

Virtual Fax Integration Guide

Yeastar P-Series Appliance Edition



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Virtual Fax Integration Overview

Yeastar P-Series PBX System supports integration with online fax service providers, enabling your team to securely send and receive faxes over the Internet via Linkus Desktop or Web Client, without relying on physical fax machines.

Requirements

To integrate online faxing capability into Yeastar PBX, ensure both Yeastar PBX and thirdparty fax platform meet the following requirements.

Platform	Requirements
Yeastar PBX	 Firmware: Version 37.20.0.74 or later Plan: Enterprise Plan or Ultimate Plan Network: Remotely accessible via a domain name or public IP
Third-party Fax Platform	TelnyxIZT Cloud

Integration highlights

Accessible from Anywhere

Send and receive faxes from anywhere, at any time, as long as there is an Internet connection.

Secure Storage and Easy Access

All faxing activities are logged, and all the transmitted fax documents are securely stored for quick retrieval.

Pay-As-You-Go

Eliminate the need for paper, dedicated phone lines, and physical fax machines, reducing the infrastructure and operational costs while paying only for the faxes sent.

Customizable Cover Pages

Add custom cover pages to display essential fields such as sender information, recipient details, brief message, etc. on outbound faxes.

Fax to Email

Forward faxes to designated email addresses for quick information sharing, secure backup, etc.

Workflow to set up online faxing

To enable online faxing on Yeastar P-Series PBX System and allow extension users to send and receive faxes through Linkus, you need to perform the following operations.

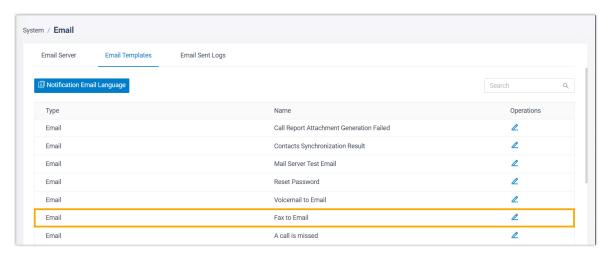
- 1. Integrate PBX with third-party fax platform(s).
 - Integrate Yeastar P-Series PBX System with Telnyx Fax
 - Integrate Yeastar P-Series PBX System with IZT Cloud Fax
- 2. (Optional) Add and customize cover page(s), which will be available for extension users to use when they send faxes.



Note:

Extension users who are authorized to send faxes can also customize their own cover page(s) from Linkus Desktop or Web Client.

3. (Optional) Customize the built-in **Fax to Email** template, which will be used when faxes are forwarded to mailboxes.



When done, extension users can send and receive faxes directly from Linkus Desktop or Web Client.

Fax data auto cleanup

Yeastar P-Series PBX System logs all inbound and outbound fax activities and stores the associated fax files. By default, the system automatically deletes fax data when either of the following thresholds is reached:

• Fax Files: The maximum storage reaches the following limit:

P520: 300MBP550: 500MB

- **P560/P570**: 1024MB
- Fax Logs: Fax logs are retained for up to 7 days, or the total number of logs reaches 200,000.

You can adjust the maximum storage size for fax files or the preservation day for fax logs in **System > Storage > Fax Data Auto Cleanup**.





Note:

The maximum number of fax logs is fixed and cannot be modified.

Related resources

- Fax User Guide for Linkus Desktop Client
- Fax User Guide for Linkus Web Client

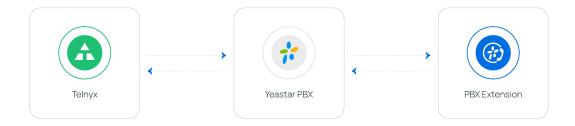
Fax Integration

Integrate Yeastar P-Series PBX System with Telnyx Fax

By integrating Yeastar P-Series PBX System with Telnyx Fax, employees within your organization can send and receive faxes instantly and securely over the Internet - directly from their own Linkus Desktop or Web Client.

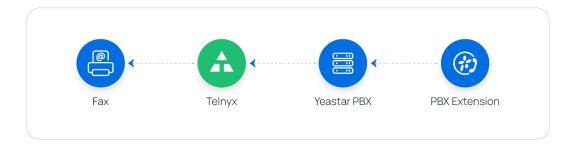
Introduction

Yeastar P-Series PBX System supports the integration with Telnyx to enable Internet-based faxing, allowing PBX extension users to send and receive faxes through Telnyx's reliable communications network.



The integration is implemented using Yeastar PBX Webhook and Telnyx Fax API V2.

When an extension user sends a fax from Linkus, Yeastar PBX calls Telnyx API to submit the fax for delivery.



 When a fax arrives at Telnyx fax number, Telnyx sends a webhook notification to Yeastar PBX. PBX then retrieves the fax file via API and delivers it to the designated extension users' Linkus.



You can easily set up the integration by following the instructions below:

- 1. Obtain Webhook URL from Yeastar PBX.
- 2. Create the necessary resources and obtain the required credentials from Telnyx.
 - An API Key to authenticate your account and access Telnyx API endpoints.
 - An Outbound Voice Profile to initiate outbound fax traffic.
 - A Fax-enabled Phone Number for sending and receiving faxes.
 - A Fax Application to manage inbound and outbound fax traffic.
- 3. Fill in the obtained credentials in Yeastar PBX, then configure fax-related settings.

Requirements

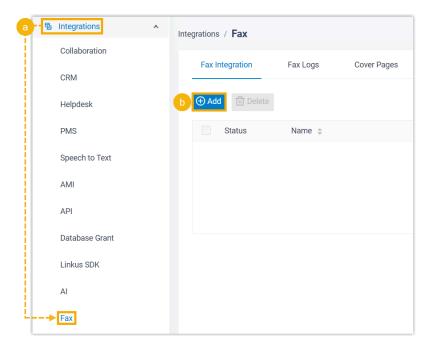
To integrate online faxing capability into Yeastar PBX, ensure Yeastar PBX meets the following requirements.

- Firmware: Version 37.20.0.X or later
- Plan: Enterprise Plan or Ultimate Plan
- Network: Remotely accessible via a domain name or public IP.

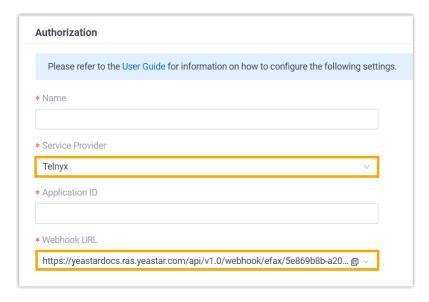
Step 1. Obtain Webhook URL from Yeastar PBX

Obtain a Webhook URL from Yeastar PBX first, which is required when you set up a fax application on Telnyx.

1. Go to the fax integration page.



- a. Log in to PBX web portal, go to Integrations > Fax.
- b. Under Fax Integration tab, click Add.
- 2. Obtain the Webhook URL for Telnyx.



- a. In the Service Provider drop-down list, select Telnyx.
- b. In the Webhook URL field, click 🗐 to copy the URL and save it for later use.

Step 2. Create resources and obtain credentials from Telnyx

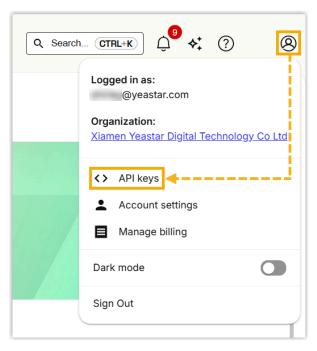
Create the necessary resources and obtain the required credentials from Telnyx, so as to authenticate and authorize interactions between Yeastar PBX and Telnyx.

You need to complete the following settings within Telnyx portal.

- 1. Create an API key
- 2. Create outbound voice profile
- 3. Buy a phone number
- 4. Create a fax application

1. Create an API key

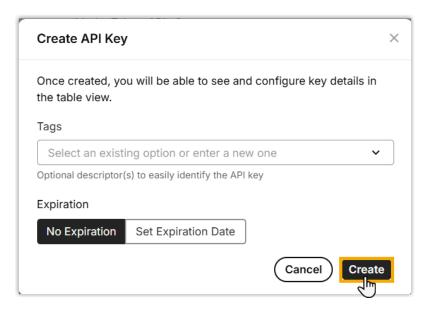
- 1. Access the creation page of API key.
 - a. Log in to Telnyx portal.
 - b. At the top-right corner, click your account, then select API keys.



- 2. Create an API key.
 - a. At the top-right corner, click Create API Key.

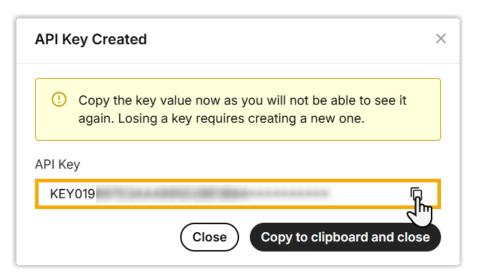


b. In the pop-up window, set tag and expiration date for the API key as needed, then click **Create**.



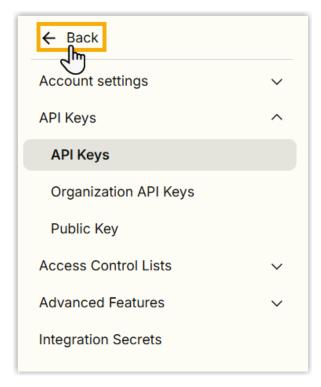
A new API key is generated and displayed.

c. Copy the API key and save it for later use, then close the window.

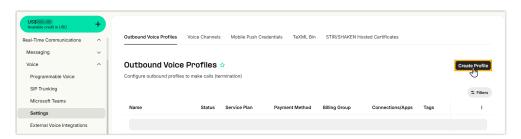


2. Create outbound voice profile

- 1. Access the creation page of outbound voice profile.
 - a. At the top-left corner, click **Back** to return to the home menu.



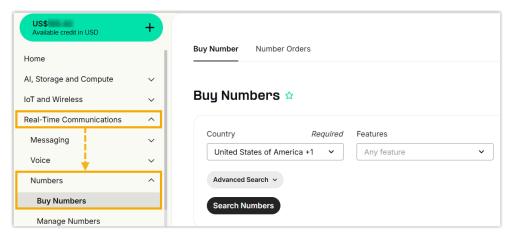
- b. On the left navigation bar, go to Real-Time Communications > Voice > Settings > Outbound Voice Profiles.
- 2. At the top-right corner, click Create Profile.



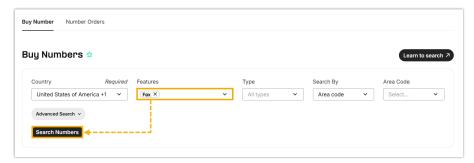
3. Customize the profile as needed.

3. Buy a phone number

1. On the left navigation bar, go to **Real-Time Communications > Numbers > Buy Numbers**.

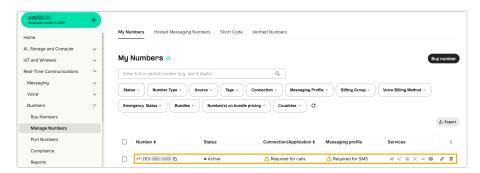


- 2. Search and buy a number with fax capability.
 - a. Under the **Buy Number** tab, set **Features** to **Fax** and configure additional filters as needed, then click **Search Numbers** to display available numbers.



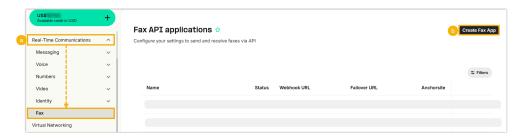
b. Select the desired number and complete payment.

You will be redirected to the **Manage Numbers** page, where the purchased number is displayed.

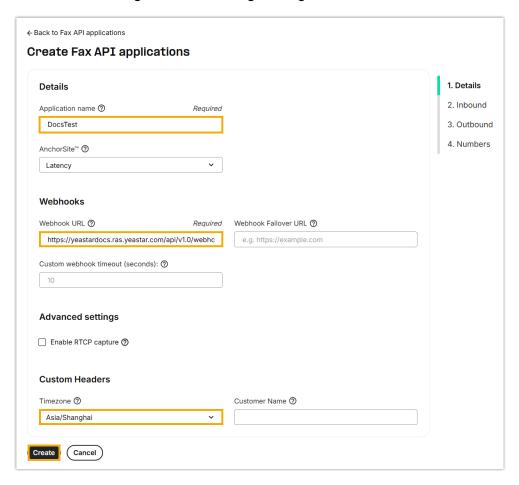


4. Create a fax application

1. Access the fax creation page.



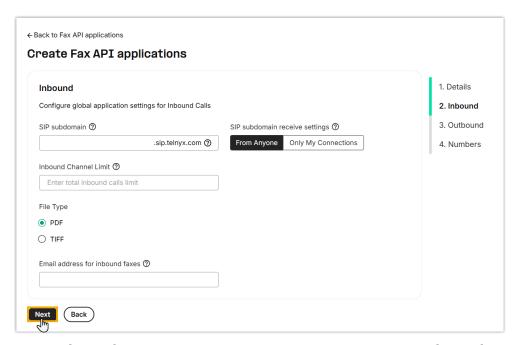
- a. On the left navigation bar, go to Real-Time Communications >
- b. At the top-right corner, click **Create Fax App**.
- 2. For **Details**, configure the following settings, then click **Create**.



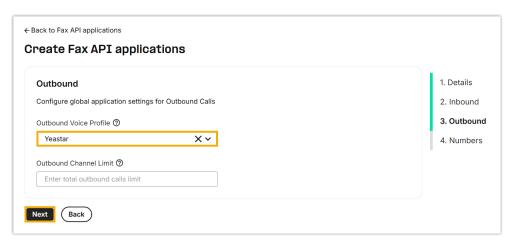
Setting	Description
Application name	Enter a name to help you identify the application.
Webhook URL	Paste the Webhook URL obtained from Yeastar PBX.

Setting	Description
Timezone	Specify the time zone used in the fax header timestamps.

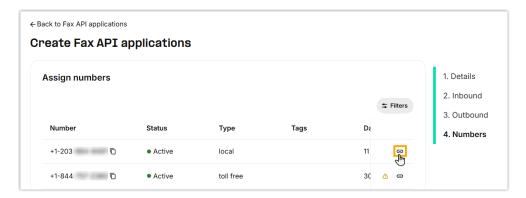
3. For **Inbound**, retain the default settings or configure it as needed, then click **Next**.



4. For **Outbound**, select the OVP from the drop-down list of **Outbound Voice Profile** to enable outbound fax traffic, the click **Next**.

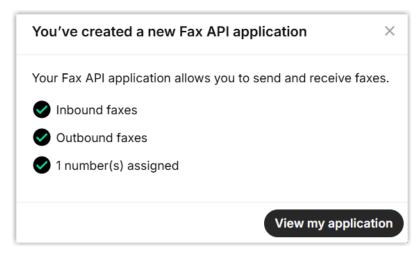


5. For **Numbers**, click ⁽⁻⁾ to assign the number to the application.

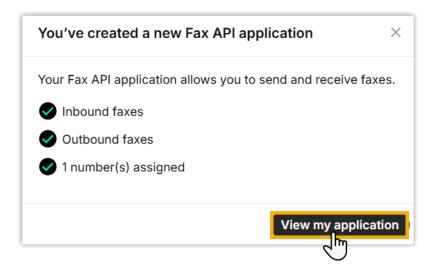


6. At the bottom-left corner, click **Complete**.

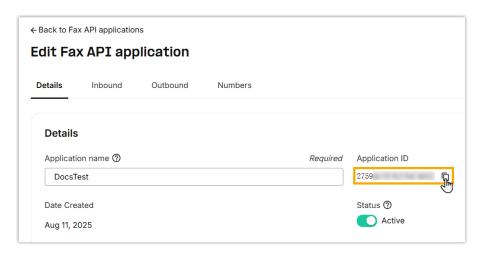
A window pops up, indicating that the fax application is created.



- 7. Obtain the application ID.
 - a. Click View my application.



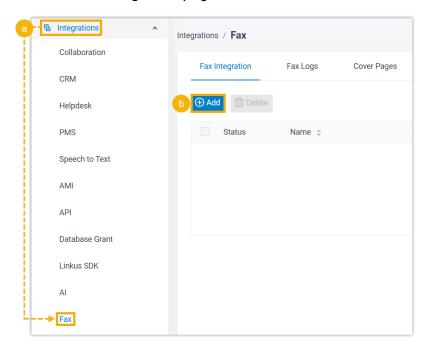
b. Under the **Details** tab, copy the application ID and save it for later use.



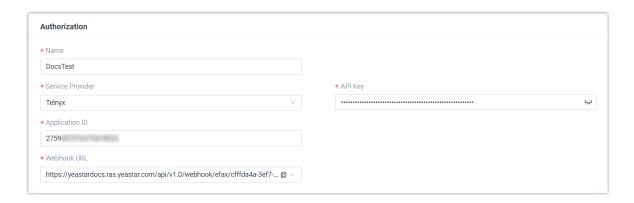
Step 3. Fill in credentials and configure fax settings on Yeastar PBX

On Yeastar PBX, fill in the credentials obtained from Telnyx, then configure the fax-related settings to complete the fax integration.

1. Go to the fax integration page.

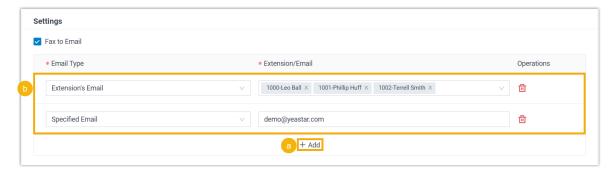


- a. Log in to PBX web portal, go to Integrations > Fax.
- b. Under Fax Integration tab, click Add.
- 2. In the **Authorization** section, complete the authorization settings.



Setting	Description
Name	Enter a name to help you identify the integration.
Service Provider	Select Telnyx.
API Key	Paste the API key obtained from Telnyx.
Application ID	Paste the application ID obtained from Telnyx.

3. **Optional:** To forward inbound faxes as email attachments to designated addresses, perform the following operations.



a. In the **Settings** section, click **Add**.



Note:

You can add up to 5 email entries.

- b. In the **Email Type** drop-down list, select the type of email address and complete the corresponding settings.
 - Extension's Email: Send the inbound faxes as email attachments to extension users' mailboxes.

If you choose this option, select the desired extensions from the **Extension/Email** drop-down list.



Note:

Ensure the selected extensions have valid email addresses configured. Otherwise, users will not receive the emails.

• **Specified Email**: Send the inbound faxes as email attachments to a specified email address.

If you choose this option, enter a custom email address in the **Extension/Email** field.

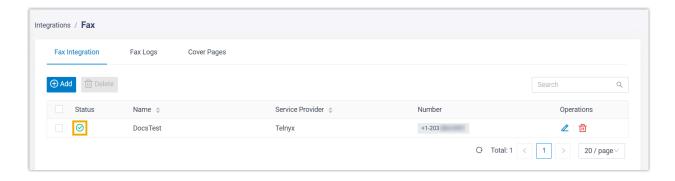
- 4. Set fax number(s) and specify which extension users are authorized to send and receive faxes.
 - a. In the Fax Number section, click Add.
 - b. In the pop-up window, configure the following settings, then click **Save**.

Setting	Description
Fax Number	Enter the fax number in E.164 format. Example : +12498037994
	Important: Remove hyphens - from the fax number, otherwise the fax delivery will fail.
Fax Reception Destination	Select extensions or extension groups that can receive inbound faxes. The designated users can view inbound faxes from Linkus Desktop or Web Client (Path: Fax Management > Fax).
Extensions Allowed to Send Fax	Select extensions or extension groups that can send faxes. The designated users can send faxes from Linkus Desktop or Web Client (Path: Fax Management > Fax).

- c. To add more fax numbers, repeat steps <u>a-b</u>.
- 5. Click Save.

Result

The **Status** displays $^{\bigodot}$, indicating the integration with Telnyx Fax has been set up successfully.



What to do next

1. (Optional) Customize cover pages, which will be accessible to extension users when they send faxes.

For more information, see Add a Fax Cover Page.

2. Instruct extension users on how to send faxes and check inbound faxes from their Linkus Desktop or Web Client.

For more information, see the following topics:

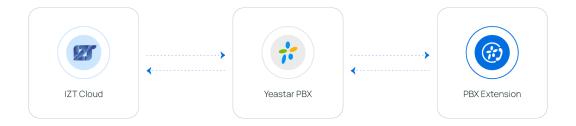
- Linkus Desktop Client: <u>Send Faxes from Linkus Desktop Client</u> and <u>Check Faxes from Linkus Desktop Client</u>.
- Linkus Web Client: <u>Send Faxes from Linkus Web Client</u> and <u>Check Faxes from Linkus Web Client</u>.

Integrate Yeastar P-Series PBX System with IZT Cloud Fax

By integrating Yeastar P-Series PBX System with IZT Cloud Fax, employees within your organization can send and receive faxes instantly and securely over the Internet - directly from their own Linkus Desktop or Web Client.

Introduction

Yeastar P-Series PBX System supports the integration with IZT Cloud to enable Internet-based faxing, allowing PBX extension users to send and receive faxes through IZT Cloud's reliable communications network.



The integration is implemented using Yeastar PBX Webhook and IZT Cloud Fax API.

• When an extension user sends a fax from Linkus, Yeastar PBX calls IZT Cloud API to submit the fax for delivery.



• When a fax arrives at IZT Cloud fax number, IZT Cloud sends a webhook notification to Yeastar PBX. PBX then retrieves the fax file via API and delivers it to the designated extension users' Linkus.



You can easily set up the integration by following the instructions below:

- 1. Obtain Webhook URL from Yeastar PBX.
- 2. Create the necessary resources and obtain the required credentials from IZT Cloud.

- A Fax-enabled Phone Number for sending and receiving faxes.
- An API Key to authenticate your account and access IZT Cloud API endpoints.
- A **Notification Group** for webhook notifications.
- 3. Fill in the obtained credentials in Yeastar PBX, then configure fax-related settings.

Requirements

To integrate online faxing capability into Yeastar PBX, ensure Yeastar PBX meets the following requirements.

Firmware: Version 37.20.0.X or later
Plan: Enterprise Plan or Ultimate Plan

• Network: Remotely accessible via a domain name or public IP.

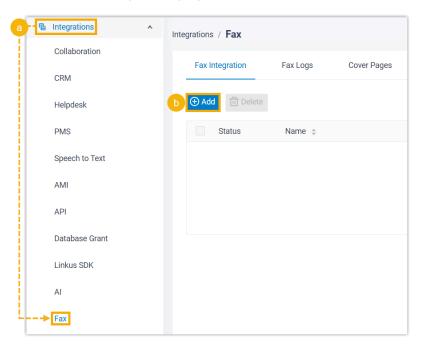
Prerequisites

Purchase fax number(s) from IZT Cloud.

Step 1. Obtain Webhook URL from Yeastar PBX

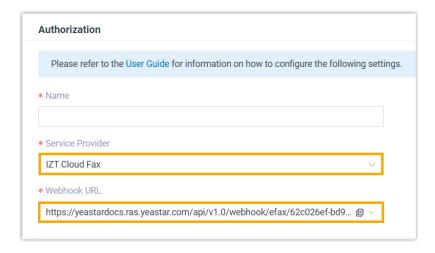
Obtain a Webhook URL from Yeastar PBX first, which is required when you set up a notification group on IZT Cloud.

1. Go to the fax integration page.



a. Log in to PBX web portal, go to **Integrations > Fax**.

- b. Under Fax Integration tab, click Add.
- 2. Obtain the Webhook URL for IZT Cloud Fax.



- a. In the Service Provider drop-down list, select IZT Cloud Fax.
- b. In the **Webhook URL** field, click (a) to copy the URL and save it for later use.

Step 2. Create resources and obtain credentials from IZT Cloud

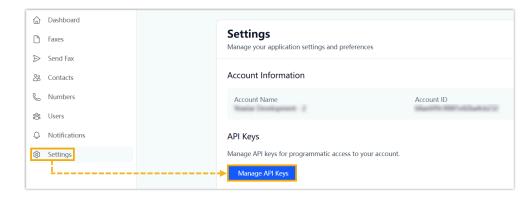
Create the necessary resources and obtain the required credential from IZT Cloud, so as to authenticate and authorize interactions between Yeastar PBX and IZT Cloud.

You need to complete the following settings within IZT Cloud portal.

- 1. Create an API key
- 2. Create a notification group
- 3. Associate notification group with fax number

1. Create an API key

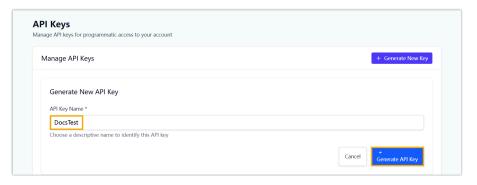
1. Access the creation page of API key.



- a. Log in to IZT Cloud Fax portal.
- b. Go to **Settings > API Keys**, then click **Manage API Keys**.
- 2. Create an API key.
 - a. At the top-right corner, click **Generate New Key**.

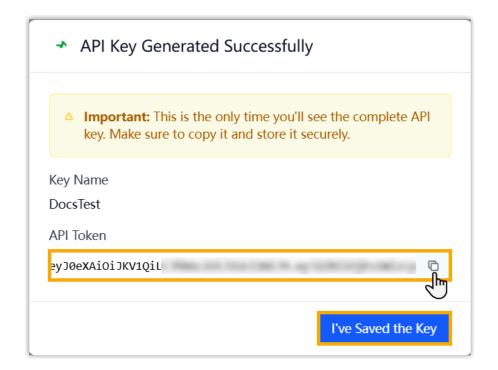


b. In the **API Key Name** field, enter a name to help you identify the key, then click **Generate API Key**.



A new API key is generated and displayed.

c. Copy the API key and save it for later use, then click **I've Saved the Key** to close the window.

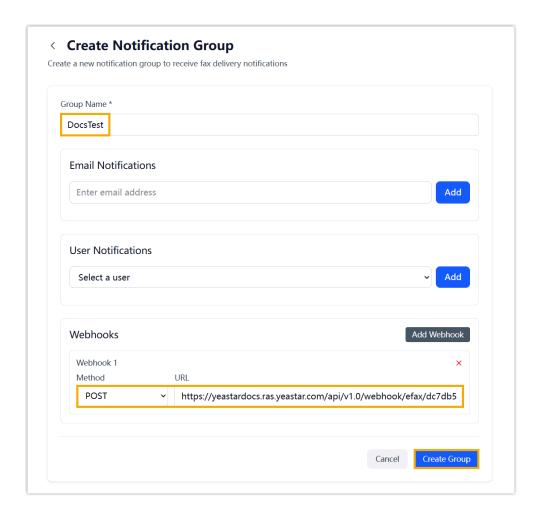


2. Create a notification group

1. Access the creation page of notification group.



- a. On the left navigation bar, click **Notifications**.
- b. At the top-right corner, click Create Group.
- 2. Configure the notification group, then click **Create Group**.



Setting	Description
Group Name	Enter a name to help you identify the group.
Email Notifications	Keep the default setting or customize it as needed.
User Notifications	Keep the default setting or customize it as needed.
Webhooks	Click Add Webhook , then paste the Webhook URL obtained from Yeastar PBX.
	Note: Set the Method to POST.

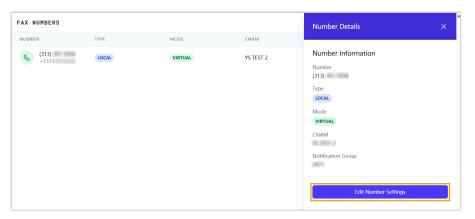
3. Associate notification group with fax number

1. Access the configuration page of fax number.

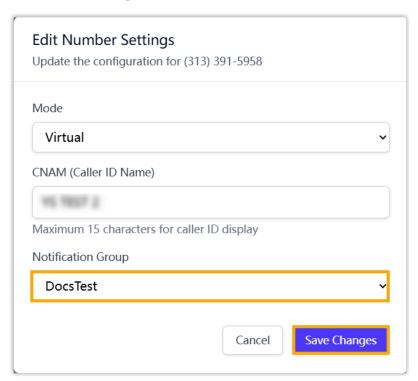
a. On the left navigation bar, click **Numbers**, then click **View** beside the desired number.



b. On the side panel, click Edit Number Settings.



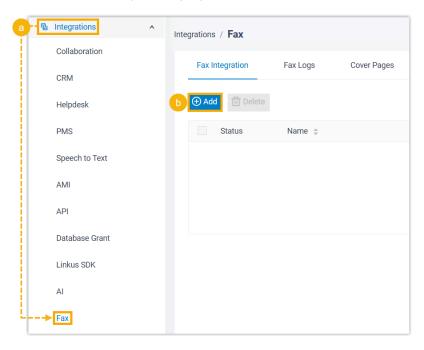
2. In the **Notification Group** drop-down list, select the created group, then click **Save Changes**.



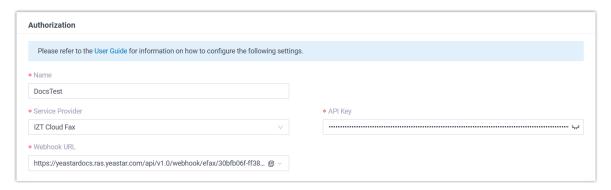
Step 3. Fill in credentials and configure fax settings on Yeastar PBX

On Yeastar PBX, fill in the credentials obtained from IZT Cloud, then configure the fax-related settings to complete the fax integration.

1. Go to the fax integration page.



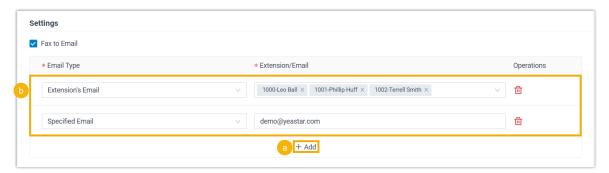
- a. Log in to PBX web portal, go to Integrations > Fax.
- b. Under Fax Integration tab, click Add.
- 2. In the **Authorization** section, complete the authorization settings.



Setting	Description
Name	Enter a name to help you identify the integration.
Service Provider	Select IZT Cloud Fax.

Setting	Description
API Key	Paste the API key obtained from IZT Cloud.

3. **Optional:** To forward inbound faxes as email attachments to designated addresses, perform the following operations.



a. In the Settings section, click Add.



Note:

You can add up to 5 email entries.

- b. In the **Email Type** drop-down list, select the type of email address and complete the corresponding settings.
 - Extension's Email: Send the inbound faxes as email attachments to extension users' mailboxes.

If you choose this option, select the desired extensions from the **Extension/Email** drop-down list.



Note:

Ensure the selected extensions have valid email addresses configured. Otherwise, users will not receive the emails.

• **Specified Email**: Send the inbound faxes as email attachments to a specified email address.

If you choose this option, enter a custom email address in the **Extension/Email** field.

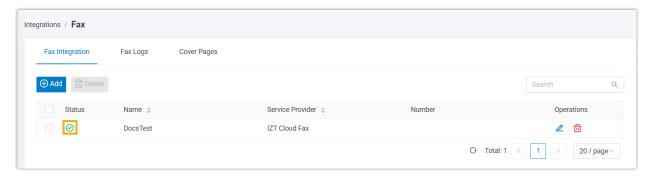
- 4. Set fax number(s) and specify which extension users are authorized to send and receive faxes.
 - a. In the Fax Number section, click Add.
 - b. In the pop-up window, configure the following settings, then click **Save**.

Setting	Description
Fax Number	Enter fax number in E.164 format. Example : +12498037994
	! Important: Remove hyphens - from the fax number, otherwise the fax delivery will fail.
Fax Reception Destination	Select extensions or extension groups that can receive inbound faxes.
	The designated users can view inbound faxes from Linkus Desktop or Web Client (Path: Fax Management > Fax).
Extensions Allowed to Send Fax	Select extensions or extension groups that can send faxes.
	The designated users can send faxes from Linkus Desktop or Web Client (Path: Fax Management > Fax).

- c. To add more fax numbers, repeat steps a-b.
- 5. Click Save.

Result

The **Status** displays Θ , indicating the integration with IZT Cloud Fax has been set up successfully.



What to do next

- 1. (Optional) Customize cover pages, which will be accessible to extension users when they send faxes.
 - For more information, see Add a Fax Cover Page.
- 2. Instruct extension users on how to send faxes and check inbound faxes from their Linkus Desktop or Web Client.

For more information, see the following topics:

- Linkus Desktop Client: <u>Send Faxes from Linkus Desktop Client</u> and <u>Check Faxes</u> from Linkus Desktop Client.
- Linkus Web Client: <u>Send Faxes from Linkus Web Client</u> and <u>Check Faxes from Linkus Web Client</u>.

Fax Cover Page

Add a Fax Cover Page

Fax Cover Page appears as the first page of an outbound fax, typically displaying essential fields such as sender information, recipient details, brief message, etc. This topic describes how administrator can configure a fax cover page from PBX web portal.

Introduction

Both **administrator** and **extension users** can add cover pages.

- As an administrator, you can configure system-wide fax cover pages from PBX web
 portal. These cover pages will be available to the extension users who are authorized
 to send outbound faxes.
- For **extension users**, as long as they are authorized to send outbound faxes, they can create extension-specific fax cover pages from their Linkus Desktop or Web Client.

The following instructions describe how administrator can configure a fax cover page from PBX web portal. For more information about how extension users can proceed from their Linkus clients, see <u>Add a Fax Cover Page from Linkus Desktop Client</u> and <u>Add a Fax Cover Page from Linkus Web Client</u>.

Limitations

A maximum of **20** system-wide fax cover pages are supported.



Note:

Each extension user can customize up to **10** extension-specific fax cover pages.

Prerequisites

Prepare a cover page file that meets the following requirements:



Tip:

You can download and use the <u>sample.docx</u> file to customize a new cover page, then convert it to PDF for upload.

• File format: .pdf

• File size: Less than 5MB

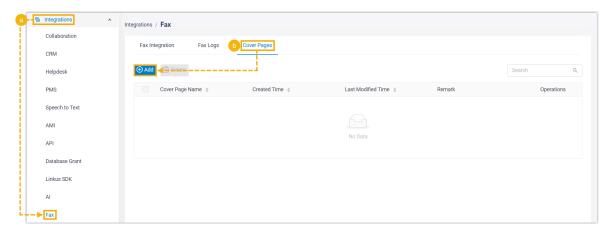


Note:

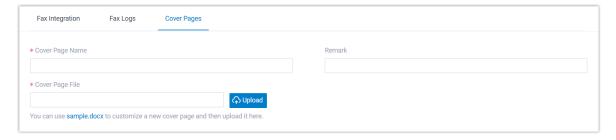
Encrypted PDF file is NOT supported.

Procedure

1. Access the creation page of fax cover page.



- a. Log in to PBX web portal, go to Integrations > Fax.
- b. Under the Cover Pages tab, click Add.
- 2. Complete the following settings.

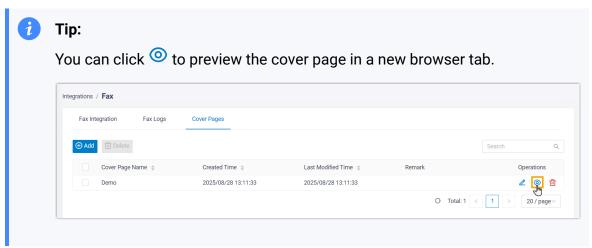


Setting	Description
Cover Page Name	Enter a name to help you identify the cover page.
Remark	Enter a short description.
Cover Page File	Click Upload to upload a PDF file.

3. Click Save.

Result

• The fax cover page is created and displayed in the list.



• Extension users authorized to send outbound faxes can view and use the cover page directly from Linkus Desktop or Web Client.

Delete Fax Cover Pages

For fax cover pages that are not in use, you can delete them at any time.

Introduction

Both administrator and extension users can delete fax cover pages.

- As an administrator, you can remove system-wide cover pages from PBX web portal.
 Once deleted, these cover pages will no longer be available to extension users.
- For **extension users**, they can delete their own custom cover pages directly from their Linkus Desktop or Web Client.

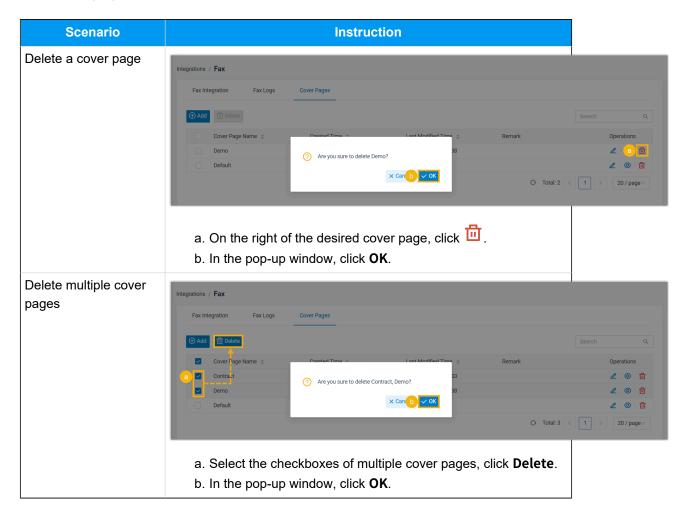
The following instructions describe how administrator can delete fax cover page(s) from PBX web portal. For more information about how extension users can proceed from their Linkus clients, see <u>Delete Fax Cover Pages from Linkus Desktop Client</u> and <u>Delete Fax Cover Pages from Linkus Web Client</u>.

Procedure

1. Log in to PBX web portal, go to Integrations > Fax > Cover Pages.

All system-wide cover pages are displayed in the list.

2. Delete cover pages as needed.



Result

The fax cover page(s) are removed from the PBX, and are no longer accessible to extension users.

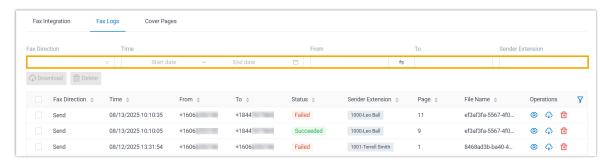
Fax Logs

Check Fax Logs

Fax logs allow you to keep track of all virtual faxes sent and received through Yeastar P-Series PBX System. This topic describes how to access fax logs and view the details.

Procedure

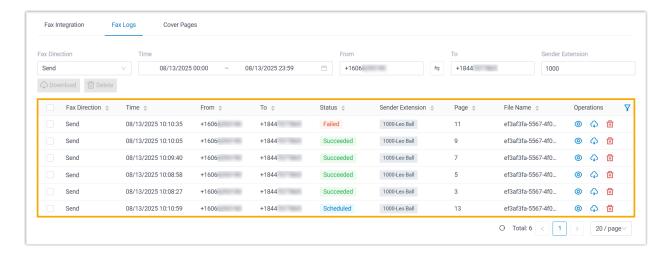
- 1. Log in to PBX web portal, go to Integrations > Fax > Fax Logs.
- 2. At the top of the list, set filters to locate the fax logs that you want to view.



Item	Description
Fax Direction	Select Send or Receive to filter sent or received faxes.
Time	Specify a time range to filter faxes sent or received within the period.
From	Enter the sender's fax number in E.164 format.
То	Enter the recipient's fax number in E.164 format.
	Note: For scheduled outbound faxes with multiple recipients, only the first number displayed in the list will be searched.
Sender Extension	Enter extension number or extension name to filter faxes sent by a specific user.

Result

The matched fax logs are displayed in the list.



Related information

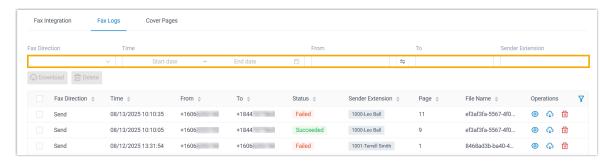
<u>Download Fax Data</u> Delete Faxes

Download Fax Data

You can download both fax logs and their associated fax files, or download individual fax file as needed.

Download fax logs and the associated fax files

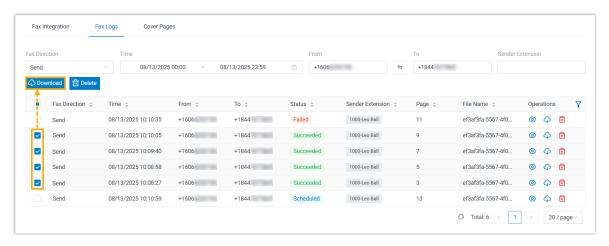
- 1. Log in to PBX web portal, go to Integrations > Fax > Fax Logs.
- 2. **Optional:** At the top of the list, set filters to locate the fax logs that you want to download.



Item	Description
Fax Direction	Select Send or Receive to filter sent or received faxes.

Item	Description
Time	Specify a time range to filter faxes sent or received within the period.
From	Enter the sender's fax number in E.164 format.
То	Enter the recipient's fax number in E.164 format.
	Note: For scheduled outbound faxes with multiple recipients, only the first number displayed in the list will be searched.
Sender Extension	Enter extension number or extension name to filter faxes sent by a specific user.

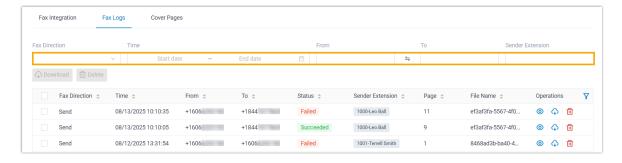
3. Select the checkboxes of the fax logs that you want to download, then click **Download**.



The fax data is downloaded as a .zip file, which includes a .csv file with log details and one or more .pdf files for the fax documents.

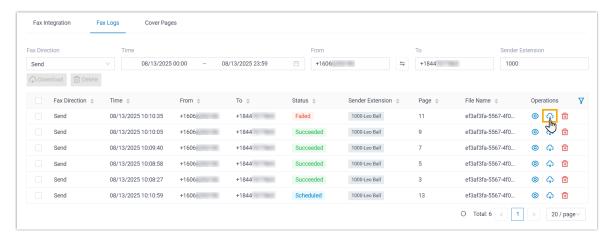
Download individual fax files

- 1. Log in to PBX web portal, go to Integrations > Fax > Fax Logs.
- 2. **Optional:** At the top of the list, set filters to locate the log associated with the fax file that you want to download.



Item	Description
Fax Direction	Select Send or Receive to filter sent or received faxes.
Time	Specify a time range to filter faxes sent or received within the period.
From	Enter the sender's fax number in E.164 format.
То	Enter the recipient's fax number in E.164 format.
	Note: For scheduled outbound faxes with multiple recipients, only the first number displayed in the list will be searched.
Sender Extension	Enter extension number or extension name to filter faxes sent by a specific user.

3. Click • beside a desired fax log.



The fax file is downloaded as a .pdf file.

Delete Faxes

All the inbound and outbound faxes through Yeastar P-Series PBX System are organized in one location for central management. If you don't need specific faxes, you can delete them as needed.

Introduction

Both administrator and extension users can delete faxes.

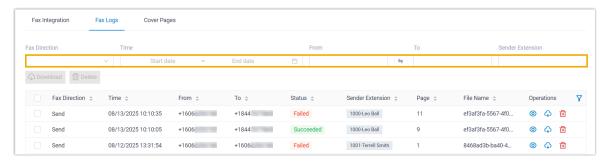
- As an administrator, you can delete faxes from PBX web portal.
 - Once deleted, the fax logs and associated fax files will no longer be accessible to extension users.
- For **extension users**, as long as they are authorized to send or receive faxes, they can delete faxes from Linkus Desktop or Web Client.

This deletion only removes the record from Linkus, the fax files still exist in the system.

The following instructions describe how administrator can delete faxes from PBX web portal. For more information about how extension users can proceed from their Linkus clients, see <u>Delete Faxes from Linkus Desktop Client</u> and <u>Delete Faxes from Linkus Web Client</u>.

Procedure

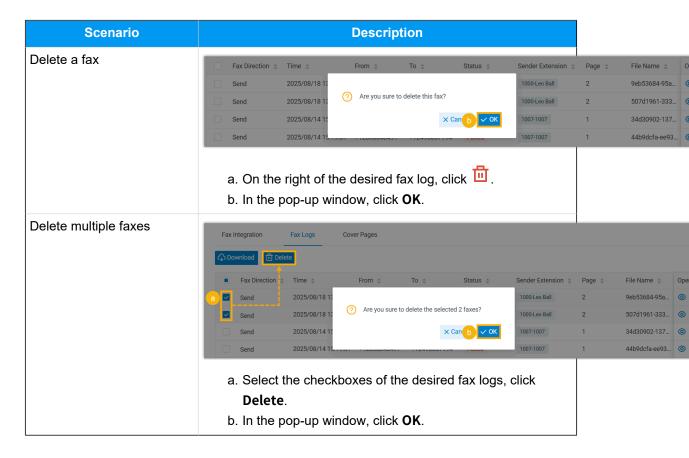
- 1. Log in to PBX web portal, go to Integrations > Fax > Fax Logs.
- 2. Optional: At the top of the list, set filters to locate the faxes that you want to delete.



Item	Description
Fax Direction	Select Send or Receive to filter sent or received faxes.
Time	Specify a time range to filter faxes sent or received within the period.

Item	Description
From	Enter the sender's fax number in E.164 format.
То	Enter the recipient's fax number in E.164 format.
	Note: For scheduled outbound faxes with multiple recipients, only the first number displayed in the list will be searched.
Sender Extension	Enter extension number or extension name to filter faxes sent by a specific user.

3. Delete faxes as needed.



Result

The fax logs and the associated fax files are removed from PBX and extension users' Linkus clients.