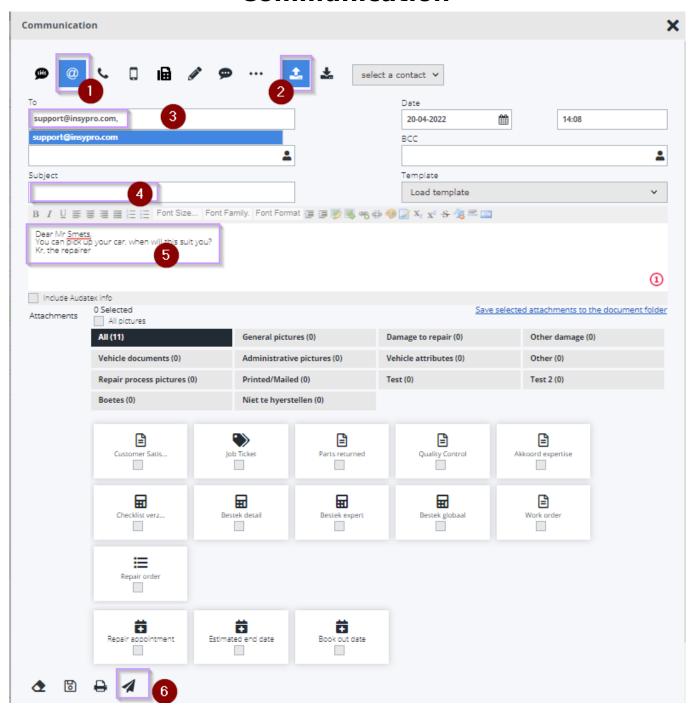
Communication The mail system.

E-mail system

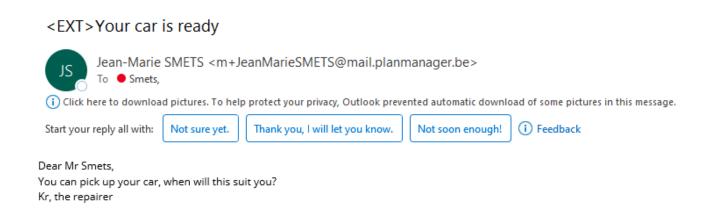
In order to enable further growth of the amount of mails that PlanManager sends in the name of the repairer, we will switch to a new e-mail system.

The operation is similar and gives you a number of additional options.

Create a new email is very easy, select customer, enter topic, email type and click on the send button.

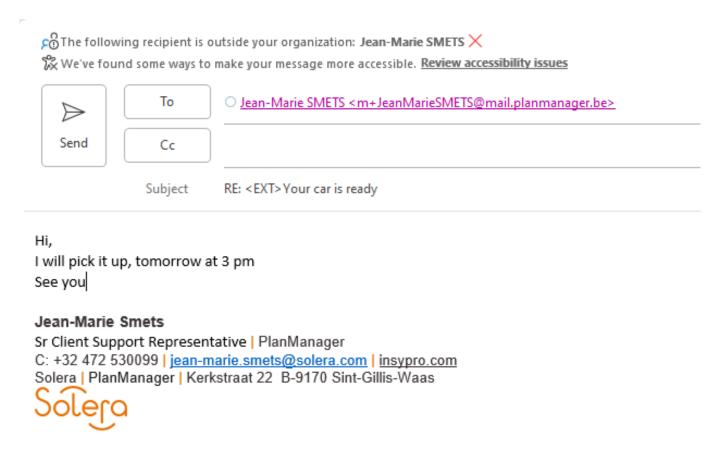


The customer receives the email in his inbox and can send an answer. Remark: The e-mail address where the customer answers is an e-mail address of PlanManager. This allows us to process the mail in a correct way.



The new mail address that PlanManager sends has the form:

"Jean-Marie SMETS" <m+Jean-Marie SMETS@mail.planmanager.be>



The first part will always contain your own name, so the customer sees who e-

mailed him.

The second part can still be adjusted slightly if you wish.

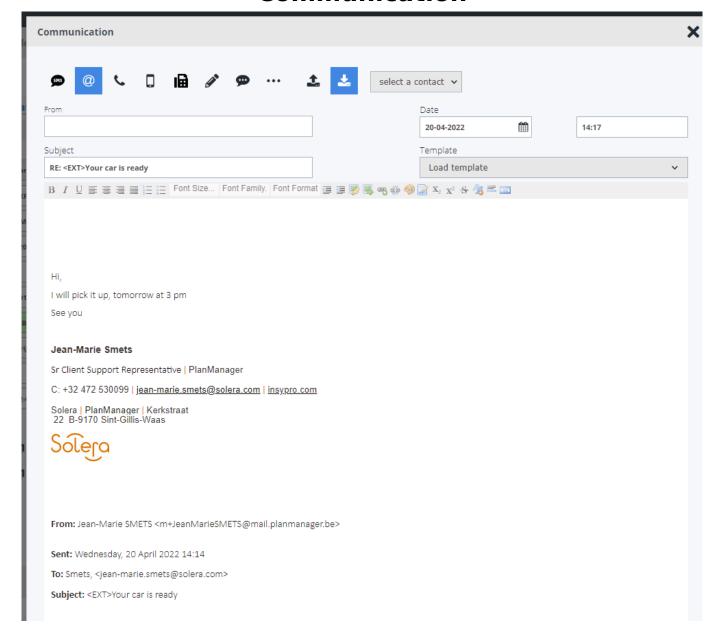
If you wish to adjust, please let us know via the support, mentioning the name you wish to use. A new, unique e-mail address must be created manually.

Your customer's response will be loaded immediately into PlanManager. You will receive a notification message at the bottom right (as with the SMS) when a response arrives. To see this notification, the staff member that is logged in must be set up for this. You can do this in 'Maintenance - Organization - Personnel. Here, you can select a staff member and check the box next to Notifications in the right-hand column to see if this staff member views these notifications.



We recommend that you activate this for all staff who send mail.

A simple click on the message opens the full response in the communication screen of the file (or invoice). If the email contains attachments, these will also be visible here.



In this system, we also added an Open Confirmation. This allows us to see when someone opens an email.

Note: This is not the same as Microsoft Outlook's Read Confirmation. An Outlook read confirmation does not work in many cases (you can turn it off / you can reject the confirmations, a lot of people do not work with Outlook, etc ...).

The Open Confirmation works in a completely different way and will correctly indicate in 99% of cases that the e-mail was opened regardless of the client's settings on his local PC.

Unique solution ID: #1571 Author: Katrien Vanhaute Last update: 2022-04-20 14:24