

Veeva Vault CRM

Send to Fax



What is Send to Fax?

Send to Fax enables compliant information sharing from Vault CRM in fax-dependent markets (e.g., Germany). It supports consent management and enforcement, full delivery tracking, and token-enabled fax templates managed directly in Microsoft Word.

Improve disjointed workflows with a single, audit ready process. No need to build an internal solution, or outsource fax to agencies.



Up to **30.000** faxes per year free of charge¹

Why is this important?

Send to Fax brings compliant, tracked, and personalized communication to markets reliant on fax technology.

It moves the process inside your existing CRM platform, offering three major benefits.

Complete Compliance	Ensures all outgoing faxes respect captured consent preferences for the fax channel and adheres to regulatory requirements and GDPR.
Tracked Delivery & Usage	Provides full delivery tracking and records every transaction. It also monitors usage, including the number of pages sent, against set limits.
Quick & Personalized	Allows end-users to select from pre-approved, token-enabled templates and easily personalize the content before sending, speeding up crucial communications.

¹Maximum of 3 pages per fax can be sent.

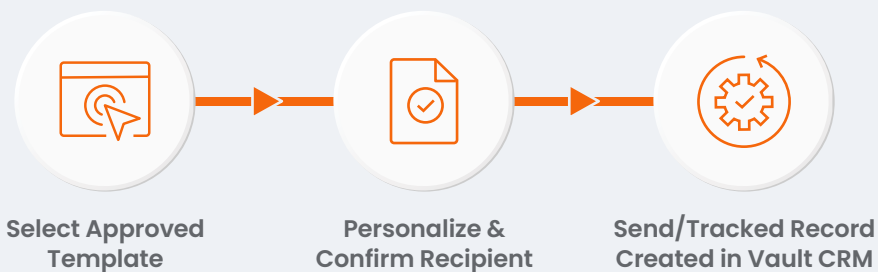
How is Send a Fax Used?

End User (e.g., Sales Rep)	Saves time by selecting pre-approved, personalized templates and sending a fax instantly, all while adhering to the HCP's consent status.	Announce a rep visit, pharmacy promotions, seasonal greetings.
Fax Admin User (e.g., Marketing/Ops)	Maintains control and consistency by creating, managing, and uploading approved fax templates directly in Microsoft Word, and monitoring overall usage.	Managing all templates, ensuring all content is compliant, tracking total page usage.

Core Components & Workflow

01 | Content source

Documents are directly uploaded to **Vault CRM**, ensuring only approved materials are shared.



02 | Fax Templates: The Key to Efficiency

- Templates are created in Microsoft Word by an admin.
- They use tokens (placeholders) that automatically pull in personalized information (like the HCP's name, or the user's signature) when sending.

5:54 PM Mon Mar 22

Cancel Send Fax
Verteo Order Form

To: Ackerman, Clinton · (980) 391-0960

Slide to Send

Compose Fax

Greeting
Dear

Introductory_Message

Order_Form_Instructions

Sign_Off
Sincerely

Fax Details

Account_First_Name
Clinton

Account_Last_Name
Ackerman

User_Name
Sarah Jones

Current_Date

Order Form

To: Dr. «Account_First_Name» «Account_Last_Name»
From: «User_Name»
Subject: Order Form for Verteo BioPharma
Date: «Current_Date»
Total Pages: «Total_Pages»

«Greeting» Dr. «Account_Last_Name»,
«Introductory_Message»
«Order_Form_Instructions»
«Sign_Off»,
«User_Name»
Verteo BioPharma, Inc.
«User_Email_Address»

Healthcare Provider Information

Practice Name:
Contact Person:
Phone Number:
Email Address:

Prescriber Information and Authorization

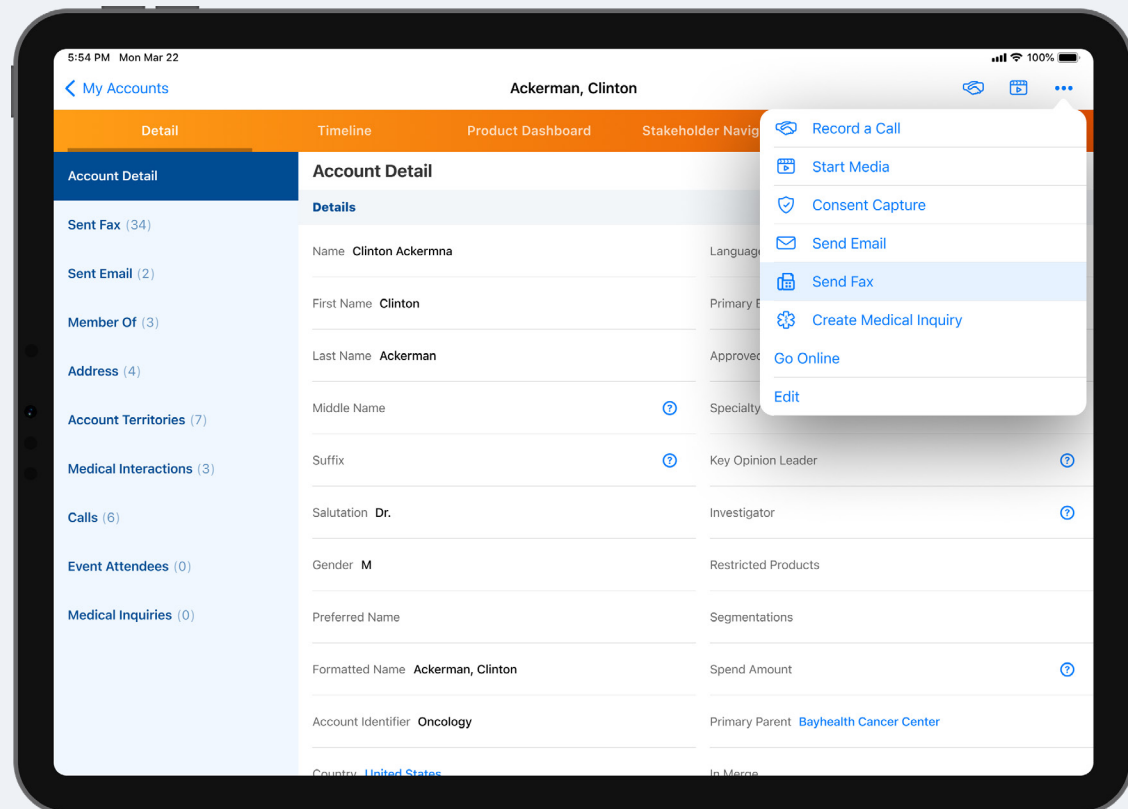
Prescriber Name:
NPI Number:
State License #:
Signature:

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Verteo BioPharma
Pleasanton, CA
Phone: (555) 555-5555
Fax: (555) 123-4567
verteobiotech.com

Product	NDC	Quantity
Painlasher®, 100mg capsules, 30 count	98765-4321-01	
Painlasher®, 200mg capsules, 60 count	98765-4321-02	
Painlasher®, 200mg capsules, 90 count	98765-4321-03	

03 | Simple Sending Process

1. **Select** an approved template. Users can search, sort, and filter the list of templates, and preview a template by selecting the “Eye” icon.
2. **Confirm** the recipient and fax number (the system automatically checks for valid consent).
3. **Enter** personalization details for any user input tokens.
4. **Send Fax** - a “Sent Fax” record is automatically created for tracking.



Useful Links

[Vault CRM Help – Send to Fax](#)



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