

<b>Subject:</b> <b>Sending Faxes Through Quickbase</b>	<b>Product:</b> <b>Customer Loyalty Group</b>	<b>Approved on:</b>
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**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



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.

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

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The screenshot shows a fax sending interface with the following fields:

- Email From (Hide Details...)**:
  - From Email: negotiations@ClearOneAdvantage.com
  - From Email Name: ClearOne Negotiations
- Mail To (Hide Details...)**:
  - Email Address
  - Fax format :1XXXXXXXXXX@metrofax.com
  - 1, 2, 3, 4 (four input fields for fax numbers)
  - Contact Name (two input fields corresponding to the fax numbers)
- CC People (Show Details...)**
- BCC People (Show Details...)**
- Attachments (Show Details...)**

A large black arrow points from the "Attachments (Show Details...)" button towards the "Attachments" section of the interface.

9. Click "Send Email"

**Exceptions:**

None

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