

Subject: Sending Faxes Through Quickbase	Product: Customer Loyalty Group	Approved on:
---	--	---------------------

Purpose:

Sending a Fax through Quickbase.

Policy:

Client requested for documents to be faxed.

Procedure:

1. Pull up the client's page in Quickbase
2. Go to the *Creditors Section*
3. As pictured below, click any of the creditor pages

	**Creditor Status	Settlement Status	Settled Date	Legal or Collection	Current Creditor Name
				No	Best Buy/Citibank
	Settled	Clearing Payment	03-28-2018	No	Capital One
				No	Chase
				No	CIR Law Office

4. Go to the *Comments Section*
5. Scroll to the bottom of the *Comments Section* until you see **Links to Emails/Files**
6. As pictured below, click on Send RC Fax link

Links to Emails/Files

Download POA
Send Authorization To Global
Wet Sign ATC General
Account Consultation
Send RC Fax
Lost Settlement Creditor
Lost Settlement Client
Lost Settlement NSF
Lost Settlement NSF

7. This will open a new iWeb page
8. As pictured below:
 - a. On the "Mail To" tab, fill in the fax number in the following format: 1xxx-xxx-xxxx@metrofax.com
 - b. On the "Attachments" tab, click Choose file attaching the document you'd like to send.

Latest Revision Date: May 16th, 2018	Page 1 of 2	Author of Latest Revision: Ta'lor Soden
--	--------------------	--

In the printed form this is an uncontrolled document. The official version can be found online.

Subject: Sending Faxes Through Quickbase	Product: Customer Loyalty Group	Approved on:
---	--	---------------------

Email From (Hide Details...)

From Email: negotiations@ClearOneAdvantage.com From Email Name: ClearOne Negotiations

Mail To (Hide Details...)

	Email Address	Contact Name
1	Fax format :1XXXXXXXXXX@metrofax.com	
2		
3		
4		

CC People (Show Details...)

BCC People (Show Details...)

Attachments (Show Details...)

9. Click "Send Email"

Exceptions:

None

Latest Revision Date: May 16th, 2018	Page 2 of 2	Author of Latest Revision: Ta'lor Soden
--	--------------------	--