

# Creating Fax Coversheets

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Create custom coversheets for your practice by following these quick steps!

Or feel free to [skip to the bottom](#) of this article for a Video rundown!

## Step 1:

From within Updox, click **Menu - Admin - Fax Coversheets**. Each account will have the 'Default' coversheet available. To create a custom coversheet, click New in the lower right-hand corner.

## Step 2:

Enter a coversheet name that will be viewable by other users in your account. Select 'Primary Coversheet' if you'd like to make this the default coversheet for the practice.

## Step 3:

Begin editing the coversheet. The toolbar will give formatting options to your coversheet, such as bullets, bold print, and text alignment. You can also personalize your coversheet by using the variable tokens on the right. For example, if you add [currentdate] to a coversheet, it will auto-populate the date when sending the fax.

**Manage your fax coversheet**

Coversheet Name: Test Coversheet  Primary Coversheet

Personalize your message  
Use the variables below to personalize your coversheet.

- [fromName] Wendy Edgar
- [fromFax]
- [fromTel] (614) 798-8170
- [fromLocation] Updox Family Practice
- [toName]
- [toFax]
- [title]
- [subject]
- [instructions]
- [currentDate] Tue, 01/26/21, 2:50 PM EST
- [totalPages]
- [doctorName]

**MEDICAL FAX**

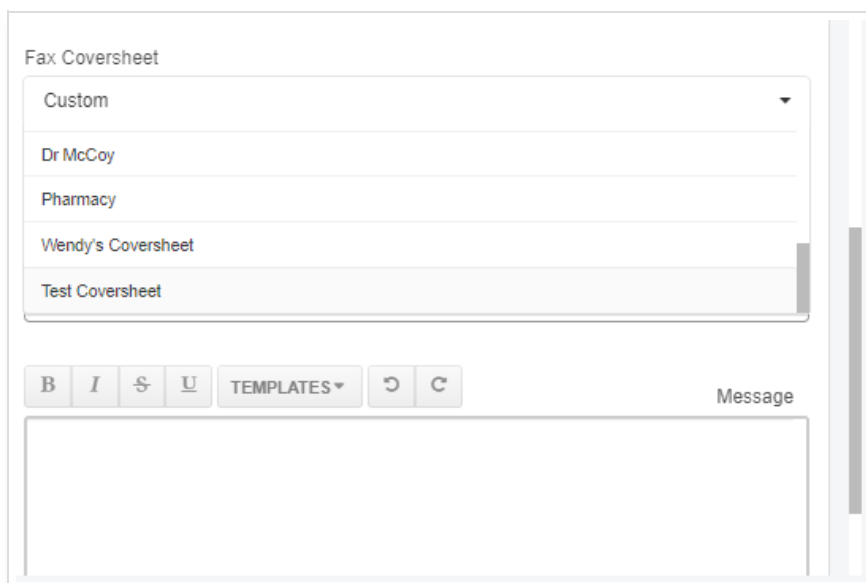
**FROM:** [fromName] [fromFax]  
**TO:** [toName] [toFax]  
**SUBJECT:** [subject]  
**DATE:** [currentDate]  
**PAGES:** [totalPages] (not including coversheet)  
**INSTRUCTIONS:** [instructions]

**CLOSE SAVE**

When you are completed with your edits, click **Save**.

#### Step 4:

When you are sending a fax, you will now be able to choose your new coversheet from the dropdown list.



The screenshot shows a web interface for selecting a fax coversheet. At the top, there is a dropdown menu labeled "Fax Coversheet" with "Custom" selected. Below the dropdown is a list of coversheet options: "Dr McCoy", "Pharmacy", "Wendy's Coversheet", and "Test Coversheet". The "Test Coversheet" option is highlighted. Below the list is a rich text editor with a toolbar containing buttons for Bold (B), Italic (I), Strikethrough (ABC), Underline (U), a "TEMPLATES" dropdown, and undo/redo icons. To the right of the toolbar is a "Message" label. The text area below the toolbar is empty.

**Tip:** Many of the variable tokens will pull directly from your Updox information:

- **[fromName]:** Full name for the sending user as it appears in Updox.
- **[fromFax]:** Fax number as it is listed in Admin - Practice Settings.
- **[fromTel]:** Main number as it is listed in Admin - Practice Settings
- **[fromLocation]:** Only applicable if multiple locations is supported for your account. If supported, it will show the location name instead of the Updox account name.
- **[toName]:** Name of the contact as it appears in the Updox Address Book.
- **[toFax]:** Fax number associated with the contact in the Updox Address Book.
- **[doctorName]:** This is only applicable if your account is tied to an integrated EMR. The drop-down will appear when sending the fax.

**Tip:** Under each User's profile in (*Menu --> Admin --> Users*), you will find a setting that allows for a Default Cover Sheet for specific Users.

The video below will take you through an in-depth tutorial on Creating Fax Coversheets in Updox!

For additional information and assistance please head to our [Faxing](#) tab.

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