TMASYSTEMS

Inbound Email Setup Guide

This guide provides step-by-step instructions for configuring inbound email settings, including screenshots and tips.

NOTE: This feature is part of the additional Integration Suite module. The *Client Info / Inbound Emails* Tab is only available if you have this module.

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Step 1: Access the Configuration

1. Go to the Admin Menu and open the Client Info window.
2. Select the Inbound Emails tab. Integration Suite module required.
3. Locate the row labeled Work Request Inbound Email Type and click the Edit (pencil) icon.
4. The Configuration Panel will appear.
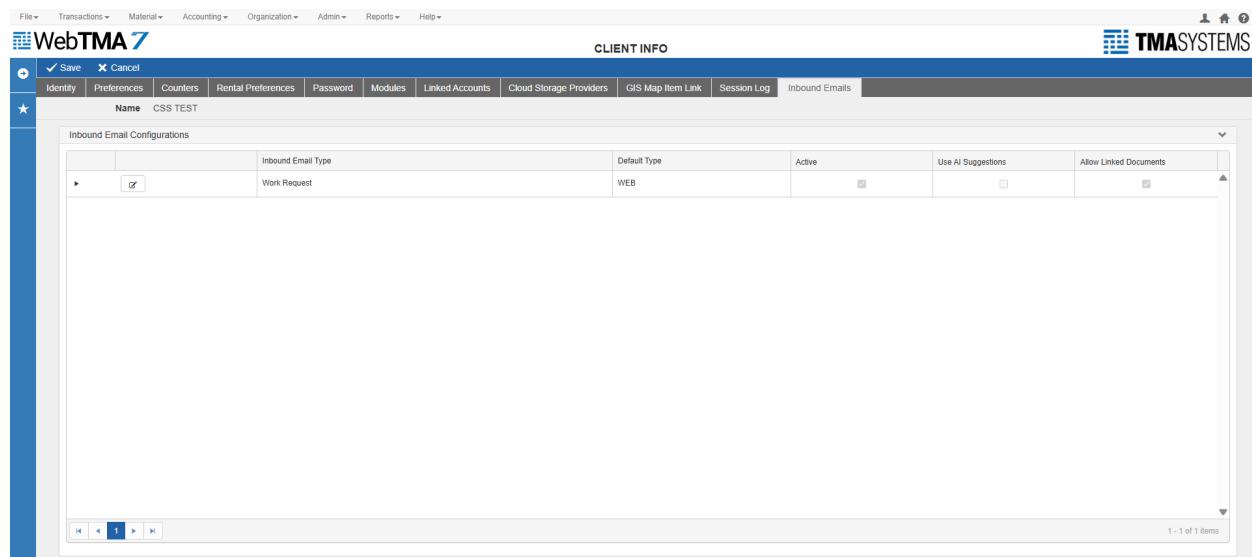
![TMA SYSTEMS logo]

Step 2: Configure Inbound Email Settings

In the Configuration Panel, configure these options:

1. Inbound Email Address: Unique for each client. Sending emails to this email address will automatically create a Work Request. If desired, this address could be used directly in a "mailto:" link but for easier use, we suggest getting your IT department to create a familiar email address like buildingMaintenance@myorg.com to forward it to the address you enter here.
2. Active: Enable or disable the inbound email feature.
3. Allow Linked Documents: Allow attachments from incoming emails to be linked to Work Requests.
4. AI Suggestions: Get suggested tasks and location details based on email content from our TMAi.
5. Default Type (Required): Set the default request type for Work Requests created via inbound email.
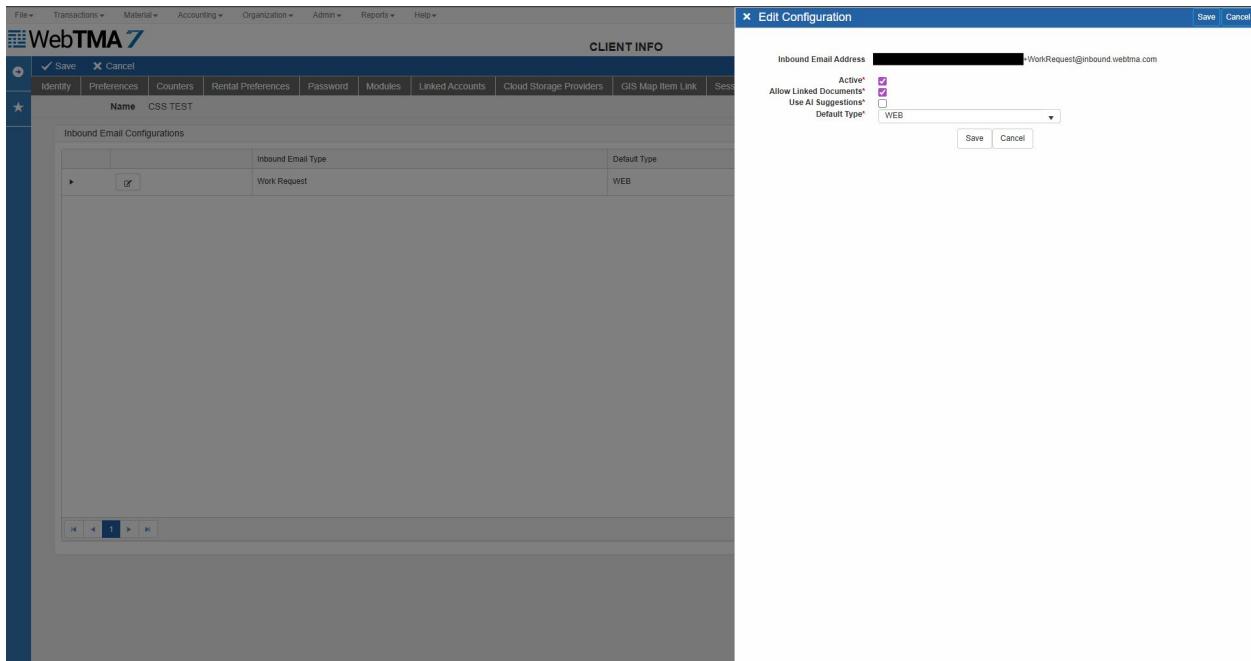
Step 3: Set Up Domain Whitelist (Optional)

By default, all email domains are accepted. After adding domains to the whitelist, only those listed will be allowed. This could be useful if you only want emails if you are receiving too many spam emails and/or want to restrict to emails only from within your organization.

To add a domain:

1. Enter the email domain.
2. (Optional) Assign a Repair Center for requests from that domain.
3. Click Save.
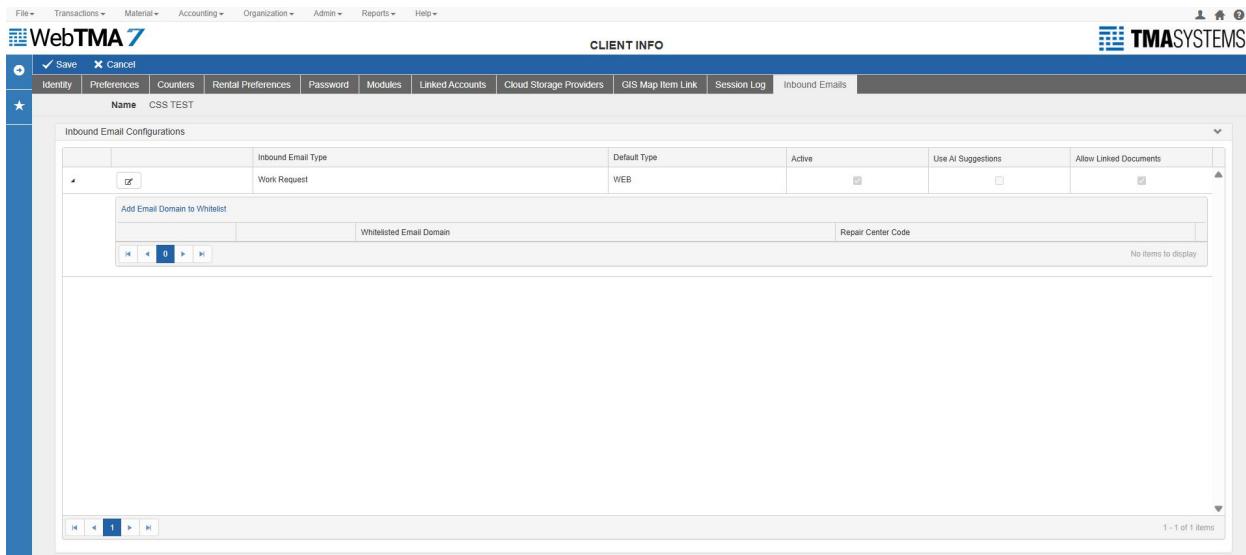
![TMA SYSTEMS logo]

Step 4: Configure Email Forwarding

Set up email forwarding to the Inbound Email Address from Step 2 if you are using Exchange to manage your email. This allows the user friendly email to be forwarded to the system-specific email address used by WebTMA and ensures incoming emails are automatically processed and converted into Work Requests.

1. From the Exchange Admin Center, expand **Recipients** -> **Contacts** and select **Add a mail contact**

2. From the New Mail Contact panel, supply the following (required fields):
   - Display name
   - Work Request Inbound email address

- Email alias
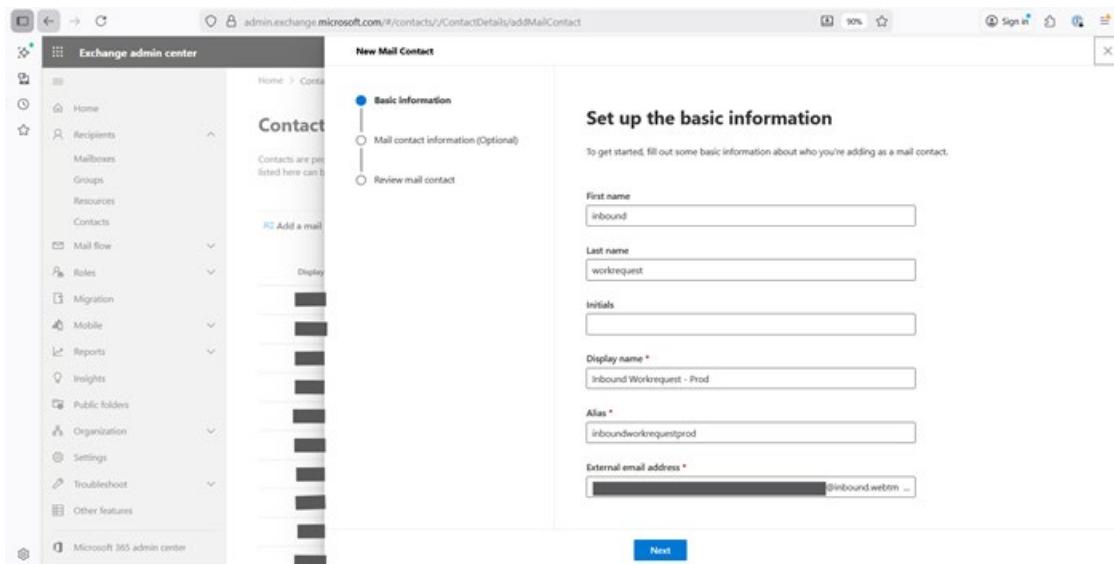
Click **Next** to continue.

3. Supply optional information if desired, otherwise, click **Next**
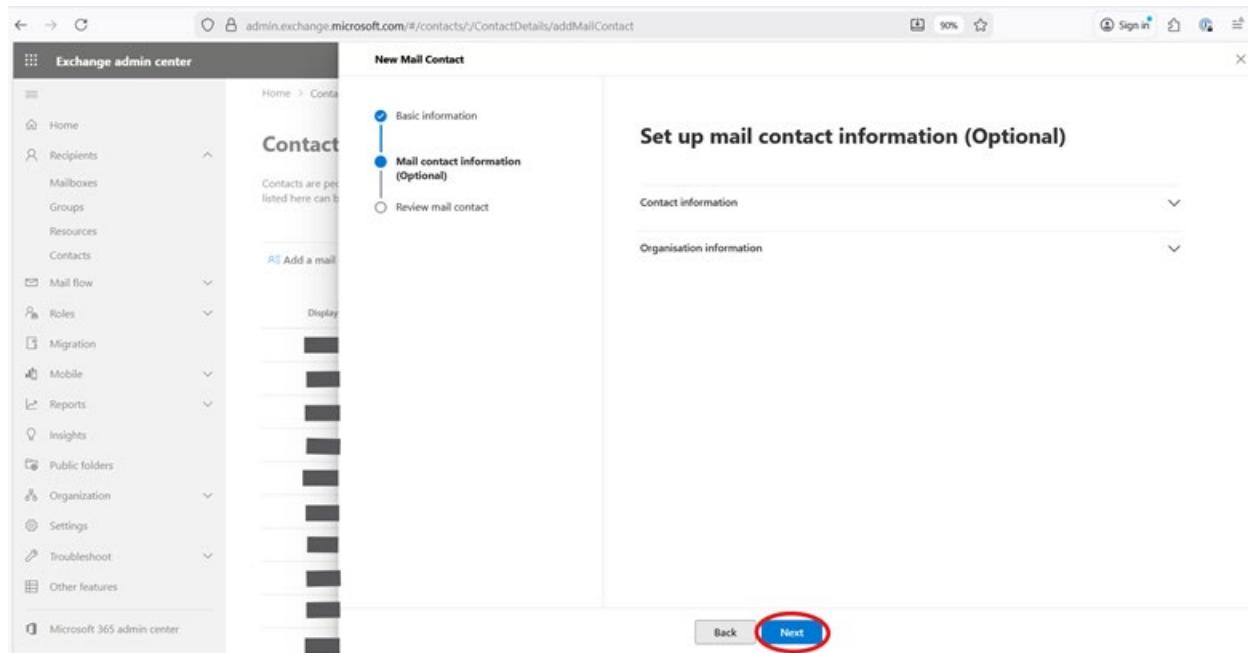
4. Review the contact information and click **Create** once validated.
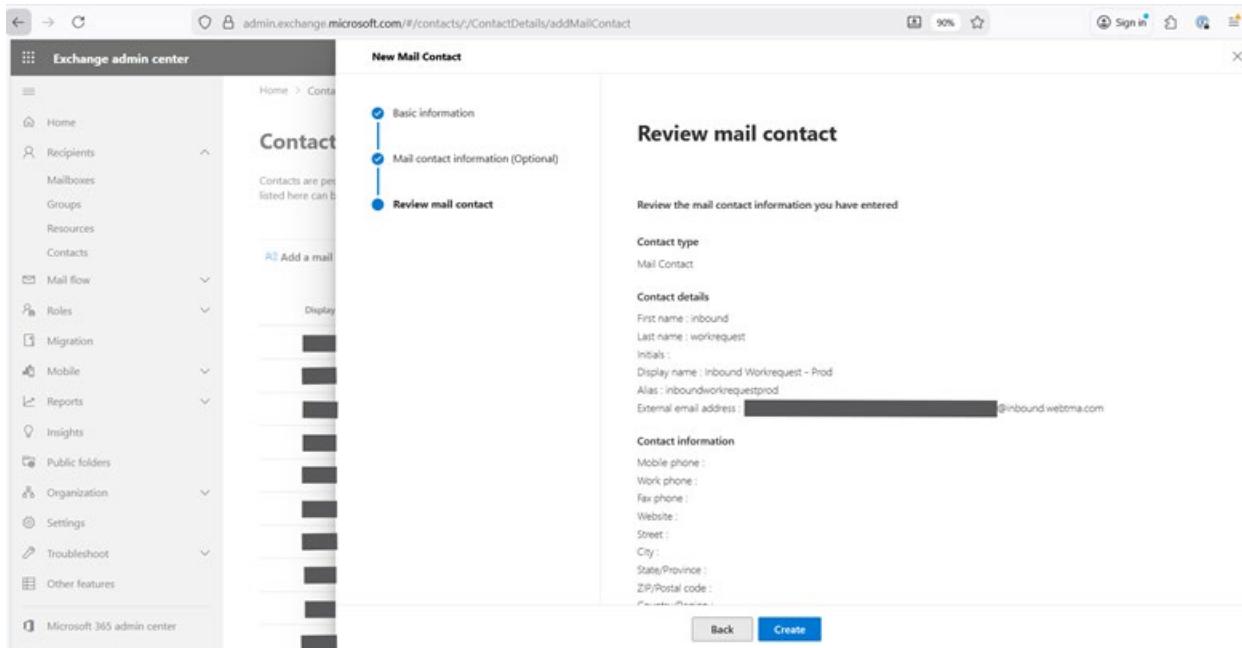
Configure the Forwarding Mailbox (eg. myorg.com support email to TMA System email)

1. From the Exchange Admin Center, expand *Recipients* -> *Mailboxes*, and click *+ Add a Shared Mailbox*. *Note: A user mailbox would also be acceptable, but Shared mailboxes do not require additional licensing and work very well in situations like this.*

2. Supply a display name, the desired email address, and select the domain. Optionally, you may supply an alias for the mailbox. Click **Create** to have the new mailbox provisioned.

Configure an Exchange Transport Rule

1. In the Exchange Admin center, expand **Mail flow** -> **Rules**.
2. Click on **+ Add a rule** and select **Create a new rule**

3. Name the new rule using the following format:
   newemail_inbound@yourdomain.com – *Redirect*
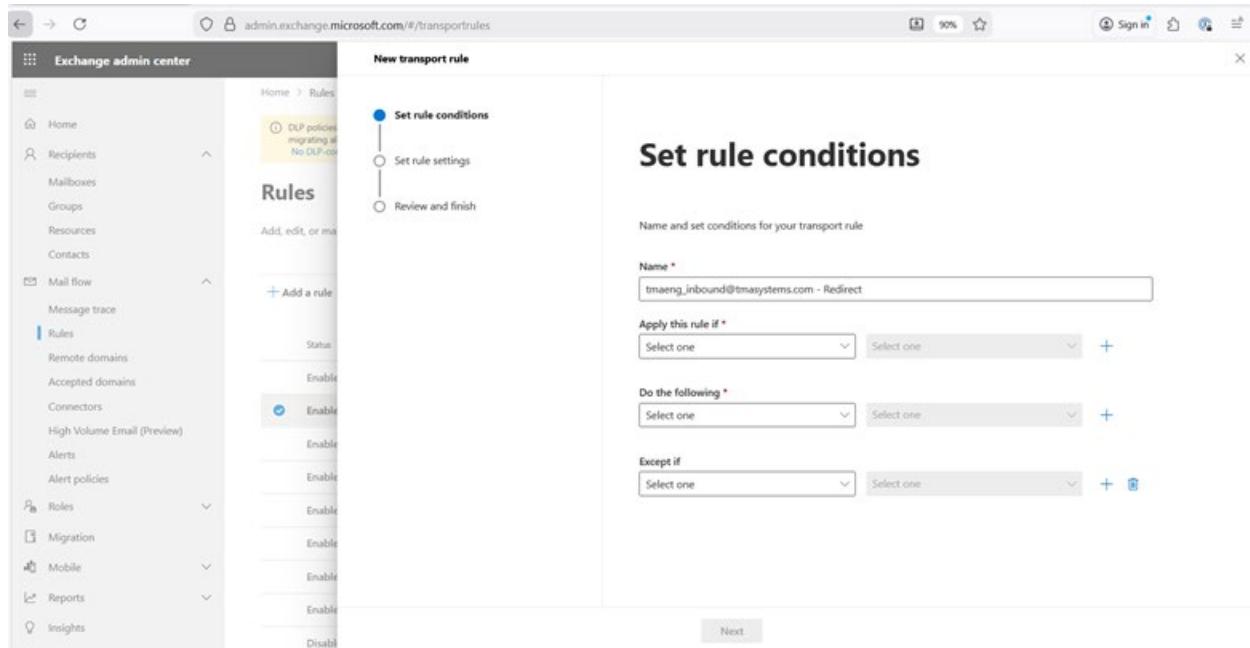
4. Expand the **Apply this rule if** dropdown and select **The Recipient** from the list of options.

5. Select **Is this person** from the list of options in the adjacent dropdown.
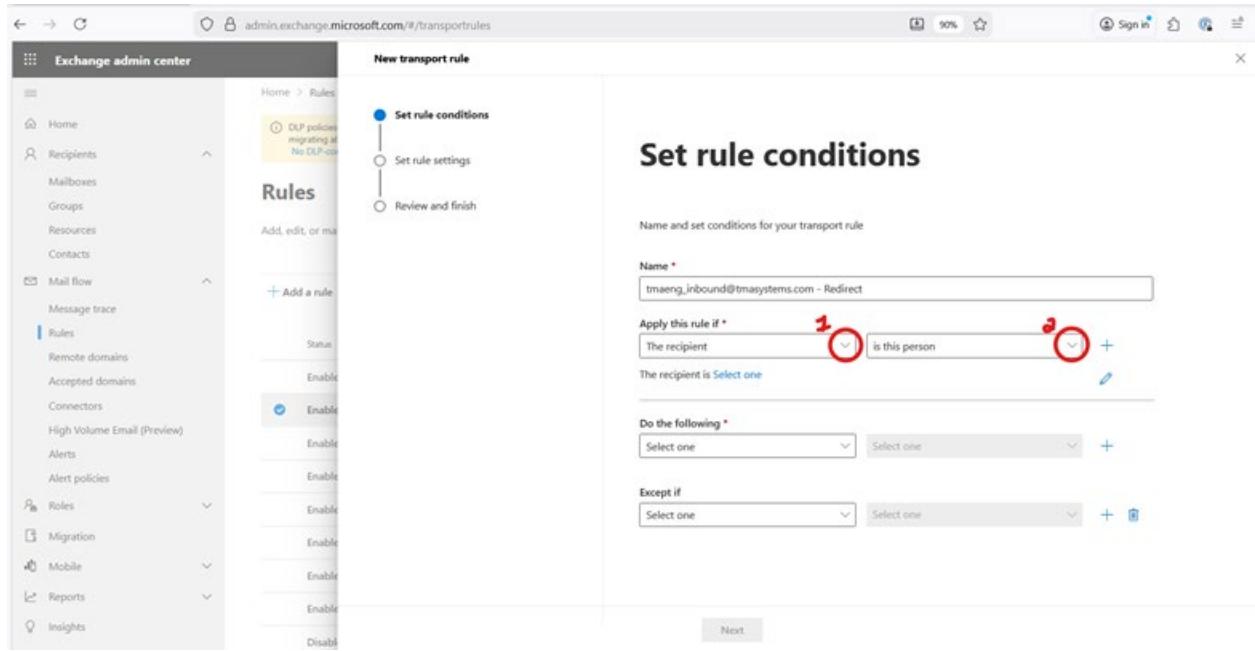
6. Click on *Select one*, locate the newly created **shared mailbox.**

7. Select it, and click *Save*
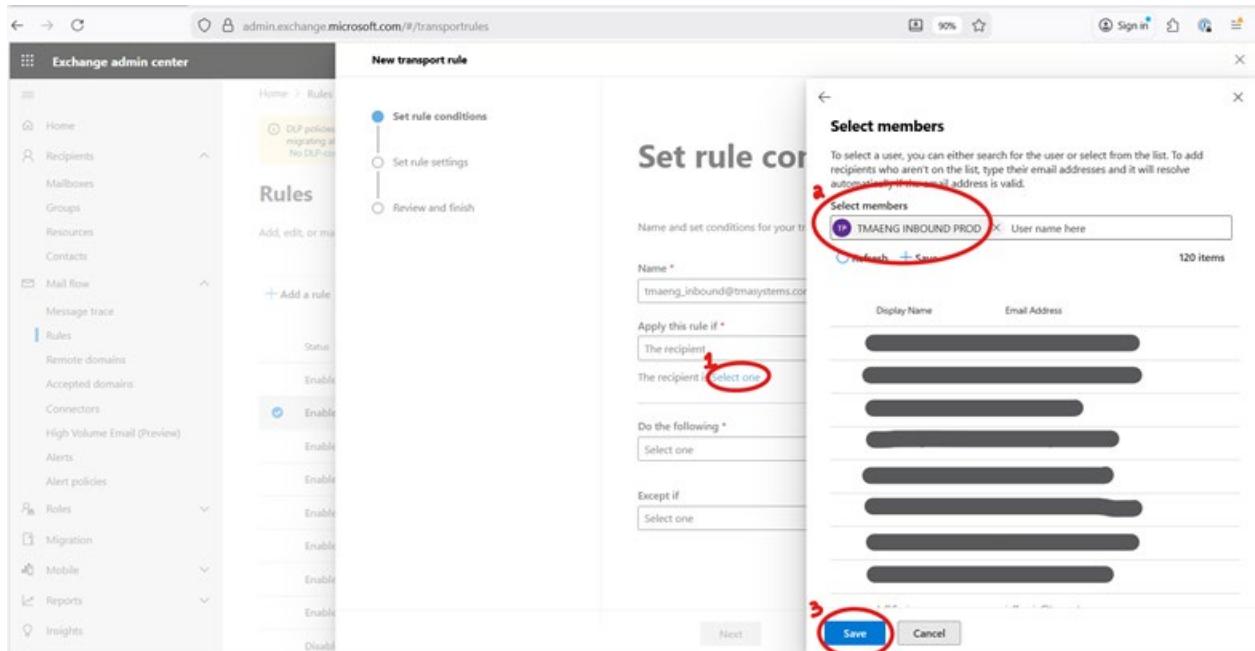
8. Expand the *Do the following* dropdown and select *Modify the message properties* from the list of options.

9. Select *Set a message header* from the list of options in the adjacent dropdown.

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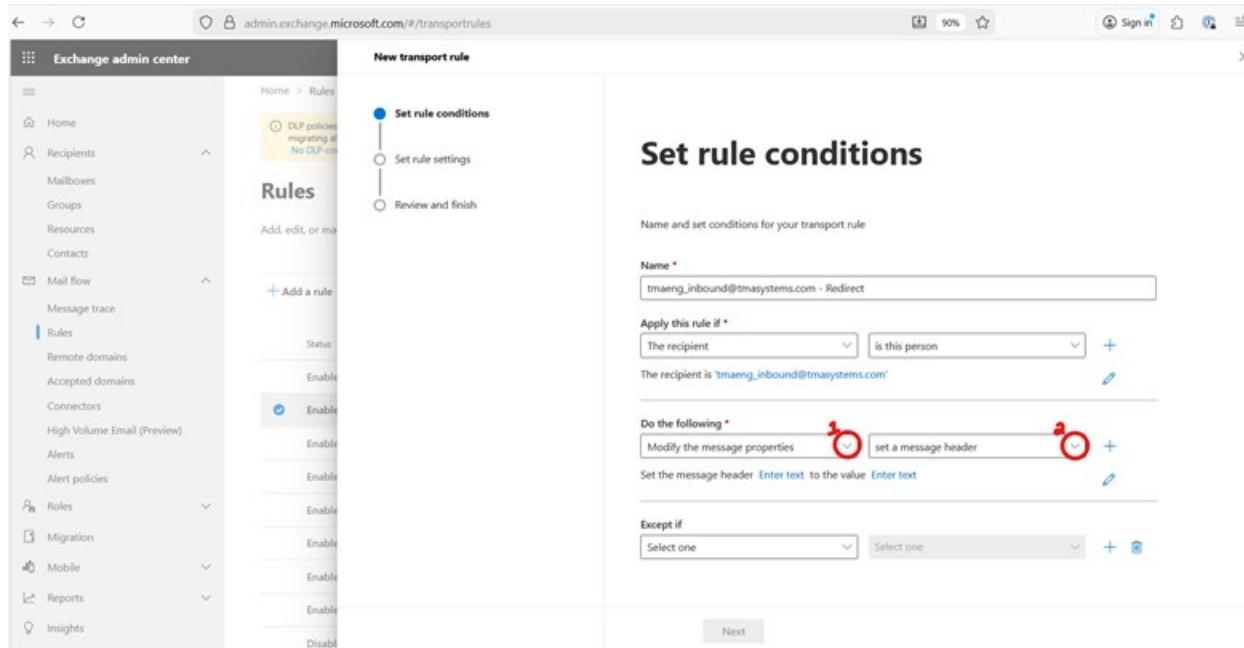
10. Click *Enter text* and supply the following in the text field: **X-Forwarded-To**
    Click *Save*
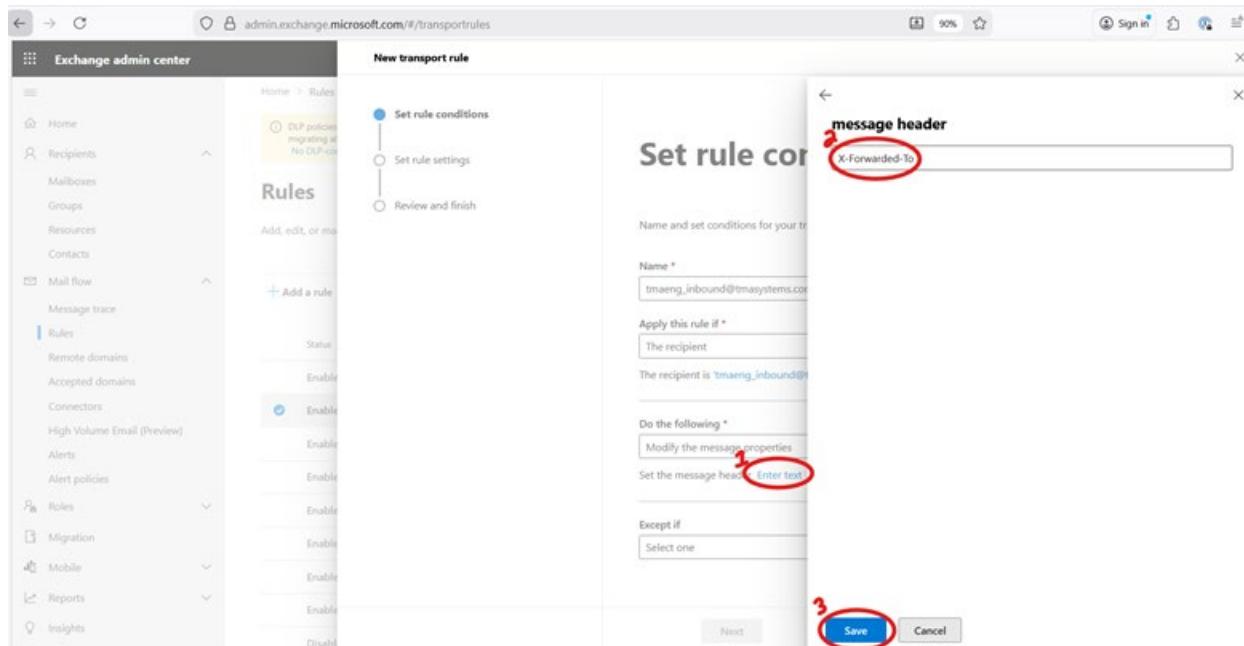
11. Click *Enter text,* supply the Work Request Inbound email address and click *Save*.

12. Click on the **+** icon to add another action

13. Expand the **And** dropdown and select **Redirect the message to** from the list of options.
14. Select **These recipients** from the list of options in the adjacent dropdown.

15. Select the newly created Inbound Work Request email **contact** and click ***Save***.
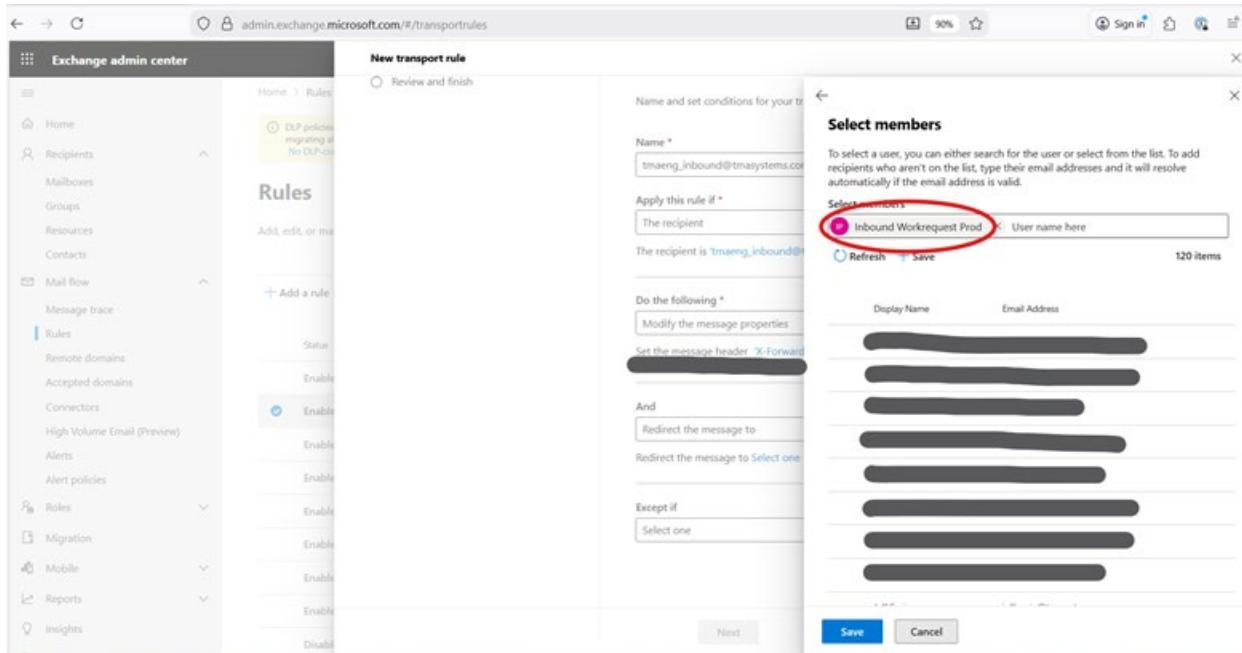
16. Review the new transport rule settings for accuracy and click ***Next*** to continue
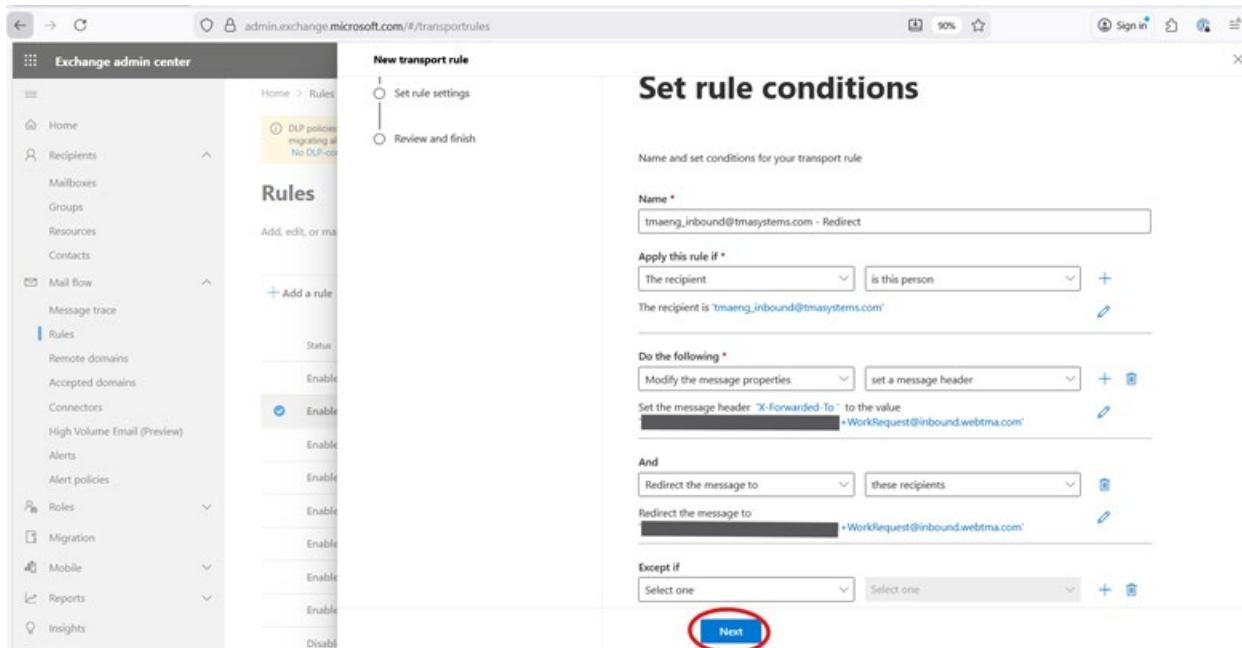
17. Select ***Stop processing more rules*** and click ***Next***

Review the settings once more and click ***Finish***

18. The newly created transport rule will be disabled by default. To enable it, select the newly created transport rule from the list of rules and toggle the switch from *Disabled* to *Enabled.*

19. Review the full list of existing transport rules to ensure that no other rule is evaluated before the newly created rule in a way that would prevent it from being applied. If a rule is processed first and is configured to "stop processing more rules," then the new rule will not be triggered. If this condition is identified, the rules should be reordered so that the new rule is evaluated before any conflicting rules.