



# Basic Smart Fax

For Support: (800) 925-1525

Support Hours:

M-F 8:30 am – 9:00 pm

Sat-Sun: 10:00 am – 3:00 pm

[www.crmls.org/support](http://www.crmls.org/support)

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# Introduction

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Smart Fax is a fax management system that allows you to receive and manage faxes electronically. Fax Manager generates a personalized cover sheet that enables your clients to fax documents to you. You also create custom cover sheets to automatically share your client's faxes with members of your office. You can also e-mail documents to your clients and colleagues directly from your Fax Manager inbox.

Follow the steps in these sections to get started.

- “Disabling Pop-up Blockers for Smart Trac” on page 3
- “Accessing Smart Fax” on page 4
- “Creating Your Fax Cover Sheet” on page 7
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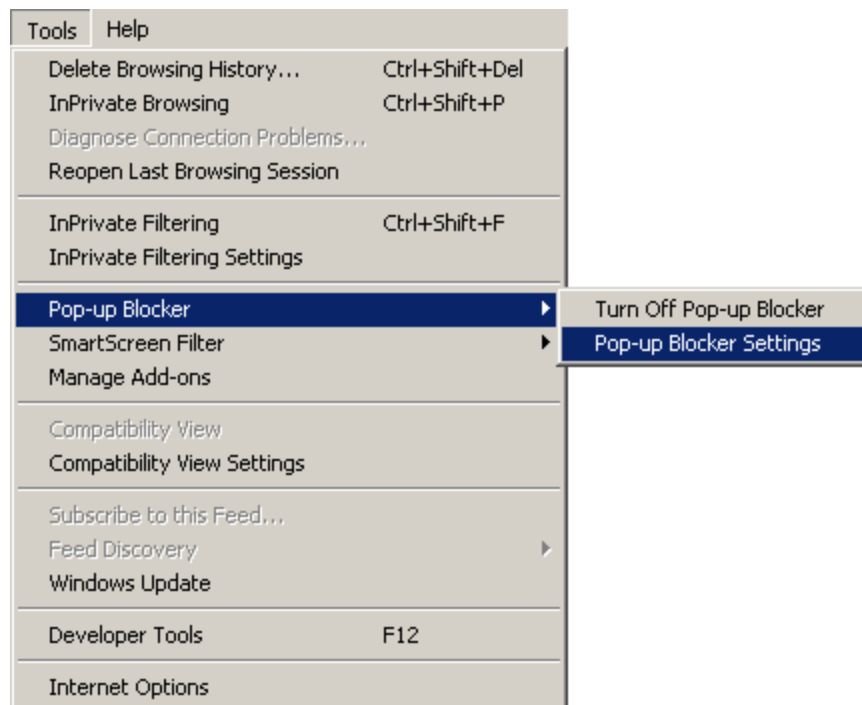
# Disabling Pop-up Blockers for Smart Trac

Your computer may have an Internet browser or security software with a pop-up blocker. CRMLS products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from CRMLS products in Internet Explorer.

**Note:**

*For information on allowing pop-ups from CRMLS products in other Internet browsers or security software, refer to your application's documentation.*

1. In Internet Explorer, select **Tools > Pop-up Blocker > Pop-up Blocker Settings**.



2. Add the following websites to the Allowed sites list:
  - <http://crmls.org> (CRMLS Website)
  - <http://www.mrmlsmatrix.com> (CRMLS Matrix)
  - <http://realist2.firstamres.com> (Realist Tax)
  - <http://tm.marketlinx.com> (Smart Trac/Smart Fax)

# Accessing Smart Fax

Follow the steps below to access Smart Fax.

1. Open your web browser and go to **www.crmls.org**.
2. Click the **CRMLS Matrix** button.

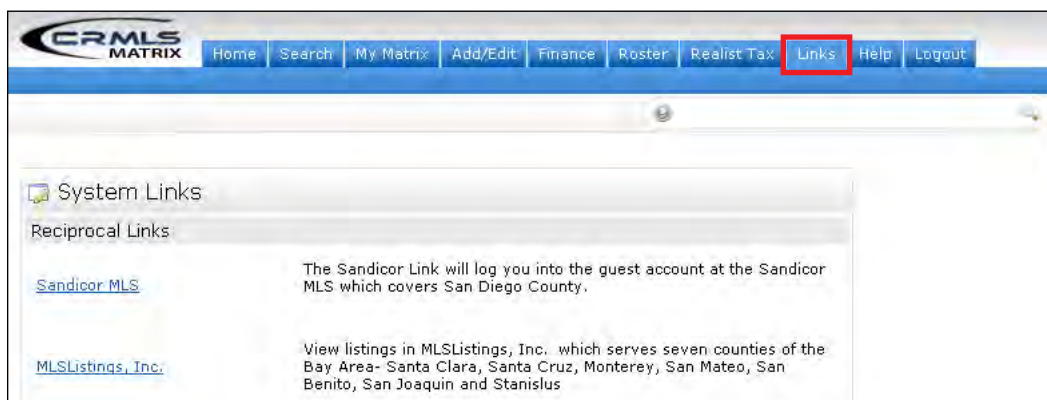


3. Enter your SCOUT Login information and click **Login**.

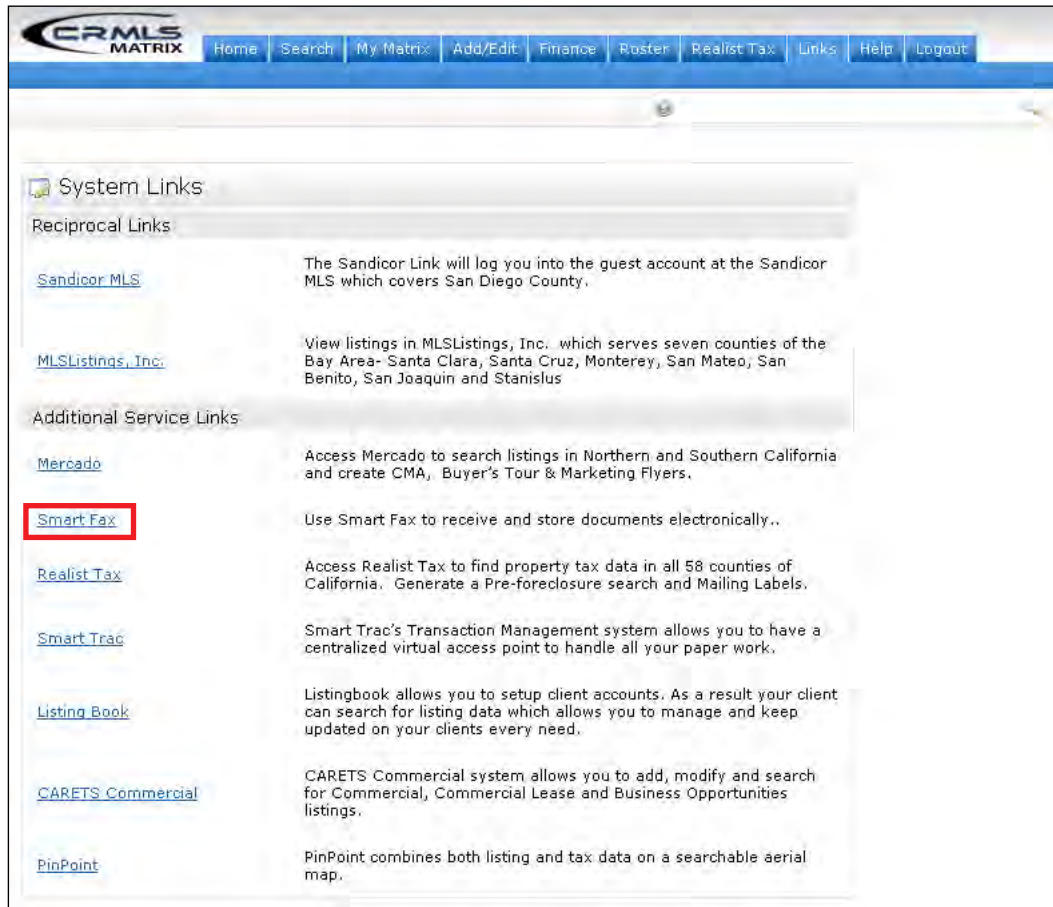


The image shows the CRMLS SCOUT Login page. At the top, the CRMLS logo is displayed with the text "California Regional Multiple Listing Service, Inc." below it. The page is titled "SCOUT Login". There are two input fields: "User ID:" and "Password:". Below the input fields is a "Login" button with a right-pointing arrow icon.

4. Click the **Links** tab.



5. Click the **Smart Fax** link.



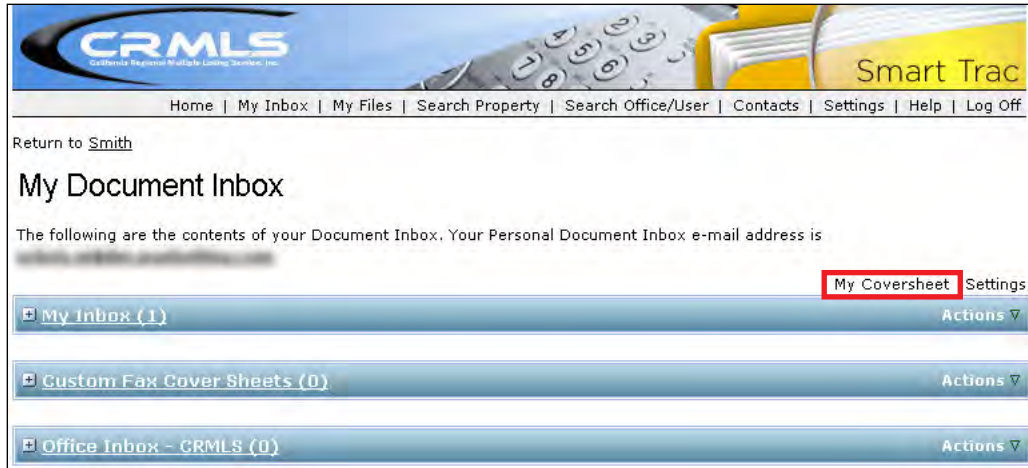
**Note:**

You can also access *Smart Fax* by clicking the *Smart Fax* link under *External Links* on the *CRMLS Matrix Home* screen.

# Creating Your Fax Cover Sheet

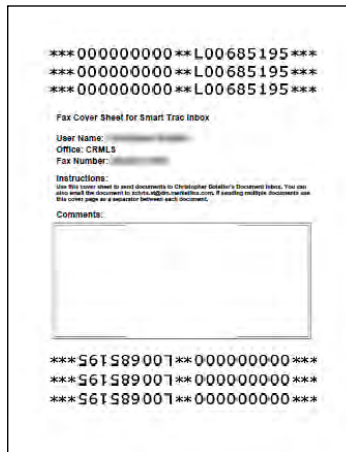
Before you can begin receiving faxes in Smart Fax, you need to create a fax cover sheet. Follow the steps below to create your cover sheet.

1. Click the **My Coversheet** link to automatically generate your cover sheet.



2. Wait for fax manager to generate your cover sheet. This can take several minutes.

When Smart Fax is done generating your cover sheet, you see a cover sheet similar to this one:



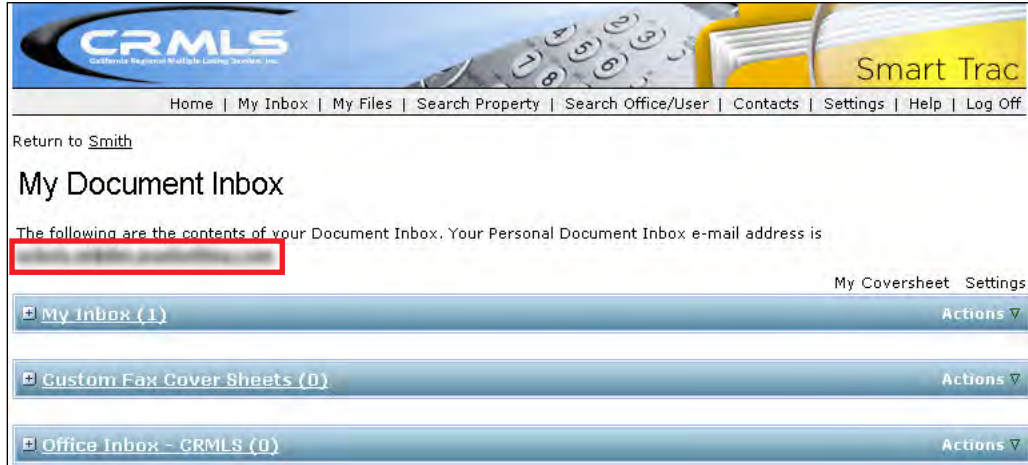
Now you can send your cover sheet to clients and colleagues and start receiving faxes in your Smart Fax inbox.

**Note:**

*Cover sheets enable clients and colleagues to fax documents to your Smart Fax inbox. A cover sheet can be re-used as many times as needed. If someone wants to fax you several documents at once, they must place a copy of the cover sheet before each document.*

# Receiving Faxes

There are two ways for people to send documents to your Smart Fax inbox. Your clients and colleagues can use your personalized Smart Fax cover sheet to fax documents to your inbox or they can attach documents to an email message and send it to your Smart Fax email address that appears at the top of the My Document Inbox page.



**Note:**

*If someone wants to fax you several documents at once, they must place a copy of the cover sheet before each document.*

# Managing Fax Cover Sheets

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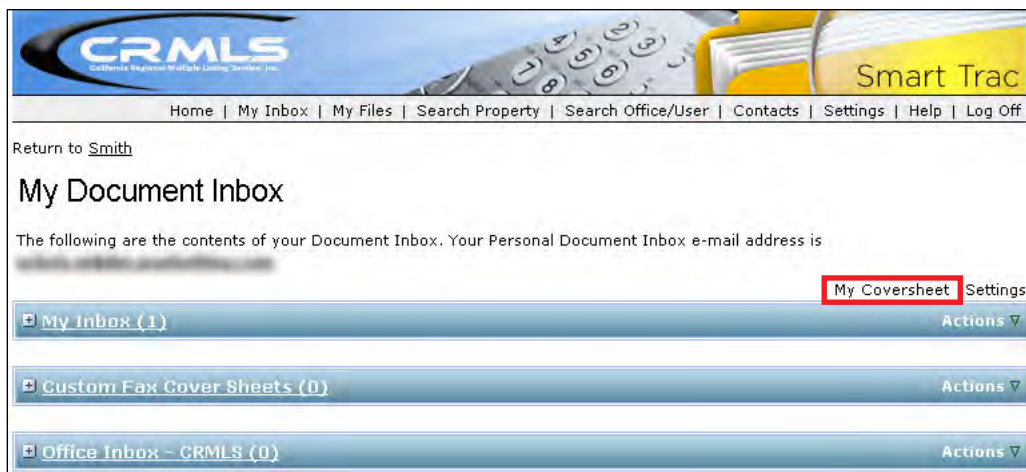
Follow the steps in these sections to save, print, and customize fax cover sheets:

- “Saving Your Fax Cover Sheet” below
- “Printing Your Fax Cover Sheet” on page 10
- “Creating Custom Fax Cover Sheets” on page 11

## Saving Your Fax Cover Sheet

Follow the steps below to save your fax cover sheet as a PDF for future use.

1. Click the **My Coversheet** link to view your cover sheet.

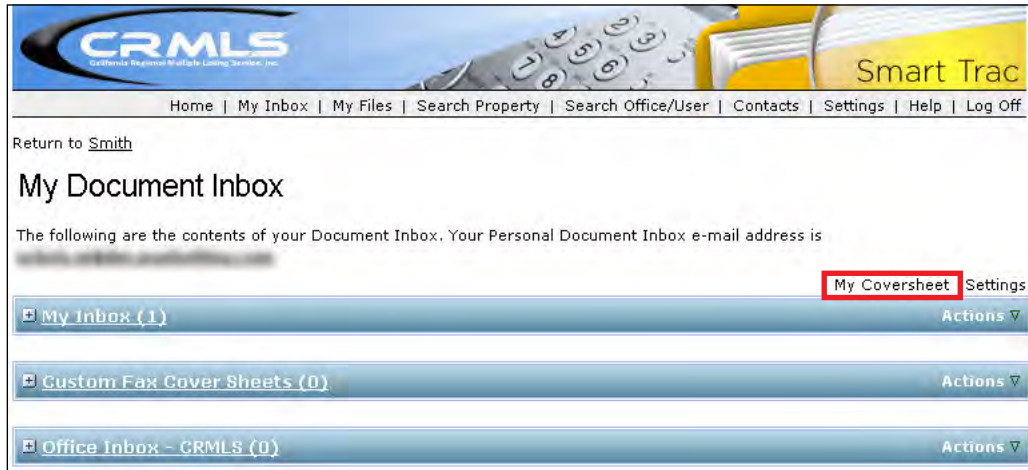


2. Click **File > Save**.
3. Select a destination and file name for your cover sheet.
4. Follow the prompts on the screen to finish saving your cover sheet.

# Printing Your Fax Cover Sheet

Follow the steps below to print a copy of your fax cover sheet.

1. Click the **My Coversheet** link to view your cover sheet.



2. Click **File > Print**.
3. Follow the prompts on the screen to select your print settings and print.

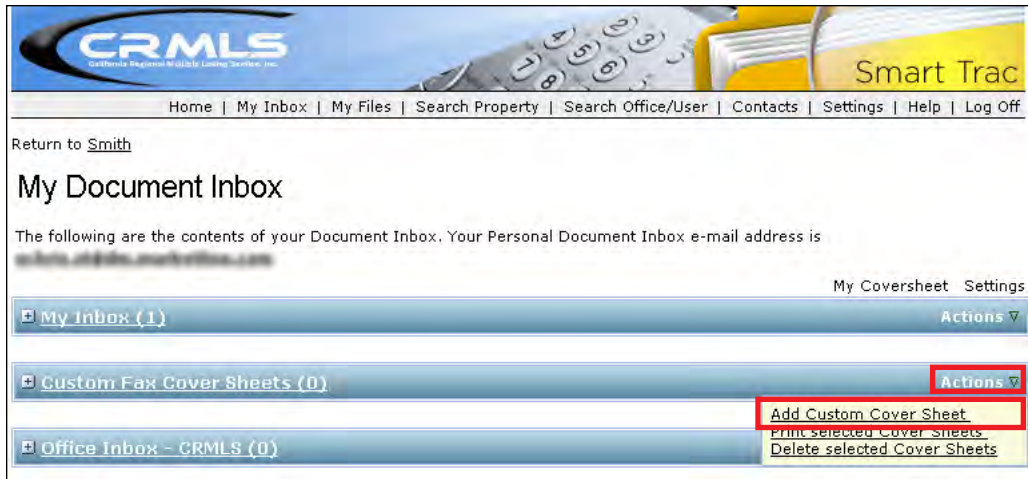
# Creating Custom Fax Cover Sheets

Smart Fax Custom Cover Sheets allow you to automatically forward a PDF of incoming faxes to additional recipients via email. This is helpful if you are working with a co-listing agent, brokers, sellers or other parties in the real estate transaction. Follow the steps below to create a Custom Cover Sheet.

**Note:**

The number of custom fax cover sheets you can create is unlimited, so you can create as many as you need.

1. Hover your mouse over Custom Fax Cover Sheets **Actions** and choose **Add Custom Cover Sheet**.



2. Enter the e-mail addresses you want copied on incoming faxes when the selected custom cover sheet is used.

**Custom Fax Cover Sheet**

**Recipients**  
Enter e-mail addresses separated by semi-colons(;) or select **Contacts** to populate the address

**To:** [ ] **Contacts**

**Bcc:** [ ] **Contacts**

Copy Me at this e-mail:  
 Attach my Personal Coversheet to this e-mail

**Title:** [ ]

This message will be displayed to the recipient.

**Message:** Please review the attached document.

**Branding:**

Sincerely,  
**E-mail Me**  
(909) 859-2040  
CRMLS  
(909) 859-2040  
**Company Website**

Cancel Print Save

**Note:**

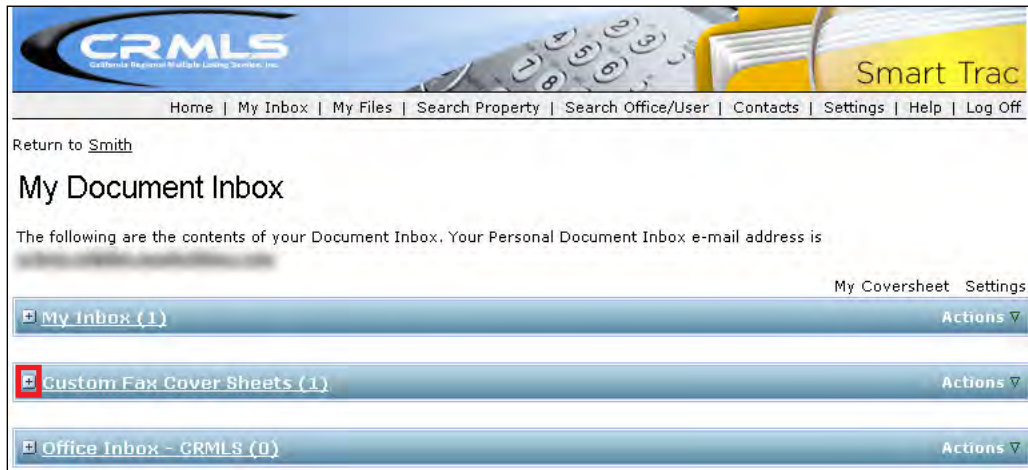
*You will automatically receive a copy of the fax in your email unless you uncheck **Copy Me at this e-mail**.*

3. Enter a title to help you easily identify the custom cover sheet in the **Title** field.
4. Enter a custom message that will be sent to all recipients included on the custom fax cover sheet in the **Message** field.
5. When you're finished, click **Save** to save the custom cover sheet and return to your Document Inbox.

# Managing Custom Cover Sheets

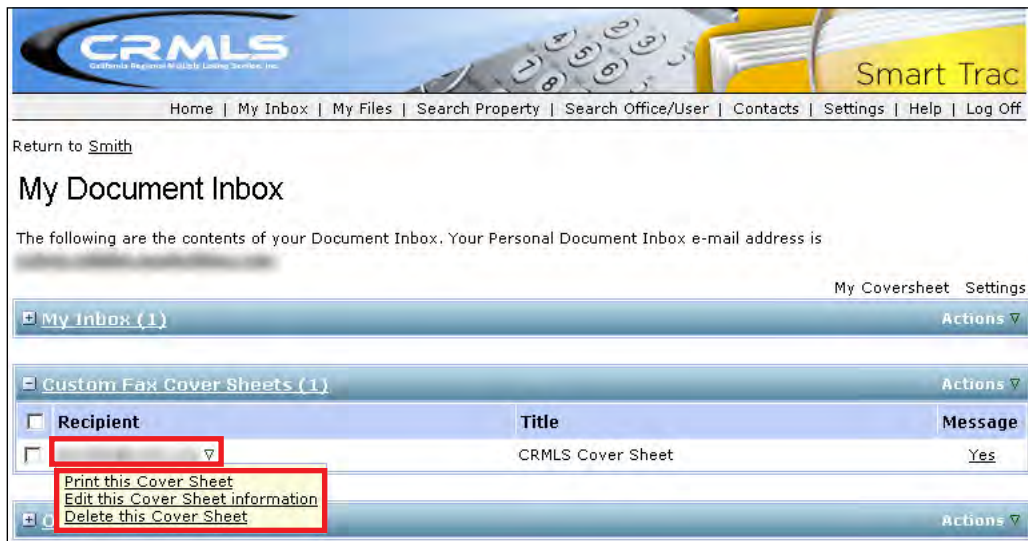
Follow the steps in this section to manage Custom Cover Sheets.

1. Click the + next to Custom Fax Cover Sheets to view your custom cover sheets.



2. Hover your mouse over the cover sheet and do one of the following:

- Select **Print this Cover Sheet** to print a copy of the selected custom cover sheet.
- Select **Edit this Cover Sheet information** to add or remove recipients from the custom cover sheet.
- Select **Delete this Cover Sheet** to delete the custom cover sheet.



# Managing Faxes

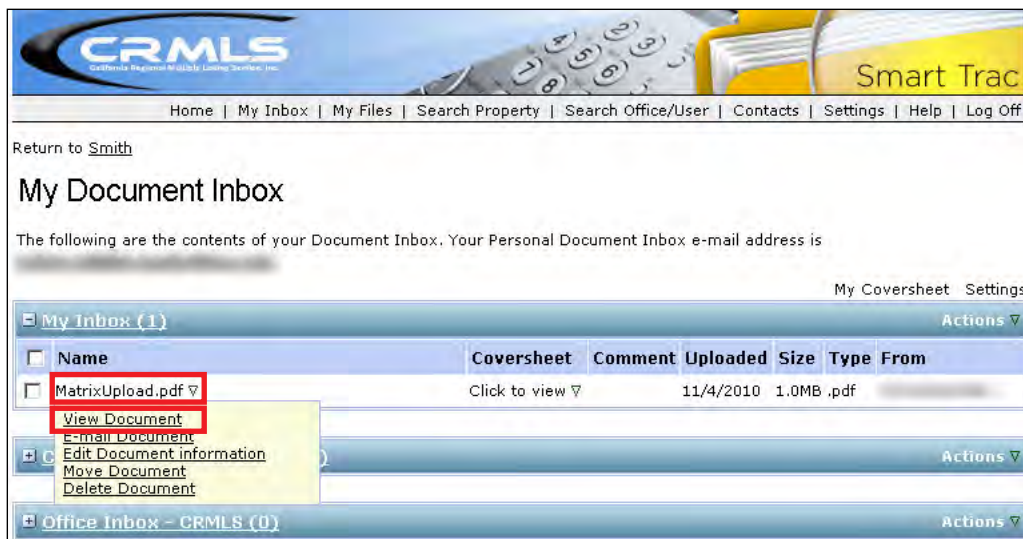
Follow the steps in these sections to manage faxes in Smart Fax.

- “Viewing Faxes” below
- “Renaming Faxes” on page 15
- “Moving Faxes” on page 16
- “Deleting Faxes” on page 17
- “Sending Faxes to Smart Trac” on page 18

## Viewing Faxes

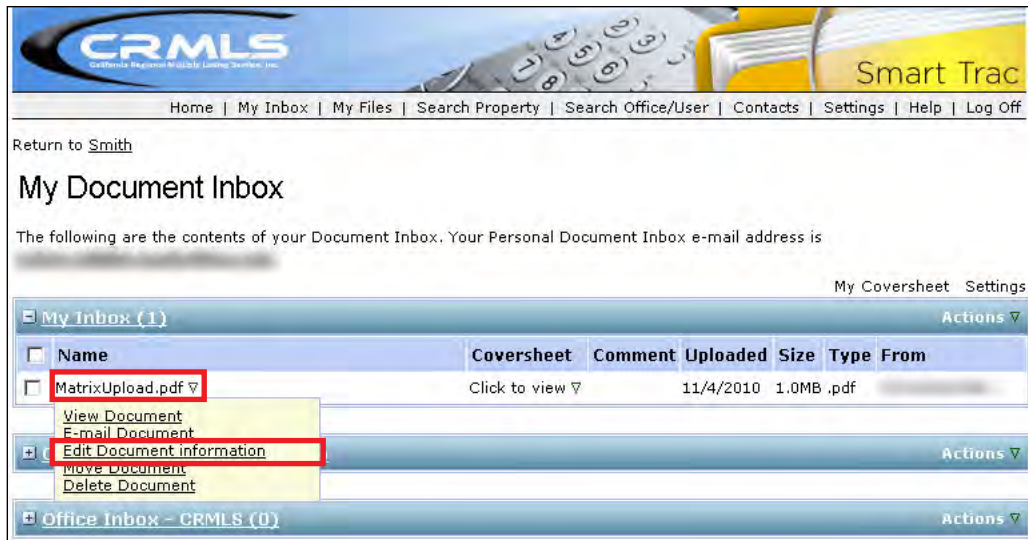
Follow the steps below to view faxes in Smart Fax.

1. Hover your mouse over the document you want to view.
2. Click **View Document** to view the document in a new browser window.



# Renaming Faxes

1. Hover your mouse over the document you want to rename.
2. Click **Edit Document information**.



3. Type a new name for the document in the Enter Name field.

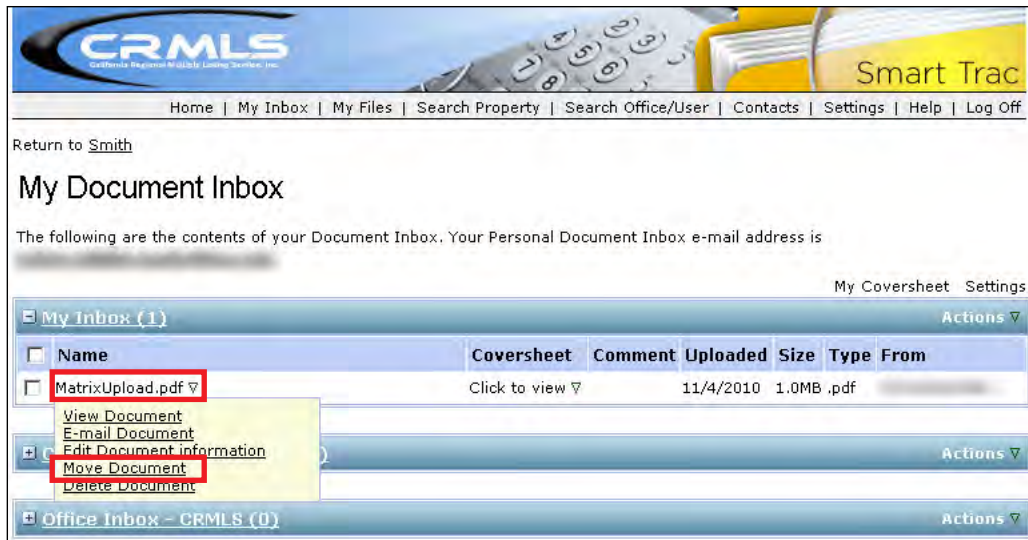
The 'Edit Document Information' dialog box has the following fields and controls:

- Name:** A dropdown menu currently showing '<User Defined...>'. A red box highlights the 'Enter Name' label and the text 'MatrixUpload.pdf' in the adjacent input field.
- Comment:** An empty text input field.
- From:** An empty text input field.
- Upload file:** A text input field followed by a 'Browse...' button.
- Note:** A message at the bottom states 'Note: This will replace the existing document'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom.

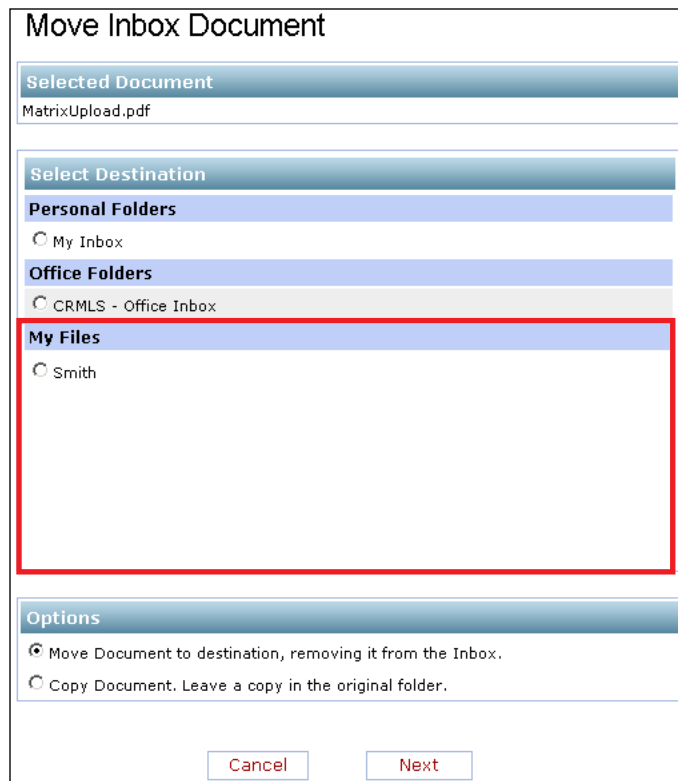
4. Click **Save**.

# Moving Faxes

1. Hover your mouse over the document you want to move.
2. Click **Move Document**.



3. Select a new folder to move the fax to.

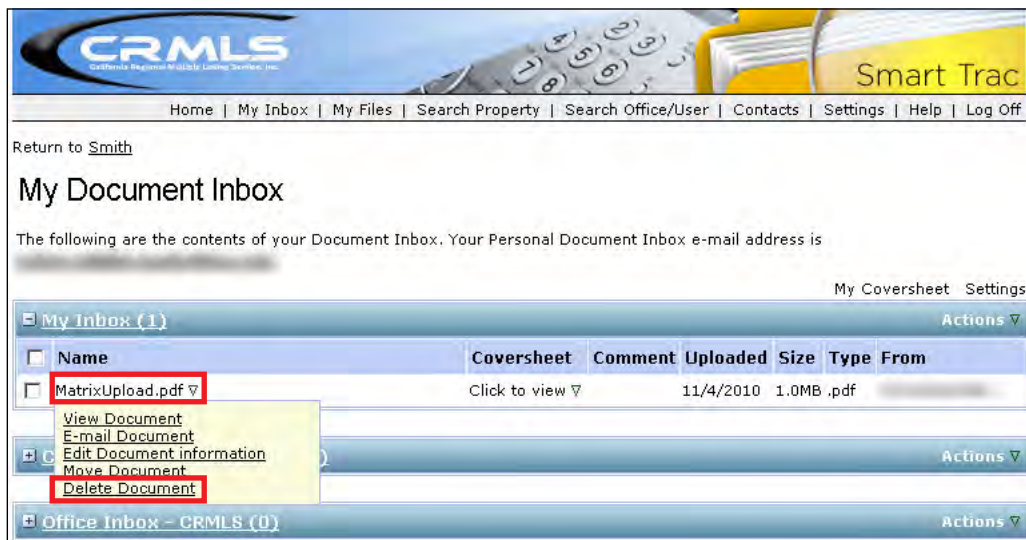


4. Select one of the following as the Options setting:
  - Select **Move Document to destination** to move the fax from your Inbox to the selected folder.
  - Select **Copy Document** to leave the selected fax in your inbox and to place a copy of the document in the selected folder.
5. Click **Next**.

Your fax appears in the destination folder you selected.

## Deleting Faxes

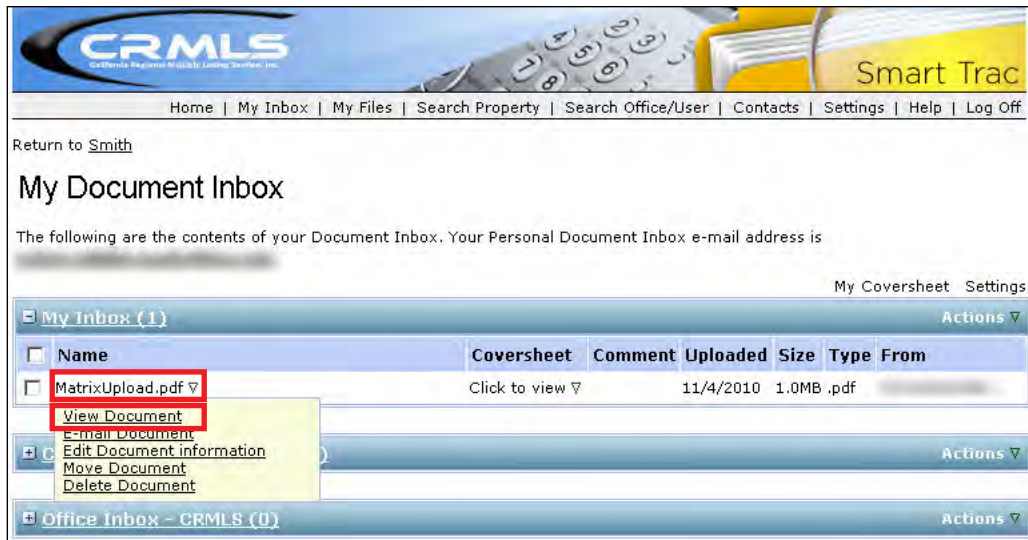
1. Hover your mouse over the fax you want to delete.
2. Click **Delete Document**.



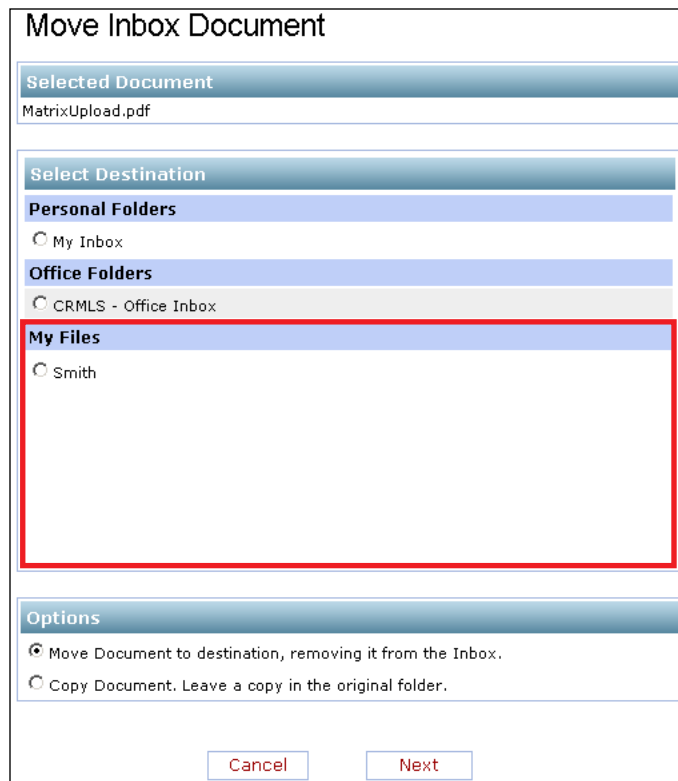
3. When you see a confirmation message, click **OK** to delete the file.

# Sending Faxes to Smart Trac

1. Hover your mouse over the document you want to send to Smart Trac.
2. Click **Move Document**.



3. Select the transaction you want to move the fax to.



4. Select one of the following as the Options setting:
  - Select **Move Document to destination** to move the fax from Smart Fax to the selected Smart Trac file.
  - Select **Copy Document** to leave the selected fax in Smart Fax and to place a copy of the document in the selected Smart Trac file.
5. Click **Next**.
6. Select a name for the fax in the File Name drop-down menu.
7. Enter comments for the fax in the Comment field, as necessary.
8. Click **Save** to move or copy the fax to Smart Trac.

### Move Document to File

**Selected File**  
Smith

**Selected Document - My Inbox**  
Please review the document list below and make any changes to the document settings. When documents are moved they will be converted to a File document and may need to be renamed. Smart Trac has attempted to match the Inbox document name to a corresponding File document name. If a match could not be found then a name will need to be selected.  
**Inbox Name: MatrixUpload.pdf**  
**File Name:** Select Document Name  
**Comments:**

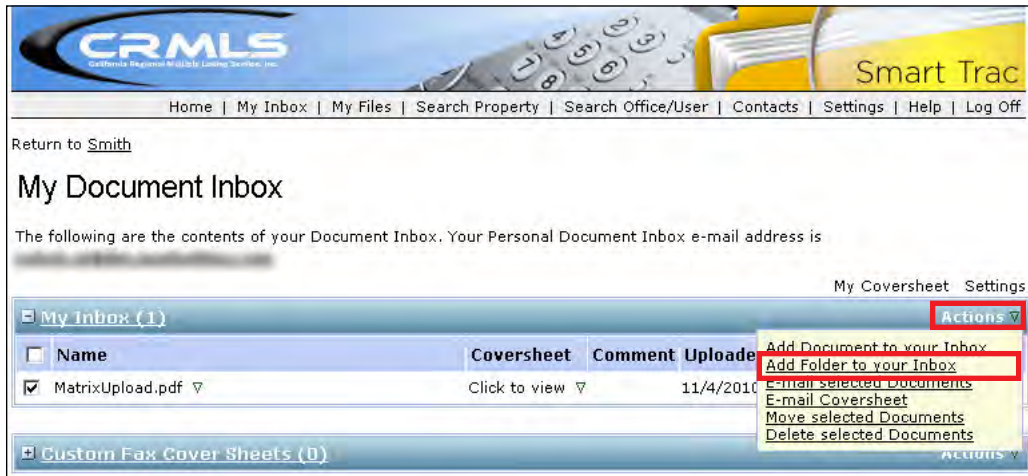
**Options**  
 Move Document to destination, removing it from the Inbox.  
 Copy Document. Leave a copy in the original folder.

Your fax appears in the available documents list of the transaction you selected.

# Adding Folders to Your Inbox

Follow the steps below to add folders to your inbox.

1. Hover your mouse over My Inbox **Actions** and choose **Add Folder to your Inbox**.



2. Type a name for the folder in the **Folder Name** field.

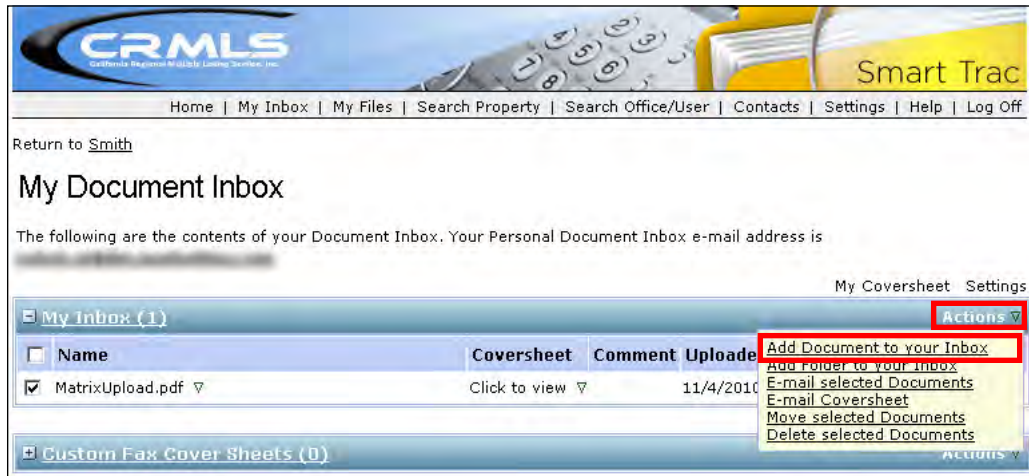
A screenshot of a dialog box titled 'Add Inbox Folder'. It features a text input field labeled 'Folder Name:' which is highlighted with a red border. Below the input field are two buttons: 'Cancel' and 'Save'.

3. Click **Save** to add the new folder to your inbox.

# Adding Documents to Your Inbox

Follow the steps below to upload documents stored on your computer to your Smart Fax inbox.

1. Hover your mouse over My Inbox **Actions** and choose **Add Document to your Inbox**.



2. Select a name for the document in the **Name** drop-down menu.

The screenshot shows a dialog box titled "Add Document to My Inbox". It contains the following fields and buttons:

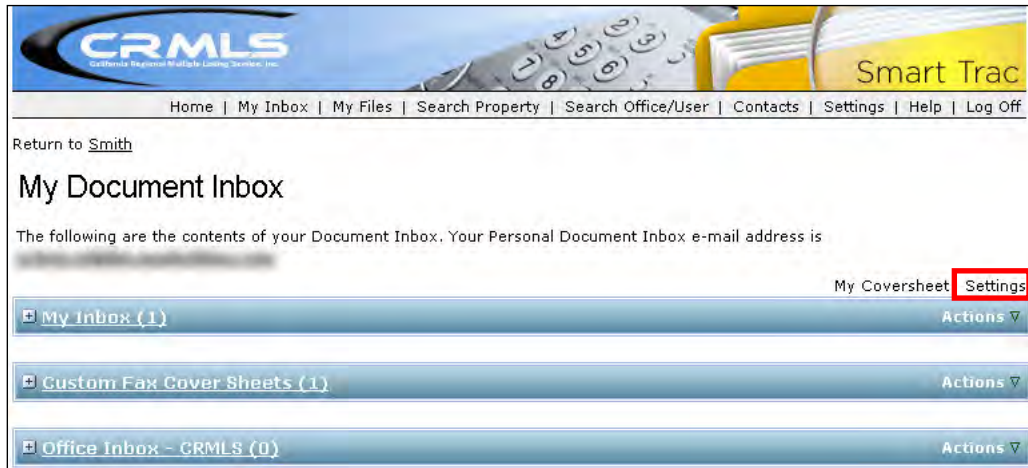
- Name:** A drop-down menu with the text "Select Document Name".
- Comment:** An empty text input field.
- From:** An empty text input field.
- Upload file:** An empty text input field with a "Browse..." button to its right.
- Buttons:** "Cancel" and "Save" buttons at the bottom.

3. Enter comments about the document you're uploading in the **Comments** field, if necessary.
4. Enter the sender of the document in the **From** field.
5. Click the **Browse** button to locate the document you are uploading.
6. Click **Save** to upload the document and add it to your inbox.

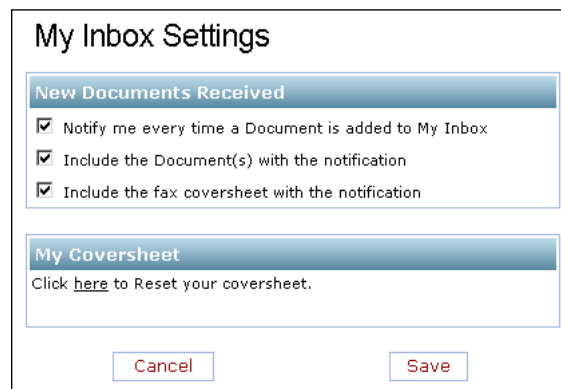
# Managing Smart Fax Settings

Follow the steps below to manage your Smart Fax Inbox settings.

1. Click the **Settings**.



You see a window like this one:



2. Select from the following settings:

- Select **Notify me every time a Document is added to My Inbox** to receive email notifications when a document is added to your inbox.
- Select **Include the Document(s) with the notification** to include a copy of the received document(s) in your email notification.
- Select **Include the fax coversheet with the notification** to include a copy of the fax cover sheet in your email notification.

3. When you're done selecting settings click **Save**.