

Getting Started and Managing Rules



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Getting Started

Overview

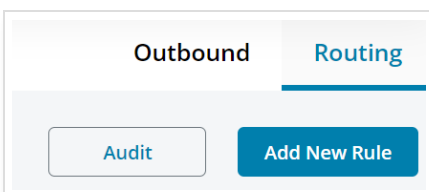
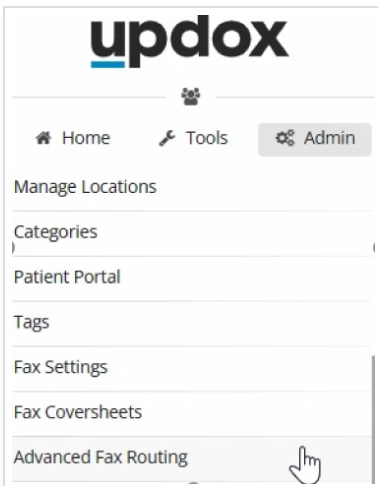
Advanced Fax Routing is included with your Updox subscription at no extra charge, and is turned on automatically for new customers.

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.

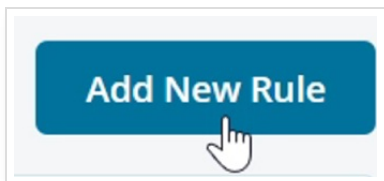
Once Advanced Fax Routing is enabled on your account, you can open the settings by clicking on **Menu → Admin → Advanced Fax Routing**.



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 pop-up window titled "New Routing Rule" with a close button (X) in the top right corner. The form contains several fields: "From Number:" with a help icon and a text input field containing "Any"; "To Number:" with a dropdown menu containing "Any"; "Destination: *" with a dropdown menu containing "Group Workspace"; "Tag:" with a dropdown menu containing "No tag"; "Email Forwarding:" with a "--" selection; and "Notes:" with a text area containing "0 / 100" characters. At the bottom, there are "Cancel" and "Create Rule" buttons, with a hand cursor over the "Create Rule" button.

Updating Rules

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

Edit Routing Rule [X]

From Number: (614) 555-5556

To Number: Select option

Destination: * Group Workspace

Tag: Black

Email Forwarding: -

Notes: 12345 5 / 100

Delete Cancel 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.

Notes

Add a note

OR

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

Edit Routing Rule [X]

From Number: (614) 555-5556

To Number: Select option

Destination: * Group Workspace

Tag: Black

Email Forwarding: -

Notes: 12345 5 / 100

Delete Cancel Update Rule

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.

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.