

# Advanced Fax Routing Overview



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## Overview

Advanced Fax Routing replaces the previous fax routing rules that could be found in the Fax Settings menu (*Menu* → *Admin* → *Fax Settings*). With Advanced Fax routing, you can now create rules that match on the from number of the incoming fax, along with the to number. This gives you the ability to create extremely specific rules and build workflows to match your office's needs.

You can build rules based on the *to* number:

- Tag all faxes to (614) 555-1545 to the "Rx refill" queue
- Tag all faxes to (614) 555-1090 to Dr. Stover's private inbox

Our powerful matching capabilities even allow you to match on partial *from* numbers:

- **Use area code matching (first 3 digits) to tag all faxes from a specific region:**
  - Tag all faxes from (614) xxx-xxxx with the "Central Ohio" tag
- **Use exchange matching (first 6 digits) to route all faxes from a local hospital to a queue:**
  - Route all faxes from (614) 566-xxxx to the "Riverside" queue
- **Use full number matching (all 10 digits) to tag all faxes from a payer:**
  - Tag all faxes from (800) 555-1100 with the "Blue Cross Blue Shield" tag

And of course, you can combine them:

- Tag all faxes from (888) 490-xxxx to (614) 555-2325 with the "Medical Records Release" tag

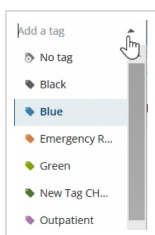
**NOTE:** This feature can be found by going to: *Menu* → *Admin* → *Advanced Fax Routing*

## Actions

Customized actions that can be executed upon receipt of an inbound fax include tagging a specific tag, routing to a group, private inbox or queue, and forwarding the fax to one or more email addresses (on encrypted domains only, configurable by Updox Support).

## Tagging

Users can optionally pick any active tag to assign to a matching fax, and the inbound fax will be correctly tagged.

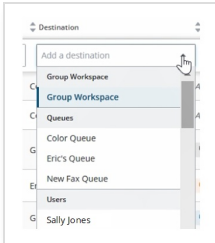


**NOTE:** If the tag in question is inactive at the time the fax is received or has even been deleted, the system

will still apply the tag.

## Routing

Users must choose a destination where the inbound fax should be placed. Available options are the Group Workspace (sometimes called the practice inbox), any active user's private inbox, and any active queue.



**NOTE:** If the chosen user or queue is inactive at the time the fax is received, the fax **will not** be sent to that inactive user or queue, and will instead be sent to the group workspace. Other actions, if present, will still be applied.

## Emailing

The routing system also has the ability to forward faxes along to one or more email addresses (separated by commas).

Email routing rules are configured by Updox Support upon confirmation that the email address is on an encrypted domain.

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