

Communication

How do I use Outlook to send my emails?

Introduction

When you open a file in PlanManager, you can easily send e-mails to customers etc. via the communication module. The emails are then sent to the imported party via our systems.

If you choose Outlook, then you can. You will then, as before, compile your communication (e-mail) via the communication module. The communication will thus be stored in PlanManager as before.

However, when you click on sending, the email will not be sent by PlanManager, but will be forwarded to Outlook. Attachments are also passed to Outlook.

Outlook will then ask you if you want to send the e-mail effectively.

How

Of course, an Outlook must be installed on your PC to enjoy this functionality. We also recommend that you have started Outlook.

In order to enjoy this functionality in PlanManager you go to 'System', select MAIL_TROUGH_OUTLOOK. Then press Save.

Important

Remark 1: this option is valid for all locations, but can also be set by location. For this setting contact the PlanManager support team.

Remark 2: when the MAIL_THROUGH_OUTLOOK option is enabled, everyone should email via Outlook.

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