

Claims

Send email or scans to PlanManager.

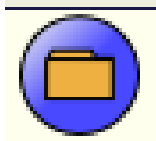
Many scanners and printers have the function to scan a document and send the scanned document as a PDF to an email address. If you have this scanner, then you can adjust the settings for the document to be loaded directly into your PlanManager.

To what email address should I send my document?

Send your document by mail to: in@mail.planmanager.be. Use your e-mail client or scanner to send the mail.

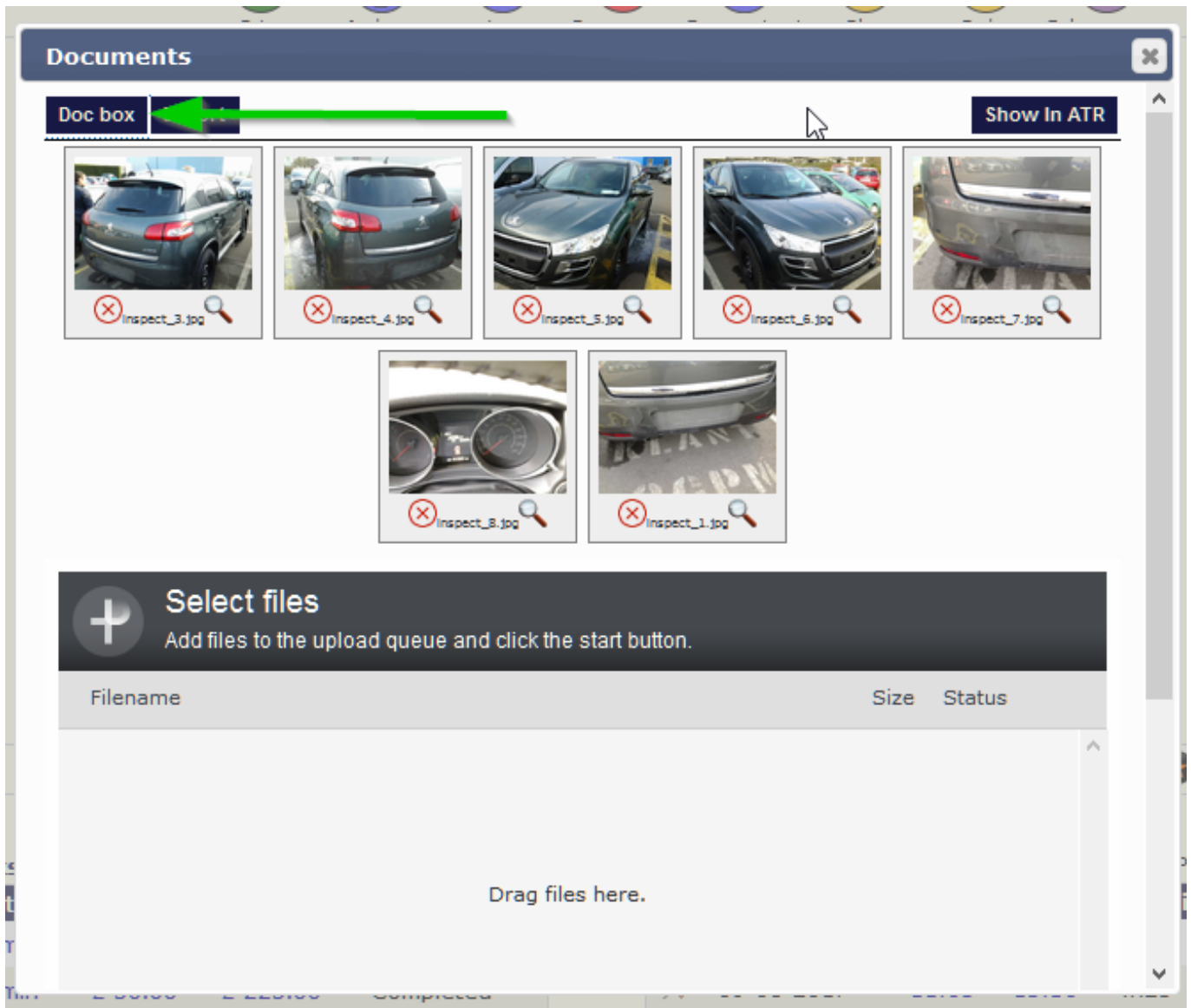
Where can I find the documents in PlanManager?

After sending the e-mail, open the job to where the document has been sent. Click



the Documents button. This will open the Documents screen. At the top of the screen to the left, you will find a button with the name Doc box.

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Click Doc box, you'll see a new window where you can see all the documents that were sent to PlanManager. Select the documents you want to link to this folder and click on import ..

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DocBox

The documents below were uploaded to the docbox.
PlanManager was unable to link these documents to a claim automatically.

If you enter a claim number as your e-mail subject, the documents will automatically be linked to the claim.

2 Selected
 All pictures

Save

If you enter a claim number as your e-mail subject, the documents will automatically be linked to the claim.

In the same way you can send attachments from mails to PlanManager by forwarding these emails to in@mail.planmanager.com

Be sure your e-mail address is known in PlanManager, otherwise this won't work. Same for the email address your scanner send his mails from.

Be sure to create a new user for this scanner in "Maintenance - Organisation - Personnel" with the e-mail address of the scanner noted. Don't forget to put in a

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password as well.

The screenshot shows the PlanManager user profile page. The top navigation bar includes 'PlanManager' and several menu items: 'Help', 'Workshop', 'Job', 'Planning', 'Report', and 'Maintenance'. Below this is a secondary navigation bar with 'Back' and various categories like 'Organisation', 'Third Parties', 'Task Types', etc. The main content area is divided into two sections: 'Personnel data' and 'Security'. In the 'Personnel data' section, the 'Lastname' field contains 'Scanner' and the 'Forename' field contains 'Main Office'. A green box highlights these two fields. The 'Email' field contains 'scanner@mainoffice.co.uk' and has a green arrow pointing to it. The 'Security' section has 'Password' and 'Confirm Password' fields, both empty. Below them is a 'Visible' section with several checkboxes: 'Login' (checked), 'Workshop', 'Planning', 'Notifications', 'Inspection', 'Webservice', 'Courtesy Car', and 'Reception'. A green arrow points from the 'Confirm Password' field to the 'Login' checkbox. At the bottom center is a 'Save' button. On the right side, there is a partially visible note: 'This will a use the r'.

Unikátní ID: #2086

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Aktualizováno: 2019-10-08 11:30