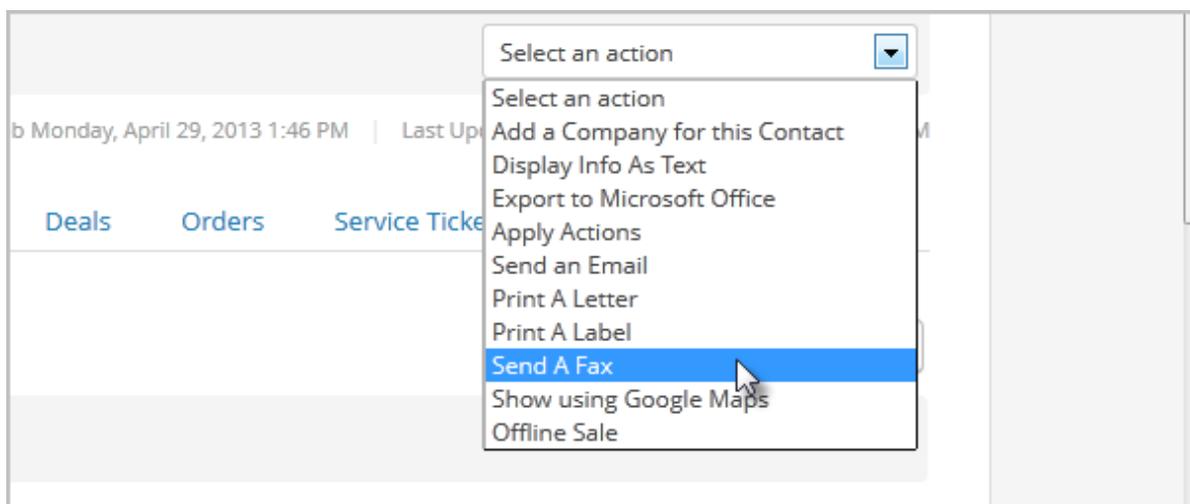


Send a one-off fax to a contact

You can send a fax to one contact or broadcast a fax to a group of contacts. Before you start using Infusionsoft to send faxes, you may want to set up a confirmation email address through **Marketing > Settings > Voice & Fax**. The system will email a confirmation message to this account after each fax is sent.

Send a Fax to a Single Contact

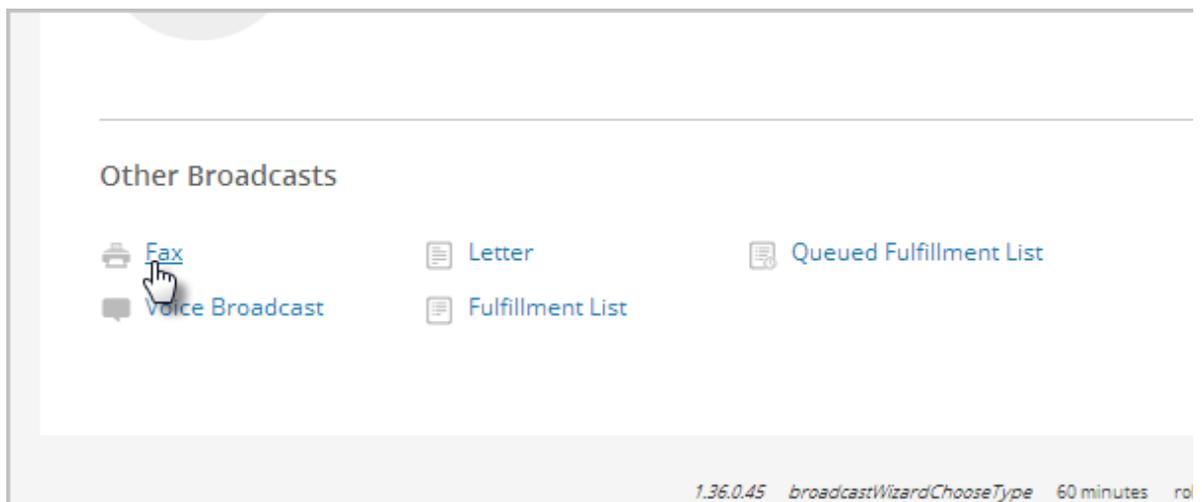
1. Send a fax to a single Contact. While viewing a contact record, click the **Select an action** drop-down and click **Send a Fax**.



2. Choose from the following options:
 1. Select a system template from the drop-down to use a fax from your template library.
 2. Select a document from the uploaded document drop-down.
3. Click on the **Process** button to send the fax immediately.

Send a Batch Fax to a Group of Contacts.

1. Go to **Marketing > Email & Broadcasts** in the main navigation menu
2. Click on the **Fax** option

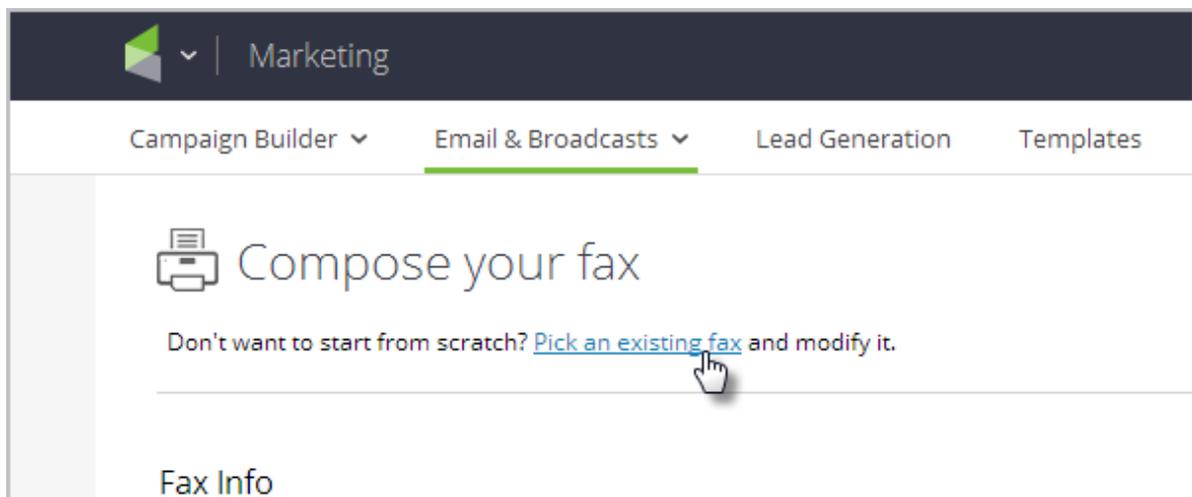


3. Select the people:

1. **Saved Search:** Select a list of contacts from the dropdown. If you frequently broadcast to a specific list of contacts, you should create a saved search for that list.
2. **New Search:** Click on the new search link to create a new list of people. This list is temporary. It is not going to be a saved search.
3. **Quick add a new contact:** Add a new contact if you find someone missing from the saved search or new search lists.
4. **Import a list of new contacts:** Import a new list if the contacts you need are not already in Infusionsoft.

4. Click on the **Next** button

5. Upload a file attachment (such as a pdf or word document) and select it from one of the Attachment drop-downs. If you have previously created a Fax Template, click the **Pick an Existing Fax** link.



6. Click on the **Send Test** button to send the fax to yourself. Note: You must have a valid fax number in your user record. Fax fees will apply

7. You must have permission to send fax broadcasts to a business. Click on the **Acceptable Use Policy** link to read the policy, then mark the checkbox to confirm you are in compliance.
 8. Click on the **Next** button
 9. Go to **Marketing > Reports > Fax Batch Status** to view the status of your fax
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