "Browse" Folder	The folder that opens by default when choosing to select a local file. For example, when Attach is clicked, file browsing starts in this folder.
Inbox/Outbox Username	Your Cleo Stream Notify login.
Inbox/Outbox Password	Your Cleo Stream Notify password.
Override Global Settings	Select this option to overwrite the Cleo Stream Server IP, update port, and FTP port. You can also test a connection to verify the fields are correct.

Field Name	Description
Cleo Stroom Server IP	This field is enabled when you select Override Global Settings . Use this field to specify the IP address Cleo Stroom Print uses for the Cleo Stroom Server.
Cleo Stroom Server Update Port	This field is enabled when you select Override Global Settings . Use this field to specify the port Cleo Stroom Print uses to connect to the Cleo Stroom Server update service.
Cleo Stroom Server FTP Port	This field is enabled when you select Override Global Settings . Use this field to specify the port Cleo Stroom Print uses to connect to the Cleo Stroom Server FTP service.

Cover pages

Specify information that your Cleo Stroom Print application uses to implement the right cover page.

View the list of available cover pages and information about each, and add, edit, and/or remove cover pages from the list.

The information displayed for each cover page is:

Field Name	Description
Default	Indicates whether this cover page is the default.
Description	Displays a general description of the cover page.
File Name	Displays the file name of the cover page.

The operations that you can perform on your cover page list include.

- **Add:** This opens the **Add New Cover Page** dialog box. Browse or specify an `.rtf` file, specify a name for it, and click **OK**.
- **Edit:** Enabled when a cover page is selected in the list, this option opens the **Add New Cover Page** dialog box and populates it with information about the selected cover page. Update the information as needed and click **OK**.
- **Remove:** Enabled when a cover page is selected in the list, this option immediately removes the selected cover page from the list.
- **Open:** Enabled when a cover page is selected in the list, this option opens the selected file in a text editor or word processor.
- **Set Default:** Enabled when a cover page is selected in the list, this option sets the currently selected cover page as the default.

Templates

Existing templates can be renamed or removed from this list.

- **Remove:** Removes the selected template from the list.
- **Rename:** Opens a dialog box where you can rename the selected template file.

Options

Use the **Options** tab to set miscellaneous options:

- **Reset Clear button:** Overwrites any settings for the **Clear** button. This is useful if you previously selected **Always use this selection when I press the Clear button**.
- **Import previous version of Cleo Stroom Print address book:** Allows you to import an address book from the previous version of Cleo Stroom Print. When starting Cleo Stroom Print for the first time, you are prompted to

import the address book. This is a manual import. When you click **Import**, Cleo Stream prompts you to browse for an address book file with a `.dat` extension.

- **Automatically close Cleo Stream Print after successful fax:** Select this option to have Cleo Stream Print close after a fax has been successfully submitted to Cleo Stream.

Send a fax using Cleo Stream Print

Use Cleo Stream Print to send a fax either directly from the document you are currently working on, or by invoking Cleo Stream Print.

1. Open Cleo Stream Print.

- If you are working on a document that is ready to be faxed, choose **Print** from your application. The application's **Print** dialog box appears. In the **Name** section of the **Print** dialog box, choose **Stream Print** from the drop-down menu, and then click **OK**.
- Otherwise, double-click the Cleo Stream **Print** icon on your desktop.

A **Cleo Stream Print** dialog box appears with your name and email address in the **From** field.

2. Specify fax recipients:

- Type one or more recipient fax numbers in a semicolon-separated list. Use the following format to enter fax numbers:

```
name@fax_number
```

- Click **To** to select numbers from an existing address book.
 - Optionally: Click **Edit** to update your address book.
 - Optionally: Click **New** add a contact to your list.

3. Optionally, add or remove attachments to your fax.

- Attach a file: click **Attach**, browse for the file, and select one document at a time.
- Remove a file: click **Remove**.
- View an attachment: Click **Open**.
- Change the order attachments are faxed: Click on an attachment and click **Move Up** or **Move Down**.

4. In the **Subject** field, enter text to be the subject on your cover page.

5. Optionally, to use a cover page other than your default, choose one from the **Cover Page** menu.

6. In the **Reference No** field, enter a number to be used throughout Cleo Stream as the reference number for this fax.

7. In the **Cover Notes** field, enter text to appear as notes on your cover page.

8. Choose the day and time that you would like to send the fax. Alternatively, select **Save on Close** to save your text and the files attached.

9. Click **Send**.

Your recipients receive the cover page first, followed by your main document, and then by any attachments in the order they were attached.

After you click **Send**, Cleo Stream confirms that your fax has been accepted for processing. After your recipients receive your fax, you receive a confirmation email.

View fax history

View information for any fax you have sent using Stream Print.

1. Select **History** from the Cleo Stream Print menu bar.
The **History** window displays a list of recent fax jobs.

2. Click a fax job from the list to select it and then click **Open**.
The fax opens in the Cleo Stroom Print main window.