

## Overview

Upland InterFAX's Salesforce Faxing API allows organizations to embed faxing capabilities into their Salesforce experience, enabling the ability to both send and receive fax communications from within the Salesforce interface.



## Getting Started

Utilizing our REST API, Upland InterFAX integrates seamlessly with Salesforce. Setting up the InterFAX account is a simple process and can be done by either credit or pre-paid pricing methods. The purchasing process is handled outside of Salesforce through the native Upland interface. Users can be provisioned infinitely, with or without a dedicated fax number per user, while the sending and receiving volumes are pulled out of a central bank for each organization account. Users are able to send faxes from all of the available interfaces. Our available interfaces include the Salesforce fax feature, e-mail, or our convenient web interface provided on <https://cp.interfax.net>.

## How to: Simple Send Fax Interface

The development method can vary greatly given the flexibility of Salesforce and the Upland API. But, to show as an example - here is a quick and simple way to set up InterFax inside of Salesforce:

1. Log into your Salesforce Account.
2. Ensure you are on "Salesforce Classic" Experience.
3. Navigate to the Setup Area.
4. From the navigation on the left choose:

Build > Develop > Apex Classes

5. Click "New", and paste in the contents of InterFaxController.txt, and then save.

6. Edit InterFaxController Class created, and insert your InterFAX Credentials.

```
Apex Class
InterFaxController

Apex Class Edit [Save] [Quick Save] [Cancel]

Apex Class Version Settings

public class InterFaxController {
    public String recordId {get; set;}
    public String faxNumber {get;set;}
    public List<Attachment> attachments {get;set;}
    private Map<Id, Attachment> attachmentMap = new Map<Id, Attachment>();
    public String attachmentId {get;set;}
    public List<InterFax350N.OutboundFaxDetail> listOutboundFaxes {get;set;}
    public List<InterFax350N.InboundFaxDetail> listInboundFaxes {get;set;}
    // Specify the required user name and password to access the endpoint
    // As well as the header and header information
    String username = 'devforceone';
    String password = 'redacted';

    public InterFaxController() {
        this.recordId = ApexPages.currentPage().getParameters().get('id');
        this.attachments = new List<Attachment>();
        this.listOutboundFaxes = new List<InterFax350N.OutboundFaxDetail>();
        this.listInboundFaxes = new List<InterFax350N.InboundFaxDetail>();
    }
}
```

7. Navigate to:

Build > Develop > Visualforce Pages

8. Click "New", and paste in the contents of UI.txt, and then save. (Make sure to note the name you give the page, e.g. "InterFAX\_UI" in the following steps.)

### Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing app

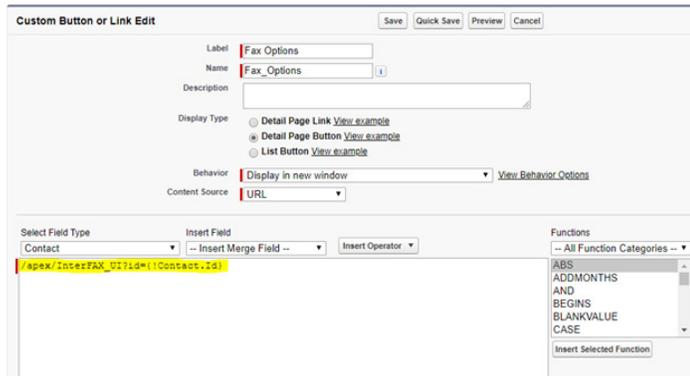
View: [All] Create New View

Action	Label	Name	Namespace Prefix	Developer Console	Api Version	Description
Edit   Del   Security	InterFAX_UserInterface	InterFAX_UI		<span>New</span>	47.0	
Edit   Del   Security	Test Page	Test_Page_HTML			47.0	
Edit   Del   Security	Test Page	Test_Page_PDF			47.0	

9. Now to choose which record to add our Button to (e.g. Contact), and navigate to Build > Customize > (Chosen Object) > Buttons, Links and Actions.

10. Click "New Button or Link".

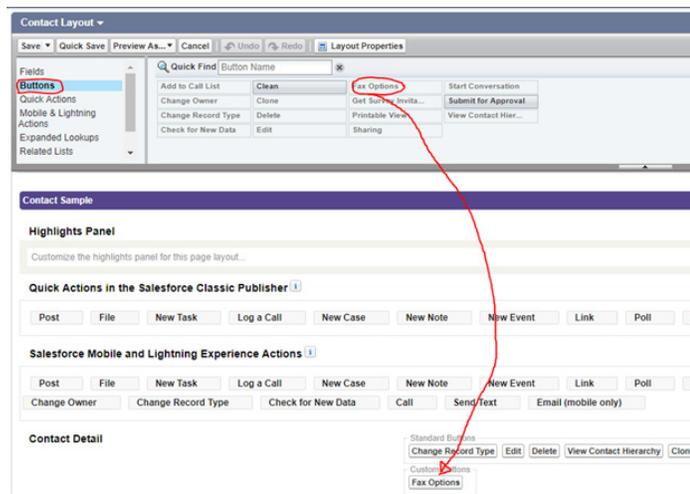
11. Create your button, paying attention to the highlighted section, and using the name of the page you created earlier (e.g. "InterFAX\_UI" as created in Step 9), and click Save.



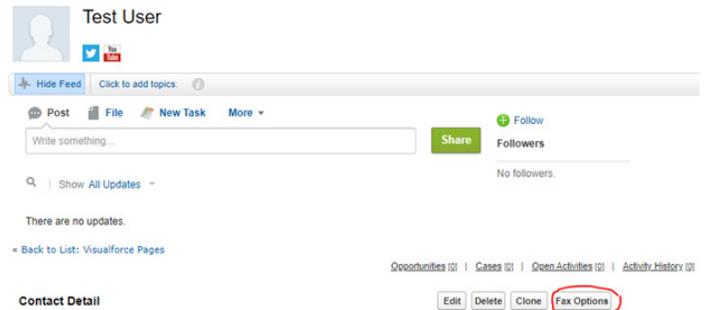
12. Navigate to Build > Customize > (Chosen Object) > Page Layouts.

13. Click Edit for the desired Page.

14. Under Contact Layout, select buttons from the left-hand side, and then drag-and-drop the button (e.g. Fax Options) created in step 12 to the appropriate section (as seen below), and click Save.



15. Afterwards, you should see the button you created under records associated with that object (example below).



16. Once clicked, will take you to the following page that will allow you to fax attachments associated with the object.

