Creating and Sending an Electronic Fax via IQ

Market: House

Description: These instructions teach users how to use IQ to send email messages to a contact's fax machine using a House Outlook Exchange Server. Please contact your House IQ Consultant for questions on the technical configuration.

Note: This feature recommends that attachments which are included in the electronic faxed message are 20MB or less. Attachment types accepted: PDF, Word, Excel, PowerPoint, and Text.

Creating an E-Fax Contact Record for an E-Fax Message

1. Navigate to Contacts > Find Contacts > Find or Add a Contact.



- 2. In the Find Contact pane, enter information and click **Find Existing Contacts** to determine if the contact record exists in IQ.
- **3.** A set of results is displayed, click **Add Contact** and complete the steps to create a contact record. If the **Contact** exists, click on the existing contact.



4. The Contact window opens. If there is existing fax information listed in the Contact record, it will appear under General in the **Online Info** field.

General	Messages (163)	Outreach (3)	Services (30)	Events (0)	Voter Data	Log (19)	
Home Address 7990 Quantum Dr Vienna, VA 22182 VA11 Fairfax Coun <u>Map</u> Q	• ★ , Ofc 1 <i>▲</i> -5255 aty	Business A Leidos 123 Leidos I Vienna, VA : <u>Map</u> ♀	ddress + Prive 12345	Onlin v tı Fax	ne Info + raining@iqservic 035551212@fax	edesk.com * x.house.gov	Phone Numbers + F: (703) 555-1212 ★ ♪

5. Select the Online Info + to add the E-Fax information, if it's not listed.

General Messages (163)	Outreach (3) Services (30)	Events (0) Voter Data Log (19)	
Home Address + *	Business Address +	Online Info +	Phone Numbers +
7990 Quantum Dr, Ofc 1 🏼 🖊	Leidos 🖌	🖂 training@iqservicedesk.com *	F: (703) 555-1212 * 🗸
Vienna, VA 22182-5255	123 Leidos Drive		
VA11 Fairfax County	Vienna, VA 12345	🖂 7035551212@fax.house.gov	
Map 💡	Map 💡	Fax 🖋	

- 6. Complete the fields for adding an E-Fax.
 - In the Email Address field, add the E-Fax information. For IQ, the @fax.house.gov is the default address. For example: <u>703-555-1212@fax.house.gov</u>.
 - In the **Description** field, type **Fax.**
 - Check **Primary**, if this is the preferred contact information to use. If not, leave it blank.
 - Select Save.

General Messages (165)	Outreach (3)	Services (30)	Events (0)	Voter Data	Log (19)	
Home Address + ★ 7990 Quantum Dr, Ofc 1 ▲ Vienna, VA 22182-5255 VA11 Fairfax County Map ♥	Business A Leidos 123 Leidos I Vienna, VA <u>Map</u>	ddress + Drive 12345	Fe	Email Ship 7035551212@fax.h Fax Primary Save Cance	vouse.gov	Phone Numbers + F: (703) 555-1212 ★ ♪

7. The E-Fax contact information will now be saved to the Contact record.

Sending an E-Fax

1. Navigate to the Actions drop-down and select New Form Message. The Email Message module appears.

Contacts » <u>New</u> » Contact	t							■ ID# 7118124
Mr. To Newsletter S Person	Actions C New Default Service New Flags Attach Existing Event							
General Messa	ges (164) Ou	utreach (3)	Services (30)	Events (0)	Voter Data	Log (19)		New Form Message
Home Address + *	Onlin	e Info +		Phone Numb	New Opinion Duplicate Check			
7990 Quantum Dr, Ofc 1	🖂 t	raining@iqservic	edesk.com *	F: (703) 555-1	Summary Report by Section			
Vienna, VA 22182-5255	rive	/				Delete		
VA11 Fairfax County	2	035551212@fax	- E					
Map 🛛		Map 💡		Fax d	5.			Issu

2. Complete the necessary fields listed below to send an E-Fax.

- Outgoing Email should be selected.
- To Access the fax number by selecting the drop-down and choosing the fax number with @fax.house.gov. If the E-Fax number was listed in the Contact record it should appear.
- Attachments Add attachments in the electronic faxed message. Attachment types accepted are: PDF, Word, Excel, PowerPoint, and Text.
- Form Letter If sending a Form Letter, select the type. You have the option of customizing the Form Letter.

7035551212@fax.H Newsletter Subscriber Frequent Writer IQ-Id Local Press Radio Press Very Important Persor	ouse.gov (Fax) entified								L	
General	L0g (3)							A Deterit		
	Message			Tuilling				S Detail	O	her Activity
Outgoing:	E-Mail	Ŧ		Chi Se	Status:	Approved	v	Save as T	emplate	🔗 Edit
From:	"Congressman John Quorum" <iq.training@training.lmhostediq.com></iq.training@training.lmhostediq.com>	Ŧ				Send		Date In: 4/22	2/2021	
To:	7035551212@fax.house.gov Fax	Ŧ	Cc/	lcc				Incoming: U Created By:	S Mail	Categorize
Subject:								Lakeisha Tayl Assigned To	or :	•
Attachments:								Lakeisha Tayl Priority: Non Salutation: N	or e 1r. Ouorum	
Issues:	Select issues	0	+							
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Batch:	No batch selected	Ŧ	0)						

3. Select Send.