








Communication

Adress book

An option was added to create an address book in PlanManager. You can check the address book going to Maintenance - Third parties - Address book. If this option is not visible, you can activate it by changing the rights of the user groups. To do this you can go to System - User Groups - and select a user group. Then click "Maintance" -> "Third Parties" -> "Address Book" and check all boxes here

Organisation	Third Parties	Task Type
Filter	Customers	
<input type="text" value="select a location"/>	Engineers	<input type="text" value="select a tea"/>
<input type="text" value="type a number"/>	Insurers	<input type="text" value="ype an Ema"/>
	Suppliers	
<input type="button" value="New"/> Results: Vi	Brokers	
	Titles	Last
	Supplier Types	api
		api
	DMS Datastore	API
	Address Book	App
		Aron
		Ban

If an e-mail address / mobile number that is not yet known in the address book, is

Communication

used in communications within PlanManager, this will automatically be added in the address book. Note, this is only the case when the party is “Other” in the communication.

Address Book

Description

Email

Phone number

Filter

Reset

type a description

type an e-mail

type a telephone number

Description ▲

Email

Phone number

✎

jonesie@insypro.com

You can also add / edit the address book manually. As soon as the e-mail address / mobile number is known in the address book, this will be automatically proposed as soon as you start entering the name or e-mail address in the communication, to complete this automatically.

Unique solution ID: #4021

Author: Sophia Bouhajra

Last update: 2022-02-10 09:44