Onboarding Checklist: Fax

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When getting started with Updox Fax, make sure to follow this checklist to ensure your practice will be set-up for long-term success!

The links below will take you to relevant articles as needed!

- Review the **Fax User Guide** for step-by-step instructions on getting started.

- Review how to route your inbound fax traffic with **forwarding or porting**.

- Create user accounts under **Menu - Admin - Users** with **this guide**.

- **Create custom coversheets** for your team to use when sending fax out.

- Install the **Updox Print to Inbox and Updox Print to Fax** drivers to make outbound faxing efficient from anywhere on their computer.