WestFax SendFax for Microsoft Teams Quickstart Guide

Version 1.0.2 (last updated 2/19/25)

Welcome!

To get started with the MS Teams Quickstart guide there are some pre-requisites you need to have to use the WestFax SendFax app.

To install the "WestFax SendFax" third-party app in Microsoft Teams, as an MS Teams Administrator, you'll need to ensure the following prerequisites are met:

1. Enable Third-Party Apps in Teams:

• **Access Teams Admin Center:** Sign in to the Microsoft Teams admin center with your administrator credentials.

• **Navigate to Manage Apps:** Go to **Teams apps** > **Manage apps**.

• **Configure Org-Wide Settings:** In the upper-right corner, select **Org-wide app settings**.

• **Allow Third-Party Apps:** Ensure the **"Allow third-party apps"** option is turned **on**. This setting permits users to access and install third-party applications within Teams.

• **Allow New Third-Party Apps:** Optionally, enable **"Allow any new third-party apps published to the store by default"** to automatically allow newly published apps.

• **Save Changes:** Click **Save** to apply the settings.

Reference: Manage your apps in the Microsoft Teams admin center

2. Configure App Permission Policies:

• **Navigate to Permission Policies:** In the Teams admin center, go to **Teams apps** > **Permission policies**.

• **Edit or Create Policy:** You can edit the existing **Global (Org-wide default)** policy or create a new custom policy:

• **Allow Specific Apps and Block All Others:** To permit only certain apps, choose this setting and add **"WestFax SendFax"** to the list of allowed apps.

• **Allow All Apps:** To permit all apps, select this option.

• **Assign Policy:** Apply the policy to the relevant users or groups.

Reference: [Manage app permission policies in Microsoft Teams](#)

3. Pre-Install the App for Users (Optional):

• **Navigate to Setup Policies:** In the Teams admin center, go to **Teams apps** > **Setup policies**.

• **Edit or Create Policy:** Modify the existing policy or create a new one:

• **Add Apps:** Under **Installed apps**, click **Add apps** and search for **"WestFax SendFax"**.

• **Pin Apps:** Under **Pinned apps**, add **"WestFax SendFax"** to make it easily accessible in the Teams sidebar.

• **Assign Policy:** Apply the policy to the desired users or groups.

Reference: [Preinstall apps in user's Teams client](#)

By ensuring these prerequisites are met, you can successfully deploy the "WestFax SendFax" app within your Microsoft Teams environment, providing users with integrated faxing capabilities.

Once you have installed the App as an allowed app in your organization you can now allow users to run the app in MS Teams.
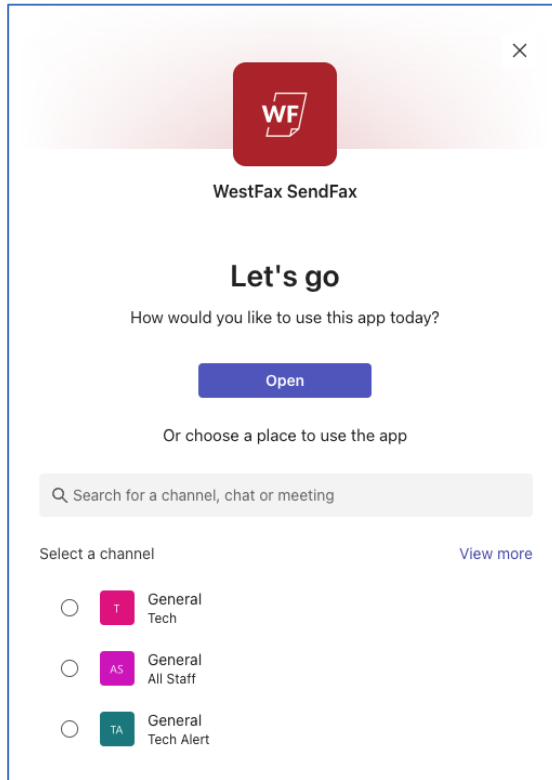
1. Install the WestFax SendFax App

A. From Microsoft Teams App Store (If Available

1. Open **Microsoft Teams** (Desktop or Web).

2. Click on the **Apps** icon in the left sidebar.

3. In the search bar, type **"WestFax SendFax"**.

4. Click on the **WestFax SendFax** app from the results.

5. Click **Add** to install it.

B. If Provided by IT or Admin (Manual Installation)

1. Click on the **Apps** icon in Microsoft Teams.

2. At the bottom, click **"Upload a custom app"** (this may require admin permissions).

3. Select **"Upload for me or my team"**.

4. Choose the **WestFax SendFax manifest file** (provided by your IT admin).

5. Click **Open**, then **Add** to install.

2. Open the WestFax SendFax App

1. In Microsoft Teams, click on **Chat**.

2. Look for **WestFax SendFax** under **Pinned Apps** or search for it using the **search bar**.
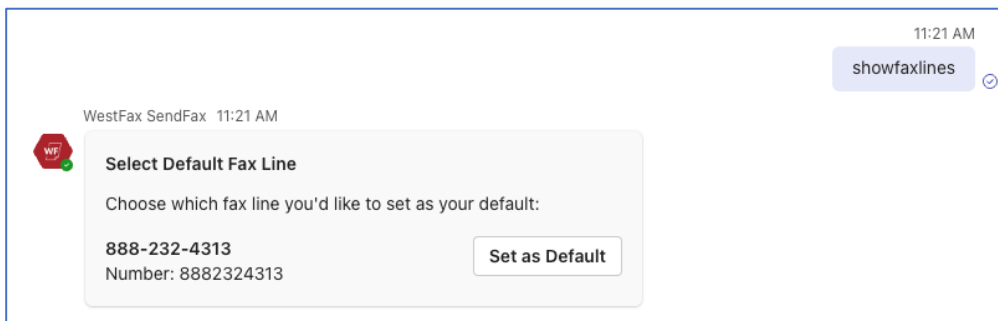
3. Click on it to open the bot chat.
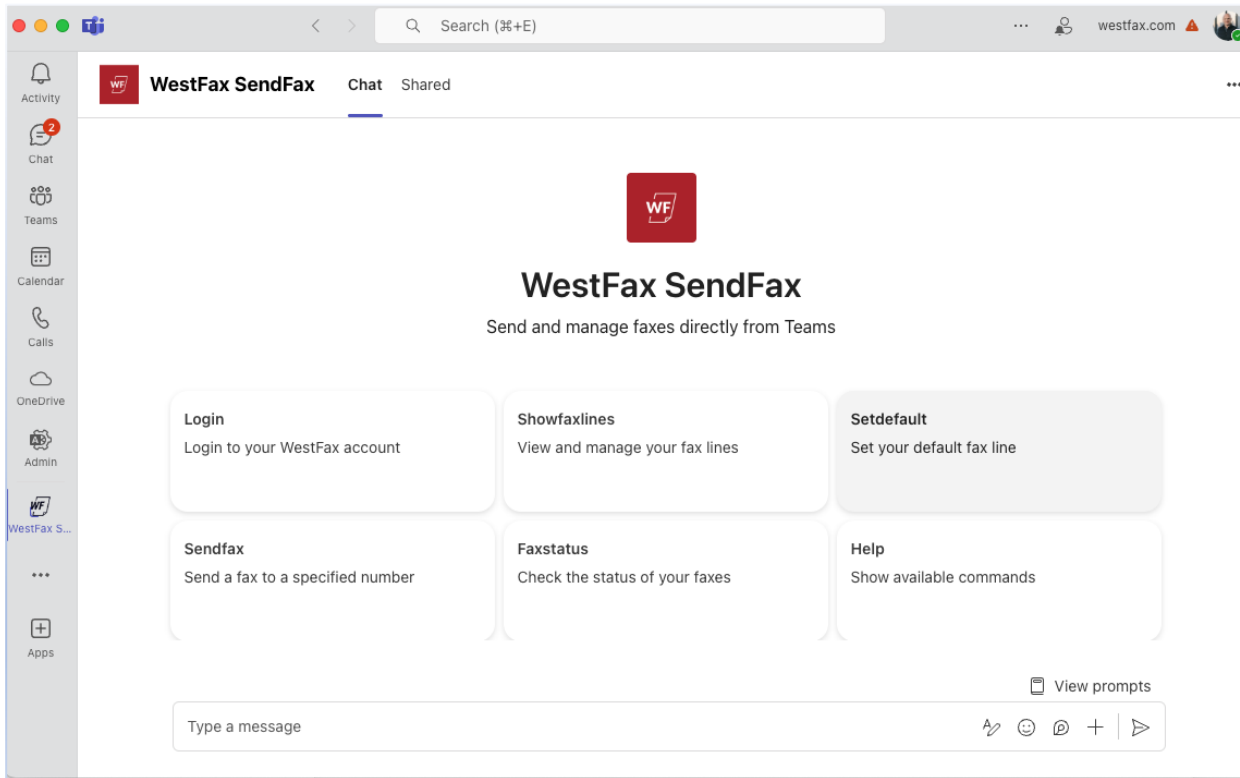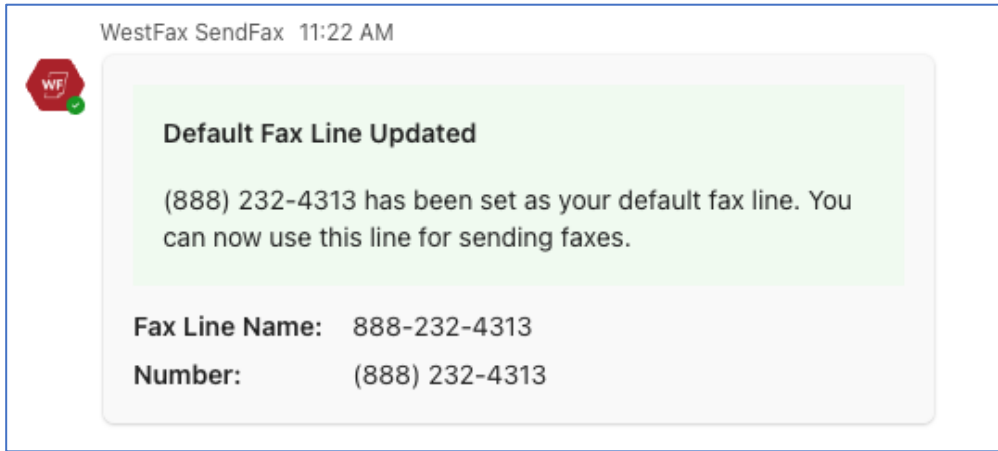
3. Log In to Your WestFax Account

1. In the chat window, type: **Login**

2. The bot will prompt you to log in. Click the provided link.

3. Enter your **WestFax credentials**. Not your Microsoft AD or O365 Credentials.

4. Once logged in, you can begin sending faxes.
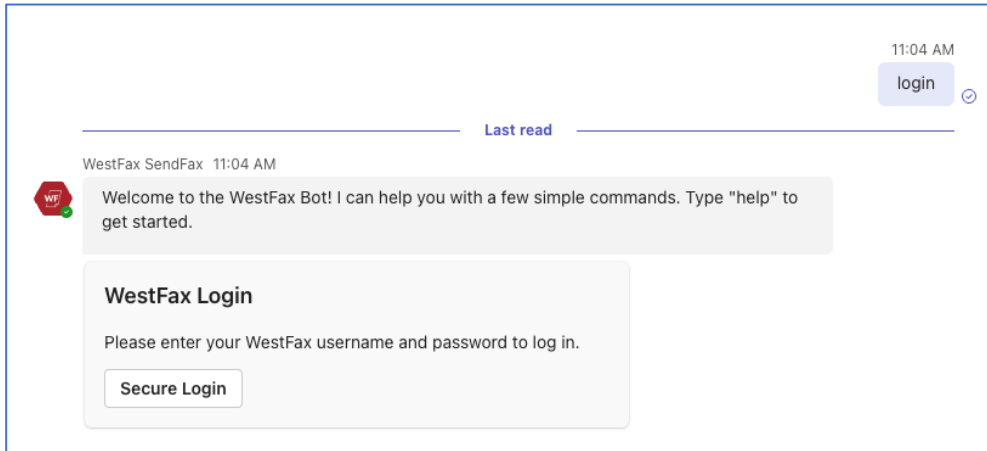
4. Set a default Fax Number.

1. Type the command: **showfaxlines**

2. A list of fax numbers or a number will be shown.

3. Click "Set as Default" on the fax line of your choice.

4. All faxes will be sent from this fax line.

5. You may change this default fax line later by typing **showfaxlines** again.

WestFax

WestFax SendFax 11:22 AM

Default Fax Line Updated

(888) 232-4313 has been set as your default fax line. You can now use this line for sending faxes.

Fax Line Name: 888-232-4313
Number: (888) 232-4313

5. Send a Fax

1. Click the + icon on the right hand side of the chat window.

2. Select a file from your local hard drive or cloud locations.

3. We only allow PDF, DOCX, DOC, TIF, PNG, JPG & XLS.

4. Once you select a file type **sendfax 999-999-9999** (Replace 9 with the recipient fax number)

5. Hit enter to submit the fax send requ est.

sendfax 9702895979

WestFax-TestFax.pdf
personal > dclayton_westfax_com

6. You will see a fax submission success or failure message. If it fails try again or contact support for more information.

WestFax SendFax 2:00 PM

✅ Fax queued to **(970) 289-5979**. Use **faxstatus** for updates.

6. Check Fax Status

1. If you want to check on the status of the fax job just type: faxstatus

2. You will see a dialog pop up that will give you an indication of send status.

WestFax SendFax 2:02 PM

Recent Fax Status

Fax to **(970) 289-5979**

File: WestFax-TestFax.pdf

Status: ✅ Completed

At: 2/19/2025, 2:02:00 PM – Pages: 1

Fax is complete!

7. Clear Fax Status.

1. You can clear the status check by typing: **faxstatus clear**.

2. This will remove any faxes that are complete so that only incomplete faxes are shown.

3. Note: This will only show faxes you sent. Not other users or your fax line. Just MS Teams based faxes.

8. Log out

1. You can end your session by typing: Logout

2. This will clear your session and require you to log in if you want to check on the fax status later.

Support:

If you need additional support contact us at support@westfax.com or call us at 303-299-9329 8-5pm PST M-F.

Thank you