



## How to: Port an Existing Fax Number to Updox

### What is porting?

Fax number porting is the process that will transfer ownership of your existing fax number from the carrier you currently use to Updox.

### What does Porting do for me?

Porting your existing fax line to Updox provides several benefits:

- Get closer to a paperless office because all your faxing will now be electronic
- Receive all inbound faxes directly in the Updox Inbox
- Keep your existing fax number
- Eliminate fax machines and all the associated costs
- Achieve better quality images with electronic faxing
- Save time for staff because they will no longer stand at the fax machine dealing with resends or busy fax signals

### How do I get started?

Follow these step-by-step instructions:

#### Before you begin

- ✓ **Inform Updox if you have a toll-free fax line**

**NOTE:** If your existing fax number is a toll-free number, you will have a different process to follow. Stop and contact [support@updox.com](mailto:support@updox.com) for assistance.

✓ **Do you also use your fax line for your credit card machine or is a DSL?**

**NOTE:** If your existing fax line is also used for your credit card machine or is a DSL used for your internet connectivity, you will not be able to port your number. Those services would stop working if you port that number to Updox.

**TIP:** If your current carrier supports forwarding shared lines, contact them to help you forward your number to your Updox provided number. If they do not support forwarding, you may use your Updox provided fax number as your new number.

Access your Updox fax number by going to Menu > Admin > Fax Settings.

## Let's get started

✓ **Contact your current fax carrier**

1. Check with your current carrier and make sure they allow porting.

**TIP:** If your current carrier does not allow porting, consider forwarding your fax number as an alternative.

**NOTE:** Porting can take up to 14 days to complete.

✓ **While you wait for porting to complete**

2. Forward your fax number to your Updox provided number while you are waiting for the porting process to finish. Contact your current carrier to help you forward your number.

**TIP:** Check with your carrier to ensure you won't incur long distance charges with your Updox provided fax number. Updox can provide a toll-free fax number if needed.

3. To access your Updox fax number go to Menu > Admin > Fax Settings.

✓ **Print and complete the Letter of Authorization**

4. Go to the Updox Learning Center, [rxhelp.myupdox.com](http://rxhelp.myupdox.com), and print the Porting Letter of Authorization. Right click on the document to print.
5. Fill it out and retain this until the next step. Scan it once complete so you have it in an electronic format.

✓ **Inform Updox that you are porting your fax number**

6. Send an email to [porting@updox.com](mailto:porting@updox.com) with this information:
  - Current carrier
  - Authorizing person
  - Exact Name & Address used for billing with the existing carrier. This must be a physical address
  - Account # with the existing carrier
  - Billing Phone # with existing carrier
  - Attach a copy of your most recent bill from your current carrier
  - Attach the completed Updox Letter of Authorization form from the previous step.

**TIP:** To avoid delays, ensure the information provided to Updox precisely matches what the current carrier has on file.



## Do Queues need updated?

Queues can be a very powerful way to manage your inbound faxes. Often you will assign fax numbers to a Queue so you can direct all incoming faxes to that Queue.

### If you assigned your fax number to a Queue

1. During your onboarding call with Updox, you may have been instructed to assign your Updox provided fax number to a Queue while you wait for the porting process to complete. If your Queues were set up using the Updox provided fax number, update Fax Settings to reflect your ported fax number once the porting process is complete.
2. To assign your newly ported fax number to a Queue, go to Menu > Admin > Fax Settings.
3. Click on Route To and select the appropriate Queue from the list.
4. **NOTE:** You will see your newly ported fax number at the top of the screen.

## Things to Remember:

- If your existing fax number is a toll-free number, contact [support@updox.com](mailto:support@updox.com)
- Porting can take up to 14 days.
- Get started quickly by forwarding your fax number to your Updox provided fax number. Contact your current carrier for help.
- Check with your carrier to ensure you won't incur long distance charges with your Updox provided fax number. Updox can provide a toll-free fax number if needed.
- Do not cancel service with your current carrier until your port to Updox is complete. We will notify you by email.
- You will not lose any faxes during the porting process.
- You may need to update Queues once the porting process is complete.

## For more information, contact Updox at:

Sales@updox.com  
614-798-8170 x1

Support@updox.com  
614-798-8170 x2

Updox Learning Center  
<http://rxhelp.myupdox.com>

