

Claims

Send email or scans to PlanManager.

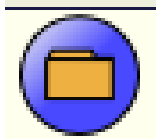
Many scanners and printers have the function to scan a document and send the scanned document as a PDF to an email address. If you have this scanner, then you can adjust the settings for the document to be loaded directly into your PlanManager.

To what email address should I send my document?

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

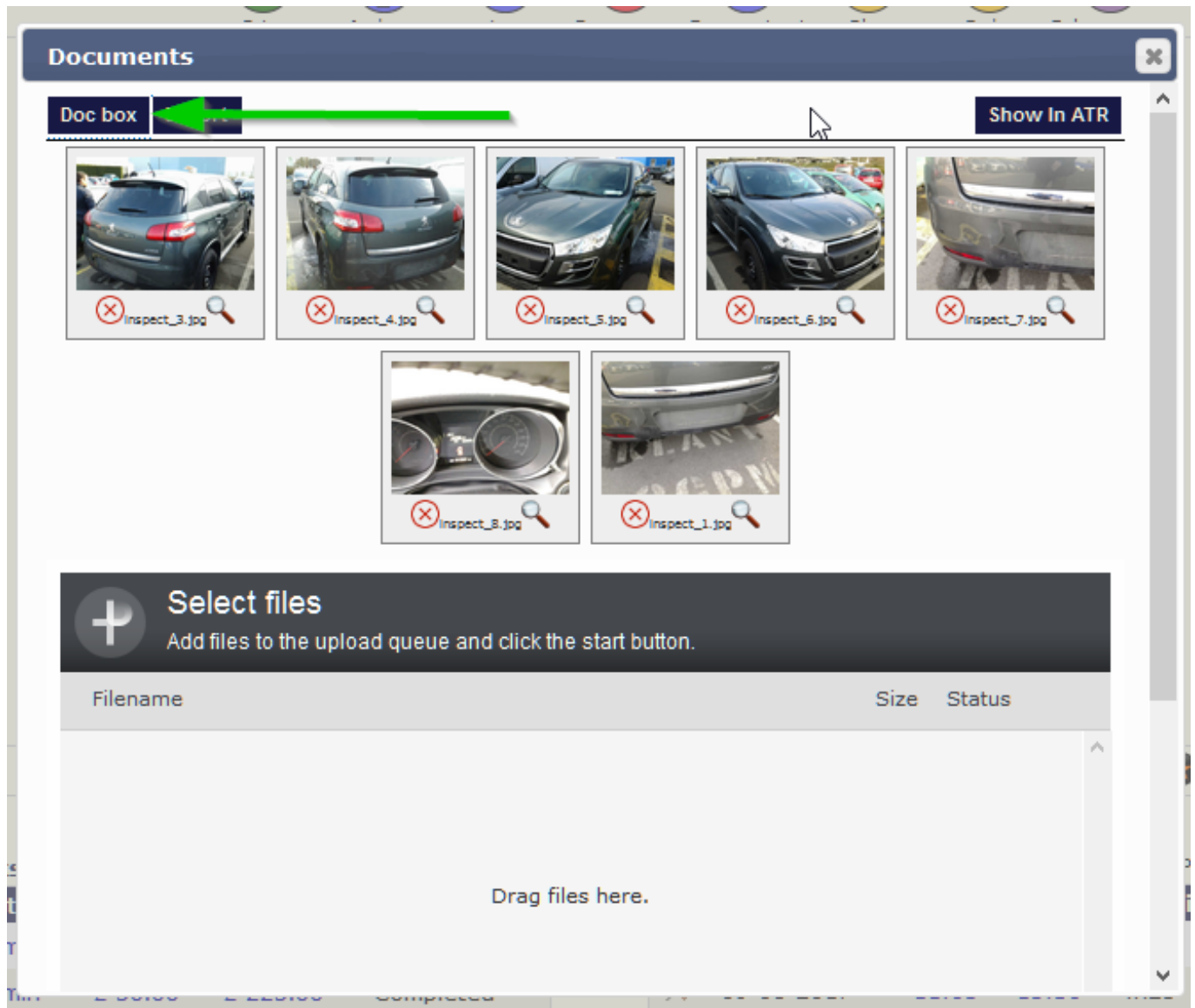
Where can I find the documents in PlanManager?

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.

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

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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

☐




IMG_6031.JPG

☐




IMG_6032.JPG

☐




IMG_6051.JPG

☐



IMG_6052.JPG

☐



IMG_6053.JPG

☐

Save

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

In the same way you can send attachments from mails to PlanManager bij forwarding these emails to in@mail.planmanager.com

Be sure your e-mail address is known in PlanManager, otherwise this won't work. Same for the email address your scanner send his mails from.

Be sure to create a new user for this scanner in "Maintenance - Organisation - Personnel" with the e-mail address of the scanner noted. Don't forget to put in a

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password as well.

PlanManager Help | Workshop | Job | Planning | Report | Maintenance

Back Organisation Third Parties Task Types Part Types Standard Jobs Comm Templates Catalog Tablet Vehicle Checklists

Personnel data

Surname: Scanner
Forename: Main Office
Number: Number
Click here to change the address.
Phone: Phone
Email: scanner@mainoffice.co.uk
Use e-mail for:

Location: select a location
Usergroup: select a usergroup
Language: English (United Kingdom)
Team: select a team
Hourly Cost: £

Security

Password:
Confirm Password:
Visible:
☒ Login
☐ Workshop
☐ Planning
☐ Notifications
☐ Inspection
☐ Webservice
☐ Courtesy Car
☐ Reception

This will a use the r

Save

Unikátní ID: #2086

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