

Getting Started and Managing Rules

Last Modified on 02/13/2025 1:08 pm EST

Getting Started

Overview

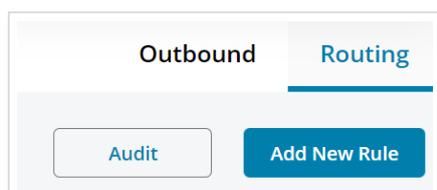
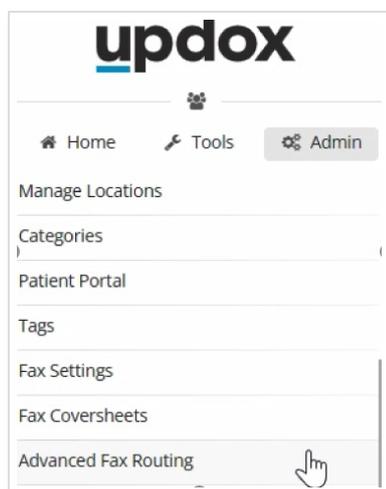
Advanced Fax Routing is included with your Updox subscription at no extra charge, and is turned on automatically for new customers.

Existing customers can upgrade at a time of their choosing. To upgrade to Advanced Fax Routing, go to Menu → Admin → Fax Settings and click the **Upgrade Now** button. You can upgrade at any time. However, you can not currently downgrade your account (i.e. – remove Advanced Fax Routing).

When you upgrade, the system will automatically create new Advanced Fax Routing rules based on your existing rules in Fax Settings. You will not need to recreate any rules to keep your existing functionality in place.

NOTE: As long as you do not upgrade to Advanced Fax Routing, the standard faxing rules apply (*Menu → Admin → Fax Settings*). Once you upgrade, the routing settings in the Fax Settings screen will disappear and you will need to use the Advanced Fax Routing page to add or modify the rules.

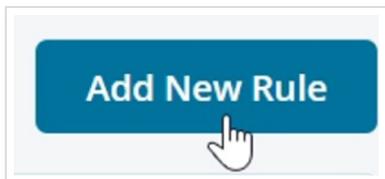
Once Advanced Fax Routing is enabled on your account, you can open the settings by clicking on **Menu → Admin → Advanced Fax Routing** or navigating to the **Routing** tab in **Outbound Faxes**.



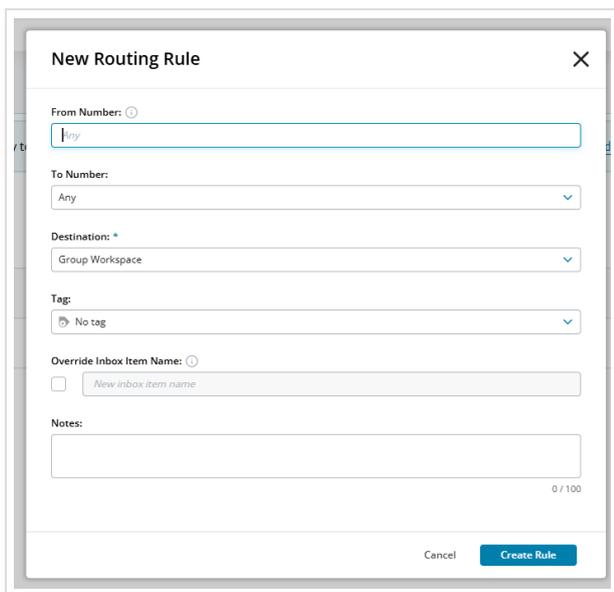
Manage Your Rules

Adding Rules

Begin adding rules by clicking the **Add New Rule** button in the top right corner.



Customize the rule in the pop-up and then click **Create Rule** to add it to the dashboard.

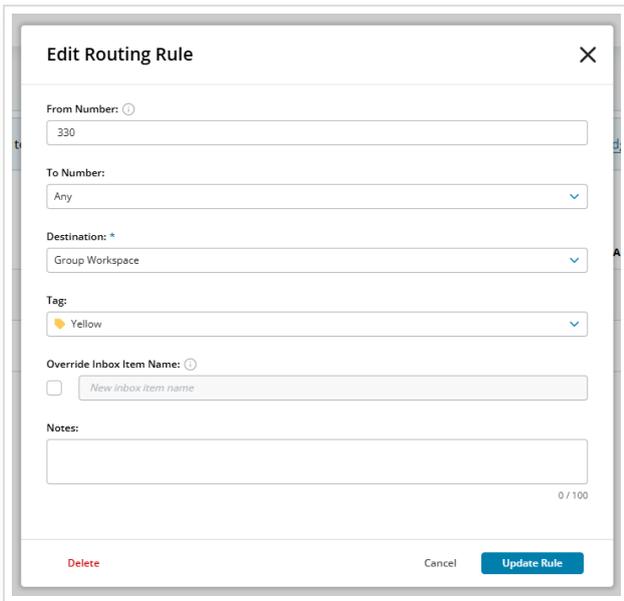
A "New Routing Rule" pop-up window with a close button (X) in the top right corner. The form contains the following fields:

- From Number:** A text input field with a help icon (i) and the value "Any".
- To Number:** A dropdown menu with the value "Any".
- Destination:** A dropdown menu with the value "Group Workspace".
- Tag:** A dropdown menu with the value "No tag".
- Override Inbox Item Name:** A checkbox followed by a text input field containing "New inbox item name".
- Notes:** A text area with a character count "0 / 100" at the bottom right.

At the bottom of the form are two buttons: "Cancel" and "Create Rule".

Updating Rules

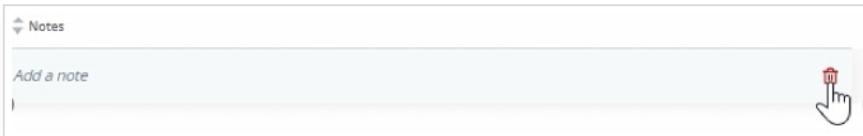
Update a rule by clicking the rule, making the necessary changes in the pop-up, and clicking **Update Rule**.



Deleting Rules

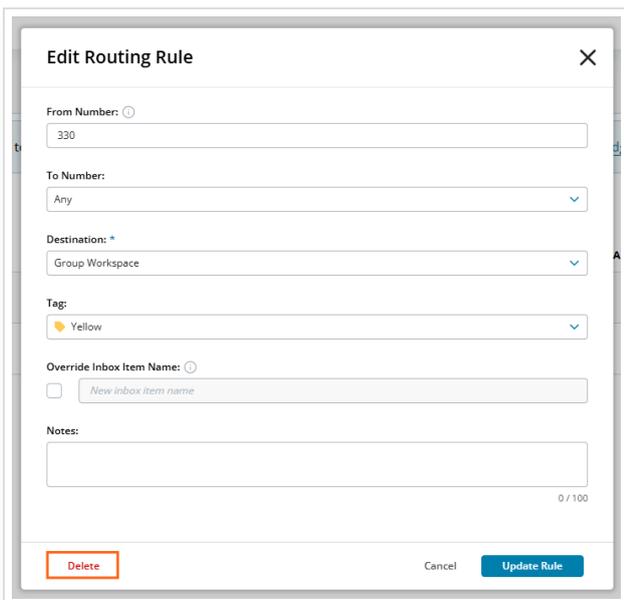
There are 2 different ways to delete rules.

Hover over the rule you want to remove, click the trash can icon next to Notes, and confirm deletion.



OR

Click the rule, hit **Delete** in the pop-up, and confirm deletion.



Bulk Actions

Remove

Remove multiple rules at once by clicking the 'Select All' checkbox or individually choosing the rules you want to remove. Then click the red **Remove** button and confirm deletion.

Filter results...			 Remove (2)
<input type="checkbox"/>	From Number 	To Number 	Destination * 
<input checked="" type="checkbox"/>	(111) 222-3334	(443) 221-3342	Premier Family Health
<input type="checkbox"/>	(111) 222-3334	(443) 221-3346	Color Queue
<input checked="" type="checkbox"/>	(123) 123-4564	Any	Color Queue

Are you sure you want to delete these 2 rules? 

This action cannot be undone.