

Creating and Sending an Electronic Fax via IQ

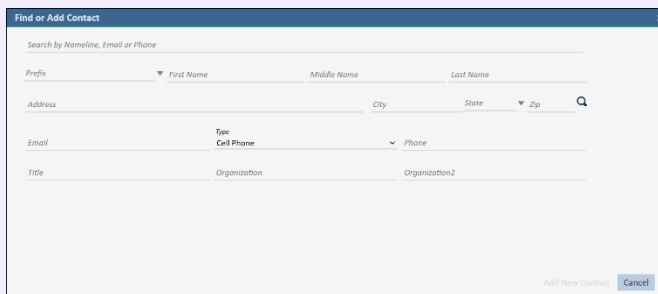
Market: House

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.

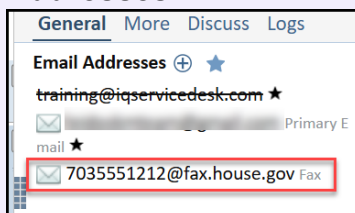
Creating an E-Fax Contact Record for an E-Fax Message

1. Click on the Find or Add a Contact Action icon 



The dialog box titled "Find or Add Contact" contains a search bar "Search by Name, Email or Phone". Below it are fields for "Prefix", "First Name", "Middle Name", and "Last Name". There are also fields for "Address", "City", "State", and "Zip" with a search icon. Further down are fields for "Email", "Type", "Cell Phone", and "Phone". At the bottom are fields for "Title", "Organization", and "Organization2". A "Add New Contact" button and a "Cancel" button are at the bottom right.

2. Enter your search criteria for the contact. Results will display after each piece of information has been entered.
3. If there is a match, click the **radio button** next to the contact in order to access their record. If there is no match, click **Add New Contact**.
4. The Contact record opens. If this is an existing contact record, look under **Email Addresses** to check if there is already fax information.



The contact record shows tabs for "General", "More", "Discuss", and "Logs". Under the "General" tab, the "Email Addresses" section is expanded, showing a list of email addresses. The first address is "training@iqservicedesk.com" with a star icon. Below it is a redacted address. At the bottom, a new address "7035551212@fax.house.gov" is being added, with a red box highlighting it and a "Fax" label next to it.

5. If there is no fax number listed, click the + icon next to Email Addresses to add one.
6. Complete the fields for adding an **E-Fax**.
 - In the **Type** field, choose **Email**.
 - In the **Data** field, enter the fax number followed by **@fax.house.gov**. 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 contact you are sending a fax to and click **Add Message**.

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.

Approved Message for Mr. Tom Quorum

Response More Preview

To 7035551212@fax.house.gov Fax Cc/Bcc From "Office of Congressman John Quorum"<DistrictServices@training.lml>

Subject Method Out E-Mail

Issues Assigned To Jonathan Kilgore

Form Letter Limit to Codes Or Custom Reply

Add Discussion Message...

Alert these Users or Groups Post

Deny Change Approver On Hold Batch Send ID#7118124 Row 1 Save & Close Save Close

3. Select **Send**.