



ReplixFax Fax Loader

Admin Guide

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Table of Contents

INTRODUCTION	1
INSTALLATION OVERVIEW	2
CONFIGURING THE REPLIXFAX FAX LOADER	3
CONFIGURATION STEPS	3
INDIVIDUAL FAX FILE PROCESSING	5
CONFIGURATION STEPS	5
<i>Folder Processing Rules.....</i>	<i>5</i>
<i>Rules to Extract Metadata from a Filename.....</i>	<i>6</i>
<i>Rules to Extract Metadata from a Parent Folder.....</i>	<i>6</i>
<i>Fax Metadata for All Files in a Folder</i>	<i>7</i>
<i>Testing Metadata Rules</i>	<i>7</i>
FCL METADATA FILE PROCESSING.....	8
CONFIGURATION STEPS	8
<i>Folder Processing Rules.....</i>	<i>8</i>
<i>Fax Metadata for All Files in Folder</i>	<i>9</i>
FCL METADATA EXAMPLE	9
SUPPORTED FCL TAGS	10
XML OR JSON METADATA FILE PROCESSING.....	11
CONFIGURATION STEPS	11
<i>Folder Processing Rules.....</i>	<i>11</i>
<i>Fax Metadata for All Files in Folder</i>	<i>11</i>
XML XSD	12
EXAMPLE XML FILE	14
EXAMPLE JSON FILE.....	15
BATCH PROCESSING	16
CONFIGURATION STEPS (FOR CONTROL FILE FORMAT).....	16

BASIC SETTINGS FOR PROCESSING BEHAVIOR	17
CONFIGURING THE BATCH CONTROL FILE FORMAT.....	18
<i>General Options</i>	18
<i>Common Section</i>	19
<i>Fax Section</i>	19
DETAILED BATCH PROCESSING	20
BATCH PROCESSING ERROR HANDLING AND RECOVERY	20

Introduction

ReplixFax® Fax Loader is a Windows Service that polls file system folders for files to send as faxes using the ReplixFax cloud service.

The ReplixFax Fax Loader Windows Service runs in three modes: Individual Files, FCL, or Batches.

- When running in the “Individual File” mode, the Fax Loader monitors folders for files to fax. Each file will be a separate fax. The file name and parent folder can contain fax metadata to be used when sending the fax. Typically, the fax number is the file name.
- When running in FCL mode, the Fax Loader monitors folders for metadata files that reference the actual fax file.
- When running in the “Batch” mode, the Fax Loader monitors the file system for control files that contain information about a batch of files to load as faxes.

Fax requests are submitted securely using the ReplixFax Web Services API.

This documentation will guide you through the setup and operation of the ReplixFax Fax Loader application.

Installation Overview

In order for the ReplixFax Fax Loader to install properly, the following prerequisites must be met:

- Supported Operating Systems: Windows 2019, Windows 2022
- Installer has Windows administration privileges
- Microsoft .Net 4.8 is installed on the system

To start the installation, run the ReplixFax Fax Loader setup.exe application. Accept the default installation options. You may install this program and run it on a separate system other than the ReplixFax server system, or on the same machine.

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

Do not start the service until you have completed all configuration steps.

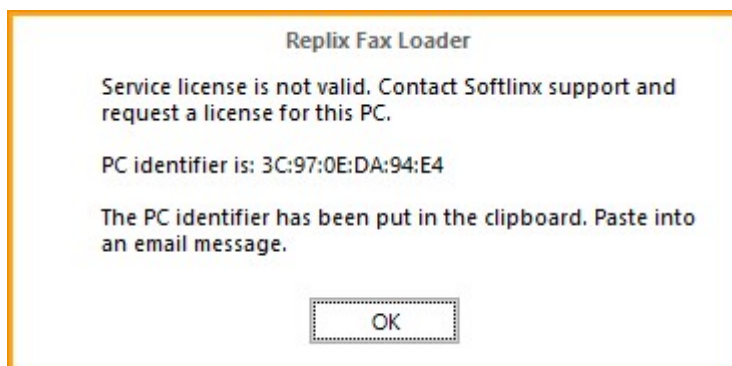
Configuring the ReplixFax Fax Loader

The ReplixFax Fax Loader will poll folders for individual fax files, fax metadata files or batches of faxes. Only one polling mode is supported per Fax Loader installation. The fax files will be sent over a secure connection to the ReplixFax cloud service for processing. Follow the steps below to configure the Fax Loader.

Configuration Steps

1. Start the ReplixFax Fax Loader Configurator Application

2. Select the **Server** to use, either the production cloud service or the test service.
3. Enter credentials into the **Master User Name** and **Password** fields. This name should be in the format: <user>@<company>. These credentials will be provided by Softlinx Technical Support.
 - If the **Master User** has administrative permissions, then the ReplixFax Fax Loader can send out faxes owned by different users.
 - If the user does not have administrative permissions, then, select the **Individual User** check box. It is recommended that a user called “faxloader” be created in the portal and be granted administrative permissions, but not allowed to use the portal.
4. Press the **Validate Credentials** button. If the Fax Loader can contact the server and verify the credentials, it will then check to see if there is a license on the server for the PC running the Fax Loader. If there is no license, the unique PC identifier will be copied to the clipboard. Paste this into an email and sent it to Softlinx Technical Support (email: help@softlinx.com) to have a valid license added to the server.



5. Specify the **Polling Interval** number of seconds, which is the number of seconds between polling attempts.
6. Set the **Logging** to “High” when first configuring the Fax Loader. This will allow the Fax Loader to log detailed information to facilitate troubleshooting. Set it to “Normal” after verification that your configuration is correct.
7. Select **Errors to Event Log** only to help diagnose issues.
8. Select the **Polling Mode**. The Fax Loader can only operate in a single polling mode.
 - The “Individual Files” polling mode indicates that the Fax Loader will look for individual fax files to send. The metadata for the fax is obtained via the filename or preconfigured for all files in a folder.
 - The “FCL” polling mode indicates that the Fax Loader will look for FCL metadata files that reference fax files to send.
 - The “Metadata” polling mode indicates that the Fax Loader will look for metadata files that reference fax files to send. The metadata file can be an xml or json file.
 - The “Batches” polling mode indicates that the Fax Loader will look for control files in the folder(s). The control files will contain metadata for each fax and identify the location of the fax file. This is mode is not typically used.
9. Add a folder to poll. The information collected for each folder will depend on the polling mode. Each folder is polled sequentially in the order listed in the configurator. The following sections details how to configure the folder based on the polling mode.
10. After configuring a folder, you can test your settings to see if the correct files are polled and the correct metadata is found. Select the row in the Folders list and press the “Test” button.

*** Note: Save any pending changes before closing the configuration application.

Individual Fax File Processing

When the ReplixFax Fax Loader is configured for Individual Fax File processing, it will poll a specific folder and look for files to send as faxes.

- Metadata for each fax, such as fax number destination, can be specified in the configuration or can be determined by the fax filename.
- After a fax file is submitted, it can be moved to another folder or deleted.

Configuration Steps

Folder Processing Rules

1. Specify the **Folder to Poll** for fax files.
 - Use the browse button to select the folder.
 - If folders will be created dynamically, then specify a top-level folder and select **Parse Sub Folders**.
2. Determine if fax files should be moved to a different folder or deleted after they are submitted.
 - Select the corresponding radio button “**Move Files When Done**” or “**Delete Files When Done**”.

- If the files will be moved, then specify the **Done Folder**. When files are moved, their extension will be changed to “.success.<fax id>”. For example, report.pdf will become report.pdf.success.12345.
3. Specify the **Fax File Filter** to use for identifying which files in the folder(s) should be sent as faxes. For example, if all files in the folder should be sent as a fax, then use “*” as a filter. If only PDF files should be sent, then specify “*.pdf”. Multiple file filters can be separated by a semicolon “;”.
 4. Select **Continue on Error** if all of the files in a folder should be attempted to be sent regardless of encountering an error. During processing, the fax file will be renamed with a “.processing” extension. If there is an error, then the file will be renamed with an “.error” extension.
 5. Select **Auto Recover** to have the Fax Loader attempt to send *.error files when it polls the folder. If this option is not selected and there are errors sending the fax file to the ReplixFax system, then these *.error files will remain in the folder and must be manually dealt with.

Rules to Extract Metadata from a Filename

1. If the fax file name contains metadata such as fax number, then specify the **Fax File Format**.
 - Put the cursor on the Fax File Format field and right mouse click. A list of metadata that can be included in file names will be displayed.
 - Select a metadata item. Each metadata item in the file **MUST** be separated with a “~” character. For example, if the fax file name includes fax number and account, then the file would look like: “15551231234~myaccount.pdf.”
2. If the fax file name contains characters that should be ignored, then set the **Regular Expression Filename Cleanup** field.
 - For example, if the filename is “15554447890(1).pdf” then set the regular expression to: [\\(.+?\\)](#) in order to ignore the parentheses and any characters within the parentheses.
 - If the filename is “15556727676 XXX-YYY.pdf” where the first set of digits is the fax number and rest of the filename should be ignored, then set the regular expression to be: [\s\(.*\)](#)
 - Press the “Test Regular Expression” button to verify that the regular expression removes the desired characters.
3. If a set of faxes are considered a “batch” then put the unique batch name as part of the file name.
 - All of the faxes will have that as a batch name and can be tracked via the Softlinx web portal.

Rules to Extract Metadata from a Parent Folder

1. The parent folder for the fax files can contain fax metadata. For example, the parent folder name can be the batch name and all of the fax files in the folder will be considered a batch.

Follow the same steps to identify metadata in folder name as above. The only restriction is that the fax number cannot be in the folder name.

Fax Metadata for All Files in a Folder

If the filename does not contain values for the following fax metadata, then these values can be specified and applied to all files in the folder being polled.

1. Specify the **Fax Number** that will be used when sending the fax files in the folder being polled. Typically, the fax number is determined by the filename. When this is the case, this field should be empty. A fax number is required so either the **Fax Filename Format** field must contain '[faxnum]' or this field must contain a fax number.
2. If the faxes should be sent on behalf of a ReplixFax user that is different from the **Master User** specified in the configuration, then select **Use Pseudo User** and pick a user from the list. This option will work only if the Master User has the appropriate privileges to send faxes on behalf of a different user.
3. Specify a **Keyword** and/or an **Account**. The keyword will be visible when searching for faxes using the web portal or desktop client. The account will be visible in usage reports.
4. If you want to use a Softlinx cover page template, then select **Use Cover Page** and select the cover page to use.
 - If you select a pseudo user, then you can optionally select the "Default" cover page. This will cause the default cover page for the user to be used when sending a fax.
 - If a cover page is selected, then additional metadata (**Cover Page Message, Recipient Name, Recipient Company, Recipient Title, and Recipient Voice**) can be specified that will appear on the cover page.

Testing Metadata Rules

Enter a sample filename in the corresponding field and press the "Test" button. A dialog will open with the metadata that was determined based on the specified rules.

FCL Metadata File Processing

When the ReplixFax Fax Loader is configured for FCL File processing, it will poll a specific folder and look for metadata files containing FCL commands.

- Metadata files must contain, at a minimum, a fax number and reference to the actual fax file. Additional fax information is also supported as documented below. Default metadata information can be configured to be applied to all faxes being polled.
- After a fax request is submitted, the fax metadata file and fax files can be moved to another folder or deleted.

Configuration Steps

Folder Processing Rules

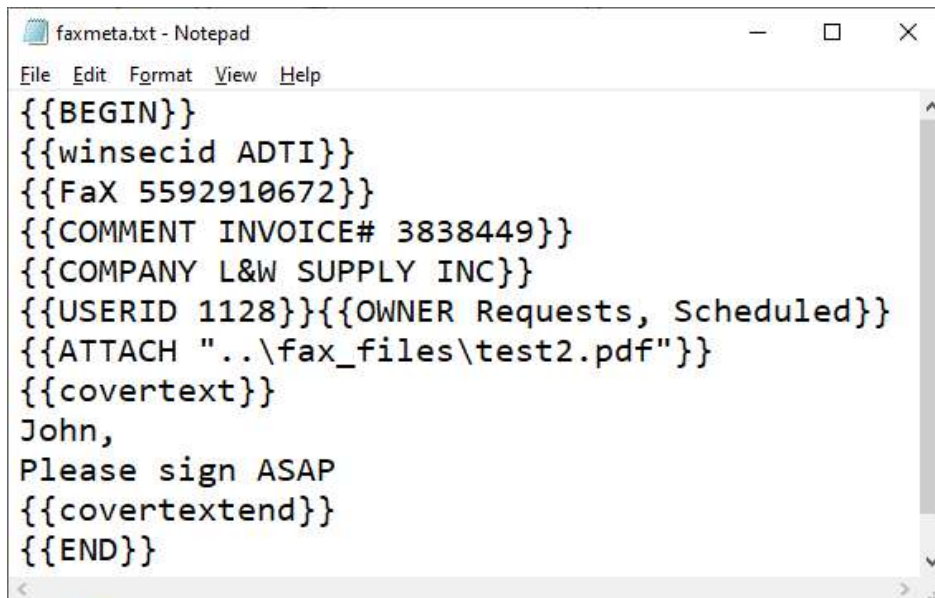
1. Specify the **Folder to Poll** for fax metadata files. Use the browse button to select the folder. If folders will be created dynamically, then specify a top-level folder and select **Parse Sub Folders**.
2. If the folder being polled is protected, then specify the required (read/write) credentials to access the folder.
3. Specify the **Meta Fax File Filter** to use for identifying which files in the folder(s) are metadata files. For example, if all files in the folder are metadata file, then use “*” as a filter. If the folder contains the metadata files and fax files, then specify “*.fcl”. Multiple file filters can be separated by a semicolon “;”.
4. Determine if fax metadata files and fax files should be moved to a different folder or deleted after they are submitted. Select the corresponding radio button “**Move Files When Done**” or “**Delete Files When Done**”. If the files will be moved, then specify the **Done Folder**. When files are moved, their extension will be changed to “.success.<fax id>”. For example, report1.txt will become report1.txt.success.12345.
5. Select **Continue on Error** if all of the files in a folder should be attempted to be sent regardless of encountering an error. During processing, the fax metadata file will be renamed with a “.processing” extension. If there is an error submitting the request to the cloud, then the file will be renamed with an “.error” extension.
6. If there is an issue parsing the FCL file, then the file will be renamed *.error_meta. These files must be manually corrected and renamed before they are processed by the fax loader again.
7. If there is an issue accessing the referenced attachment file in the FCL, then the FCL file will be renamed *.error_attach. These files must be manually corrected and renamed before they are processed by the fax loader again.
8. Select **Auto Recover** to have the Fax Loader attempt to send *.error files when it polls the folder. If this option is not selected and there are errors sending the metadata file to the ReplixFax system, then these *.error files will remain in the folder and must be manually dealt with.

Fax Metadata for All Files in Folder

If the metadata file does not contain values for the following fax metadata, then these values can be specified and applied to all files on the folder being polled.

1. If the faxes should be sent on behalf of a ReplixFax user that is different from the **Master User** specified in the configuration, then select **Use Pseudo User** and pick a user from the list. This option will work only if the Master User has the appropriate privileges to send faxes on behalf of a different user.
2. Specify a **Keyword** and/or an **Account**. The keyword will be visible when searching for faxes using the web portal or desktop client. The account will be visible in usage reports.
3. If you want to use a Softlinx cover page template, then select **Use Cover Page** and select the cover page to use.
 - If you select a pseudo user, then you can optionally select the “Default” cover page. This will cause the default cover page for the user to be used when sending a fax.
 - If a cover page is selected, then you can also specify **Cover Page Message**.

FCL Metadata Example



```
faxmeta.txt - Notepad
File Edit Format View Help
{{BEGIN}}
{{winsecid ADTI}}
{{FaX 5592910672}}
{{COMMENT INVOICE# 3838449}}
{{COMPANY L&W SUPPLY INC}}
{{USERID 1128}}{{OWNER Requests, Scheduled}}
{{ATTACH "..\fax_files\test2.pdf"}}
{{covertext}}
John,
Please sign ASAP
{{covertextend}}
{{END}}
```

Supported FCL Tags

FCL TAG	ReplixFax Attribute	Comments
winsecid	Replixfax userid	
FAX	Fax number	Can have multiple numbers
COMPANY		
USERID		Will override winsecid
ATTACH	attachment	A trailing "DELETE" command will be ignored.
COVER	Coverpage name	NONE = no cover page
BATCH		
COVERTTEXT /COVERTTEXTEND		Only one coverttext
COVERTTEXT N /ENDCOVERTTEXT		N is from 0 to 9 and must be on the same line as the tag.
CSI		
NOCOVER		
NO_COVER		
NOTE		ignored
REM		ignored
USER1-5		Project code 1 -5
Contact	Recipient name	
COMPANY		
TONAME	Recipient name	

***Note: Single BEGIN/END assumed in metadata file

XML or JSON Metadata File Processing

When the ReplixFax Fax Loader is configured for Metadata File processing, it will poll a specific folder and look for xml or json files.

- Metadata files must contain, at a minimum, a fax number and reference to the actual fax file. Additional fax information is also supported as documented below. Default metadata information can be configured to be applied to all faxes being polled.
- After a fax request is submitted, the fax metadata file and fax files can be moved to another folder or deleted.

Configuration Steps

Folder Processing Rules

1. Specify the **Folder to Poll** for fax metadata files. Use the browse button to select the folder. If folders will be created dynamically, then specify a top-level folder and select **Parse Sub Folders**.
2. If the folder being polled is protected, then specify the required (read/write) credentials to access the folder.
3. Specify the **Meta Fax File Filter** to use for identifying which files in the folder(s) are metadata files. The only valid file extensions are “.xml” and “.json”. Multiple file filters can be separated by a semicolon “;”.
4. Determine if fax metadata files and fax files should be moved to a different folder or deleted after they are submitted. Select the corresponding radio button “**Move Files When Done**” or “**Delete Files When Done**”. If the files will be moved, then specify the **Done Folder**. When files are moved, their extension will be changed to “.success.<fax id>”. For example, report1.xml will become report1.xml.success.12345.
5. Select **Continue on Error** if all of the files in a folder should be attempted to be sent regardless of encountering an error. During processing, the fax metadata file will be renamed with a “.processing” extension. If there is an error, then the file will be renamed with an “.error” extension.
6. Select **Auto Recover** to have the Fax Loader attempt to send *.error files when it polls the folder. If this option is not selected and there are errors sending the metadata file to the ReplixFax system, then these *.error files will remain in the folder and must be manually dealt with.

Fax Metadata for All Files in Folder

If the metadata file does not contain values for the following fax metadata, then these values can be specified and applied to all files on the folder being polled.

1. If the faxes should be sent on behalf of a ReplixFax user that is different from the **Master User** specified in the configuration, then select **Use Pseudo User** and pick a user from the list. This

option will work only if the Master User has the appropriate privileges to send faxes on behalf of a different user.

2. Specify a **Keyword** and/or an **Account**. The keyword will be visible when searching for faxes using the web portal or desktop client. The account will be visible in usage reports.
3. If you want to use a Softlinx cover page template, then select **Use Cover Page** and select the cover page to use.
 - a. If you select a pseudo user, then you can optionally select the “Default” cover page. This will cause the default cover page for the user to be used when sending a fax.
 - b. If a cover page is selected, then you can also specify **Cover Page Message**.

XML XSD

```
<xsd:schema xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  xmlns:rpx="http://www.softlinx.com/SendFaxSchema.xsd"
  targetNamespace="http://www.softlinx.com/SendFaxSchema.xsd"
  elementFormDefault="qualified">
  <xsd:element name="FaxData" type="rpx:OutboundFaxDetail"/>

  <xsd:simpleType name="XBoolean">
    <xsd:restriction base="xsd:string">
      <xsd:pattern value="true|false"/>
    </xsd:restriction>
  </xsd:simpleType>

  <xsd:simpleType name="XPositiveInt">
    <xsd:restriction base="xsd:string">
      <xsd:pattern value="[+]?[1-9]\d*" />
    </xsd:restriction>
  </xsd:simpleType>

  <xsd:simpleType name="XNonNegativeInt">
    <xsd:restriction base="xsd:string">
      <xsd:pattern value="[+]?\d+" />
    </xsd:restriction>
  </xsd:simpleType>

  <xsd:complexType name="Recipient">
    <xsd:sequence>
      <xsd:element name="FaxNumber" type="xsd:string"/>
      <xsd:element name="Name" type="xsd:string" minOccurs="0"/>
      <xsd:element name="Company" type="xsd:string" minOccurs="0"/>
      <xsd:element name="Title" type="xsd:string" minOccurs="0"/>
      <xsd:element name="Phone" type="xsd:string" minOccurs="0"/>
    </xsd:sequence>
  </xsd:complexType>
  <xsd:complexType name="OutboundFaxDetail">
    <xsd:sequence>
      <xsd:element name="FaxRecipient" type="rpx:Recipient" maxOccurs="unbounded"/>
      <xsd:element name="Attachment" type="xsd:string" minOccurs="0"
maxOccurs="unbounded"/>
      <xsd:element name="SendAfter" type="xsd:string" minOccurs="0"/>
    </xsd:sequence>
  </xsd:complexType>
</xsd:schema>
```

```
<xsd:element name="CoverPageName" type="xsd:string" minOccurs="0"/>
<xsd:element name="CoverMessage" type="xsd:string" minOccurs="0"/>
<xsd:element name="NotifyEmailAddress" type="xsd:string" minOccurs="0"/>
<xsd:element name="NotifySuccess" type="rpx:XBoolean" minOccurs="0"/>
<xsd:element name="NotifySuccessAttachFax" type="rpx:XBoolean" minOccurs="0"/>
<xsd:element name="NotifyFailed" type="rpx:XBoolean" minOccurs="0"/>
<xsd:element name="NotifyFailedAttachFax" type="rpx:XBoolean" minOccurs="0"/>
<xsd:element name="DeleteAfterSend" type="rpx:XBoolean" minOccurs="0"/>
<xsd:element name="ProjectCode1" type="xsd:string" minOccurs="0"/>
<xsd:element name="ProjectCode2" type="xsd:string" minOccurs="0"/>
<xsd:element name="ProjectCode3" type="xsd:string" minOccurs="0"/>
<xsd:element name="ProjectCode4" type="xsd:string" minOccurs="0"/>
<xsd:element name="ProjectCode5" type="xsd:string" minOccurs="0"/>
<xsd:element name="TSI" type="xsd:string" minOccurs="0"/>
<xsd:element name="FaxUserId" type="xsd:string" minOccurs="0"/>
<xsd:element name="FaxHeader" type="xsd:string" minOccurs="0"/>
<xsd:element name="NotifyUrl" type="xsd:string" minOccurs="0"/>
</xsd:sequence>
</xsd:complexType>

</xsd:schema>
```

Example XML File

```
<?xml version="1.0" encoding="utf-8"?>
<FaxData xmlns="http://www.softlinx.com/SendFaxSchema.xsd">
  <FaxRecipient>
    <FaxNumber>1555123888</FaxNumber>
    <Name>Name1</Name>
    <Company>Company1</Company>
    <Title>Title1</Title>
    <Phone>Phone1</Phone>
  </FaxRecipient>
  <FaxRecipient>
    <FaxNumber>15556335567</FaxNumber>
    <Name>Name2</Name>
    <Company>Company2</Company>
    <Title>Title2</Title>
    <Phone>Phone2</Phone>
  </FaxRecipient>
  <Attachment>fax1.pdf</Attachment>
  <Attachment>fax2.pdf</Attachment>
  <SendAfter>2024-02-09T13:30:45Z</SendAfter>
  <CoverPageName>cover.pdf</CoverPageName>
  <CoverMessage>CoverMessage1</CoverMessage>
  <NotifyEmailAddress>faxloader@softlinx.com</NotifyEmailAddress>
  <NotifySuccess>true</NotifySuccess>
  <NotifySuccessAttachFax>false</NotifySuccessAttachFax>
  <NotifyFailed>true</NotifyFailed>
  <NotifyFailedAttachFax>false</NotifyFailedAttachFax>
  <DeleteAfterSend>false</DeleteAfterSend>
  <ProjectCode1>My Project Code</ProjectCode1>
  <ProjectCode2>ProjectCode21</ProjectCode2>
  <ProjectCode3>ProjectCode31</ProjectCode3>
  <ProjectCode4>ProjectCode41</ProjectCode4>
  <ProjectCode5>ProjectCode51</ProjectCode5>
  <TSI>My TSI1</TSI>
  <FaxUserId>test1</FaxUserId>
  <FaxHeader>FaxHeader1</FaxHeader>
  <NotifyUrl>http://foo.com</NotifyUrl>
</FaxData>
```

Example JSON File

```
{
  "FaxRecipient": [
    {
      "FaxNumber": "1555123888",
      "Name": "Name1",
      "Company": "Company1",
      "Title": "Title1",
      "Phone": "Phone1"
    },
    {
      "FaxNumber": "15556335567",
      "Name": "Name2",
      "Company": "Company2",
      "Title": "Title2",
      "Phone": "Phone2"
    }
  ],
  "Attachment": [
    "c:\\files\\fax1.pdf",
    "fax2.pdf"
  ],
  "SendAfter": "2024-02-09T13:30:45Z",
  "CoverPageName": "cover.pdf",
  "CoverMessage": "CoverMessage1",
  "NotifyEmailAddress": "faxloader@softlinx.com",
  "NotifySuccess": "true",
  "NotifySuccessAttachFax": "false",
  "NotifyFailed": "true",
  "NotifyFailedAttachFax": "false",
  "DeleteAfterSend": "false",
  "ProjectCode1": "My Project Code",
  "ProjectCode2": "ProjectCode21",
  "ProjectCode3": "ProjectCode31",
  "ProjectCode4": "ProjectCode41",
  "ProjectCode5": "ProjectCode51",
  "TSI": "My TSI1",
  "FaxUserId": "test1",
  "FaxHeader": "FaxHeader1",
  "NotifyUrl": "http://foo.com"
}
```

Note: If the fax files are in a different folder than the metadata file, use “\\” to separate paths. For example: c:\\files\\faxfile.pdf

Batch Processing

When the ReplixFax Fax Loader is configured for batch processing, it will poll a specific folder and look for control files. The control file corresponds to a batch fax job.

- The format of the control files is determined by the configuration settings. The control file must contain certain information, including the location of the fax file. Multiple fax files can be listed in the control file.
- After all of the fax files listed in the control file are processed, the control file is moved to a different folder.

Below are the steps to configure how the Fax Loader should process a folder in batch mode. This behavior is stored in a configuration file that contains **name/value** pairs. Since the Fax Loader can support slightly different control file formats, it is necessary to describe the format of the specific control file.

Configuration Steps (for control file format)

Each control file must be in the following format:

```
<key><delimiter><value>
<common section end>
<key><delimiter><value>
<fax section end>
...
<key><delimiter><value>
<fax section end>
```

All control files must have a common section at the top of the file, even if there are no keys in the common section. Common section can contain key/value pairs for ReplixFax user, cover page template name, and batch name. If present, these values will be used when sending ALL of the faxes identified in the control file.

The actual names of the keys are set via the configuration described below. The separator character between the key and value can also be specified. Typically, this will be the equal sign “=”.

Basic Settings for Processing Behavior

Follow the steps below to configure the basic settings for batch processing.

The screenshot shows a dialog box titled "Batch Folder Polling Settings". It contains the following fields and controls:

- Folder To Poll:** A text input field with a "Browse..." button to its right.
- Move Files When Done:** A radio button that is currently selected.
- Delete Files When Done:** An unselected radio button.
- Done Folder:** A text input field with a "Browse..." button to its right.
- Control File Filter:** A text input field.
- Continue On Error:** An unchecked checkbox.
- Auto Recover:** An unchecked checkbox.
- Ignore Fax Number:** A text input field.
- Buttons:** "OK", "Cancel", and "Details..." buttons at the bottom.

1. Specify the **Folder to Poll** for control files. Use the browse button to select the folder.
2. Determine if the control files and local fax files should be moved to a different folder or deleted after they are submitted.
 - Select the corresponding radio button "**Move Files When Done**" or "**Delete Files When Done**".
 - If the files will be moved, then specify the **Done Folder**.
 - If the fax files are not in the same folder as the control file, then the fax files will not be deleted.
3. Specify the **Control File Filter** to use for identifying which files in the folder are the control files. For example, "*.dat".
4. Select **Continue On Error** if the Fax Loader should continue processing other faxes identified in the control file after encountering an error.
 - For example, a control file can list multiple files and one of them is not found in the folder. If this occurs, the Fax Loader can either stop processing the control file or continue.
 - A control file is renamed to "*.working" while it is being processed. If there are any errors during processing of that control file, the filename will remain with the ".working" extension.

5. Select **Auto Recover** if “bad” control files will be reprocessed during subsequent polling cycles. If not selected, then the local administrator must manually address any control files with a “.working” extension.
6. If any fax number should be ignored, then enter the fax number in the **Ignore Fax Number** field.

Once the basic settings are configured, select the “Details” button to configure in the batch control file format.

Configuring the Batch Control File Format

Batch Control File Format

General Options

*Key/Value Delimiter:

*Comment Indicator:

☐ Fax Files Have Full Path

☐ Send From Different Users

Ignore Keys:

Unique Fax Key:

Common Section

Select Which keys will appear in control file

☐ Cover Page Template

☐ Batch Name

☐ From (fax owner)

*Common Section End:

Fax Section

Select Which keys will appear in control file

*Fax Number:

*Fax File:

☐ From (fax owner)

☐ Keyword

☐ Account

☐ Unique Fax ID

*Fax Section End:

☐ Cover Page Message

☐ Recipient Name

☐ Recipient Company

☐ Recipient Title

☐ Recipient Voice

Sample Control File

```
# sample control file automatically generated
@+COMMON
fax_num =
fax_file =
@+END
```

☐ Control File will contain Multiple Faxes

☐ A Fax will contain multiple files

☐ Show sample data

General Options

1. Typically name/value pairs in a control file are delimited by an equal “=” sign. This can be changed by specifying a different **Delimiter**.
2. A control file may contain comments. Use the **Comment Indicator** as the first character on a line in the control file in order for that line to be ignored.
3. If the fax files will not be in the same folder as the control files, then select **Fax Files Have Full Path**.
4. If faxes will be sent on behalf of specific ReplixFax users, then select **Send From Different Users** check box.
 - If this is selected, then the Master User must have appropriate privileges. Also, each fax section or the common section must contain a key/value pair for the ReplixFax user.
 - Enter the key name in the corresponding field.

5. If there are key/value pairs in the control file that should be ignored by the Fax Loader, list them in the **Ignore Keys** field. Separate each key with a semicolon “;”.
6. In order to uniquely identify a fax in a control file, a combination of one of the keys and the fax number can be used.
 - This is helpful during recovery. For example, this is used when the same fax number can occur in a single control file.
 - Enter the key name that will be in the control file in the **Unique Fax Key** field. The value of the corresponding key in the control file along with the fax number is concatenated to make a unique id.

Common Section

1. If Softlinx cover page templates will be used, then select the **Cover Page Template** check box.
 - If this is selected, then a cover page template will be used. Enter the key name in the corresponding field.
2. If the common section will contain a key/value pair for the name of the batch corresponding to this control file, then select the **Batch Name** check box and enter the key name in the corresponding field.
3. If the fax sender key will appear in the common section, select the **From** check box.
4. **Common Section End** is a delimiter that will be on a line and indicates that the common section is done and subsequent lines will contain fax sections.

Fax Section

1. Enter the key for the destination fax number in the **Fax Number** field.
2. Enter the key for the fax file in the **Fax File** field.
 - This key can be occurring multiple times in the fax section if there is more than one fax file for the fax.
 - If the value in the key/value for the fax file contains full path information, the **Fax Files Have Full Path** check box must be selected.
3. If the fax sender key will appear in the fax section, select the **From** check box.
4. Faxes can have a **keyword** or **account** associated with them.
 - These values can be specified in the control file. Select the appropriate check box and enter the key names in the corresponding fields.
5. The **Unique Fax Id** is a key that, if set, will uniquely identify a fax in a control file.
 - This should only be used if the generating application can guarantee that the value in the control file for this field is unique.

6. **Fax Section End** is a delimiter that will be on a line and indicates that the fax section is done and subsequent lines will contain additional fax sections.
7. You may specify additional information (**Cover Page Message, Recipient Name, Recipient Company, Recipient Title, and Recipient Voice**) for the recipient, which will appear on the cover page. Select the appropriate check boxes and enter the key names in the corresponding field.

Detailed Batch Processing

The Fax Loader will poll a fax folder for all control files.

- For each control file, which it finds, it will parse the control file for keys and values representing fax information. The keys are defined in the configuration file. There can be more than one fax defined in a single control file.
- As the control file is being processed, its name is changed to “*.working”.

When a control file is successfully completed, it is deleted along with the corresponding fax files. Optionally, the control, sent file, and fax files can be moved to a different folder and not be deleted. The sent file contains Fax Job IDs, so this file could be used for a fax completion verification process.

When the Fax Loader is done with all of the control files, it will repeat the above steps for the next folder to poll. Once all folders have been polled, it will stop and wait a configured amount of time before polling the folders again.

Batch Processing Error Handling and Recovery

The error recovery mechanism is controlled by the **auto_recover** parameter.

- If auto recovery is enabled, then each control file is appended with “*.working” as it is processed. If there is an error, the control file’s name is unchanged. When the Fax Loader starts its next iteration, all *.working files will be processed again.
- If auto recovery is disabled, then after a control file is processed, if there is an error, the file will be renamed to “*.error”. These error files need to be corrected and then renamed without the “*.error” extension. Then they will be picked up by the Fax Loader on its next iteration.

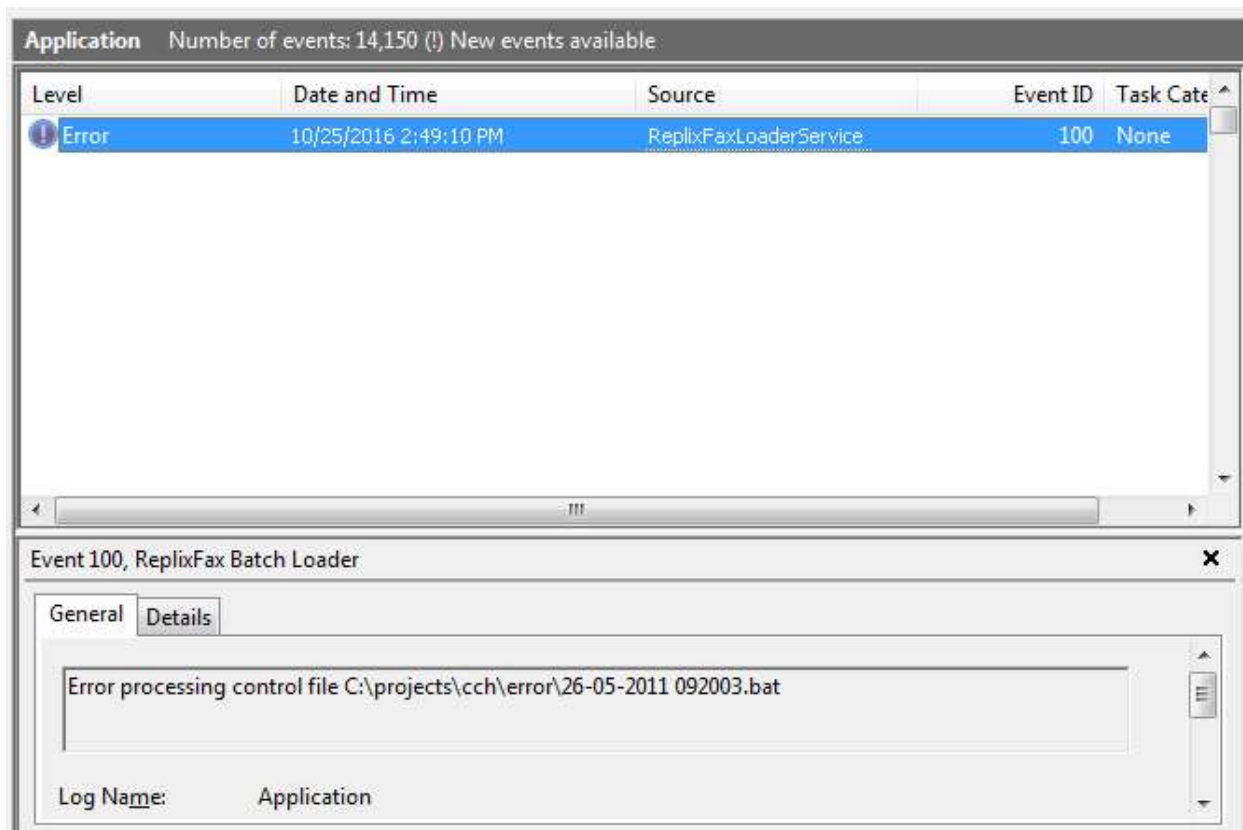
If the configuration setting, **delete_when_done**, is set to false, and there is an issue while moving the control file to the “done” folder, then the control file will be renamed to *.error. An administrator will need to manually address this issue.

After a successful fax request is made to the Softlinx Cloud Service, a *.sent file is created that corresponds to the control file being processed.

- Contained in the *.sent file will be a line for each fax request made. The recipient fax number will be on each line unless the **key_unique_fax_key** or **key_unique_fax_id** parameters are set. Additionally, each line will contain the Fax Job ID (Ex: [FAXID: 123]).
- If an error occurs when processing subsequent faxes from the same control file, this *.sent file is used to ensure duplicate faxes are not sent when the control file is reprocessed.

Logging is sent to the ReplixFaxLoader.log file. This file will contain all errors and may contain send, info and warning messages depending on the **logging_level** parameter.

The Windows Event Log will contain an Application error for every “bad” control file if the **errors_to_event_log** parameter is set to true.



For control file issues, the event ID will be “100”. For configuration or other issues, the event ID will be 200.

A **ReplixFaxLoaderError.log** is also created when there is an error processing a control file. The specific control file with the issue is appended to the file. Note that if auto recovery is enabled and there are errors in a control file, this error file and the log file will grow in size.

On startup of the service, informational messages will be added to the event viewer, such as registry values. If there are errors, these too will be in the event viewer.



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