Send a one-off fax to a contacts

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**.

	Select an action				
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Monday, April 29, 2013 1:46 PM Last Up	Add a Company for this Contact	N			
	Display Info As Text				
	Export to Microsoft Office				
Deals Orders Service Ticke	Apply Actions				
	Send an Email	_			
	Print A Letter				
	Print A Label				
	Send A Fax				
	Show using Google Maps				
	Offline Sale				

- 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

Other Broadcasts					
Eax Letter Queued Fulfillment List	Other Broadcasts				
Fulfillment List	÷ Fax	📄 Letter	E	Queued Fulfillment List	
	Voice Broadcast	Fulfillment List			

- 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.

🗲 🗸 Marketing							
Campaign Builder 🐱	Email & Broadcasts 🐱	Lead Generation	Templates				
🗐 Compos	se your fax						
Don't want to start from scratch? <u>Pick an existing fax</u> and modify it.							
Fax Info							

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