

Creating and Sending an Electronic Fax via IQ

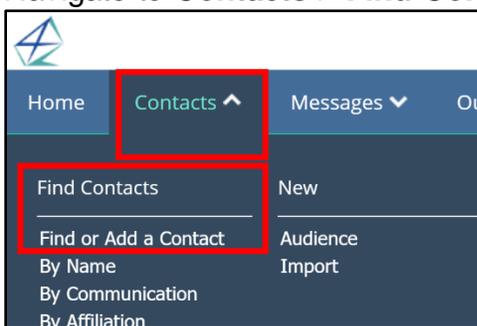
Market: House

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.

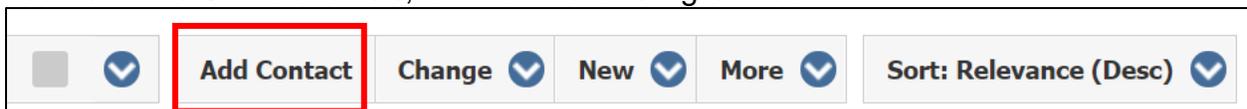
Note: This feature recommends that attachments which are included in the electronic faxed message are 20MB or less. Attachment types accepted: PDF, Word, Excel, PowerPoint, and Text.

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

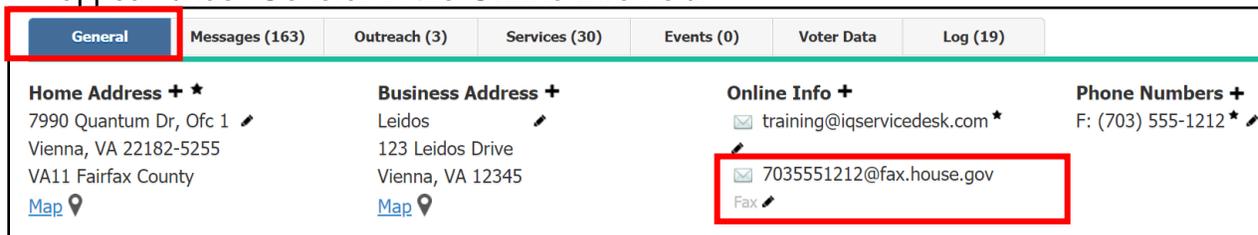
1. Navigate to **Contacts > Find Contacts > Find or Add a Contact**.



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.



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

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: 703-555-1212@fax.house.gov.
- In the **Description** field, type **Fax**.
- Check **Primary**, if this is the preferred contact information to use. If not, leave it blank.
- Select **Save**.

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.

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.

The screenshot shows a web application interface for sending a message. The main form is titled "Message" and is highlighted with a red border. It contains the following fields:

- Outgoing:** E-Mail (dropdown)
- From:** "Congressman John Quorum" <iq.training@training.lmhostediq.com> (dropdown)
- To:** 7035551212@fax.house.gov Fax (dropdown)
- Subject:** (text input)
- Attachments:** (upload icon)
- Issues:** Select issues ... (dropdown with search icon)
- Form Letter:** New Form Letter -- version 1 -d- (dropdown)
- Batch:** No batch selected (dropdown)

To the right of the form is a "Status" dropdown set to "Approved" and a prominent green "Send" button, which is also highlighted with a red box. Further right is a "Detail" sidebar with the following information:

- Date In:** 4/22/2021
- Incoming:** US Mail
- Created By:** Lakeisha Taylor
- Assigned To:** Lakeisha Taylor
- Priority:** None
- Salutation:** Mr. Quorum

At the top of the interface, there are tabs for "General" and "Log (3)".

3. Select **Send**.