Communication
## How does the communication screen work?
Introduction

PlanManager allows you to communicate (texting, mailing, ..) with your customers, experts, insurances,... in a fast way.

In the job you open this communication screen by clicking on the communication button:

The communication screen is opened. It has been developed in a manner known to an e-mail client such as Microsoft Outlook. Of course there are some big differences because the communication screen has a lot of options.
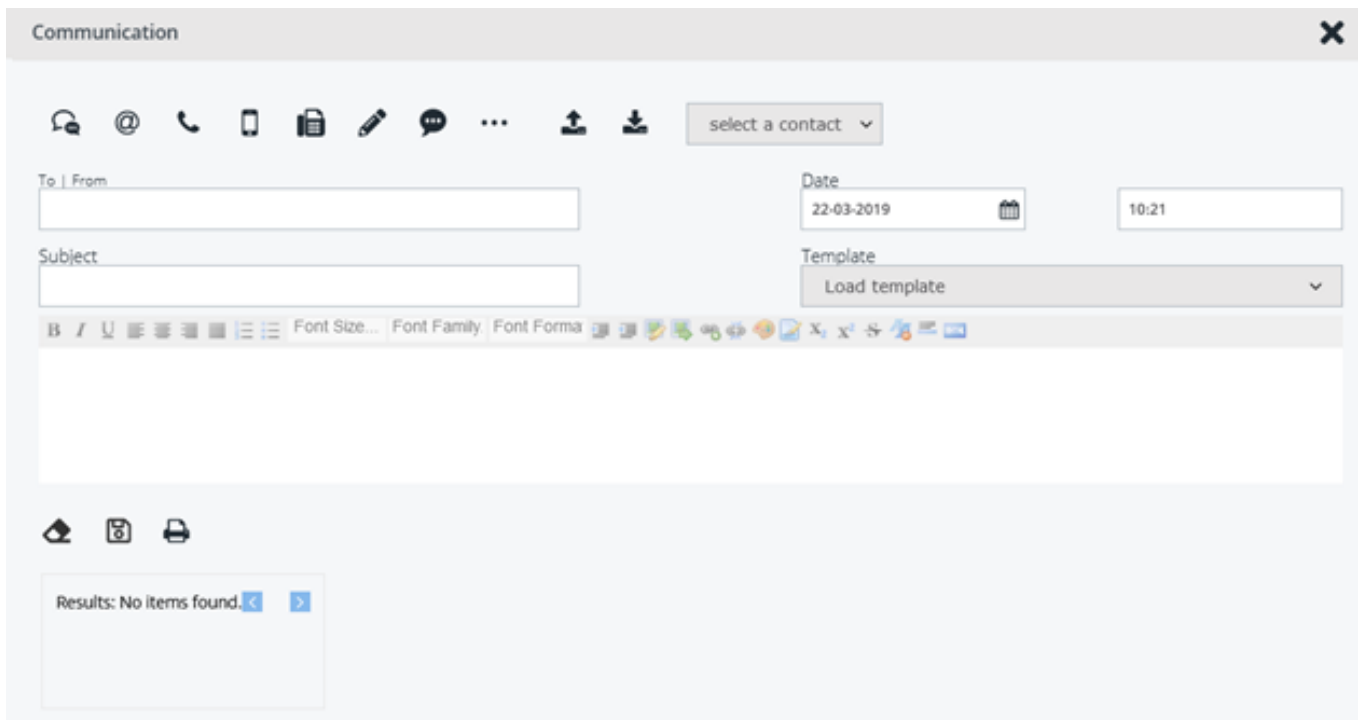

Communication types

At the top you will see a row of buttons. These are the buttons that determine what type of message you want to send or receive.

Communication

In order from left to right these buttons mean: SMS, Email, Telephone, GSM, Fax, Public note, Internal note and Other. A note can be compared to a post-it. A public note is a note that is added to the file and can be read by anyone who can see the file. An internal note is a note that is only visible to the staff.

All procedures for using this are proportionate. We will use E-mail as an example. If you want to send an E-mail, click on the E-mail icon. The button then turns blue to indicate that it is selected:
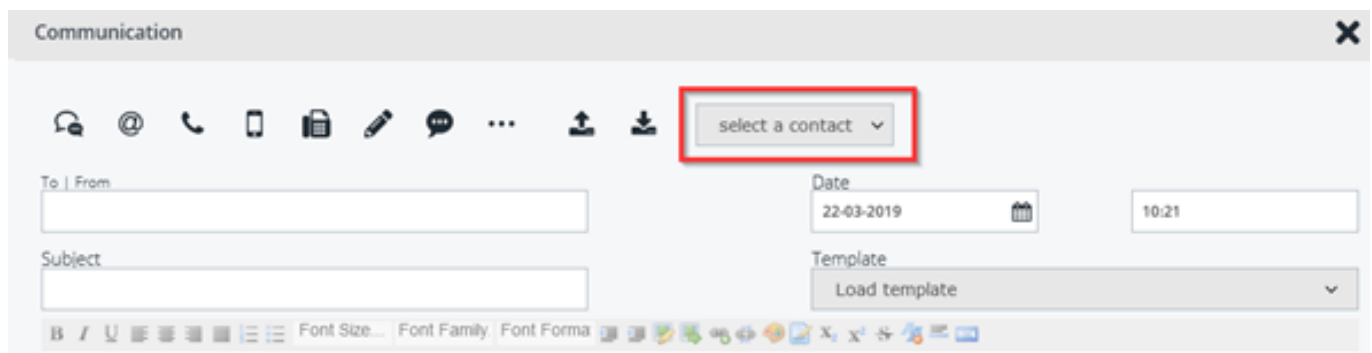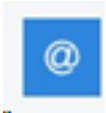

Sending and receiving

You will also find these action buttons:

These determine whether you want to send an e-mail (1) or whether you have received one (2) and keep this in the system. Here you will usually only use the send icon. To send an email, we click on the send icon.
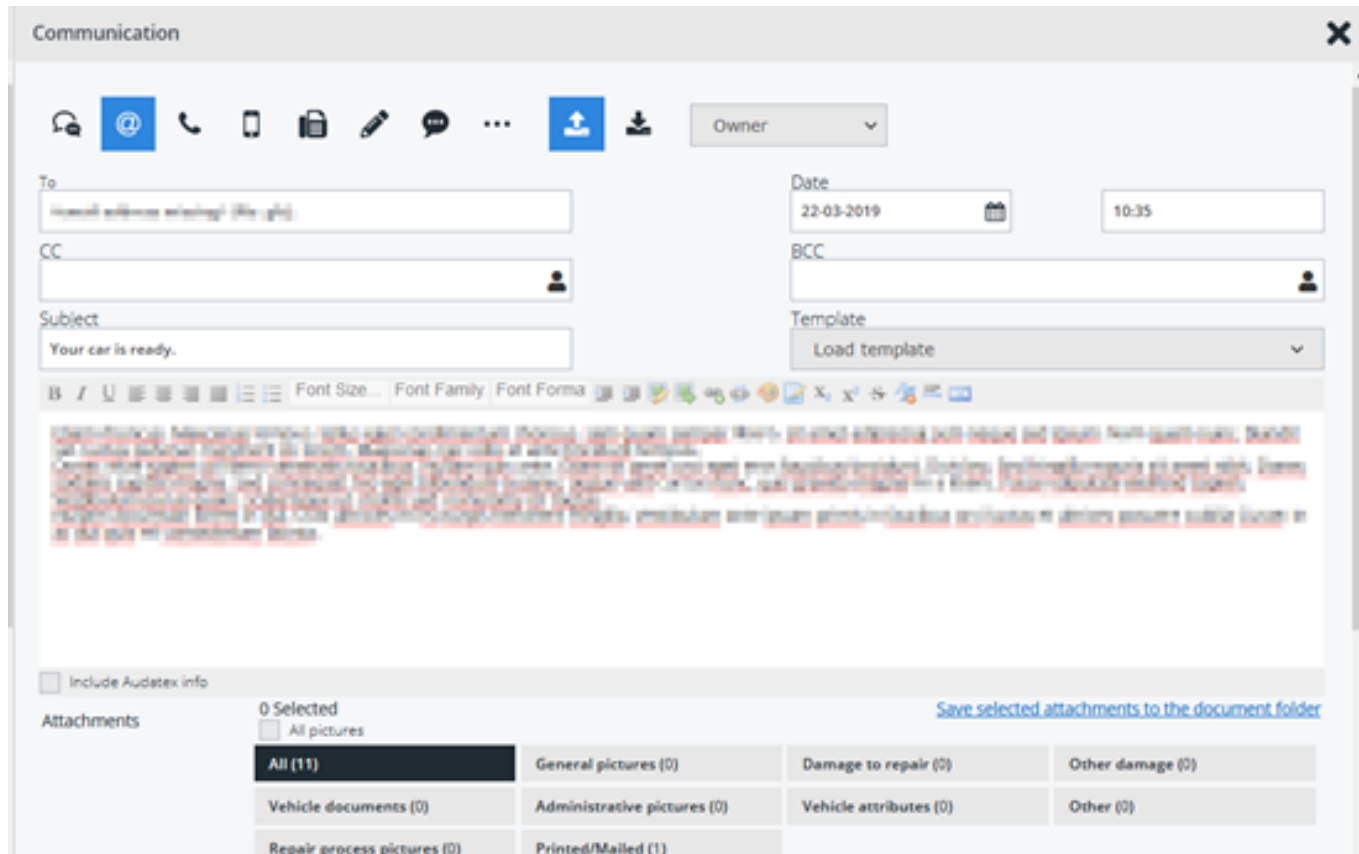
Parties

Finally, we will see a selection list asking for a party to be selected.Select here who you want to send your message to.You can only designate parties that have been filled in in the file. If you want to send an email to the owner, select "Owner". The system will automatically retrieve the customer's e-mail address and fill it in the To field.

Communication

Select here to whom you want to send your message. You can only indicate contacts that have been entered in the job. If you want to send an e-mail to the owner, select "Owner". The system will automatically retrieve the customer's e-mail address and enter it in the To field.

More information

This is the basic operation of the communication screen.

For advanced performance, refer to the links below:

[How do I send a copy of an email to myself?](#)

[How do I send an informex estimation to an expert?](#)

[How do I print an order to fax?](#)

[Can I receive SMS from the customer?](#)
Unikátní ID: #2039
Autor: Katrien Vanhaute
Aktualizováno: 2019-10-08 10:54