



# Delivery Manager

## Admin Guide

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## **Introduction**

ReplixFax Delivery Manager is a Windows service that polls for newly received and sent faxes, captures fax information and routes them to a file system. Optionally, the fax can be printed to a network printer.

Multiple incoming fax numbers (ReplixFax users) can be polled. Each fax file can be named and placed into a folder based on available fax information such as job id, sender fax number, time received, TSI, etc.

This documentation will guide you through the setup and operation of the ReplixFax Delivery Manager application.

## **Installation Overview**

In order for the ReplixFax Delivery Manager to install properly, the following prerequisites must be met:

- Supported Operating Systems: Microsoft Windows 2016, 2019, and 2022
- User has Windows administration privileges
- Microsoft Dot Net Framework 4.8 is installed on the system
- TLS 1.2 is enabled on the system

To start the installation, run the setup.exe application. Accept the default installation options.

The installation creates a Windows service “Replix Fax Delivery Manager” which is set to Automatic startup.


Do not start the service until you have configured the Service using the Configurator Application.

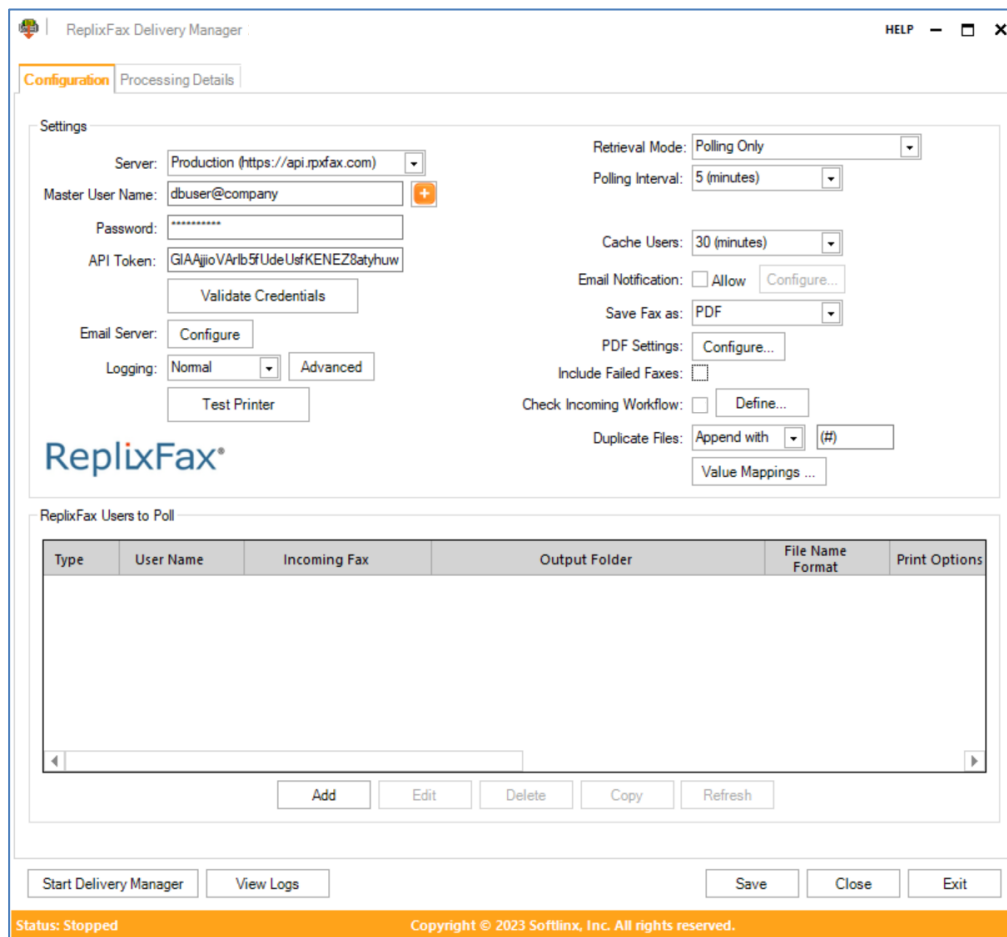
The default logon account for the Windows service is the Local System Account. If you need to change this to a different user, then that user must have local administrative permissions and have access to the internet.

# Configuring the ReplixFax Delivery Manager

The ReplixFax Delivery Manager will poll the ReplixFax Cloud Service for newly arrived faxes. The fax images will be retrieved over a secure connection to the ReplixFax Cloud Service and stored on a locally accessible folder.


## Start the Configurator

The Configurator can be accessed by clicking on the  icon in the desktop tray. "Right mouse click" the icon and then select the configure menu item. The main screen of the Configurator will appear:



## Using the Configurator

In order for the Delivery Manager to work correctly, master user credentials must be set and the PC running the Delivery Manager must be registered in the Cloud Fax service. Take the following steps to set up the Delivery Manager:

- **Select the Server** - Select either the production cloud service or the test cloud service. Softlinx support will provide instructions as to which server you should use.
- **Enter valid master user credentials** - The Master User Name should be a valid ReplixFax user. If the Delivery Manager will be used to poll for multiple fax numbers (ReplixFax users), then either the master user must have the “View All Faxes” and “Manage Users, Departments, Contacts” API permission or additional users' credentials must be specified by using the  button. If the master user does not have the API permissions, then only faxes belonging to that user can be retrieved by the Delivery Manager. Obtain the appropriate user credentials from your administrator.
- **API Token** – The API token is only required if auxiliary metadata from OCR and triage will be used in the folder/filename or in the optional metadata file. The API token can be generated by using the portal.
- **Validate Credentials** - After entering the username and password, press the “Validate Credentials” button to confirm that the user credentials are correct and the user has the appropriate permission. If a server license is not set for this PC, you will see a message indicating this and you must provide Softlinx support with the unique key associated with the PC. The key is automatically copied into your clipboard. Paste this string into an email and send it to [help@softlinx.com](mailto:help@softlinx.com). Softlinx support will use this key to enable the Delivery Manager to run on this PC.
- **Email Server** – The delivery manager can be configured to send emails when a fax is received or when there are application errors. An email server must be configured in order for emails to be sent.
- **Logging** - The three options for logging are normal, high or debug. Typically, the Delivery Manager should be run with normal logging. High logging should only be selected if there is an issue and it is being actively investigated. The debug logging level should only be used if instructed by Softlinx support.
- **Advanced Logging** - Advanced logging supports sending an email message when there is a severe error related to user credentials or licensing. Emails will be sent each hour until the problem is resolved. Additionally, severe errors can be logged to the Windows Event Viewer to be polled by SNMP applications.
- **Test Printer** - Used to verify that a printer can be accessed by an application on the host server. This feature should only be used when instructed by Softlinx support.
- **Retrieval Mode** - The Delivery Manager can poll for new faxes or new fax information can be pushed (URL Notify) to the Delivery Manager as it is received. If faxes are being pushed via URL Notify, then the Softlinx Portal needs to be used to configure URL Notify. The URL set in the portal needs to match exactly the URL set in the Delivery Manager.
  - Note: To test that the Delivery Manager is listening on a specific URL, open a browser on a different PC and enter the Delivery Manager URL into the browser. If the connection is working, the following should appear in the browser:

Delivery Manager on <ServerName> Version X.X.X  
M/D/YYYY H:MM:SS

- **Polling Interval** - The polling interval is the number of minutes at which the Delivery Manager will poll for new faxes. If the retrieval method is polling only, then the minimum polling interval is 5 minutes. If the retrieval method is URL Notify with polling, then the minimum polling interval is 1 hour. When URL Notify is enabled, polling is used just in case there is an issue with the receipt of the push information and therefore does not need to occur frequently.
- **Cache Users** – Enable the user cache if email notification for received faxes will be used or if project codes for received faxes need to be used in the folder/filename or metadata file.
- **Email Notification** – If email notification for received faxes will be used, then select the “Allow” check box. The content of the email message can be configured by pressing the “Configure” button. Fax metadata can be placed in the email message. Select the field, position the cursor where the field should be inserted and then press the “Add to Subject” or “Add to Body” button.
- **Select Output File Format** - The Fax images can be stored as PDF or TIFF. If PDF is selected, then one PDF file will be created per fax. If TIFF is selected, then either one TIFF file can be created per Fax or the TIFF file can be split into individual page TIFF files. See the File Naming Scenarios section below for more details.
- **PDF Settings** – If the output file format is PDF, then the Delivery Manager can optionally add a sticky note comment to the PDF or embed text in the PDF. To configure the annotation or embedded text, then select the “Configure” button.

If an annotation is to be added, then the Title and Comment is required. Three fax attributes can be added to the comment, status, date time of the fax, and fax id.

If text is to be embedded into the fax, the same three attributes can set in the text. Additionally, the color, font, style, and position can be specified for the text. The Fax image is not reduced, so the embedded text may overlay some fax text.

If a PDF annotation or embedded text is desired, then each needs to be enabled when specifying the user to poll.



**Include Failed Faxes** - If "Include Failed Faxes" is checked, then faxes that did not get sent completely or faxes that were only partially received will be returned by the Delivery Manager.

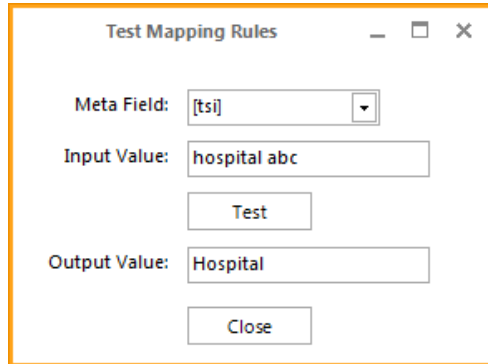
- **Check Incoming Workflow** - Retrieve faxes with or without a specific workflow status. This typically is only applicable for incoming faxes where barcode reading or OCR is enabled.
- **Duplicate Files** - If Fax is downloaded and there is already a file with the same name, then the new file name will be prepended or appended with a counter. The format of the counter must contain "#", which is replaced with an increasing counter value.
- **Value Mappings** - Use the Mapping dialog to map fax status and fax type to static text that can be used in the filename or folder path. For example, if [status] is part of the folder path, then faxes that were received would be placed in the folder called "received". Faxes that were not completely received, would be put in a folder called "receiveFailed". You can also create rules based on non-static metadata.

- **Conditional Rules** - If you need to group faxes based on data from dynamic metadata like TSI, then you can add condition rules. When creating a rule, pick the metadata field, the operator (equal, not equal, or like) and the pattern. Use "%" to match any number of characters and "\_" to match a single character. If the value in the fax metadata field matches the rule, then the action in the rule is executed. The action can be:
  - **Set to value** – Sets the value of the metadata field to a static value.
  - **Use regular expression** – Perform regular expression match on the metadata value and replace with a static value.
  - **Replace with key** – Use the value of a different metadata field.

Matches are case sensitive by default. Check "Ignore Case" to match regardless of case.

See Value Map Conditional Rule Examples section for different conditional rule use cases.

- Testing Conditional Rules - To see if your rules result in the desired behavior, press the "Test" button. Select the metadata field you want to simulate. Enter the input value which represents what is found in the fax. Press "Test". The Output value is the result of processing the rules.



The screenshot shows a window titled "Test Mapping Rules" with standard window controls (minimize, maximize, close). Inside the window, there are four main sections:

- Meta Field:** A dropdown menu currently showing "[tsi]".
- Input Value:** A text input field containing the text "hospital abc".
- Test:** A rectangular button labeled "Test".
- Output Value:** A text input field containing the text "Hospital".
- Close:** A rectangular button labeled "Close".

- **Add ReplixFax Users to poll** - Press the “Add” button and the Add User Dialog will appear:

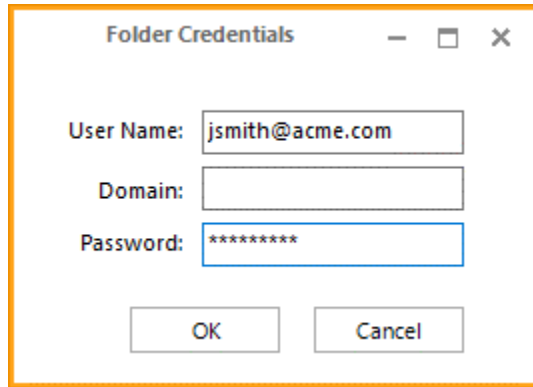
The screenshot shows a dialog box titled "Add User to Poll" with the following fields and options:

- Polling Type:** Radio buttons for Received (selected), Sent, and Both.
- User Name:** A dropdown menu.
- Output Folder:** A text field with a "Browse..." button and a "Folder Credentials ..." button.
- Time Zone:** A dropdown menu set to "Local".
- File Name Format:** A text field with a help icon.
- Create Meta File:** An unchecked checkbox.
- Custom Format:** A text area with a help icon.
- Meta File Extension:** A text field.
- Add PDF Text:** An unchecked checkbox.
- Add PDF Annotation:** An unchecked checkbox.
- Use Mappings:** A checked checkbox.
- Print Options:** A dropdown menu set to "Don't Print".
- Printer:** A dropdown menu.
- Email Notification:** An unchecked checkbox with the text "(Inbound Faxes Only)".
- Receive Success Email:** An unchecked checkbox with an "Override" label and a text field.
- Receive Failed Email:** An unchecked checkbox with an "Override" label and a text field.
- Delete After Email:** An unchecked checkbox.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

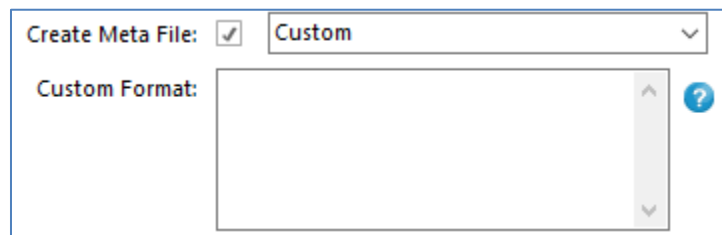
For each user, specify the following information:

- **Select the type of fax to be polled.** Sent and/or Received faxes can be polled and retrieved. Only successfully sent or received faxes will be retrieved. Failed faxes will not be retrieved.
- **Specify a valid user.** Select from the list. If the Master User does not have sufficient privileges, then only the master user will be in the list.
- **Specify the output folder.** When fax images are retrieved, they are put into a local or remote folder. The name of the folder can be static or dynamic based on fax metadata. See the Folder and File Naming Scenarios section for examples of how to configure the output folder. Meta placeholders are replaced with real fax metadata. To access these placeholders, put the cursor on the text field and then right-click. Select a value. The placeholder will be added to the value. (\* If using auxiliary metadata, see note below.)

- **Folder Credentials.** If the output folder requires a password for write access, you can specify credentials by selecting the “Folder Credentials” button. You will be prompted with a dialog to enter the appropriate credentials.

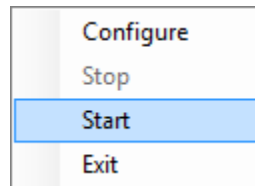



- **Time Zone.** This is the time zone used when/if the fax’s creation date is part of the fax file or metadata file.
- **Specify the filename format.** The name should not be static, but it must be based on fax metadata. To set the placeholder values, follow the previous instructions for output folder. (\* If using auxiliary metadata, see note below.)
- **Optionally create a meta value file.** If selected, select the type of metadata file to create: XML, JSON, name/value, or custom. A metadata file will be created in the same folder where the fax file is created with the same name as the fax file except with the different extension. The default file extension is "meta", but can be changed by entering the extension in the meta extension field.
  - If custom is selected, then the Custom Format field will be editable. Right mouse click in this field to see the list of metadata fields available to include in the file. Static text can also be added. The static text and variable metadata will be added to the meta file. Add "\n" to the Custom Format field where new line characters are required.




- **Optionally set Meta File Extension.** If a metafile is being created the default extension is "meta". To change this, enter the desired value in the Meta File Extension field.
- **Optionally annotate the PDF.** If selected, a comment annotation will be added to the PDF as defined in the PDF settings dialog. If this is enabled and the PDF settings do not have the correct information set, the PDF will NOT be created.
- **Optionally embed text in the PDF.** If selected, text will be embedded into the PDF. The text is defined in the PDF settings dialog. If this is enabled and the

- PDF settings do not have the correct information set, the PDF will NOT be created.
- **Optionally use the mapping rules.** If selected, the static and conditional mapping rules will be used when processing faxes for this user.
- **Select a Print Option.** Optionally, a fax can be printed. Select whether sent and/or received faxes should be printed.
- **Select a printer.** If a fax should be printed, then select an installed printer to use.
- **Enable email notifications if desired.** If an email server is configured then email can be sent to the owner for inbound faxes. The user's email will be used by default. If the email address for successfully received or incomplete faxes needs to be different, then override the appropriate setting.
- **Press Ok** when done Select a printer. If a fax should be printed, then select an installed printer to use.
- **Note:** Auxiliary metadata. To use auxiliary metadata from OCR/triage, add "{dm\_", then the name of the field (or "doctype"), followed by "}". For example:
  - To add the document type, add "{dm\_doctype}"
  - To add a field named "lastname", add "{dm\_lastname}"
- **Save your changes.** After making changes, press the "Save" button at the bottom right of the window.
- **Starting/Stopping the Delivery Manager.** Click the "Start Delivery Manager" to start the Delivery Manager Windows service. If the service is already running, then the button's text will become "Stop Delivery Manager".
- **Viewing Log Files.** The Delivery Manger will always log errors. It can optionally log informational messages. Both types of messages are written to the same file. Select the "View Logs" button to open a dialog that will show the current log files. The Delivery Manger will roll over the current log file after it reaches a certain size. It will only keep a certain number of files. You can open each of the log files by selecting the log and pressing the "View" button.
- **Start the Delivery Manager.** Once the configuration is saved, start the Delivery Manager Service. Either select the "Start Delivery Manager" button or right mouse click




the  icon and then select the "start" menu item. The status shown on the bottom right corner of the configurator should change from "Stopped" to "Running" if the service started successfully.

## Managing the Delivery Manager Service

- Right-click the  icon to see the available options. Select "Configure" to display the Delivery Manager Configurator.
- Select "Stop" or "Start" to stop or start the Windows service.

- *Note: If the Delivery Manager Service is running, then the "Start" menu option will be disabled.*
- Select "Exit" to exit the Delivery Manager Configurator.
- *Note: Closing the Delivery Manager Configurator dialog does not terminate the application, but it is still running and in the system tray. Exiting the configurator, does NOT stop the Delivery Manager Windows service.*

If the Delivery Manager Windows Service is running, the desktop tray icon will change and have a green arrow. 

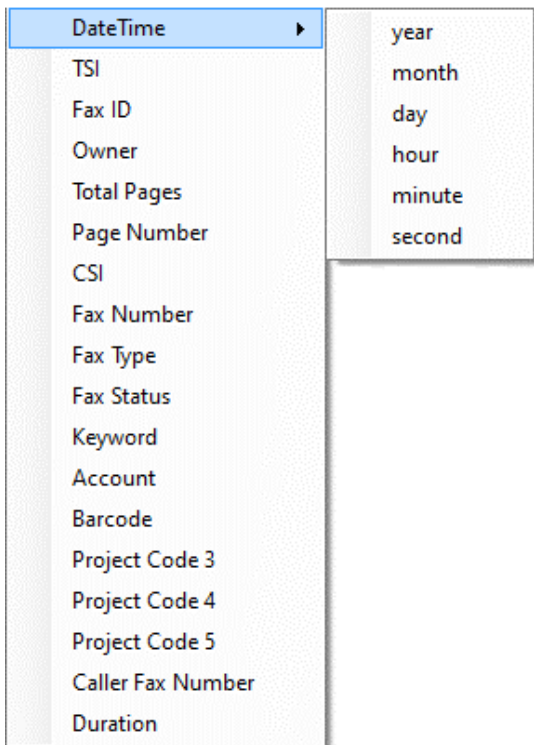
You can also use the Stop/Start Delivery Manager button on the configurator.

## Folder and File Naming Scenarios

As described in the previous sections, the location of the faxes and the name of the fax files are dynamic. Metadata related to the fax can be included in the folder path and/or file name. This is accomplished with placeholders.

If the folder is remote, then a UNC path can be used (ex: [\\repository\faxes](#)). The service account that runs the Delivery Manager must have write access to the remote folder.

- To select a placeholder value that will be substituted for fax metadata, put the cursor on the field and right-click. A menu should appear:



- Select the placeholder and it will be entered in the text field surrounded by brackets “[ ]”.
- To remove the placeholder, make sure the brackets are deleted along with the placeholder value.

*Note: When the substitution is done, any characters in the Keyword and Account field that is not allowed in a folder path or file name will be removed.*

- If the inbound faxes went through the OCR/Triage process, additional metadata is available to be included in the file or folder name. Since the OCR data can be different for each customer, the OCR placeholders do not appear in the dropdown list.
  - The OCR metadata placeholders are identified by: “{dm\_XXXX}”. The “XXXX” should match the OCR Name specified in the Web Portal when the OCR field is created. For example, if there is an OCR field with the Name “firstname” and the Label of “First” and the OCR Name of “first”, then the placeholder is “{dm\_first}”.
  - The document type can be a placeholder: “{dm\_doctype}”.

- *The ID of the user who completed the triage can also be a placeholder in the filename: “[completed\_by]”.*

Folders and file names can also have static text. You can simply add the text to the text field.

Below are examples of how to set the Output folder and file format for certain common scenarios.

- Organize faxes by user and then type. Store fax file with fax job id and date:

Output Folder: c:/faxes/[owner]/[type]  
File Name Format: [id]\_[yyyy]-[MM]-[dd]-[HH]-[mm]

c:/faxes/jdoe/Sent/1\_2014-03-01-10-33.pdf  
c:/faxes/jdoe/Received/88\_2014-02-01-09-55.pdf

- Organize faxes by day and type. Store fax file with username and jobid.

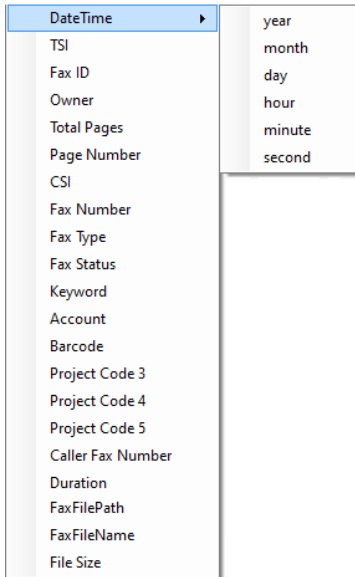
Output Folder: c:/faxes/[yyyy]-[MM]-[dd]/[type]  
File Name Format: [owner]\_[id]

c:/faxes/2014-02-01/Sent/jsmith\_100.pdf  
c:/faxes/2014-02-01/Received/jsmith\_201.pdf



## Fax Metadata Files

- **Custom** – A custom metadata file can contain any static text. You can also specify any of the fax metadata available for fax files and folders. In addition, the fax file name, fax file path and fax file size are available as metadata place holders.



Since the format of the file is custom, it can also be xml or json if the Delivery Manager's standard JSON or XML output does not match your specific needs.

- **JSON** – An example of a JSON metadata file for an inbound fax is as follows:

```
{
  "FaxId": "1163",
  "FaxUserId": "jdoe",
  "FaxStatus": "recvOk",
  "TSI": "Acme",
  "CSI": "rpxtest",
  "ReceivedTime": "2021-01-13T20:02:46Z",
  "PagesReceived": "1",
  "DestFaxNumber": "15555880650",
  "CallerNumber": "+15558955722",
  "ErrorCode": "0",
  "ErrorText": "",
  "NotifyEmail": "false",
  "NotifyAttachFax": "false",
  "Caption": "",
  "ProjectCode": "",
  "ProjectCode2": "",
  "Barcode": "",
  "WorkflowStatus": "",
  "FaxFile": "C:\\faxes\\jdoe\\1163.pdf"}

```

- **XML** – An example of an XML metadata file for an inbound fax is as follows:

```
<?xml version="1.0" encoding="utf-8"?>
<ReceiveFaxMeta xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <FaxId>1163</FaxId>
  <FaxUserId>jdoe</FaxUserId>
  <FaxStatus>recvOk</FaxStatus>
  <TSI>Acme</TSI>
  <CSI>rpctest</CSI>
  <ReceivedTime>2021-01-13T20:02:46Z</ReceivedTime>
  <PagesReceived>1</PagesReceived>
  <DestFaxNumber>15555880650</DestFaxNumber>
  <CallerNumber>+15558955722</CallerNumber>
  <ErrorCode>0</ErrorCode>
  <ErrorText />
  <NotifyEmail>>false</NotifyEmail>
  <NotifyAttachFax>>false</NotifyAttachFax>
  <Caption />
  <ProjectCode />
  <ProjectCode2 />
  <Barcode />
  <WorkflowStatus />
  <FaxFile>c:\faxest\jdoe\1163.pdf</FaxFile>
</ReceiveFaxMeta>
```

- **NameValue** – An example of a name/value metadata file for an inbound fax is as follows:

```
FaxId=1163
FaxStatus=recvOk
CallerNumber=+15558955722
Caption=
CSI=rpctest
DestFaxNumber=15555880650
ErrorCode=0
ErrorText=
FaxUserId=jdoe
NotifyEmail=false
PagesReceived=1
ProjectCode=
ProjectCode2=
ReceivedTime=2021-01-13T20:02:46Z
TSI=Acme
Barcode=
WorkflowStatus=
NotifyAttachFax=false
FaxFile=c:\faxes\jdoe\1163_2021_01_13_15_02(2).pdf
```

## Fax Metadata Placeholders

Shown below is a list of metadata fields with descriptions.

Metadata Field	Placeholder	Inbound/Outbound	Description
DateTime	[yyyy]	both	Year - date/time sent or received
DateTime	[MM]	both	Month - date/time sent or received
DateTime	[dd]	both	Day - date/time sent or received
DateTime	[HH]	both	Hour - date/time sent or received
DateTime	[mm]	both	Minute - date/time sent or received
DateTime	[ss]	both	Second - date/time sent or received
TSI	[tsi]	both	Transmitting Station Identifier
Fax ID	[id]	both	Unique identifier for a fax. An incoming fax can have the same Fax ID as an outgoing fax.
Owner	[owner]	both	Fax user that send fax or fax user that is the recipient of the fax
Total Pages	[pages]	both	Pages sent or pages received.
Page Number	[page_num]	both	The Page Number placeholder will force the TIFF file to be split into individual page TIFF files. This placeholder is not supported in folder name format or if the output file will be in PDF format.
CSI	[csi]	both	Called Station Identifier
Fax Number	[faxnum]	both	For outgoing faxes, it is the fax number sent to. For incoming faxes, it is the fax number the sender used.
Fax Type	[type]	both	Incoming or outgoing. Can be mapped to other text.
Fax Status	[status]	both	Sent, Send Failed, Received, Receive Failed. Can be mapped to other text.

Keyword	[keyword]	outbound	Specified when sending a fax.
Account	[account]	outbound	Specified when sending a fax.
Barcode	[barcode]	inbound	If barcode reading is enabled, then the barcode value can be used as part of the filename. If barcode triage is being used, then multiple barcode values can be used to split the fax document. Splitting is only supported if the output format is PDF, not TIFF.
Project Code 3	[projectcode3]	outbound	Specified when sending a fax.
Project Code 4	[projectcode4]	outbound	Specified when sending a fax.
Project Code 5	[projectcode5]	outbound	Specified when sending a fax.
Caller Fax Number	[ani]	inbound	ANI string for the sender. This value may contain the sender's fax number or may be empty or may contain text such as "Anonymous".
Duration	[duration]	both	Number of seconds of telco transmission time.
Fax File	[faxfile]	both	File name of fax file created by the Delivery Manager. This placeholder is not supported in folder name format.
Fax File Path	[faxpath]	both	The directory that contains the fax file. This placeholder is not supported in folder name format.
Fax File Size	[filesize]	both	The size of the generated fax file in bytes. This placeholder is not supported in folder name format.

## Formatting Metadata

The format of placeholder data can be specified by double-clicking on a placeholder field in the edit box.

Below are examples of how to set the Output folder and file format for certain common scenarios.

- Right justify the fax ID with leading zeros and a width of 8. When the value exceeds 99,999,999 roll-over to 1:

File Name Format: [id:R:8:0:R:]  
 Fax ID of 12345 -> 00012345

- Right justify number of pages and fill the value with "X" if the page count exceeds 999:

File Name Format: [pages:R:3:0:F:X]  
 When page count is 10 -> 010  
 When page count is 1001 -> XXX

## Value Map Conditional Rule Examples

Remove leading plus sign in caller's fax number:

The dialog box is titled "Value Map Conditional Rule". It contains the following fields and controls:

- Original value: [ani] (dropdown), Like (dropdown), +% (text input),  Ignore Case
- Action: use regular expression (dropdown)
- Reg Expr: [^0-9] (text input), Replace With: (text input)
- Buttons: OK, Cancel

If ANI is "anonymous", then use TSI value:

The dialog box is titled "Value Map Conditional Rule". It contains the following fields and controls:

- Original value: [ani] (dropdown), Equals (dropdown), Anonymous (text input),  Ignore Case
- Action: replace with key (dropdown), [tsi] (dropdown)
- Buttons: OK, Cancel

If ANI is empty, then use TSI value:

The dialog box is titled "Value Map Conditional Rule". It contains the following fields and controls:

- Original value: [ani] (dropdown), Equals (dropdown), (empty text input),  Ignore Case
- Action: replace with key (dropdown), [tsi] (dropdown)
- Buttons: OK, Cancel

## Troubleshooting

When experiencing any issues, look in the Delivery Manager log file and the Windows Event viewer.

### Common Errors

Message	Cause
FaultCode=1034 FaultText=Invalid authentication credentials	Invalid username or password
There was no endpoint listening at XXXX that could accept the message. This is often caused by an incorrect address or SOAP action. See InnerException, if present, for more details.	Bad URL, Port, or network issue not allowing connection to server. Try running as administrator.
License expired on cloud server for this PC (MAC address: XXXX). Contact Softlinx support to request an extension to the license for this PC. The MAC identifier has been put in the clipboard. Paste into an email message.	Expired License. Contact Softlinx support.
No license on cloud server for this PC (MAC address: XXXX). License not found Contact Softlinx support and request a license for this PC. The MAC identifier has been put in the clipboard. Paste into an email message."	No License Found. Contact Softlinx support.
Cannot start printer	Printer name cannot start with a dash.

## **Moving to a Different Server**

If you need to move your Delivery Manager to a different server, follow these steps:

- Install the Delivery Manager software on your new server.
- Copy the DeliveryManager.config file from the original server to the new server. This file is located in the Delivery Manager installation folder (ex: C:\Program Files (x86)\Softlinx\DeliveryManager)
- If you have configured the Delivery Manager to send fax notification emails, then you should also copy the email\_template.txt file.
- Start the Delivery Manager Configurator app on the new server.
- Select the “Validate Credentials” button to get the new server unique ID into the clipboard.
- Contact Softlinx customer support to update the license with your server ID.





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