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Faxing a Sales Document

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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":

🚨 Customer Search 📧 🌮 Settings 🖾	
📑 Close 🛛 🖶 Save 👘 🐻 Export Settings 🛛 👹 In	nport Settings
Filter:	
fax	
Sales Email Confirmation	
Email To Fax Format String {0	}@metrofax.com

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 <u>Emailing and Email Templates</u>document or the <u>Settings | SalesPad</u> <u>Desktop</u> for more information.)

Security

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

Security	t All 🔲 🚥 Select None
Access	Name
	*print r
	Print Report*

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

4. Click Fax...

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Ship Method: LOCAL DELIVERY	Select None	Printex - CC Receipt					
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- 5. Select the To fax number from the dropdown, or type in a fax number
- 6. Click Send