

How To Install & Use Updox Print to Fax

The Updox Fax printer will enable you to fax documents from your EHR, a website, or other application.

Downloading the Installation Files

Depending on your Windows System type, we have two installer packages available. Select the appropriate link to download the zip file.

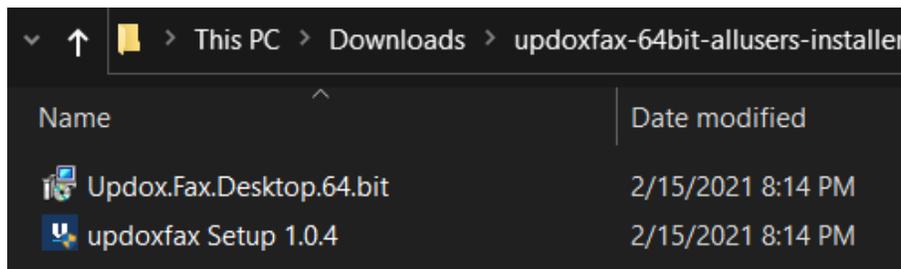
Windows 64-bit: [Click here](#)

Windows 32-bit: [Click here](#)

Installation Steps

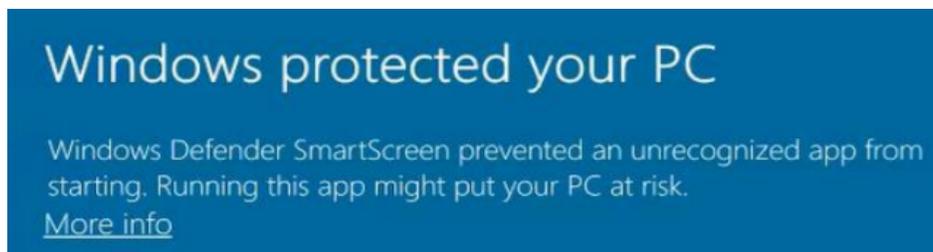
Updox Fax is installed in two pieces, a print driver and an application.

1. Unzip the file to access each installer. This is done by right clicking on the zipped file and clicking on “Extract all”. Then select your Downloads folder for the destination, and click “Extract” to save both files.



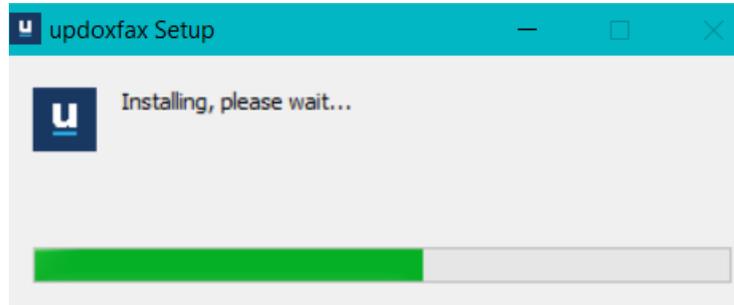
2. Install the file labelled “Updox.Printer.Fax.32.bit” or “Updox.Fax.Desktop.64.bit”. When this install completes, the installer will disappear and you should have a new printer available in Windows entitled “Updox Fax”.

A security alert may pop up. If so, click “More Info”, then click “Run Anyway”.



3. Next, install the file labelled “updoxfax Setup”. The file name will also include the version number of the application. When this install completes, the installer will disappear and you will have a new application entitled “Updox Fax”.

The same security alert may pop up. If so, click “More Info”, then click “Run Anyway.”



Updox Fax Warning Messages

When you first open the Updox Fax application you will see a couple of warning messages.

“Oh snap! Missing or incomplete configuration. Click here to correct configuration.”

Oh snap! Missing or incomplete configuration. [Click here to correct configuration.](#)

This message lets you know that the application hasn't been connected to your Updox account.

We'll explain how to connect your printer with your Updox account below in the Updox Fax Settings section.

“Oh snap! No pdf specified. Click here to select a pdf now.”

Oh snap! No pdf specified. [Click here to select a pdf now.](#)

This message will appear when the application is opened on its own. Items can be attached and faxed by clicking on the “Click here...” link then selecting the saved document you'd like to fax.

“Heads up! An application update is available! Install now.”

Heads up! An application update is available! [Install now.](#)

You may also see a blue info box alerting you that an update is available. Go ahead and update the application by clicking “Install Now”.



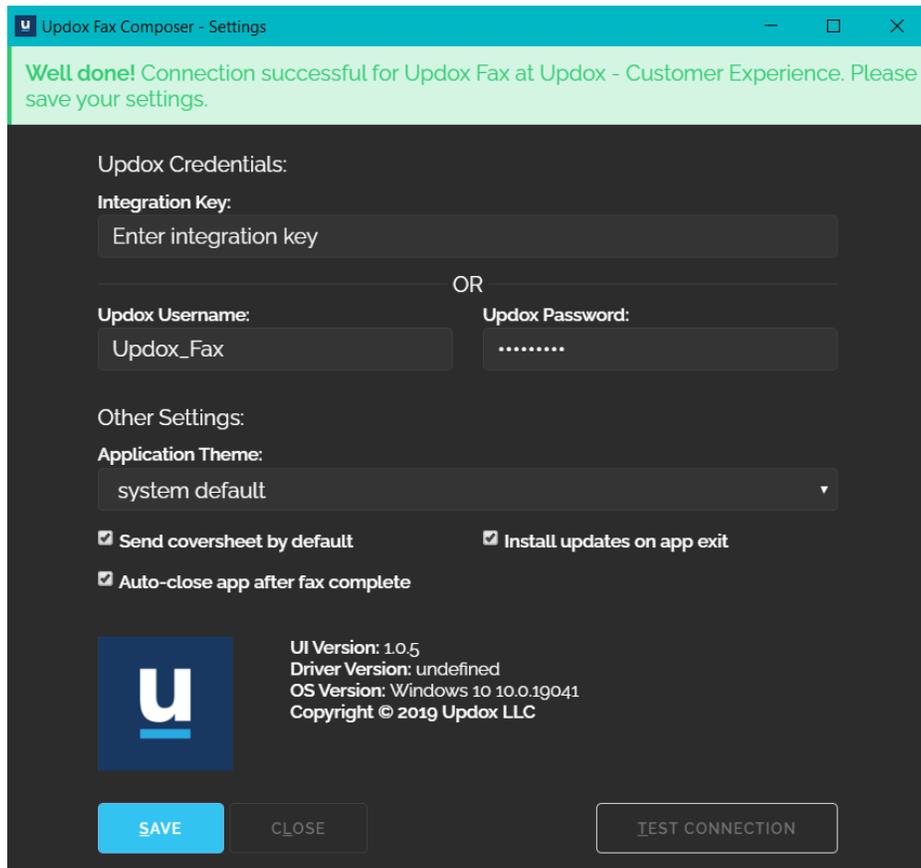
Updox Fax Settings

Follow these steps to configure the settings for Updox Fax.

1. Click the “Settings” button at the bottom.
2. Updox Credentials Authentication Options:
 - a. To fax items as the Practice, enter your integration key. The integration key is found in the Updox Menu > Admin > Practice Information.
 - b. To fax items privately, you can use your Updox username and password.
NOTE: If you use your Updox username and password to authenticate, you do not need to enter your integration key.

IMPORTANT: Practice Fusion customers will generate their printer credentials under “My Profile” in the Updox Menu.

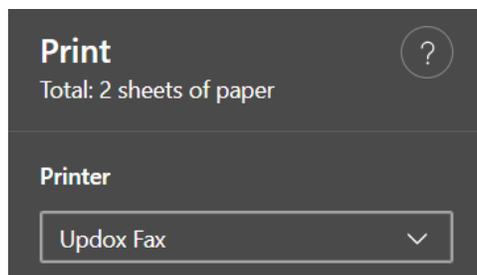
3. It is best to leave “Install Updates on app exit” checked in order to allow your printer to automatically update if you have access to install software updates on your workstation.
4. We also recommend leaving “Auto-close app after fax complete” checked as this will close the app once the fax has completed, saving you a click.
5. In order to ensure that your credentials are correct, click the “Test Connection” button. Clicking this button will display your practice and/or user in a notification, allowing you to double check that you have entered everything correctly before proceeding.
6. Once your settings have been configured, click on “Save”, then close the application.



How to Use Updox Fax

Once Updox Fax has been installed and configured on your workstation, you're ready to start faxing!

1. You can fax items using your new Updox printer by selecting "Updox Fax" from the print destination menu.



2. The Fax Composer will open allowing you to make selections for your fax destination as well as any coversheet details you'd like to include.

Updox Fax Composer - Updox Technical Guide.PDF

Send Fax To:
Enter destination fax number(s)

Send Fax From:
(614) 756-0885

Include Cover Sheet

Subject:
Cover sheet subject

Message Template: Select template

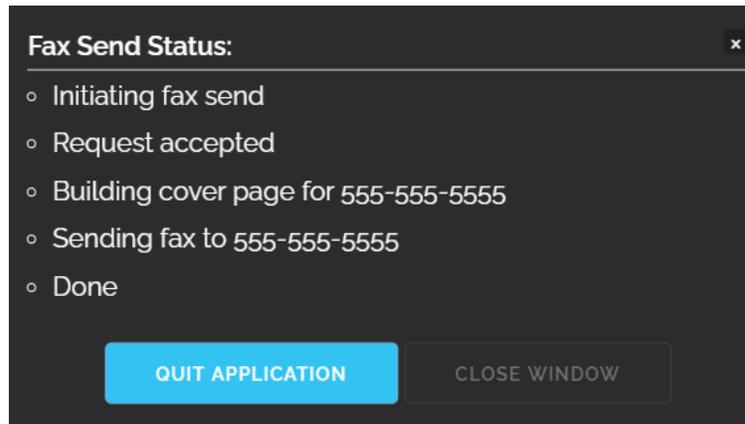
Cover Sheet Style: Default

Normal B I U S

Compose a message...

SEND FAX QUIT SETTINGS

3. Enter the fax number(s) and/or contact name(s) from your Updox Address Book under “Send Fax To”.
4. If you’d like to send with a coversheet, check the “Include Cover Sheet” box then select your preferred Cover Sheet Style.
5. After making your selections, click “Send Fax” to initiate sending your fax.
6. A small window will pop up to walk step by step through the process. In all likelihood, this window will disappear before you even have time to read it, however if errors are encountered, this window will provide details to assist with troubleshooting.



7. To view your send fax, log into your Updox account and click on the Sent folder.