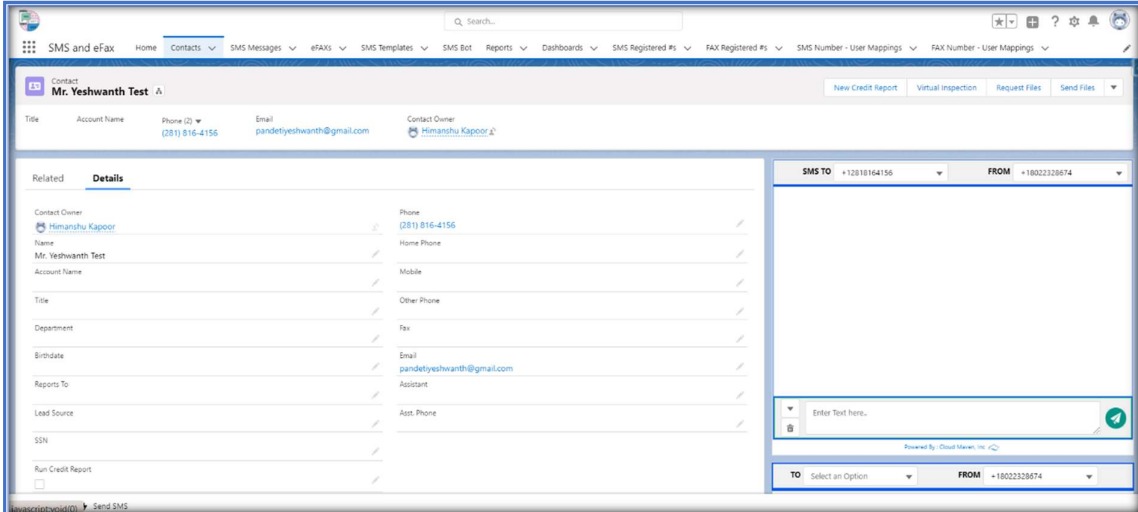


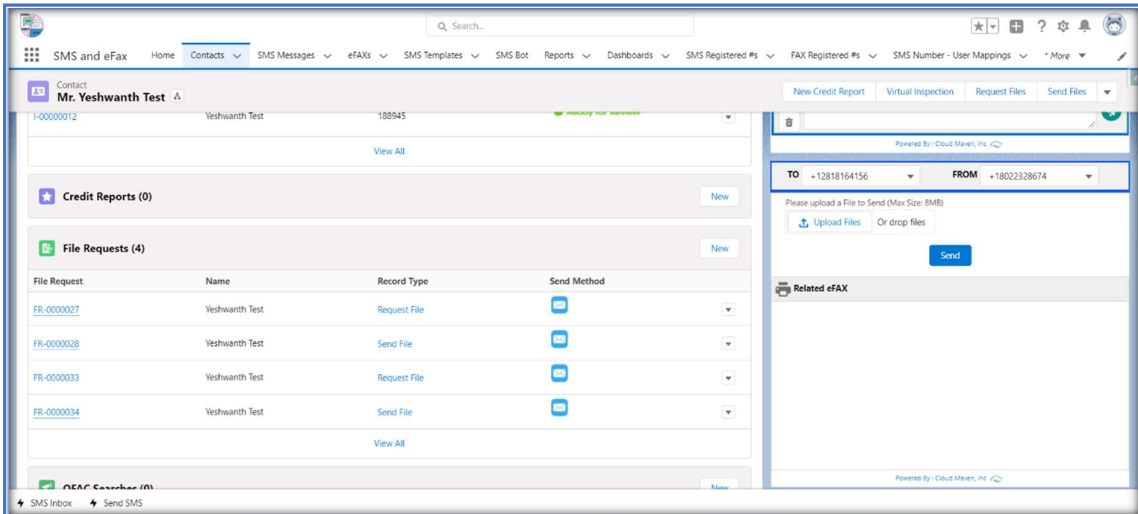
EFAQ Functionality Flow

- Log in to your Salesforce Org.
- Go to the existing Contact record or create a new one.



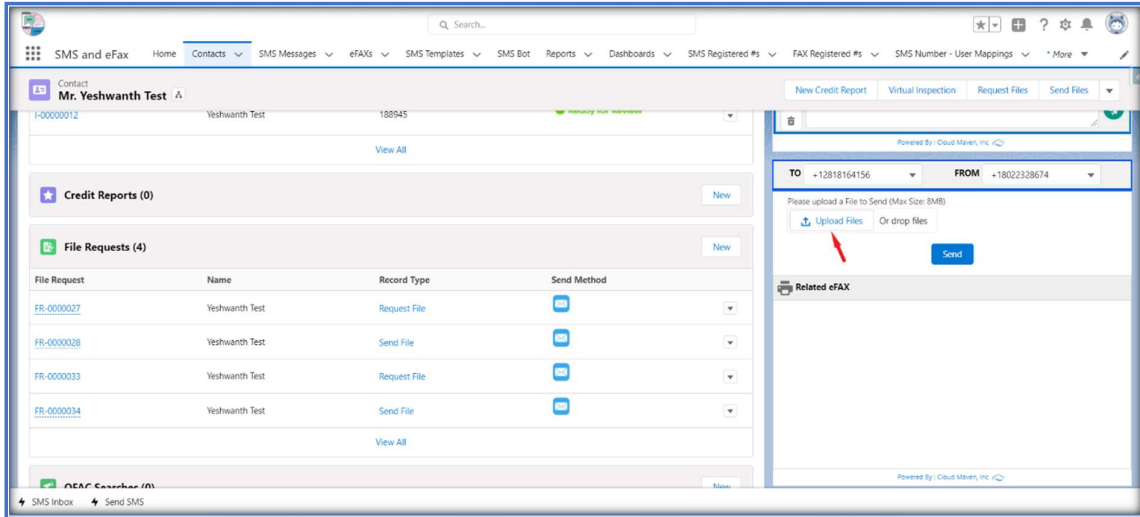
The screenshot shows the Salesforce interface for a contact record. The contact name is Mr. Yeshwanth Test, and the contact owner is Himanshu Kapoor. The details section shows various fields like Phone, Email, and Department. On the right, there is an eFax interface with fields for TO (+12818164156) and FROM (+18022328674). A text input field is present with a placeholder "Enter Text here..." and a "Send" button.

- You can see TO and FROM fields are auto populated in the eFAQ screen.



The screenshot shows the Salesforce interface for a contact record. The contact name is Mr. Yeshwanth Test, and the contact owner is Himanshu Kapoor. The details section shows various fields like Phone, Email, and Department. On the right, there is an eFax interface with fields for TO (+12818164156) and FROM (+18022328674). A text input field is present with a placeholder "Enter Text here..." and a "Send" button. Below the eFax interface, there is a section for "Related eFAQ" which is currently empty.

- You can see Upload File option which you need to choose for uploading file.
Note: Only PDF file can be uploaded.

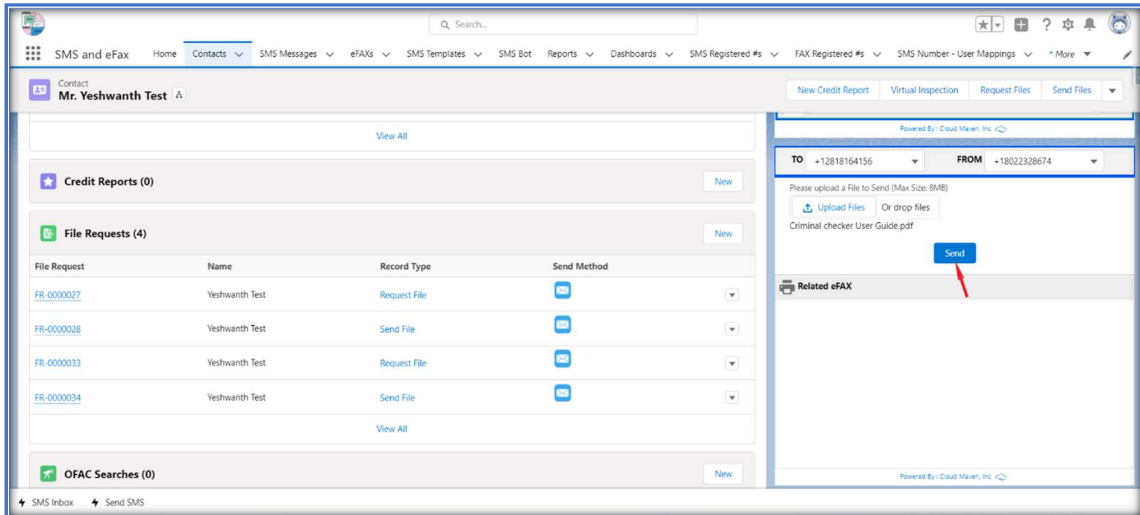


The screenshot shows the Cloud Maven interface for contact 'Mr. Yeshwanth Test'. The 'File Requests (4)' section contains a table with the following data:

File Request	Name	Record Type	Send Method
FR-0000027	Yeshwanth Test	Request File	
FR-0000028	Yeshwanth Test	Send File	
FR-0000033	Yeshwanth Test	Request File	
FR-0000034	Yeshwanth Test	Send File	

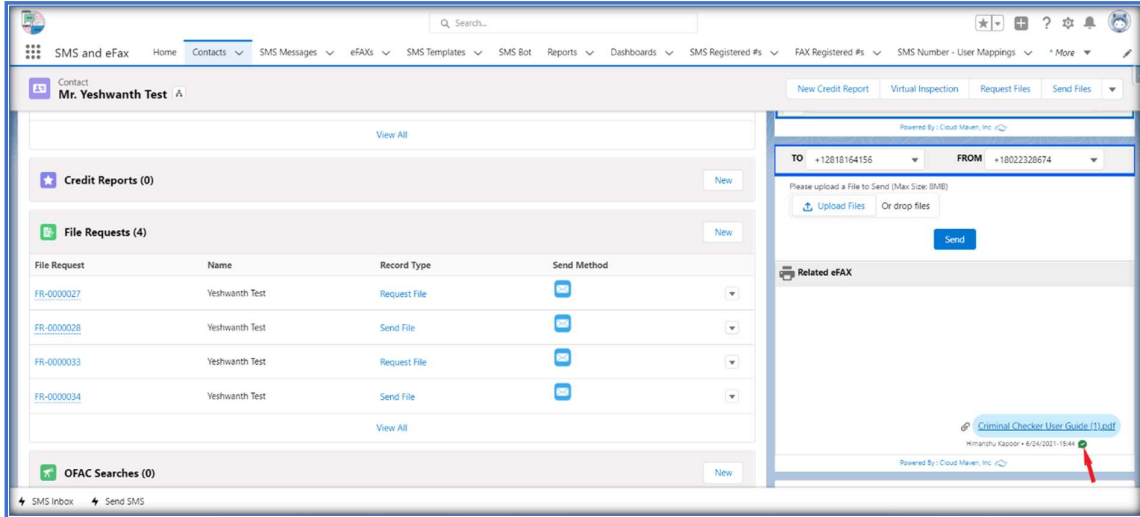
The right-hand side of the interface shows a form for sending an eFax. The 'TO' field is '+12818164156' and the 'FROM' field is '+18022328674'. Below these fields, there is a section for uploading a file. The text says 'Please upload a File to Send (Max Size: 8MB)'. There are two options: 'Upload Files' (with a red arrow pointing to it) and 'Or drop files'. A 'Send' button is located below the upload options.

- After uploading a file, you can see the name of the uploaded file. Then you need to click on Send button to send eFax.



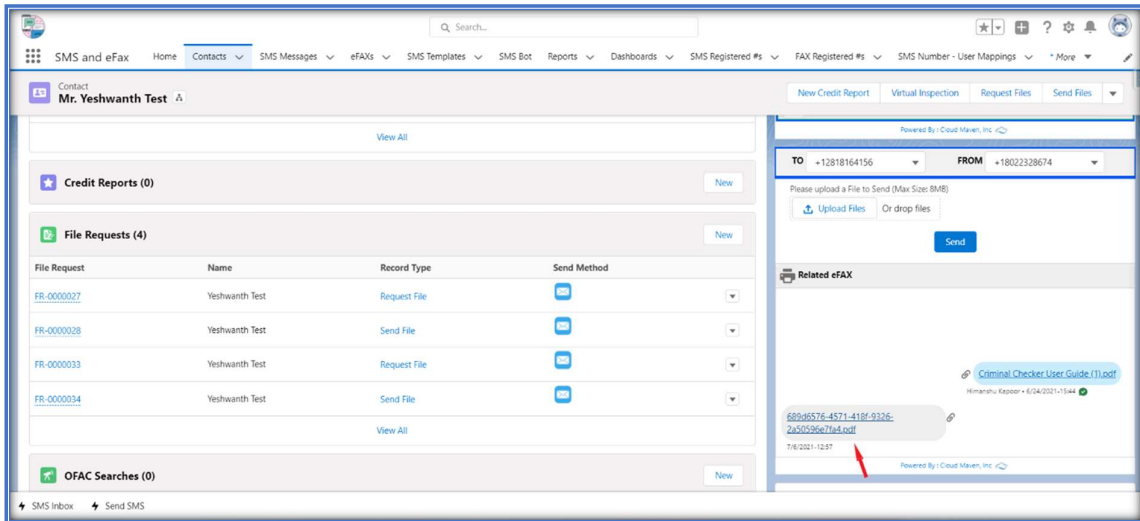
The screenshot shows the same Cloud Maven interface as the previous one, but now the file 'Criminal checker User Guide.pdf' has been uploaded. The 'Send' button is highlighted with a red arrow, indicating the next step in the process.

- After clicking on send button, you can see the file sent in eFax component. The green tick indicates that the file is sent to the customer.




The screenshot displays the 'Send Files' interface for contact 'Mr. Yeshwanth Test'. The 'Send' button is visible, and the 'Related eFAX' section shows a file 'Criminal Checker User Guide (1).pdf' with a green tick icon, signifying successful transmission.

- In the below picture, you can see the eFax received from the customer.



The screenshot displays the 'Send Files' interface for contact 'Mr. Yeshwanth Test'. The 'Send' button is visible, and the 'Related eFAX' section shows a file 'Criminal Checker User Guide (1).pdf' with a green tick icon, signifying successful receipt from the customer.

- You can view the eFax after clicking on the link.



Criminal Checker User Guide (1).pdf

Download Share Public Link

Cloud Maven, Inc
Your Vision. Our Solution.

How to run Criminal Report from Service File Object-

Please use the following steps to run a Criminal Report on any Applicant from a Service File object.

1. Login to salesforce using your credentials.
2. Go to the desired Service File.

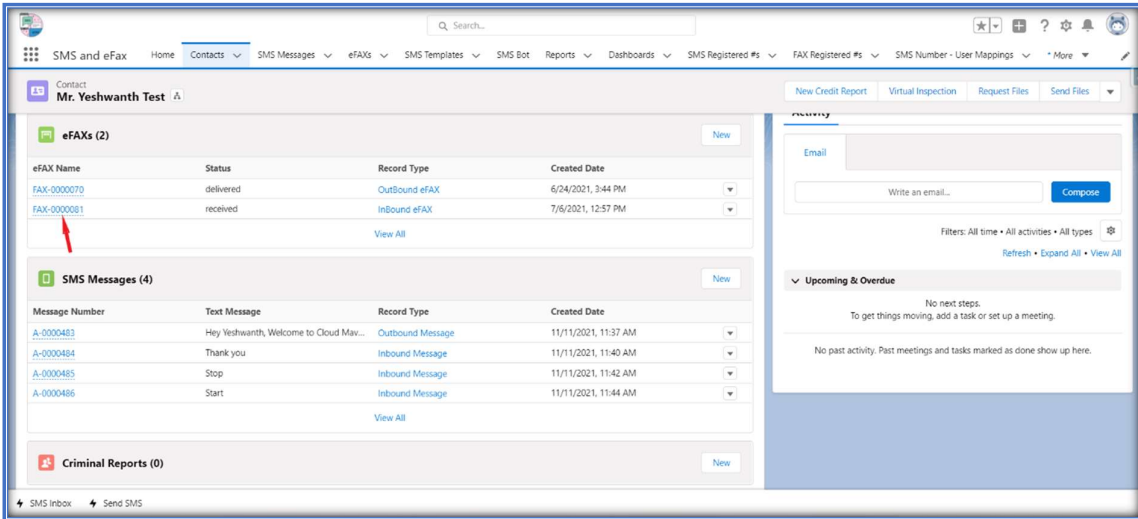
Note: Make sure all the required fields are populated on the related contact in order to run a criminal check.

First Name, Last Name, Address, SSN(Social Security Number) and Date of Birth.

3. Click on the Run Criminal Report Button.

Page 1 of 3

- You can also go to Related tab and then eFax to see all the eFax.



SMS and eFax Home Contacts SMS Messages eFAXs SMS Templates SMS Bot Reports Dashboards SMS Registered #s FAX Registered #s SMS Number - User Mappings More

Contact **Mr. Yeshwanth Test**

New Credit Report Virtual Inspection Request Files Send Files

eFAXs (2) New

eFAX Name	Status	Record Type	Created Date
FAX-000070	delivered	Outbound eFAX	6/24/2021, 3:44 PM
FAX-000081	received	Inbound eFAX	7/6/2021, 12:57 PM

View All

SMS Messages (4) New

Message Number	Text Message	Record Type	Created Date
A-0000453	Hey Yeshwanth, Welcome to Cloud Max...	Outbound Message	11/11/2021, 11:37 AM
A-0000484	Thank you	Inbound Message	11/11/2021, 11:40 AM
A-0000485	Stop	Inbound Message	11/11/2021, 11:42 AM
A-0000486	Start	Inbound Message	11/11/2021, 11:44 AM

View All

Criminal Reports (0) New

SMS Inbox Send SMS

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Please reach out to us at solutions@cloudmaveninc.com in case of any queries or concerns.