

Jobs

DocBox & sending email or scans to PlanManager.


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Many scanners and printers have the function to scan a document and/or photo (Min 1MB) and send the scanned document and/or photo to an email address. If you have this scanner, then you can adjust the settings for the document and/or photo to be loaded directly into your PlanManager.

To what email address should I send my document?

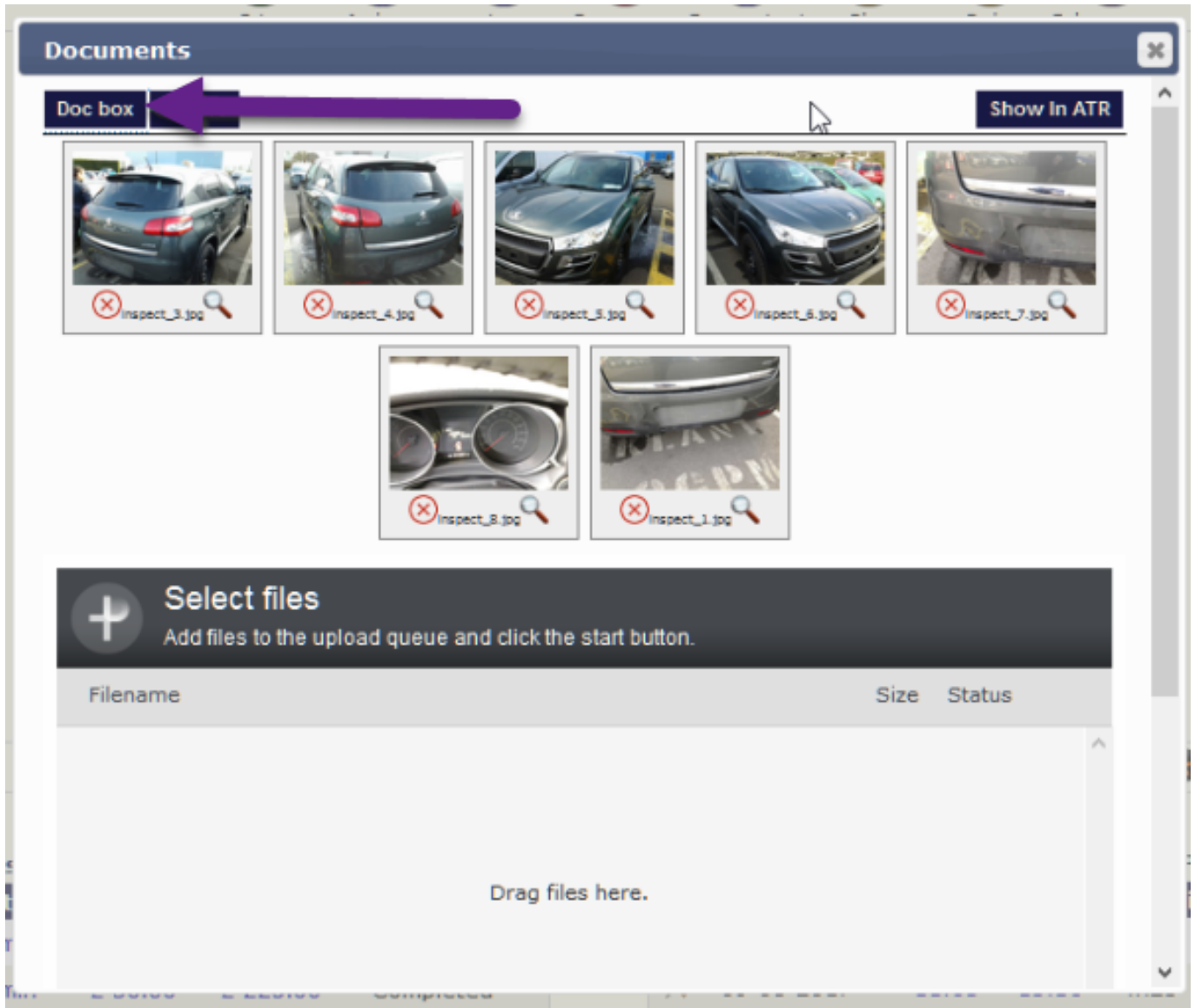
Send your document by mail to: in@mail.planmanager.be or in@mail.planmanager.com . Use your e-mail client or scanner to send the mail.

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.

Jobs




Click Doc box, you'll see a new window where you can see the first 100 documents that were sent to PlanManager. Select the documents you want to link to this folder and click on import.

Jobs

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



×

IMG_5967.JPG

☒



×

IMG_5968.JPG


☒



×

IMG_5993.JPG

☐



×

IMG_5994.JPG

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IMG_5968.JPG



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IMG_6031.JPG


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IMG_6032.JPG


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IMG_6051.JPG

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×

IMG_6052.JPG

☐



×

IMG_6053.JPG

☐

Save

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

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 and that DocBox is ticked in maintenance - personnel, otherwise this won't work. Same for the email address your scanner send his mails from.

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URL: <http://faq.insypro.com/index.php?action=artikel&cat=6&id=556&artlang=en>

Jobs

PlanManager

COMMUNICATION
HELP
WORKSHOP
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PLANNING
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RENTAL

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Organisation Third Parties Task Types Part Types


Personnel data


Lastname: Smets
Forename: JM
Number: Number
[Click here to change the address.](#)
Phone: Phone
Email: ;@gmail.com
Use e-mail for: Docbox X
Contact: JM Smets
Contact Phone: Contact Phone
Contact Email: Contact Email


Be sure to create a new user for this scanner in “Maintenance - Organization - Personnel” with the e-mail address of the scanner noted. Don’t forget to put in a password as well.


Jobs


**PlanManager**


COMMUNICATION 


HELP 


WORKSHOP 


JOB 


PLANNING 

REPORT 

MAINTENANCE 

SYSTEM 

RENTAL 

INVOICING 

Organisation

Third Parties

Task Types

Part Types

Task Type Spr

Personnel data

FirstnameScanner

ForenameFront Office

NumberNumber

PhonePhone

Emailfrontofficescanner@mail.com

Use e-mail forDocbox X

ContactContact Name

Contact PhoneContact Phone

Contact EmailContact Email

Click here to change the address.

Show Identity data

Unique solution ID: #1581
Author: Jean-Marie
Last update: 2023-02-17 15:22