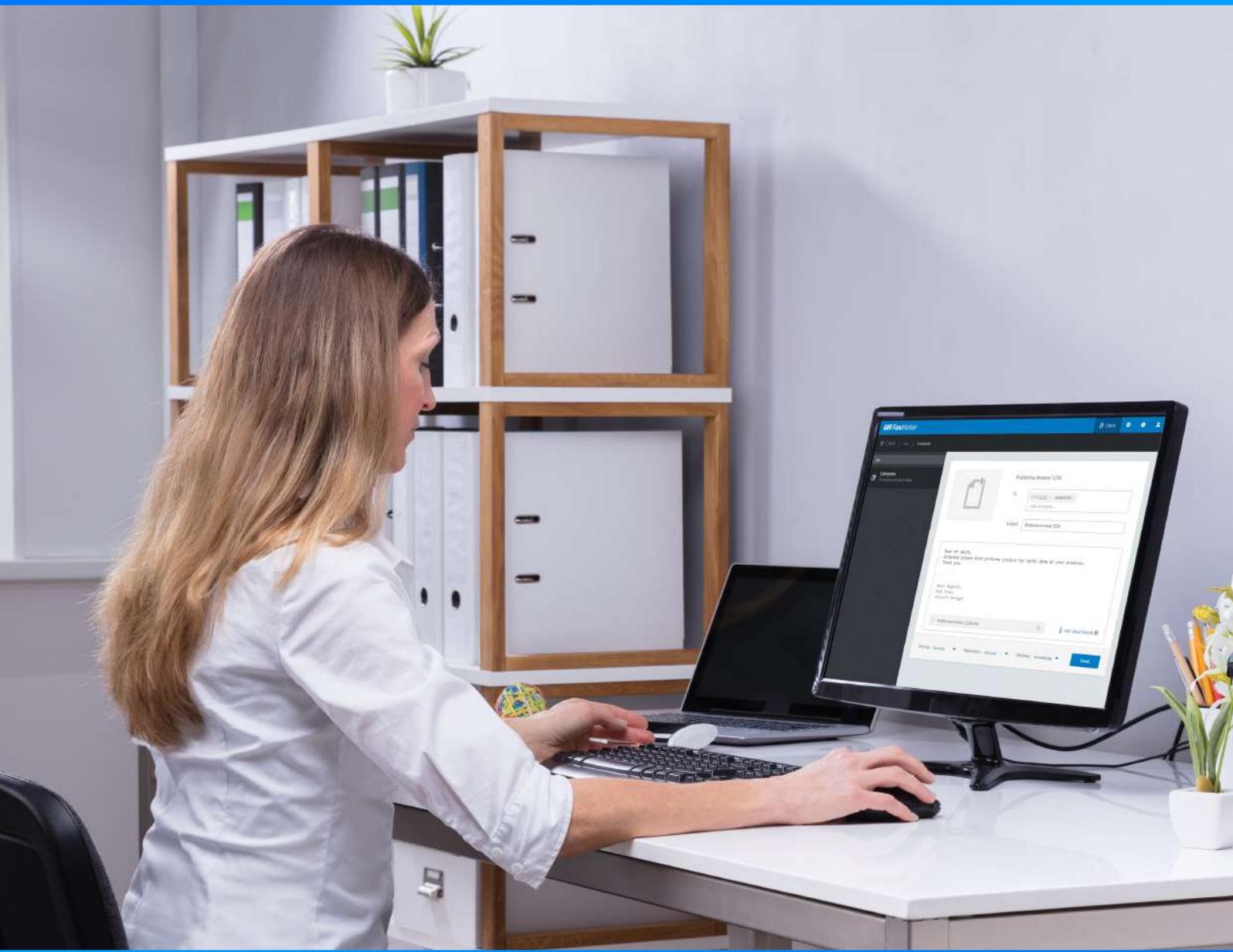


FREE TRIAL GUIDE

GFI FaxMaker: Free Trial Guide



GFI FaxMaker is available for a free 30-day trial. This step-by-step guide will walk you through the process of getting GFI FaxMaker installed and sending your first fax.



What you need

- Server /Virtual Machine (HyperV / VMWare) that meets the minimum requirements
 - Microsoft Windows Server 2008 R2+, Windows 7/10
 - CPU: One 2Ghz or better
 - Memory 4GB
 - Free Storage 1 GB
- Microsoft Active Directory (if not available GFI Directory will be installed)
- GFI “accounts.gfi.com” account with GFI FaxMaker trial key or GFI FaxMaker license key (details provided in signup email). If you didn’t receive a signup email, check your spam folder or sign in again from www.gfi.com/fax
- GFI FaxMaker installation [kit](#).
- Online Fax account with etherFax ([details provided below](#)).

Installation Overview

GFI FaxMaker can be installed on your network with a few different architectures. This guide provides you with the simplest method to see the value of GFI FaxMaker--by avoiding the need to configure your production mail server or platform. This simplest method uses “GFI FaxMaker with no mail server” from the table below.

GFI FaxMaker with no mail server

GFI FaxMaker can be configured to work in environments without a mail server. There are, however, some limitations with certain features.

Sending: Use GFI FaxMaker WebClient

Receiving: Store to a network share

GFI FaxMaker on Microsoft Exchange Server

GFI FaxMaker can be installed directly on a Microsoft® Exchange Server environment that includes the Hub Transport role. The mail server is automatically configured to route all emails addressed to faxmaker.com, smsmaker.com, Fax: & SMS: to GFI FaxMaker.

GFI FaxMaker on a separate Machine than Microsoft Exchange

When GFI FaxMaker is not installed directly on the Microsoft Exchange server, configure connectors on the mail server that route fax and SMS to GFI FaxMaker. The connector install is provided in the same Installation kit; simply execute on the mail server and only select the connector components to install.

GFI FaxMaker with Hosted email servers (Office 365, Google Apps, and others)

When GFI FaxMaker will be used with a hosted mail server to forward faxes emails designated to GFI FaxMaker. Requires you to make use of mail server routes, or alias domains configured with your hosted mail server (fax.mydomain.com) to direct emails to GFI FaxMaker.

If you would prefer to set up your trial in a production environment, please visit the [“Mail server configuration”](#) portion of our support manual to review the above options and installation steps in detail.

Installation procedure

Important notes

- Save any pending work and close all open applications on the machine.
- Disable anti-virus software on the server machine during the upgrade. Re-enable it once the upgrade is complete.

Request and prepare your etherFAX Trial account

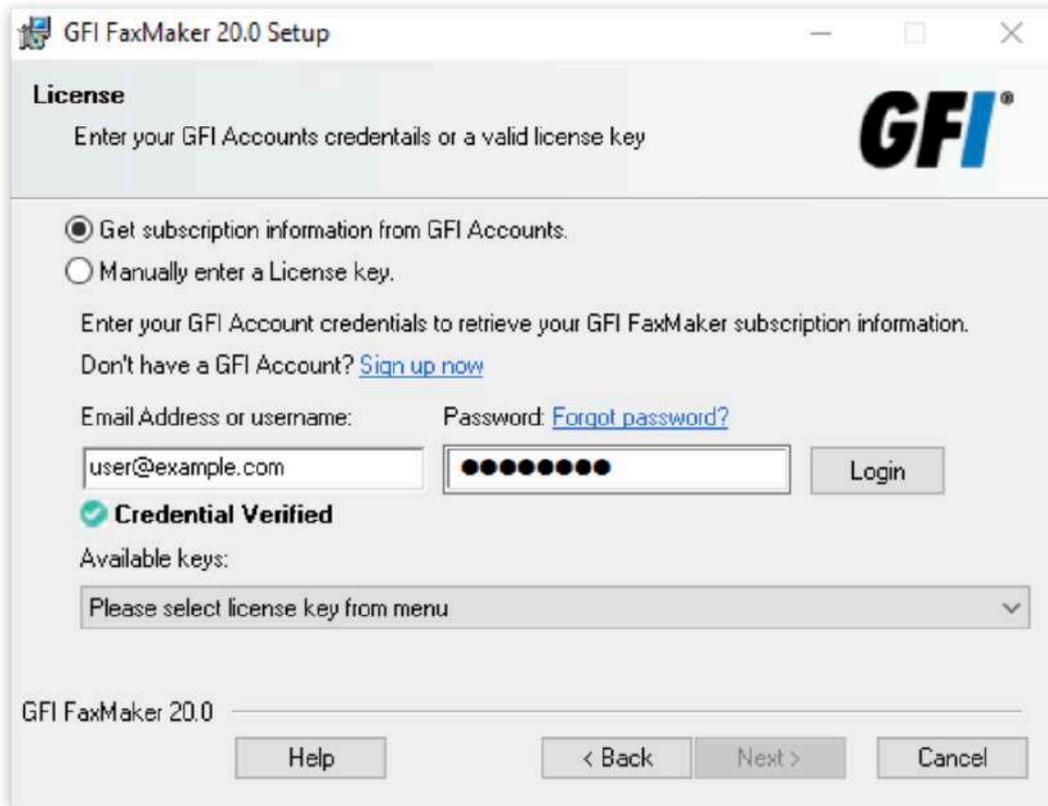
This trial guide uses etherFAX online fax connectivity to provide you with the most efficient method to see the GFI FaxMaker value.

1. Send an email to sales@gfi.com and request an etherFAX trial.
 - a) This process should take less than 48 hours, excluding weekends.
2. Once GFI has enabled your etherFAX account, you will receive two emails from etherFAX.
 - a) Portal Password Setup - used to login to the etherFAX portal and set your “service account” password. The service account is used in your GFI FaxMaker installation.
 - b) Service Account Setup - This acknowledges your new account and provides the username & account # you will need in the GFI FaxMaker installation.
3. Using the “Portal Password Setup” email, follow the steps to login to etherFAX and set your Service Account Password.
 - a) Login to the client portal
 - b) Go to settings>>Settings
 - c) You will first have to set up two-factor authentication using SMS or GAuth authenticator
 - d) Once set, you can continue under Settings>> Settings>> from the left menu.

4. On Settings >> settings> under Account information, click the Reset button on Service Username (provided in email) and set a password.
5. At the top of the settings page, click 0 changes
6. Continue with the GFI FaxMaker Installation. When prompted you will need:
 - a) etherFAX account number: EFAX-####-####
 - b) Service Account Username: <username>
 - c) Service Account Password: <the password you created using step 4 above>

Start GFI FaxMaker installation

7. IMPORTANT: Right-click the GFI FaxMaker installer and choose Properties. From the General tab, click Unblock and then Apply. *****This step is required to prevent the operating system from blocking certain actions by the installer.***
8. Launch the GFI FaxMaker installer.
9. Select the installation language and click OK.
10. In the “Welcome” screen, click Next.
11. To check for a newer build other than the one being installed, select Check for a newer build of GFI FaxMaker on the GFI web site and click Next. Otherwise, select Do not check for a new build and click Next.
12. Read the license agreement and click Agree to accept and proceed.



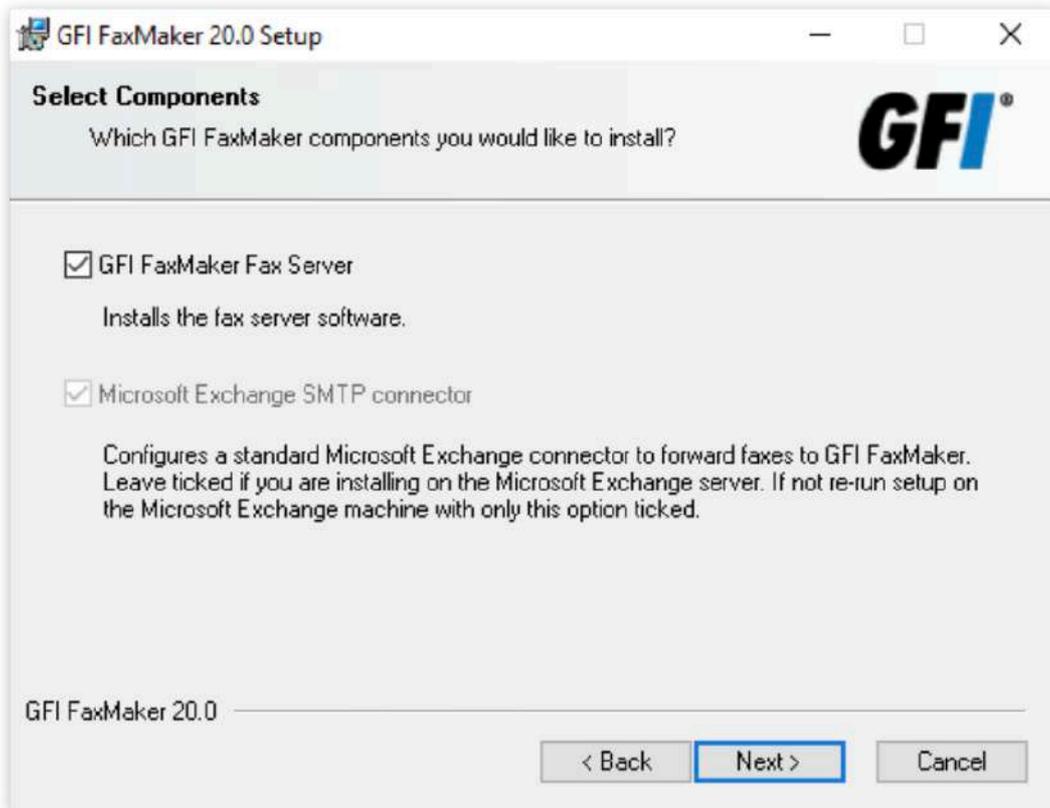
GFI FaxMaker license page wizard

1. Enter your accounts.gfi.com username and password. Click on Login to retrieve the license keys registered to your account.

If you do not have a GFI account yet click Sign up now and fill in the registration form. [For more information refer to Obtaining a GFI FaxMaker subscription.](#)

2. Select the license key from the drop down list. The default one should be automatically selected.

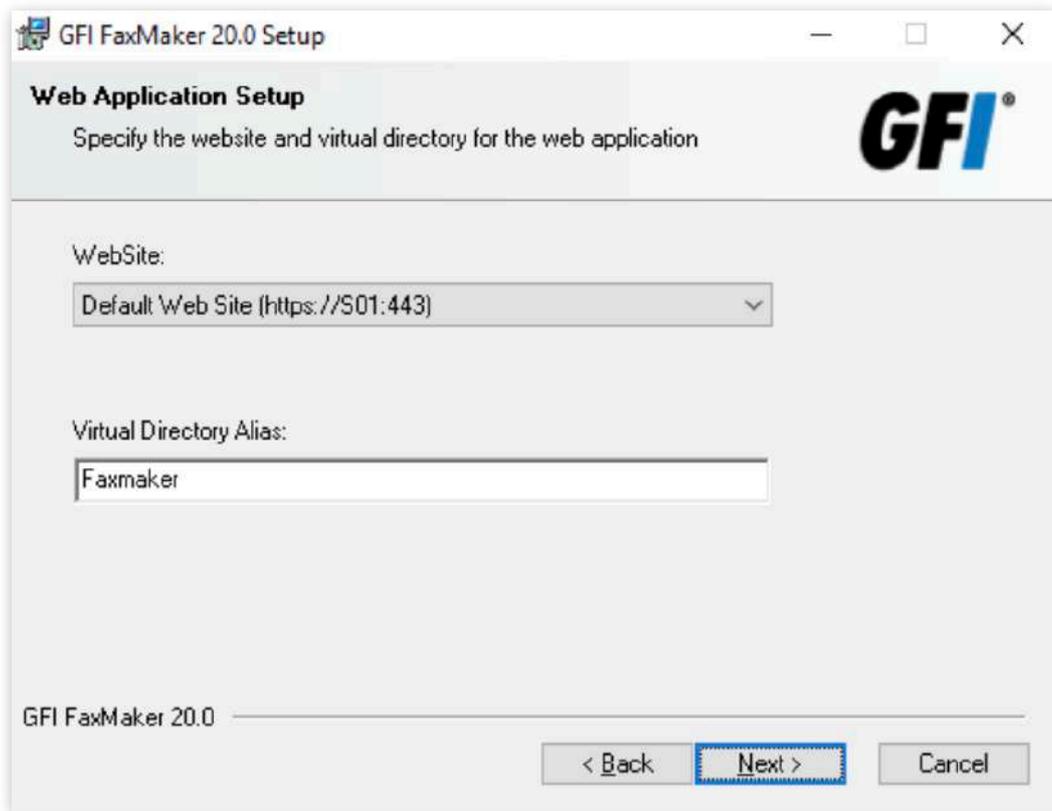
Click Next.



Selecting what components to install

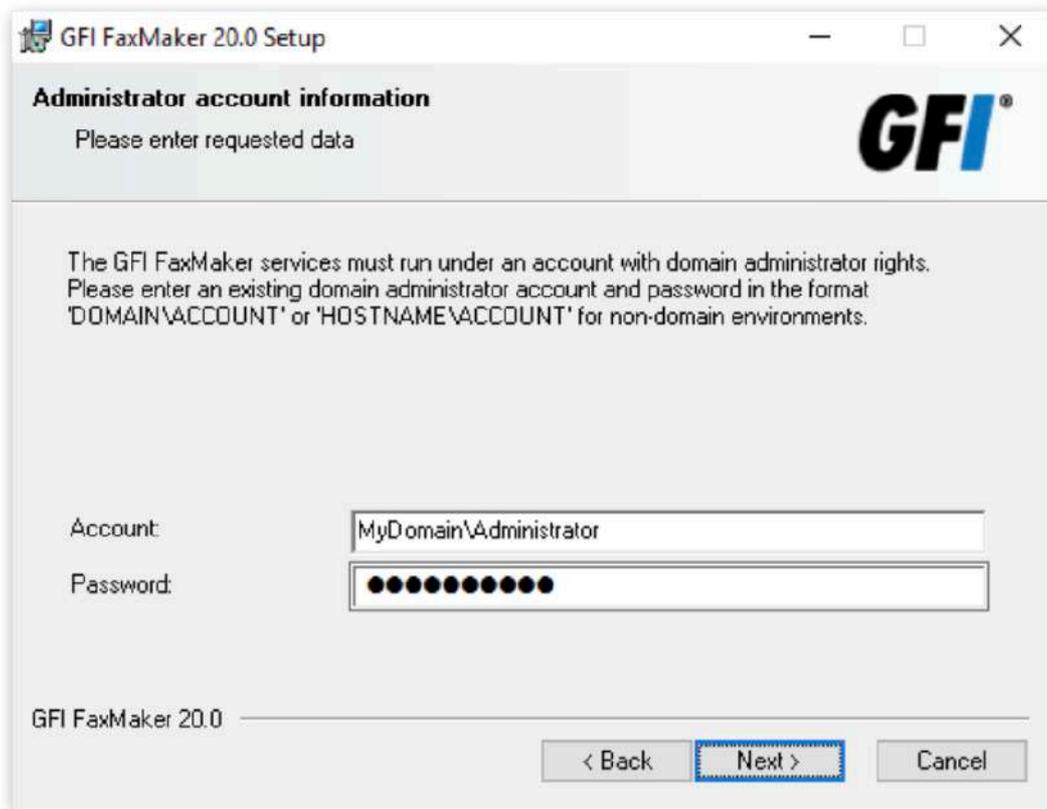
1. Select the component to install:

Component	Description
GFI FaxMaker Fax Server	Installs GFI FaxMaker on the machine.
Microsoft Exchange SMTP connector	<p>Installs the GFI FaxMaker Microsoft Exchange connectors only. Use this option when GFI FaxMaker is not installed on the Microsoft Exchange server to automatically create the connectors.</p> <p>If choosing this option, in the next screen specify the IP address of the GFI FaxMaker server and proceed to install the connectors.</p> <p>NOTE: Do not select this option when running setup on a machine that is not the Microsoft Exchange server or not using Microsoft Exchange as your mail server.</p>



Web application settings

1. Choose the IIS website where to host the GFI FaxMaker virtual directory and key in a name for the Virtual Directory, which by default is "Faxmaker". For more information about how to use the web interface refer to [The GFI FaxMaker web interface](#). Click Next.



Account name for services

1. Provide credentials of an account with administrative privileges, used for GFI FaxMaker services management. Click Next.

NOTE

If changing the password after installing GFI FaxMaker, update the password for the GFI FaxMaker services from the Services applet. When GFI FaxMaker is installed in a domain, these credentials are also used to connect to Active Directory and retrieve the list of users.

1. Click Next to continue installing GFI FaxMaker to the default folder, or Browse to select a new installation path.
2. Click Next to install GFI FaxMaker. In certain environments, you may be prompted to restart the IIS SMTP service.

Click Finish.

After installation, the “GFI FaxMaker Configuration Wizard” is automatically launched to help you configure basic settings.



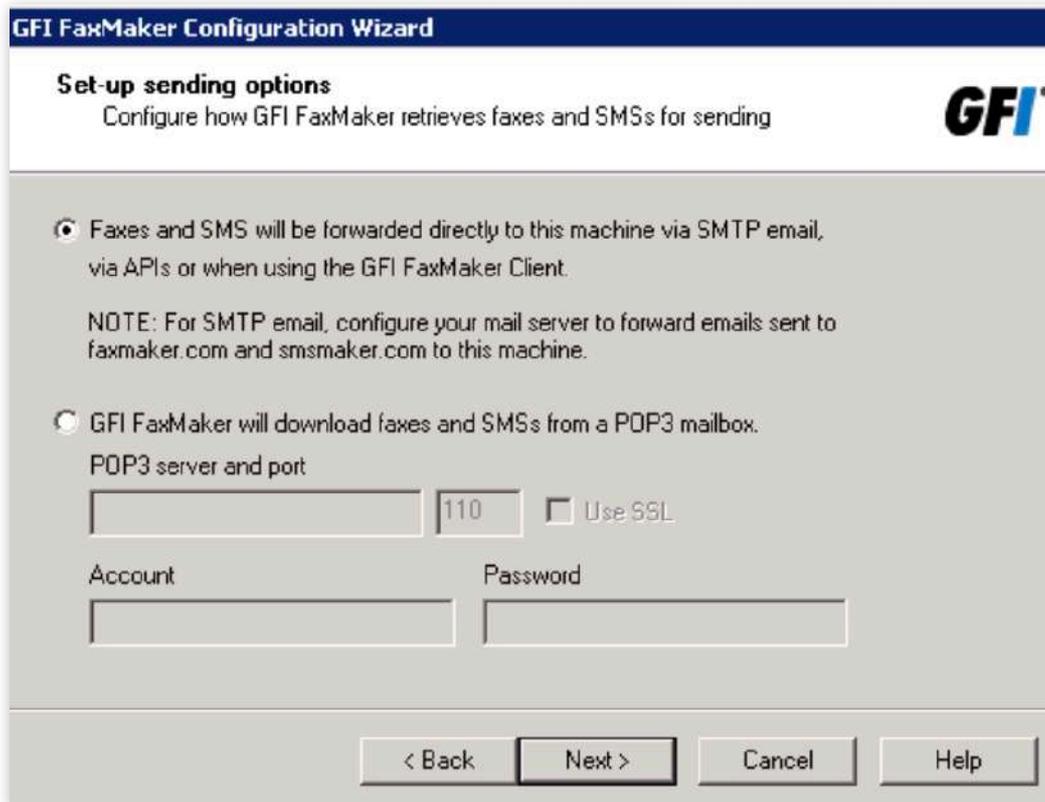
GFI FaxMaker Configuration Wizard

The GFI FaxMaker Configuration Wizard helps you through the basic steps of configuring GFI FaxMaker. The wizard runs automatically after installation, or you can run it manually from Start > Programs > GFI FaxMaker > GFI FaxMaker Configuration Wizard.

1. Click Next on the welcome screen.
2. The GFI FaxMaker Client and other Web Services API applications connect to GFI FaxMaker over HTTP port 8555. If this port is not open, click OK to have GFI FaxMaker automatically open these ports. You can also open these ports manually. [For more information refer to Web Services API port.](#)

NOTE

When GFI FaxMaker is installed on the Microsoft® Exchange server, skip to the next step.



Setting up the sending options

1. When GFI FaxMaker is not installed on the same machine running Microsoft Exchange, configure the mail server options in “How to forward faxes and SMSs to GFI FaxMaker” (shown above).

Option	Description
Faxes and SMS will be forwarded directly to this machine via SMTP email, via APIs or when using the GFI FaxMaker Client.	<p>Select this option when using any of the following methods to send faxes:</p> <ul style="list-style-type: none"> • GFI FaxMaker Client • Web client • TextAPI, XMLAPI or Web Services API • Email such that your mail server is configured to forward all faxes and SMSs to GFI FaxMaker via SMTP. For more information refer to Mail server configuration.

NOTE

Faxes & SMS cannot be sent via an SMTP mail server when GFI FaxMaker is installed on Windows 10, 8 or 7. [For more information refer to Installing GFI FaxMaker on Windows 10, 8 or 7.](#)

Option	Description
GFI FaxMaker will download faxes and SMSs from a POP3 mailbox	<p>Select option if GFI FaxMaker downloads fax/SMS from a <i>dedicated</i> POP3 mailbox. For more information refer to POP3 mailbox.</p> <p>Specify the details of the dedicated POP3 mailbox.</p> <p>IMPORTANT: Ensure that there are <i>no emails in the mailbox</i> and that it is dedicated to GFI FaxMaker only. Any <i>emails in the mailbox</i> are <i>downloaded</i> by GFI FaxMaker and permanently <i>deleted</i>.</p>

Click Next to continue.

GFI FaxMaker Configuration Wizard

Set-up receiving options
Configure mail server where GFI FaxMaker will send received faxes and transmission reports

Please specify the name or the IP address of the mail server to which GFI FaxMaker will upload received faxes and transmission reports. Typically this is the Account and password: your organization.

Mail server name or IP address:

Use Secure Connection
 SSL TLS

Use SMTP Authentication

Secure Password Authentication

< Back Next > Cancel Help

The wizard will prompt you for a mail server name

1. Specify mail server details where GFI FaxMaker forwards received emails.

Option	Description
Mail server name or IP address	Enter the name or IP address of the mail server where to upload received faxes.
Use Secure Connection	Choose this option when the mail server requires a secure connection. Choose the type of encryption required SSL or TLS.
Use SMTP Authentication	Instructs GFI FaxMaker to connect to the mail server using specific user credentials. Enter credentials in the Account and password text boxes. Select Secure Password Authentication if required by the mail server.

Click Next to continue.

1. Specify the Country code of the country where the fax lines are connected. This is used by GFI FaxMaker to determine the appropriate number to dial (for example, removes the country code for faxes within the same country). Click Next.
2. Select the Fax services option etherFAX. The etherFAX option will not require any hardware, just an internet connection. GFI FaxMaker will send faxes by connecting securely to cloud etherFAX servers.



GFI FaxMaker Configuration Wizard

Choose Your Fax Hardware
Which type of fax hardware do you have installed on your computer?

GFI

Brooktrout by Dialogic
Choose this option if you have one or more Brooktrout boards or SR140.

ISDN / CAPI devices
Choose this option if you have a CAPI 2.0 interface device.
TE-SYSTEMS XCAPI Fax over IP

Fax modems
Choose this option if you want to detect all the fax modems attached to your computer.

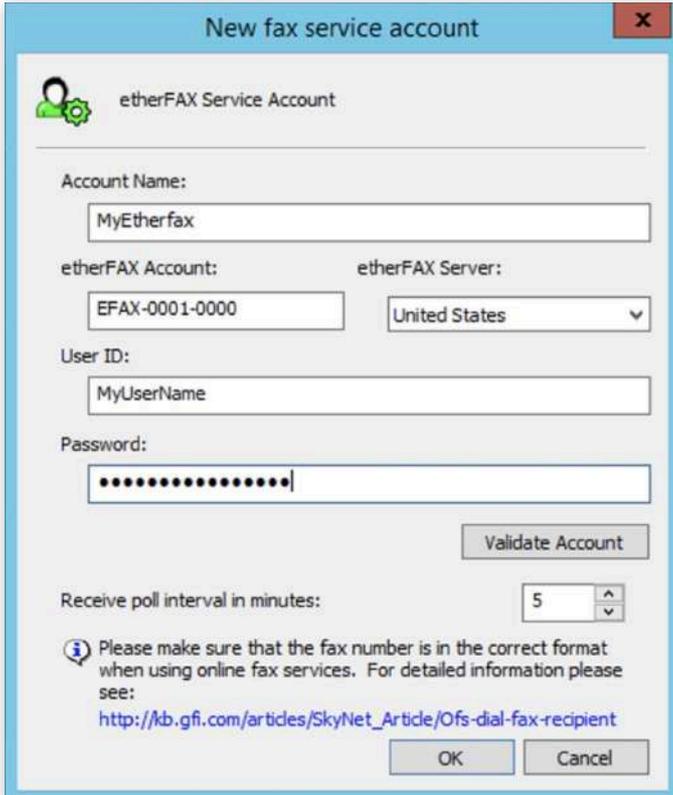
Fax services
etherFAX

Back Next Cancel Help

Fax Hardware selection screen.

Click Next.

3. Enter the Fax services etherFAX account credentials in the screen that follows.
 - a) If you have not created one yet, please follow the [steps above](#).



New fax service account

etherFAX Service Account

Account Name:
MyEtherfax

etherFAX Account: EFAx-0001-0000 etherFAX Server: United States

User ID:
MyUserName

Password:
.....

Validate Account

Receive poll interval in minutes: 5

Please make sure that the fax number is in the correct format when using online fax services. For detailed information please see:
http://kb.gfi.com/articles/SkyNet_Article/Ofs-dial-fax-recipient

OK Cancel

EtherFAX connectivity configuration screen

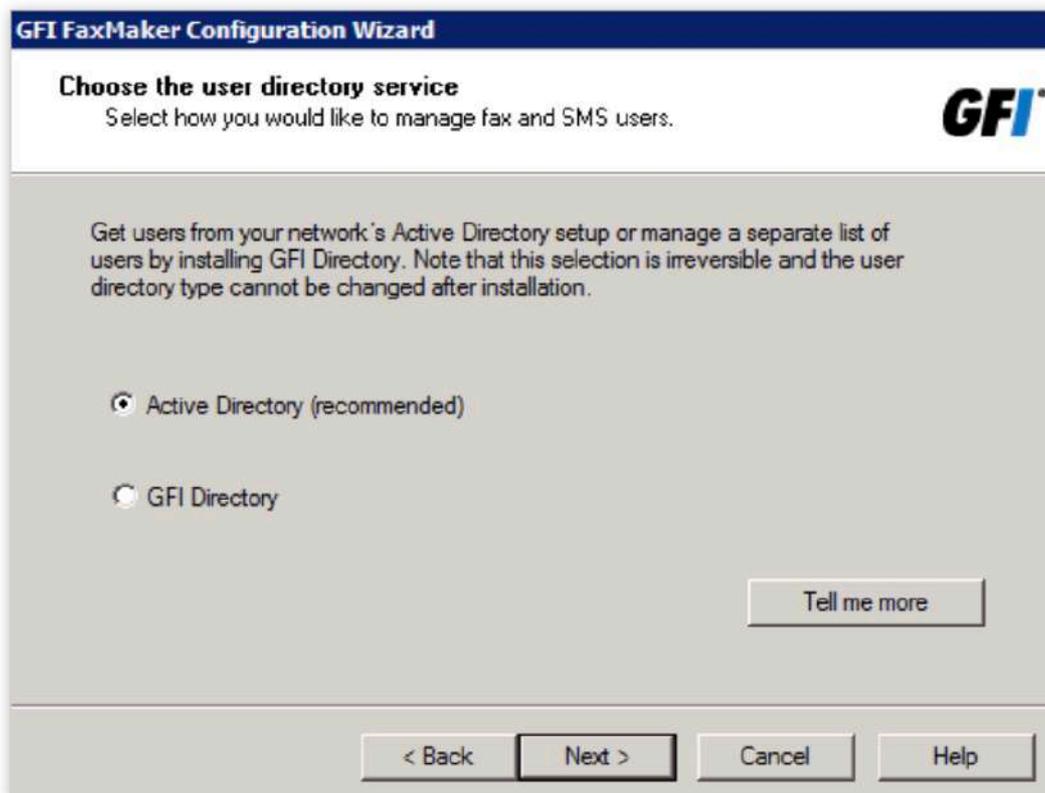
NOTE

If you want to connect but not use etherFAX (using SR140, XCAPi, etc) [click here](#).

In the email sent to you after your GFI FaxMaker trial signup, you will find trial licenses for both SR140 and XCAPi Fax over IP solutions that you can connect to your supported FoIP-enabled PBX.

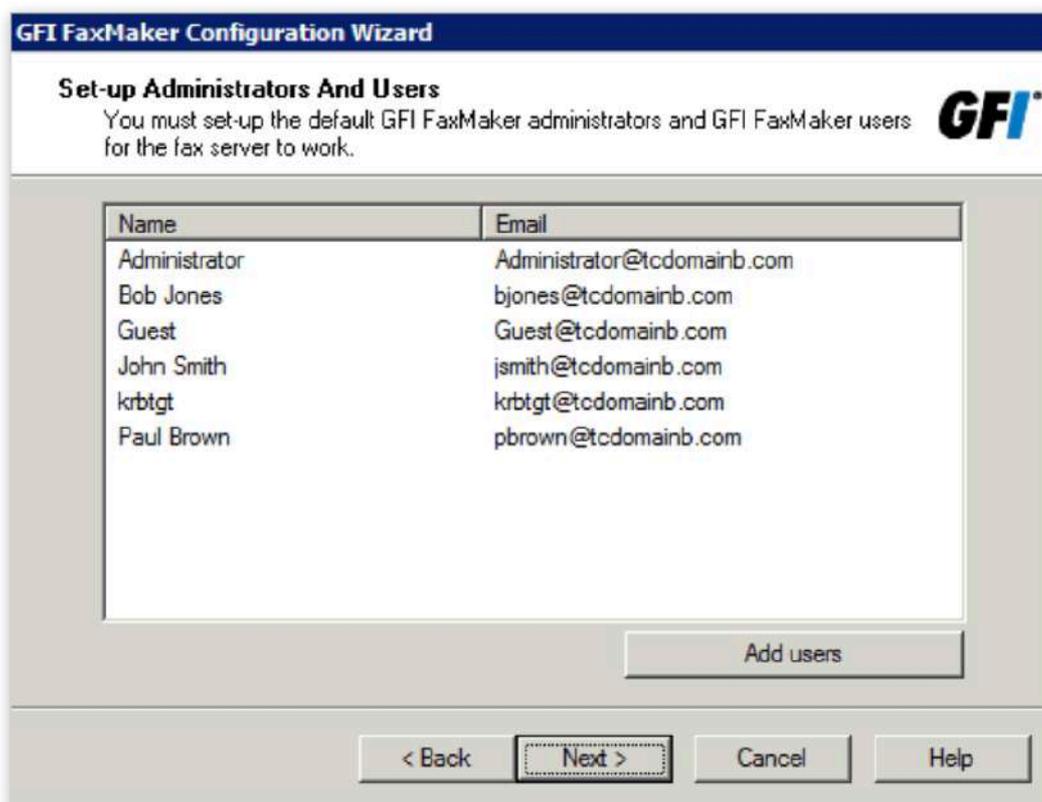
Click OK to continue.

1. Set up your fax lines in GFI FaxMaker. Click Configure lines... to launch the “Add fax line” tool. Use this tool to add your fax lines. [For more information refer to Adding new fax lines](#).



Choosing a user directory service

1. When installing GFI FaxMaker for the first time on a server that is part of an Active Directory environment, choose the user directory service to use. Choose Active Directory to add users from Active Directory, or GFI Directory to install and manage users in GFI Directory. To help you choose, refer to [Choosing a user directory service](#). If GFI FaxMaker is NOT installed in an Active Directory environment, GFI Directory must be used and is automatically installed by the Configuration Wizard.
2. If Active Directory is not found or if GFI Directory is chosen and installed the first time, the wizard prompts you to create the default administrator in the GFI Directory. This user is added to GFI FaxMaker, set as an administrator, and set as the default fax/SMS router. Key in the user details, and click Next.



Specifying users

1. Specify the GFI FaxMaker users and administrators, depending on the user directory environment:

Environment	Description
Active Directory	<p>GFI FaxMaker connects to Active Directory to enable you to choose users. If no fax administrators are configured, add the administrators from the “Select Users or Groups” dialog and click OK.</p> <p>After adding administrators, you may click Add users to add fax users, or click Next to proceed.</p>
GFI Directory	<p>When GFI Directory is installed the first time, the user specified in step 8 is automatically set as an administrator. Optionally you may click Add users to add more fax users. Use the Import Users tool to add users from GFI Directory or Windows users. For more information refer to Importing users to GFI FaxMaker.</p> <p>If the GFI Directory was already installed before GFI FaxMaker was installed, simply select “Add Users” and input the Administrators and Users to add to GFI FaxMaker using the “Import Users” tool.</p> <ol style="list-style-type: none">1. The Installation Wizard will now test the mail server settings. Click Test to send a test email to the configured fax administrators. Click Next to continue.

NOTE

If the test fails, an error condition is displayed. Use the error to troubleshoot and resolve issues. [For more information refer to Email2FaxGateway test fails.](#)

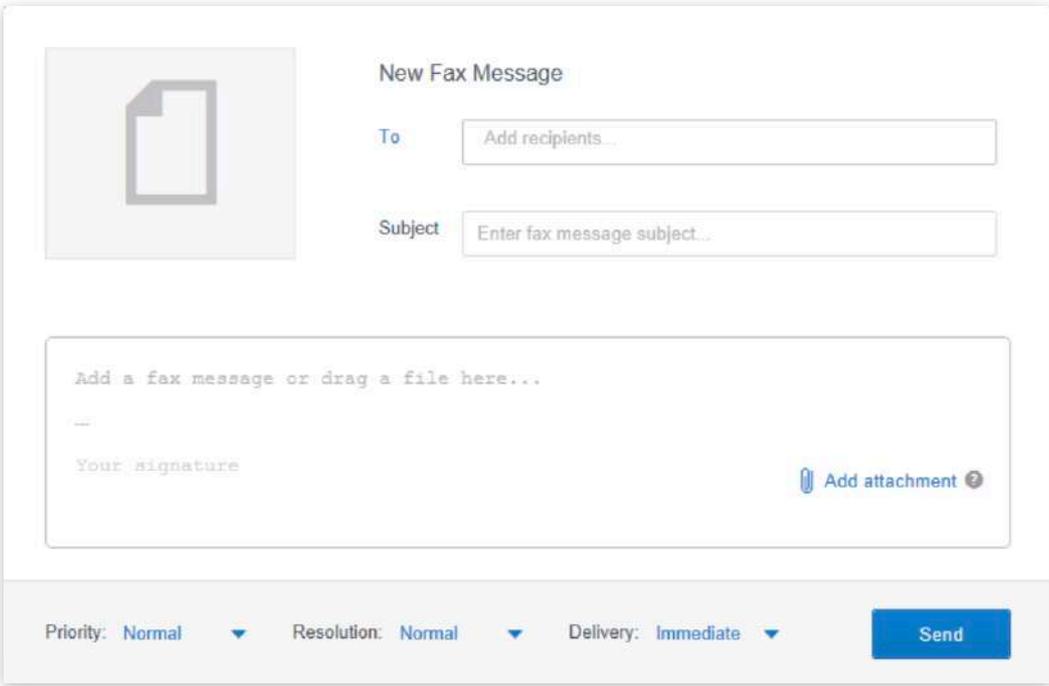
1. GFI FaxMaker now starts the services. Click Next to continue.
2. Click Finish.

Sending a Fax

Log into the GFI FaxMaker Console as an administrator via any web browser such as Microsoft Edge, Internet Explorer or Google Chrome:

http://<GFI FaxMaker host name or IP>/FaxMaker

Click the Client tab. From the left pane, click Compose under “Fax”.



Sending a fax using the GFI FaxMaker web client

To send a fax, fill in the fax message form as follows:

1. Add a recipient by entering the full fax number including the country and area codes.

Example 1: When sending a fax to a German fax number **0228910555**, use **+49228910555**.

Where:

- + is the international dial prefix.
- 49 is the country code.
- 228 is the area code.
- 910555 is the fax number.

Example 2: Sending a fax to a USA number from Canada, with area code 919, and number 555-1212. In this case, use 19195551212 where:

- 1 is the country code.
- 919 is the area code.
- 5551212 is the fax number.

2. Enter a Subject.
3. Add an Attachment, a PDF or JPEG image for example.
4. Click on Send.

Congratulations! This completes the basic setup of GFI FaxMaker and the sending of your first fax. To let other users test out sending, ensure they have the URL of the web client from the above step, and that they use their Active Directory or GFI Directory password. [More information can be found here.](#)

Receive a Fax

The simple installation described above assumed we were not working with a Mail server. To receive faxes, an inbound fax will need to be routed to a folder on the GFI FaxMaker machine.

This can be easily configured from the line settings, "Backup2Folder", [using these instructions](#). However once in production this will not be required as faxes will automatically be routed via email with attachments using the other architectures described in the [Installation Overview](#).

In order to receive a fax you will also need a fax Direct Inward Dial (DID) number connected to your etherFAX account. This can be requested using the following steps.

1. Login to your [etherFAX client portal](#).
2. Go to Assigned DID's, Click Add DID button
3. Select the number type "toll" & complete the requested information on the form
4. Select your regional information, click the Add item button
5. Select and complete the regional and area code selection details.
6. Enter "1" for the quantity of inbound DID's, click Add to request
7. Check I agree, input your initials, and submit a request.

NOTE: GFI will not charge for a DID that is used and set up during trial

8. You will receive an email from etherFAX acknowledging the request, and another with your DID, once create.

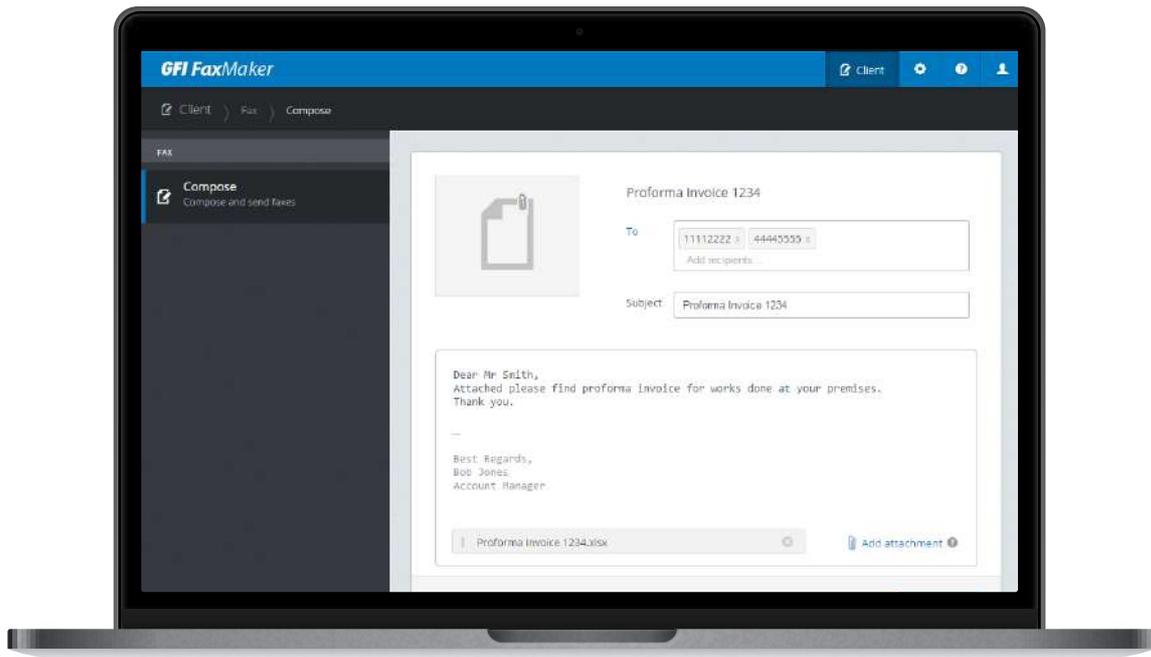
(If you have difficulty with these steps, please contact GFI: sales@gfi.com)

NOTE: There may not be a fax number in your exact region available for your trial. However, regional numbers will be available once you set up your paid account.

Once completed you can send a fax from your existing solution to your new DID and it should then route to the folder set up in your Backup2Folder location. You can also configure fax notifications from the email-to-fax gateway to inform you when it has arrived.

For a full list of GFI offices/contact details worldwide, please visit: www.gfi.com/contact-us

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