

Sign-up /Setup for InterFAX

What is InterFAX with Upland?

InterFax is a cloud-based online fax service for secure transmission by Upland Software Inc. Upland Software Inc. provides a host of cloud-based work management applications, and InterFax is one of them. We've integrated with InterFax to allow users to quickly and securely fax directly from your Client Account Documents and instantly see incoming faxes on your ATOM Home Page.

This new ATOM option can cut your faxing costs and free you and your employees from the physical fax machine. *Truly work from anywhere and make those early IRS phone calls without the need to drive to the office to fax your POA!

Here is an excerpt from our ATOM User Meeting, where we introduced this feature:

[ATOM InterFAX Information Session:](#)

[Video](#)

How Much Does Integrated ATOM Faxing Cost?

ATOM Cost

Our ATOM office will charge a Fax Programming fee of \$50 a year (paid annually) or \$5/month for those on a monthly ATOM Account.

InterFAX Cost

They can easily customize your pricing package to fit your office's needs or seasonally adjust your account to allow for our busy Tax Season. Package prices are set in increments of 100 pages (minimum per month). *A one-time setup fee is billable on your first month's invoice.

NOTE: Sales tax may apply based on your state.

100 pages Outgoing:	\$0.05 / page	Per page over 100:	\$0.09 / page
100 page Incoming (local):	\$0.04 / page	Per Page over 100:	\$0.06 / page
Your Fax Number:	\$5.00 month		

NOTE: Base monthly charges are set at a 100-page minimum and would be \$14.00/month even if you didn't use your 100-page minimum.

Example of Level 1 Total InterFAX Charges your first month:

One-Time Setup Fee:	\$9.50	= \$ 9.50
110 pages Outgoing:	100pgs @ \$0.05 page (\$5.00) + 10pgs @ \$0.09 page (\$0.90)	= 5.90
150 page Incoming (local):	100pgs @ \$0.04 page (\$4.00) + 50pgs @ \$0.06 page (\$3.00)	= 3.00
Your Number:	\$5.00 month	= 5.00
		<u>\$23.00</u>

High Volume Faxing - Level 2, 3, 4...

If you know your office has a higher fax volume, you can set your account for the next 100-level increment to account

for your needs and to avoid the overage per page. *Remember, sales tax may be applicable in certain states.

Level 2 cost structure example:

200 pages Outgoing: \$0.05 / page (\$10) Per page over 200: \$0.09 / page
 200 page Incoming (local): \$0.04 / page (\$8) Per Page over 200: \$0.06 / page
 Your Fax Number: \$5.00 month

Base Charges of \$23.00 per month

Level 3 cost structure example:

300 pages Outgoing: \$0.05 / page (\$15) Per page over 200: \$0.09 / page
 300 page Incoming (local): \$0.04 / page (\$12) Your Per Page over 200: \$0.06 / page
 Fax Number: \$5.00 month

Base Charges of \$32.00 per month

How are you charged?

Your ATOM fees will be applied to your ATOM account charges each year. Annual accounts are charged \$50 a year, and those on monthly billing will be charged \$5 per month.

InterFax, like Twilio, will be billed directly to your account Credit Card, which is required for your account setup. InterFAX charges after each month's use and your invoice can be viewed inside your InterFAX account.

[Click Here to See Our most recent Tax Season Billing Totals](#)

Company: X-TAX, CPA, PLC
 Att: Mark Pricco
 4600 W Saginaw Hwy
 Lansing
 MI
 United States of America
 48917-2700



Upland Software, Inc.
 6002 Rogerdale Rd., Suite 100
 Houston, TX 77072
 USA
 Phone: 1 (888) 206-6578

Invoice Number:	
Account number:	
Issue date:	6/30/2022
Due Date:	6/30/2022

Invoice

Part Num	Description	Qty	Unit Price	Total	
1265	Send 100 pages, 5c incl., 9c extra, Total \$5	1.00	\$5.000	\$5.00	
1276	Receive 100 pages, 4c incl., 6c extra, Total \$4	1.00	\$4.000	\$4.00	
266	Fax reception monthly subscription fee - US (local)	1.00	\$5.000	\$5.00	
Do not remit payment. You will be charged by credit card not before 6/30/2022					
				Subtotal	\$14.00
				Tax 6.0%	\$0.00
				Total	\$14.00

For questions about your invoice, please email If_US_AR@uplandsoftware.com.

Signing up for InterFAX to use with ATOM

Many offices have specific questions about adding Faxing to your office, and we encourage you to contact our office to discuss your needs and options. *If you're ready to begin your fax integration, please take note of the following steps:

Step 1: Begin Here

Go to ATOM / InterFAX Signup Form here: <https://land.interfexus.com/atom/>

Step 2: Complete your Form

Complete the Submit the InterFAX Information form and agree to their terms of service.

NOTE: You'll be asked for an estimated number of Inbound and Outbound pages your send per month. If you do not know, you can use 100 to get started, as you can adjust your account after a few months if you find your office faxes at a higher volume.

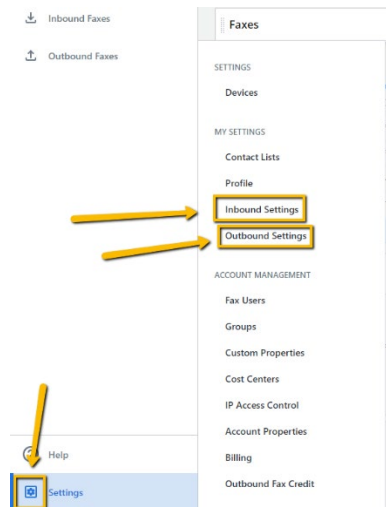
The screenshot shows a registration form with the following fields: Full Name, Email Address, Company Name, Phone Number, User Name of Choice, Area Code of Choice (Inbound only), Estimate of Monthly Outbound Pages, and Estimate of Monthly Inbound Pages. At the bottom, there is a checkbox for 'I agree' and a 'Submit' button.

Step 3: Wait for your InterFAX Email

You will be contacted, by email, by InterFAX with instructions to complete your registration and set up your initial account and billing.

Step 4: Configure your InterFAX / ATOM Gateway

While inside your InterFAX account, you'll want to configure your **Settings** so your ATOM Fax Gateway will work correctly.



Options for Incoming Preferences:

Check the box for "Deliver Received Fax via Web Service"

- Method: **HTTP Post**

***URL:** https://login.atomanager.com/ATOM_XXX/Fax/Inbound

**Replace the XXX with your ATOM Code.*

Use the following image as a guide for your Inbound Preferences under your Advanced Options:

Inbound Settings

The screenshot shows the 'Inbound Settings' form with the 'ADVANCED' tab selected. The 'Notify' section is expanded, showing a table with 'Email' and 'Format' columns. Below this, the '* Attachment Format' dropdown is set to 'PDF'. The 'Deliver Received Fax via Web Service' checkbox is checked. The '* Method' dropdown is set to 'HTTP Post'. The '* URL' field contains 'https://login.atomanager.com/ATOM_XXX/Fax/Inbound'. A yellow callout box points to the 'XXX' in the URL with the text 'Enter your ATOM Code where it says XXX'. A yellow arrow points to the 'Deliver Received Fax via Web Service' checkbox. Another yellow arrow points to the 'XXX' in the URL.

Options for Outbound Preferences:

Click the Notifications tab

- Delivery status via Web Service: **Always**
- Method: **HTTP POST**

***URL:** https://login.atomanager.com/ATOM_XXX/Fax/Outbound

**Replace the XXX with your ATOM Code.*

Use the following image as a guide for your Outbound Preferences under your Advanced Options:

Outbound Settings

GENERAL **NOTIFICATIONS** ADVANCED

* Delivery Status via Email * Format
Always HTML - L

Default Notification Email Always
Enter the default Notification Email

Include Fax Document

* Delivery Status via Web Service *
Always *

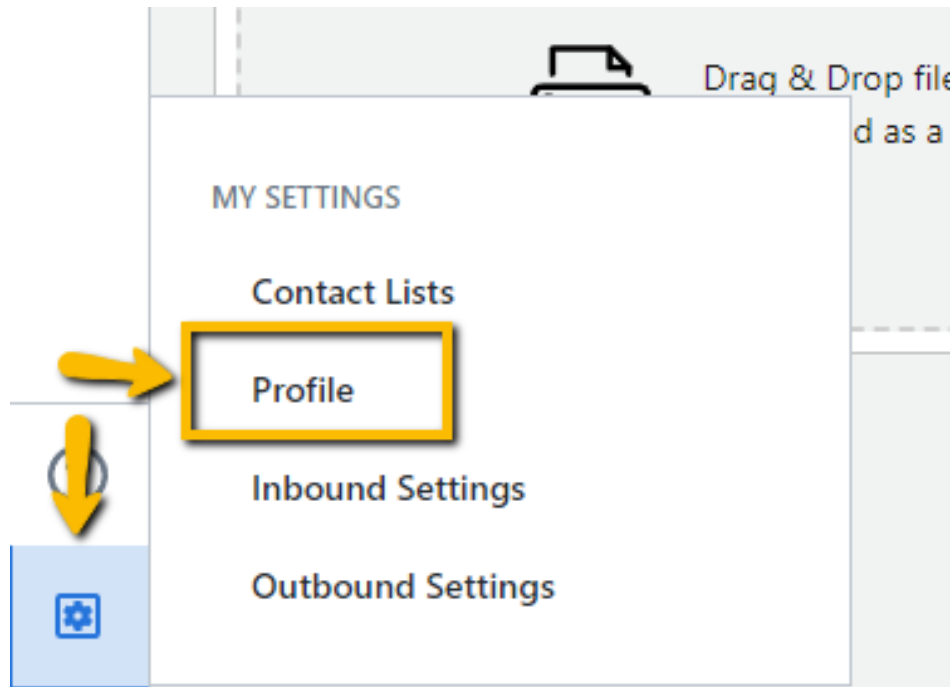
* Method *
HTTP Post *

* URL *
https://login.atomanager.com/ATOM_XXX/Fax/Outbound

Change the Delivery Status via Web Service to "Always". User your ATOM Code for XXX

Profile Preferences Fax CSID

Lastly, it would be best if you ALWAYS were sure that in the Profile Preferences, the CSID field is filled with the identifier for the account. *This name will represent the account and show under the FOR or TO Columns when faxing. Make sure to add your Company Name!



User Profile ×

Regular User

Outbound service enabled

Inbound service enabled

Properties

Name

Email

Time Zone
America/Detroit ▼

CSID

Step 5: Send ATOM your InterFAX Credentials

Once your account setup is completed with InterFAX, please send ATOM Support the following credentials so that we can set up your Faxing Gateway inside your ATOM Site:

Your InterFAX User Name:

Your InterFAX Password:

Your new FAX Number:

Once these steps are followed, we'll update your account and software and let you know when our programmer has completed your InterFAX Request task. We'll notify you by email once your InterFAX Gateway has been added to your ATOM site!

Common InterFAX Questions

Can You Use your old fax number?

If you have a current office fax number, you can apply to Port your fax number *once you have created* your InterFAX account. The Porting process is approved and processed through InterFAX, not ATOM. You can find more information from InterFAX [HERE](#).

Can we increase our Fax volume pricing during Tax Season?

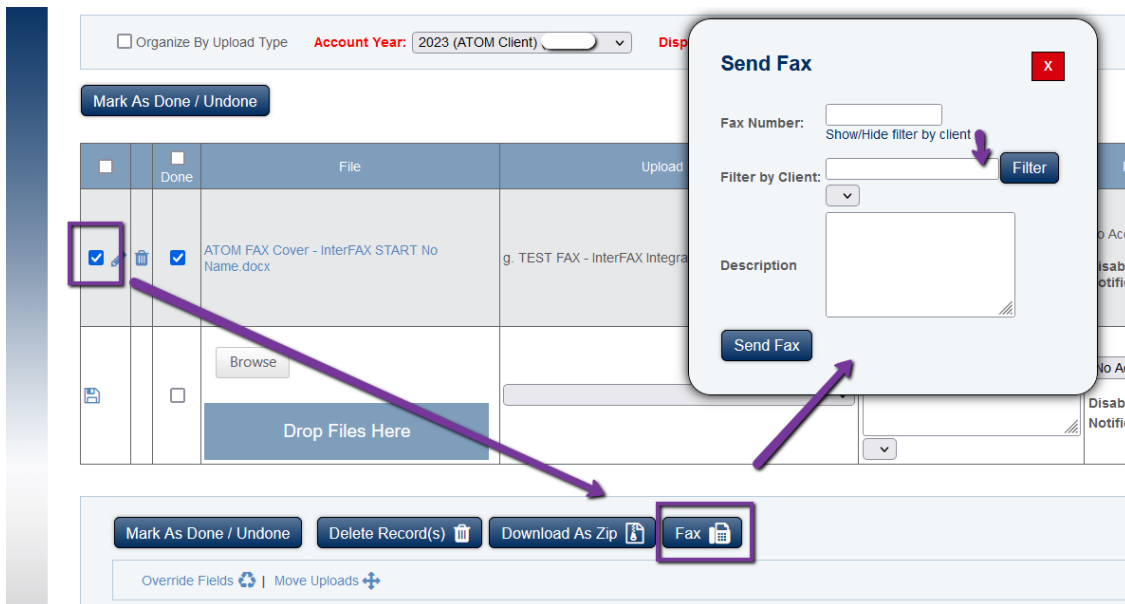
Yes, the Level Pricing is discussed in the document above, but if you have questions about your typical fax use, please do not hesitate to contact the InterFAX Support Staff. They can discuss your options for changing your Fax Volume Pricing package during your heaviest months of use.

How to Fax a document in ATOM?

We encourage you to watch the video at the top of this document to see the process, but faxing through ATOM is easy and efficient using ATOM's document storage. Many tax offices fax documents to the IRS, banks, or back to your clients, which you often already have scanned into your Client's Account Documents. Now with a few clicks, you select which documents you need to send, enter a fax number (or search your database), and fax.

NOTE: You can create "Clients" by name ("Honey Baked Ham Orders") or "MISC Faxes" to upload documents not associated with a tax client.

1. Select the document(s) you wish to fax (inside the Act Docs).
2. Select the Fax button.
3. Enter a Fax number *or* search your database for the client with the needed fax number.
4. Send Fax (button)



5. After you've sent the fax, you can click the FAX icon that appears in red (refresh your screen) next to the document(s) in question to see the progress of your fax.

