

EFAX- Instructions to Add Private Tags to Faxes

To enable enhanced searching of faxes, users can add private tags to a fax. Only owners of a fax and shared users with the “View and edit” sharing permission can add private tags to a fax.

Private Tags – Feature Overview and Benefits

Transitioning from current analog fax services to EFAX brings numerous benefits that can improve user management of received faxes. With traditional faxing, users were burdened with printing and physically filing faxes, a process that is both time-consuming and only available on-site.

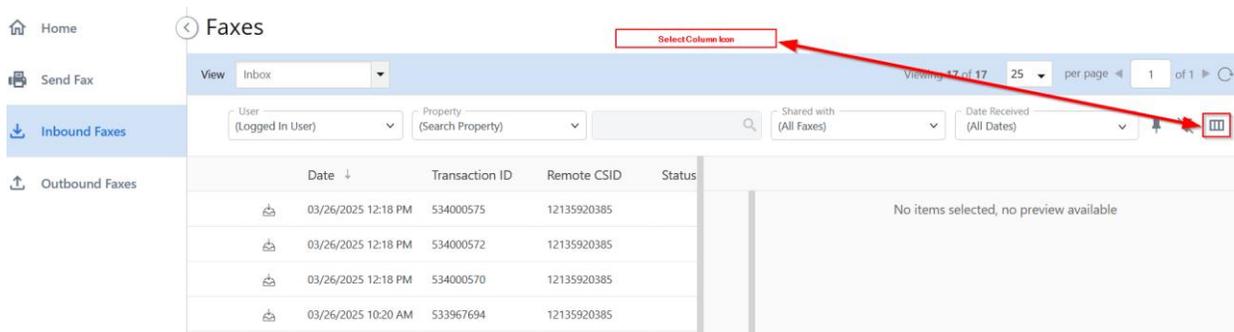
EFAX simplifies this by allowing users to effortlessly organize, search, and download faxes electronically using custom tags. These tags enhance the organization, searching, and saving of faxes. By creating and adding a custom tag, users can categorize their received faxes into groups of their choice, making it easy to locate and manage related faxes digitally. Custom tagging enables quick searching of all faxes with a specific tag and allows users to download and save all faxes associated with that tag.

Please see the detailed Custom Tag directions below to add these capabilities to your EFAX service.

Note that only the owners of a fax and shared users with the “View and edit” sharing permission can add private tags to a fax.

Set-Up Folder Column Preferences in Inbound Faxes

1. Login at [Interfax Login](#) and go to the Inbound Faxes tab to set the Private tags column to view in the inbound faxes section
2. Click on the **Columns** icon to open Folder Column Preferences



The screenshot shows the 'Faxes' interface with the 'Inbound Faxes' tab selected. A red box highlights the 'Columns' icon in the top right corner of the interface, with a red arrow pointing to it from a label 'Select Column icon'.

Date ↓	Transaction ID	Remote CSID	Status
03/26/2025 12:18 PM	534000575	12135920385	
03/26/2025 12:18 PM	534000572	12135920385	
03/26/2025 12:18 PM	534000570	12135920385	
03/26/2025 10:20 AM	533967694	12135920385	

No items selected, no preview available

3. Click the **Private Tags** arrow to the right and click **SAVE**.

Folder Column Preferences

Select the right arrow next to Private Tags / and save

Available	Search		Selected	
Private Tags		➔	Item Type Icon	⊗
Remote CSID		⊗	Date	⊗
Share Time		➔	Transaction ID	⊗
Status Code		⊗	Remote CSID	⊗
Status Text		⊗	Status Code	⊗
Transaction ID		⊗	Status Text	⊗
Unique Reference		➔	Pages	⊗

RESTORE DEFAULTS

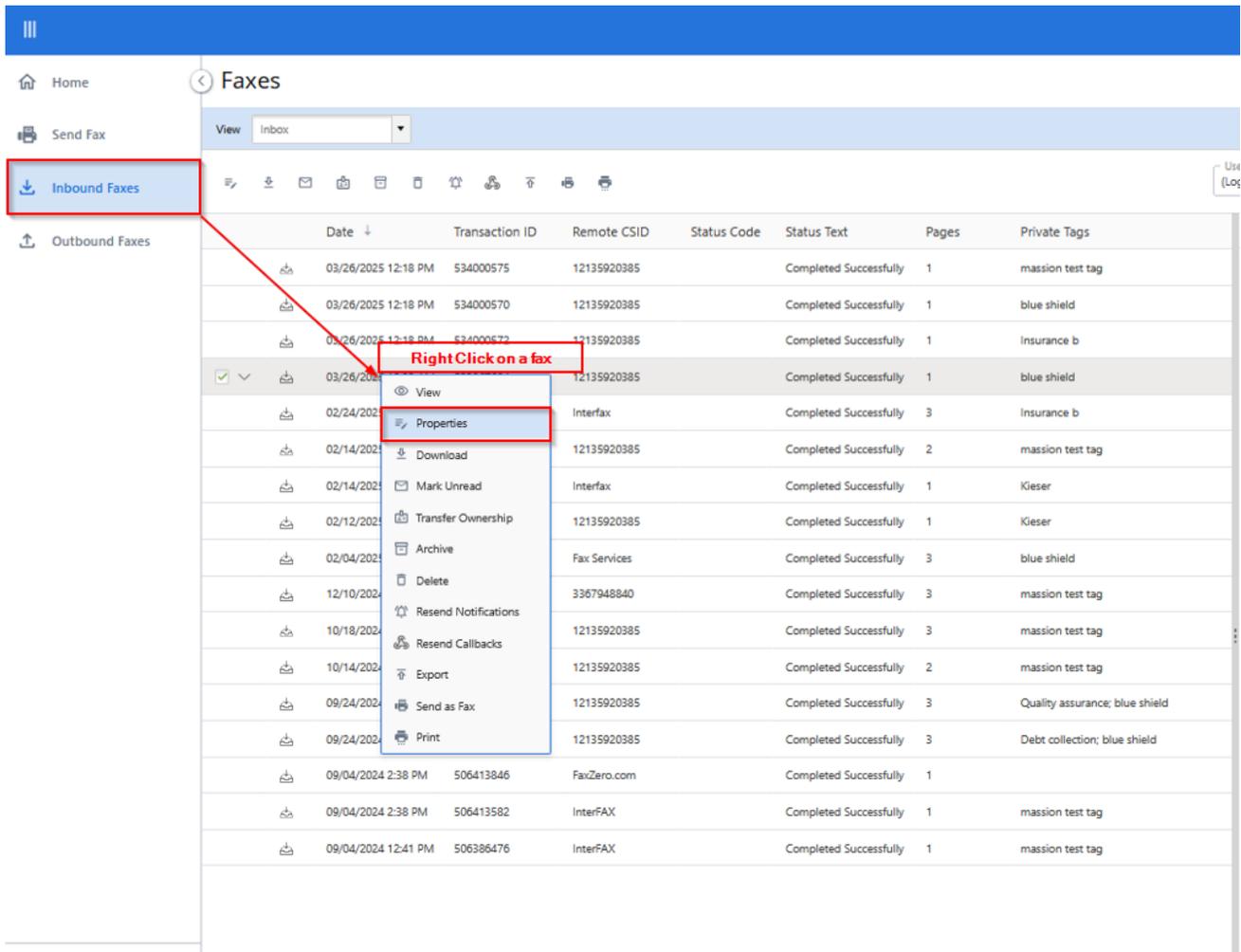
CANCEL

SAVE

TIP: You may need to move the column over to the right to see Private Tags

The screenshot shows a web interface for managing faxes. The main area is a table with columns: Date, Transaction ID, Remote CSID, Status Code, Status Text, Pages, and Private Tags. A red box highlights the 'Private Tags' column header, and a red double-headed arrow indicates the column being moved to the right. A preview window is open on the right side of the table, showing a sample fax message with the text: 'Hello, This is a test to make sure fax This test is for #interfax-duppo Mike Mission 213.821.3664'.

- From the Inbound faxes list, select a fax and right click on it, then select **Properties** to open Document Properties.



Create Private Tags

You can add private tags to a fax for enhanced searches. Only owners of a fax and shared users with the “View and edit” sharing permission can add private tags to a fax.

To create a new private tag, in the **Add new Label** box, enter the private tag, then click **Add**. The private tag will automatically be added to the selected fax. Click **Save**.

To add existing private tags to a fax, click **Add (>)** next to the private tag(s) you want to add, or move private tags from the **Available** box to the **Selected** box using a drag-and-drop operation. Click **Save**.

To remove a private tag from a fax, click **Remove (X)** next to the user in the **Selected** box. Click **Save**.

Document Properties



Document Properties dialog with tabs: GENERAL, PRIVATE TAGS, CUSTOM PROPERTIES, SHARING. The PRIVATE TAGS tab is active, showing a list of available tags and a selected tag.

Available	Selected
3-25-25	massion test tag
blue shield	
Debt collection	
Insurance b	
Kieser	
massion test tag	

Below the tags, there is an "Add new Label" section with a text input field containing "Enter the new label to add to this document" and an "ADD" button. At the bottom right, there are "CANCEL" and "SAVE" buttons.

Sorting and searching faxes by tag

1. To sort all faxes by a tag. Select the property down arrow and select **Tag**, then type the tag name and click the search icon.

Navigation: Home, Faxes

Send Fax, Inbound Faxes, Outbound Faxes

View: Inbox

User: (Logged in User) | Property Tag: blue shield

	Date	Transaction ID	Remote CSID	Status Code	Status Text	Pages	Private Tags	Share Time
	03/26/2025 12:18 PM	534000570	12135920385	Completed Successfully		1	blue shield	
	03/26/2025 10:20 AM	533967694	12135920385	Completed Successfully		1	blue shield	
	02/04/2025 8:58 AM	526690897	Fax Services	Completed Successfully		3	blue shield	
	09/24/2024 5:09 PM	509121384	12135920385	Completed Successfully		3	blue shield	
	09/24/2024 9:14 AM	509022364	12135920385	Completed Successfully		3	blue shield	

To see all faxes again, Set the Property back to (search Property)

Property (Search Property) | massion test tag

The screenshot shows the InterFAX 'Faxes' interface. The 'View' dropdown is set to 'Inbox'. The 'Property' dropdown is set to 'Tag' and the search filter is 'Kieser'. The table displays the following data:

	Date	Transaction ID	Remote CSID	Status Code	Status Text	Pages	Private Tags
<input checked="" type="checkbox"/>	02/14/2025 7:07 AM	528245460	Interfax	Completed Successfully	1	Kieser	
<input checked="" type="checkbox"/>	02/12/2025 12:11 PM	527951436	12135920385	Completed Successfully	1	Kieser	

Download and save faxes by tag

1. To download and save all faxes by a tag, select the property down arrow and select **Tag**, then type the tag name and click the download icon

The screenshot shows the InterFAX 'Faxes' interface with the 'Download' button highlighted. The 'Property' dropdown is set to 'Tag' and the search filter is 'Kieser'. The table displays the following data:

	Date	Integer	String	Transaction ID	Remote CSID	Status Code	Status Text	Pages	Private Tags	Share Time	Document Name	Document ID
<input checked="" type="checkbox"/>	04/16/2025 12:01 PM		Vee look at this	537102143	912137402448	Completed Successfully	1	Kieser				282039806
<input checked="" type="checkbox"/>	02/14/2025 7:07 AM			528245460	Interfax	Completed Successfully	1	Kieser				273174920
<input checked="" type="checkbox"/>	02/12/2025 12:11 PM			527951436	12135920385	Completed Successfully	1	Kieser				272860598

2. When downloading all select the file type you want

Download ✕

Select the File Format to download the document(s) as:



Download as
PDF



Download as
TIFF



Download as
PNG

CANCEL