

How to use IQ to Create an E-Fax Contact Record and Send an E-Fax

Market: House

Module: Messages

Purpose: This guide provides instruction on 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.

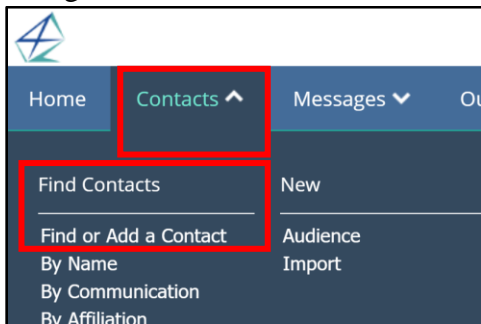
Key Benefits

IQ has the capability to fax messages to your constituents within its Messages module and thus, facilitates the process to send correspondence and create new contact record in IQ.

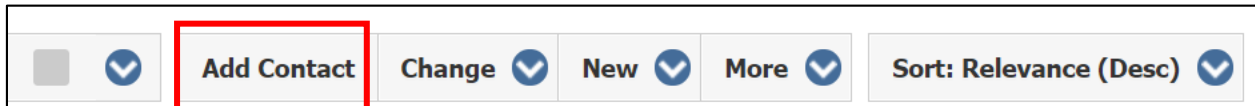
Note: This feature recommends that attachments which are included in the electronic faxed message are 20MB or less. Attachment types accepted are: PDF, Word, Excel, PowerPoint, and Text.

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

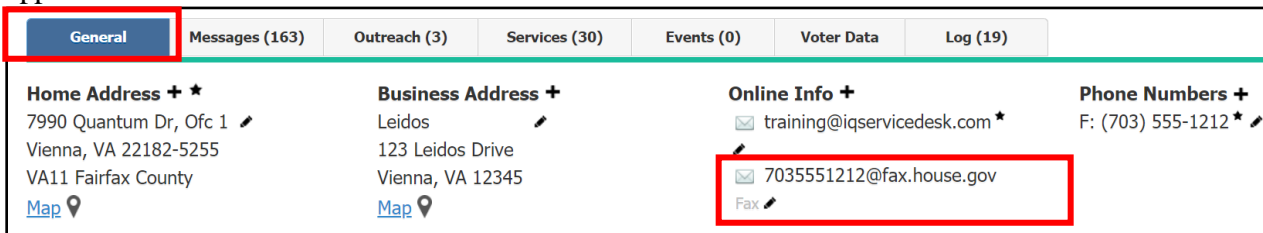
1. Navigate to **Contacts > Find Contacts > Find or Add a Contact**.



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**.

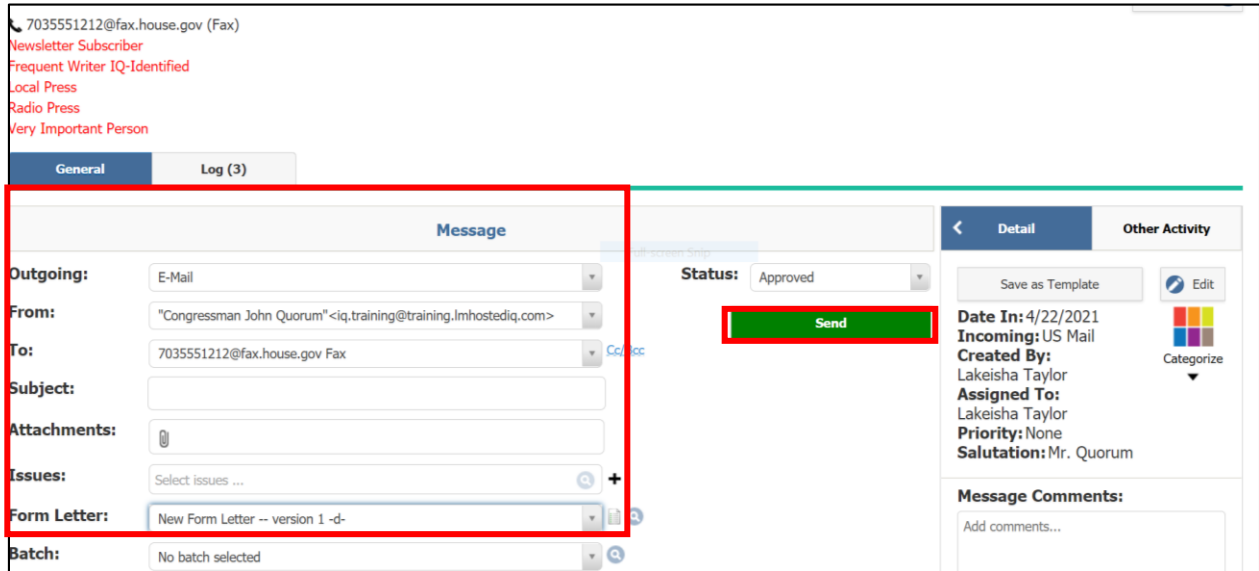
7. The E-Fax contact information will now be saved to the Contact record.

Send 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.



3. Select **Send**.