Faxing a Sales Document

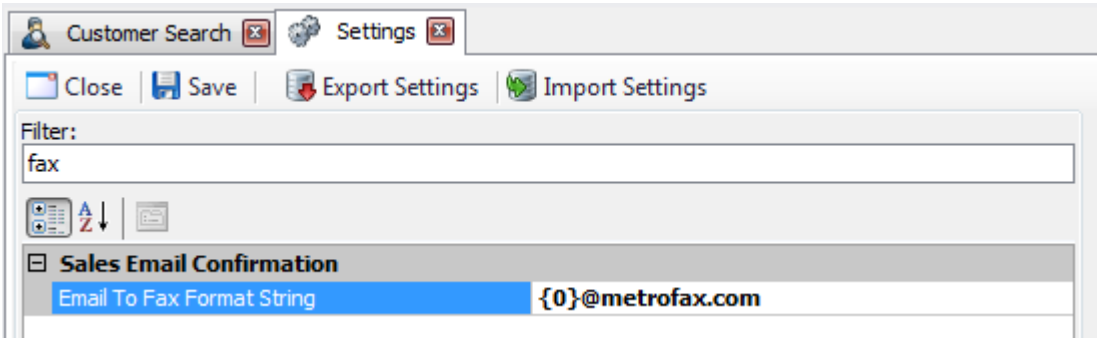
Cavallo Support - 2025-06-11 - Sales

Overview

In addition to printing and emailing functionality, SalesPad allows the option of faxing sales documents and purchase orders.

Settings

In order to send faxes through SalesPad, the *Email to Fax Format String* must be configured in the Settings module. To configure this, filter to "fax":



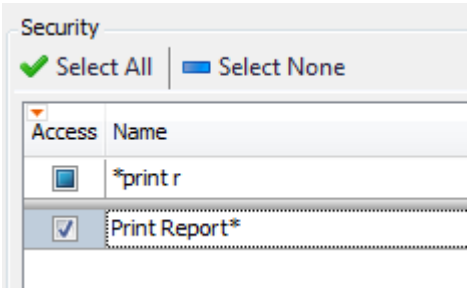
Fill in the "{0}" with the fax number. This number will be sent to the fax provider (MetroFax in this example).

The text after the "@" symbol will change depending on what fax provider is in use.

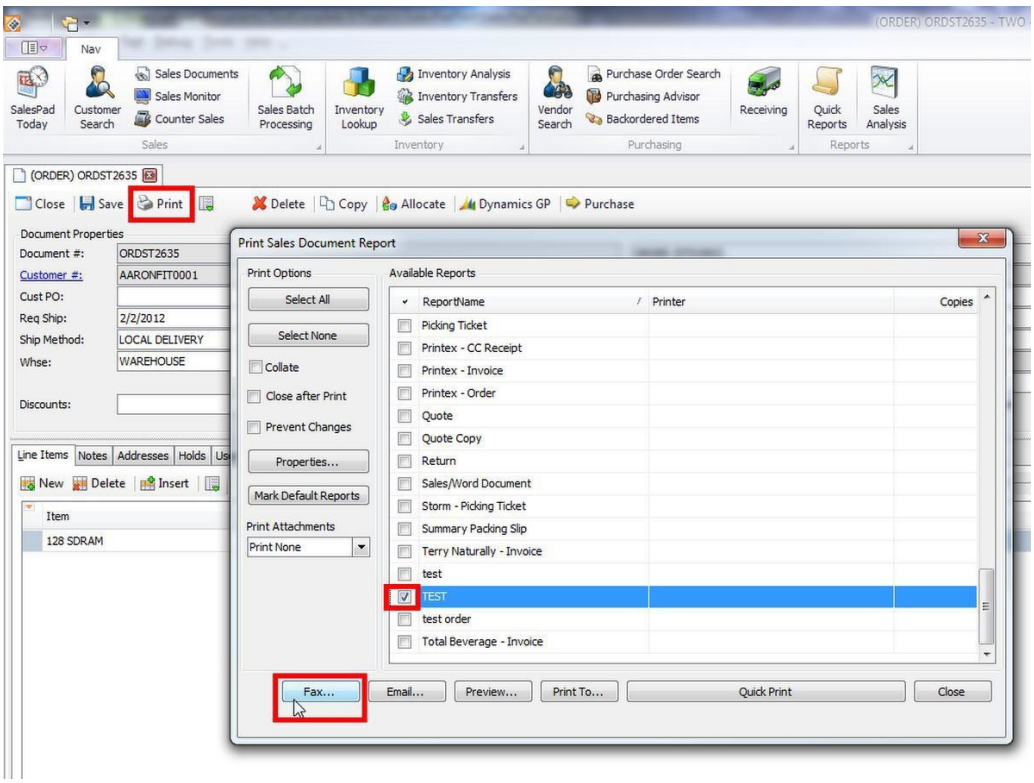
The Email setting must also be configured. (Email server/IP, SMTP User, SMTP Password, SMTP Port. Refer to the Emailing and Email Templatesdocument or the Settings | SalesPad Desktop for more information.)

Security

To enable faxing, *Print Report* must be enabled in the Security Editor.



1. Open a Sales Document or Purchase Order
2. Click the **Print** button
3. Select desired report(s)
4. Click **Fax...**



5. Select the To fax number from the dropdown, or type in a fax number
6. Click **Send**