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Faxing a Sales Document

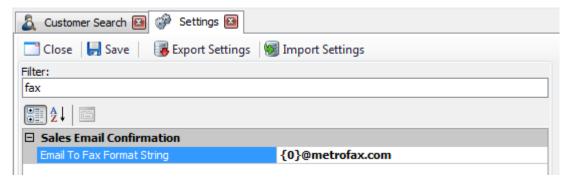
Cavallo Support - 2025-06-11 - Sales

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":



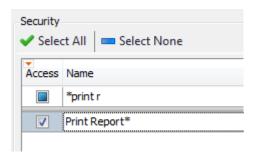
Fill in the "{0}" with the fax number. This number will be sent to the fax provider (MetroFax in this example).

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

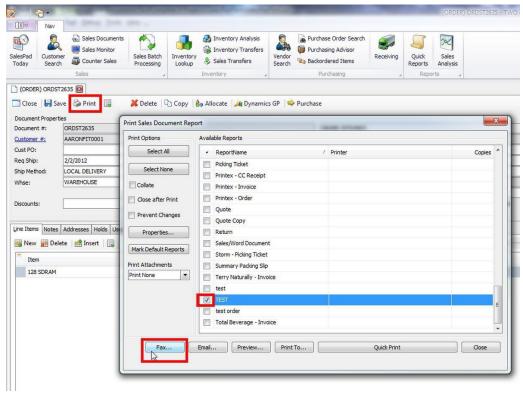
The Email setting must also be configured. (Email server/IP, SMTP User, SMTP Password, SMTP Port. Refer to the Email Templates document or the Settings | SalesPad Desktop for more information.)

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**