

Fax Overview

Overview

The Fax Component allows users to manage incoming and outgoing fax communications within the SimboConnect platform. It provides tools to view, organize, update, and track fax-related tasks efficiently. This guide walks you through all major features to help you use the Fax module effectively.

1. Accessing the Fax Module

To open the Fax component:

1. Navigate to the top navigation bar.
2. Select "**Fax**".
3. You will be directed to the Fax dashboard containing Inbox, Sent, and Resolved fax tabs.

2. Fax Dashboard Layout

The Fax dashboard provides navigation and filtering tools to help you locate and manage faxes efficiently.

The Fax dashboard consists of the following sections:

Tabs

- **Inbox** - Displays all incoming faxes.
- **Sent** - Shows faxes you have successfully sent.
- **Resolved** - Contains faxes marked as completed or closed.

Search Bar

Use the search bar in the top-right corner to search faxes by keywords, sender, reason, or other visible data.

Filters Button

Clicking the **Filters** button opens the **Advanced Filter Options** panel, allowing you to refine fax records based on multiple criteria:

Advanced Filter Options Include:

- **Sender Number** – Enter a sender’s fax number to view only faxes from that source.
- **Date Range** – Select a date or a range of dates for filtering.
- **Task Status** – Filter by Open, In-progress, or Resolved tasks.
- **Read Status** – Show only Read or Unread faxes.
- **Fax Status** – Choose from Queued, Received, Sending, Delivered, Failed, or Processing.
- **Sender Number List** – Quickly select from available sender numbers.
- **Fax Type** – lets you filter by categories of fax.
- **Favorite Filters** – Saved custom filter combinations created by the user for quick access.

Favorite Filters

Users can create custom filter combinations and save them for future use. To save a favourite filter:

1. Select multiple filter options from the Advanced Filter panel.
2. Click **Save**.
3. Enter a name for your custom filter.
4. The saved filter will appear under **Favorite Filters**, allowing quick repeated use.

This feature helps users streamline their workflow by avoiding repeated manual selection of commonly used filter sets.

Use **Fetch Logs** to apply filters or **Clear** to reset all filter selections.

3. Inbox Fax Table Columns

Each fax entry includes the following information:

- **Sender ID** – Identifies the source of the fax.
- **Primary Reason** – Summary or subject associated with the fax.
- **Fax Time** – Date and time the fax was received.
- **Pages** – Number of pages in the fax document.
- **Task Status** – Indicates if the fax task is open, in progress, or completed.
- **Read Status** – Shows whether the fax has been read or remains unread.
- **Fax Status** – Indicates if the fax status Queued, Received, Sending, Delivered, Failed, or Processing.
- **Assigned To** – Displays the user to whom the fax has been assigned.

4. Managing Fax Status

At the top of the Inbox table, users can update the status of selected fax tasks.

Change Task Status Dropdown

Allows you to update one or more selected fax tasks to statuses such as:

- Open
- In Progress
- Resolved

Mark as Read / Mark as Unread

Use these buttons to quickly manage read statuses.

Refresh Fax Logs

Reloads the fax list to ensure you are viewing the latest information.

5. Selecting and Managing Multiple Faxes

- Use the checkboxes beside each fax entry to select one or more faxes.
 - A checkbox at the top allows selecting all displayed faxes.
 - Selected faxes can be bulk-updated via the action buttons.
-

6. Viewing Fax Details

When selecting a fax from the Inbox list, you will be taken to the **Fax Summary Page**, which provides a detailed, split-screen view for efficient review and workflow handling.

Left Panel: Fax Logs

The left-side panel displays a scrollable list of fax logs. Each entry includes:

- Timestamp
- Sender name/ID
- Primary reason (if available)

Clicking any item loads its full details in the main viewing area. This allows you to quickly navigate between different faxes without returning to the main Inbox.

Center Panel: Fax Document Preview

The middle section provides a high-resolution preview of the actual fax document. Key features include:

- **Zoom Controls** - Adjust the preview size.
- **Attachment Tools** - Attach the fax to workflows or download it.
- **Page Navigation** - Scroll through multi-page documents.

Right Panel: AI Summary & Metadata

The right-side panel contains AI-generated summaries and structured data extracted from the fax.

Sections include:

- **Summary** - Condensed description of the fax content.
- **Patient Info** - Extracted details such as patient name, age, gender, and address.
- **Sender Details** - Provider or organization sending the fax.
- **Additional Data** - Any extra structured fields extracted.

Each section can be expanded/collapsed and includes a **copy icon** to easily copy summarized text.

Action Bar (Top of Summary Page)

Depending on user role, you may see options such as:

- **More Info** - Display additional metadata.
- **Block** - Block the sender.
- **Mark as Unread** - Change read status.
- **I'm working on it** - Marks the person who is working on it- it avoids the confusion if task is assigned to multiple user.
- **Mark as Resolved** - Complete the fax task.
- **Thumbs Up / Down** - Provide feedback on AI Summary quality.
- **Fax Status** - Informs on fax status.
- **Task Status Dropdown** - Update workflow status.
- **Assign To** - Assign fax to a user.

Staff Notes (Bottom Right Panel)

Users can add internal notes related to the fax, which are stored for future reference. Click **Save Note** to save your entry.

7. Assigned To Functionality

Managers or users with the correct permissions may assign fax tasks to team members:

1. Open the fax detail panel.
2. Select **Assign To**.
3. Choose a user from the dropdown list.

The assigned user will see the fax task in their dashboard.

8. Pagination Controls

At the bottom of the fax list:

- **Prev 50** - Shows previous batch of results.
 - **Next 50** - Loads the next set of fax records.
 - The system displays the total number of entries currently visible.
-

9. Fax Status Types

The system supports the following fax status types:

- **Queued** - The fax is waiting in line to be processed.
 - **Processing** - The system is currently handling the fax.
 - **Sending** - The fax is in the process of being sent out.
 - **Delivered** - The fax has been successfully delivered to the recipient.
 - **Received** - The fax has been successfully received by the system.
 - **Failed** - An error occurred and the fax was not delivered or received.
-

10. Resolved Fax Tab

This tab shows faxes that have been marked complete. Use this area to review completed tasks if needed.

11. Best Practices

- Regularly mark faxes as read/unread and change task status to in-progress or resolved to keep workflows organized.
- Assign tasks promptly to reduce backlogs.
- Use filters to quickly identify urgent or unread faxes.
- Refresh logs periodically for real-time tracking.

12. Troubleshooting

- **Fax not visible?** Try refreshing fax logs.
- **Missing details?** Ensure you have proper permissions.
- **Incorrect status?** Confirm the correct faxes were selected before updating.

Need Help?

Click **Help & Support** from the top navigation bar for additional assistance or to contact support.

This guide will help ensure smooth usage of the Fax component and enhance productivity when managing high volumes of fax-based communications.

Revision #2

Created 3 December 2025 07:33:13 by Admin

Updated 3 December 2025 09:08:58 by Admin