



# Inbound Email Setup Guide

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

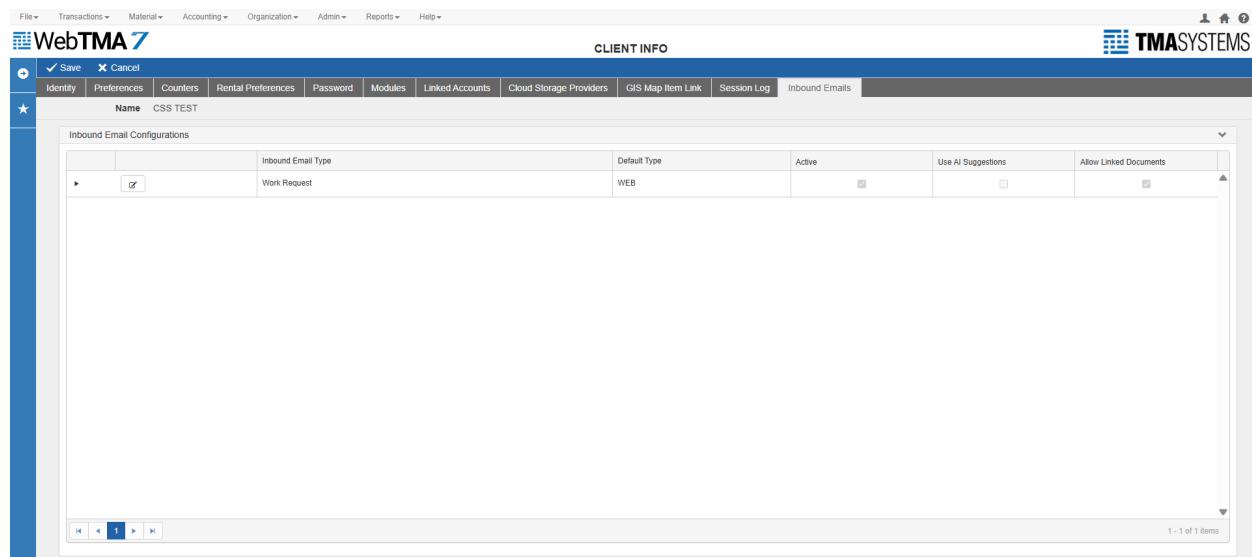
**NOTE:** This feature is part of the additional Integration Suite module. The *Client Info / Inbound Emails* Tab is only available if you have this module.

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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.



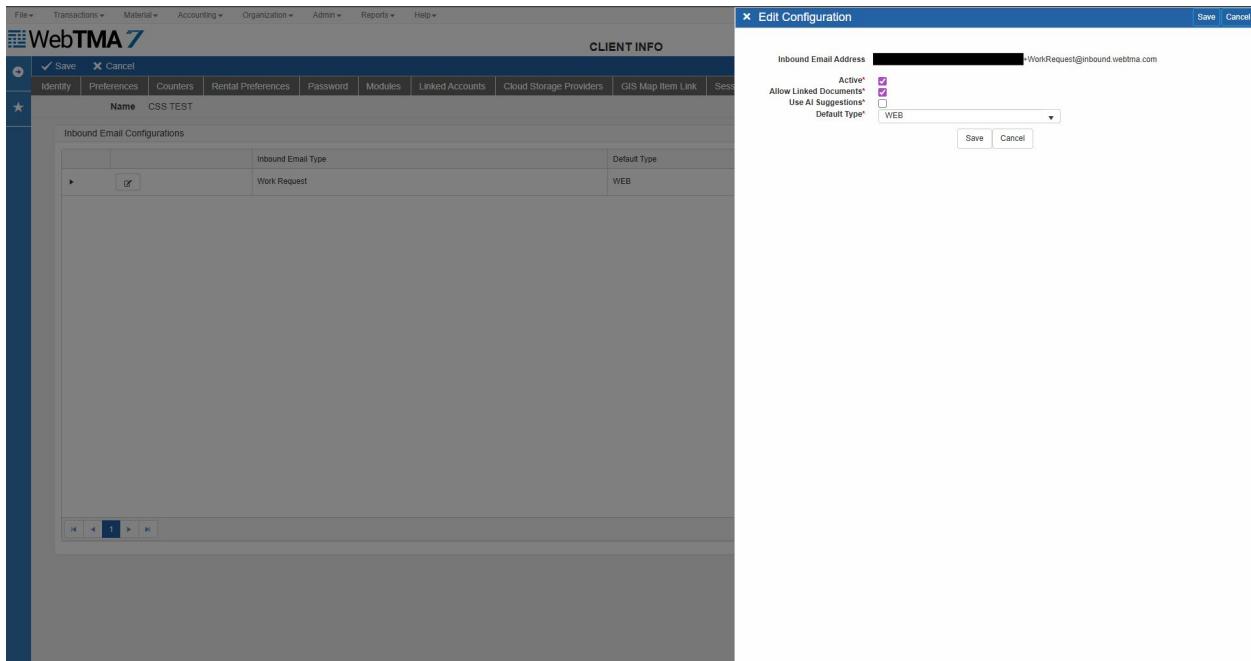
The screenshot shows the 'WebTMA7' application interface. The top navigation bar includes 'File', 'Transactions', 'Material', 'Accounting', 'Organization', 'Admin', 'Reports', and 'Help'. The 'Admin' menu is expanded, showing 'Identify', 'Preferences', 'Counters', 'Rental Preferences', 'Password', 'Modules', 'Linked Accounts', 'Cloud Storage Providers', 'GIS Map Item Link', 'Session Log', and 'Inbound Emails'. The 'Inbound Emails' tab is selected. The main content area is titled 'CLIENT INFO' and shows a table titled 'Inbound Email Configurations'. The table has columns: Inbound Email Type, Default Type, Active, Use AI Suggestions, and Allow Linked Documents. A single row is listed: 'Work Request' with 'WEB' as the Default Type, 'Active' checked, 'Use AI Suggestions' and 'Allow Linked Documents' unchecked. Navigation buttons (first, previous, next, last) are at the bottom of the table, and a status message '1 - 1 of 1 items' is in the bottom right corner.

Inbound Email Type	Default Type	Active	Use AI Suggestions	Allow Linked Documents
Work Request	WEB	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 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](mailto: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.

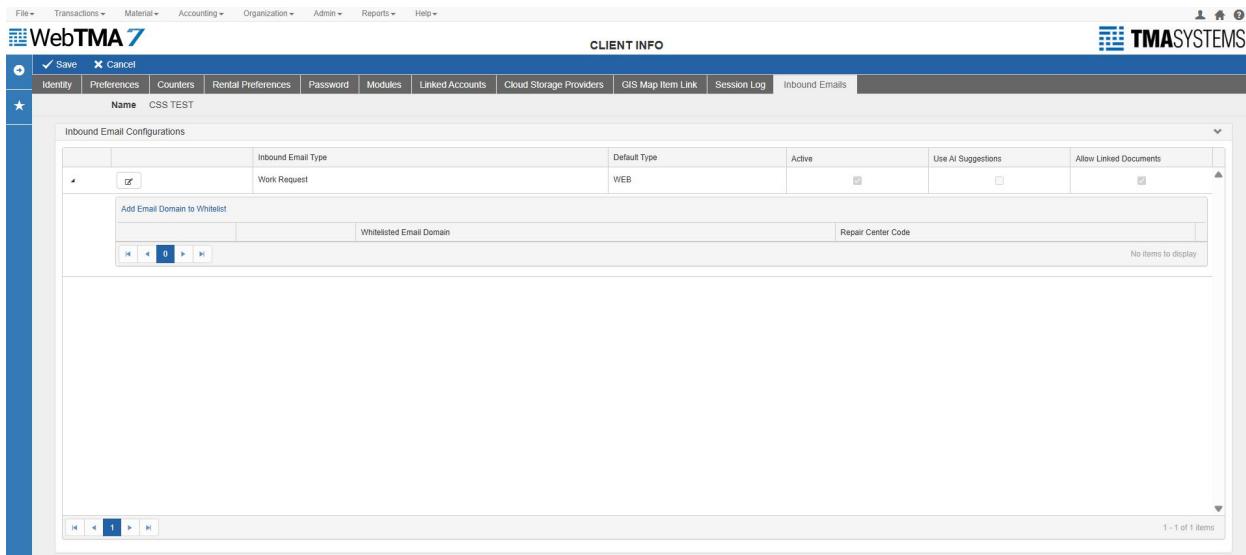


## Step 3: Set Up Domain Whitelist (Optional)

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.

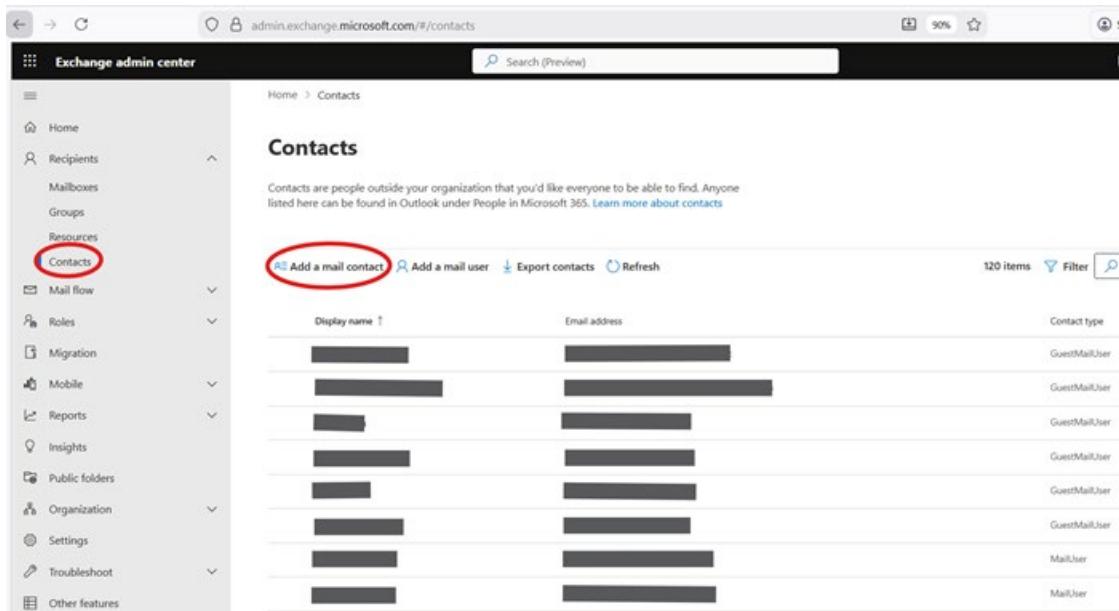


The screenshot shows the 'Inbound Email Configurations' screen in the WebTMA software. The 'Inbound Email Type' is set to 'Work Request', 'Default Type' is 'WEB', and 'Repair Center Code' is empty. The 'Whitelisted Email Domain' field is empty. The status bar at the bottom right shows '1 - 1 of 1 items'.

## 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**



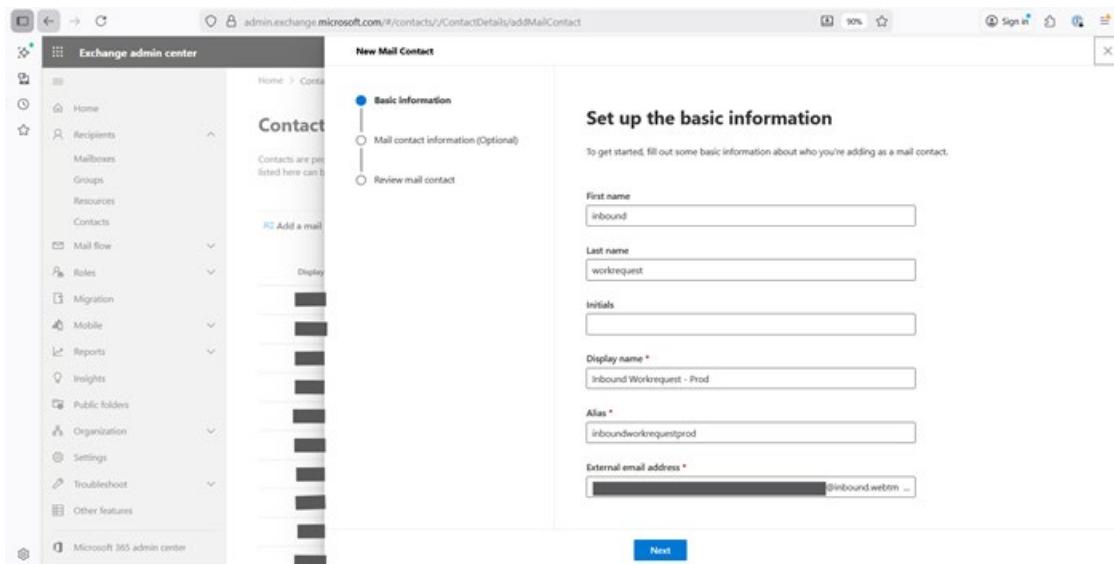
The screenshot shows the Exchange Admin Center interface. The left sidebar has a 'Recipients' section with 'Contacts' selected, which is highlighted with a red circle. The main content area is titled 'Contacts' and contains a table of existing contacts. At the top of this table, there is a button labeled 'Add a mail contact' with a red circle around it. The table columns are 'Display name', 'Email address', and 'Contact type'. The contact type for all listed contacts is 'GuestMailUser', except for one entry which is 'MailUser'.

Display name	Email address	Contact type
[REDACTED]	[REDACTED]	GuestMailUser
[REDACTED]	[REDACTED]	MailUser
[REDACTED]	[REDACTED]	MailUser

2. From the New Mail Contact panel, supply the following (required fields):

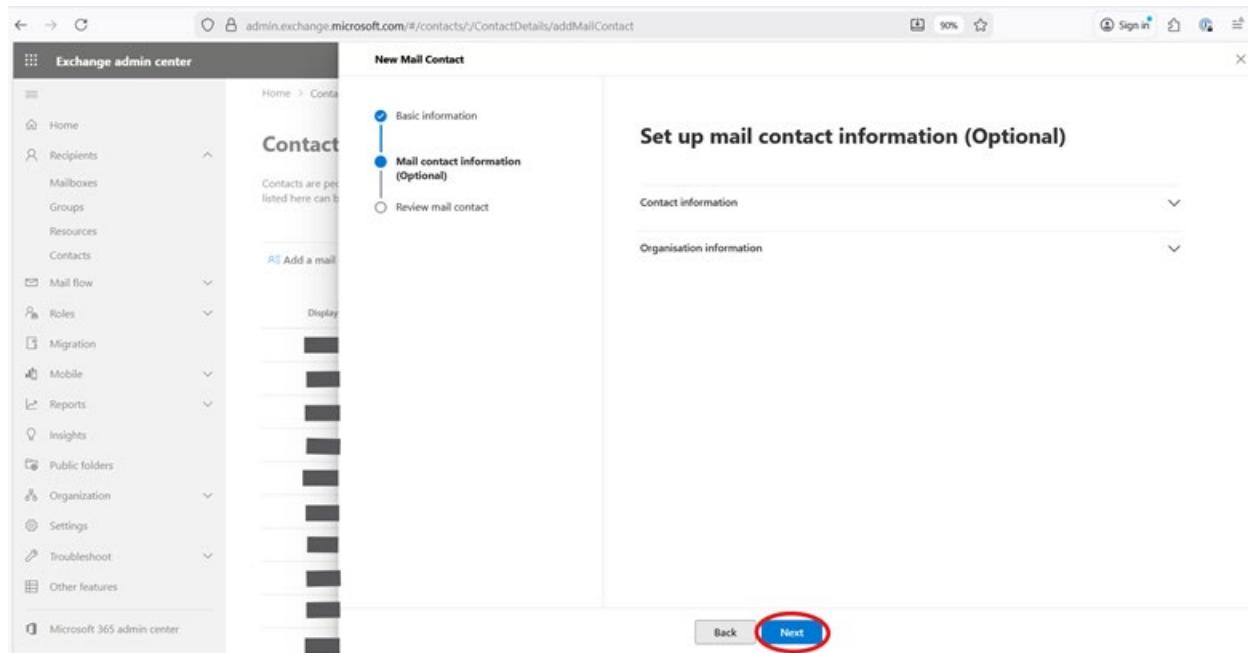
- Display name
- Work Request Inbound email address

- Email alias

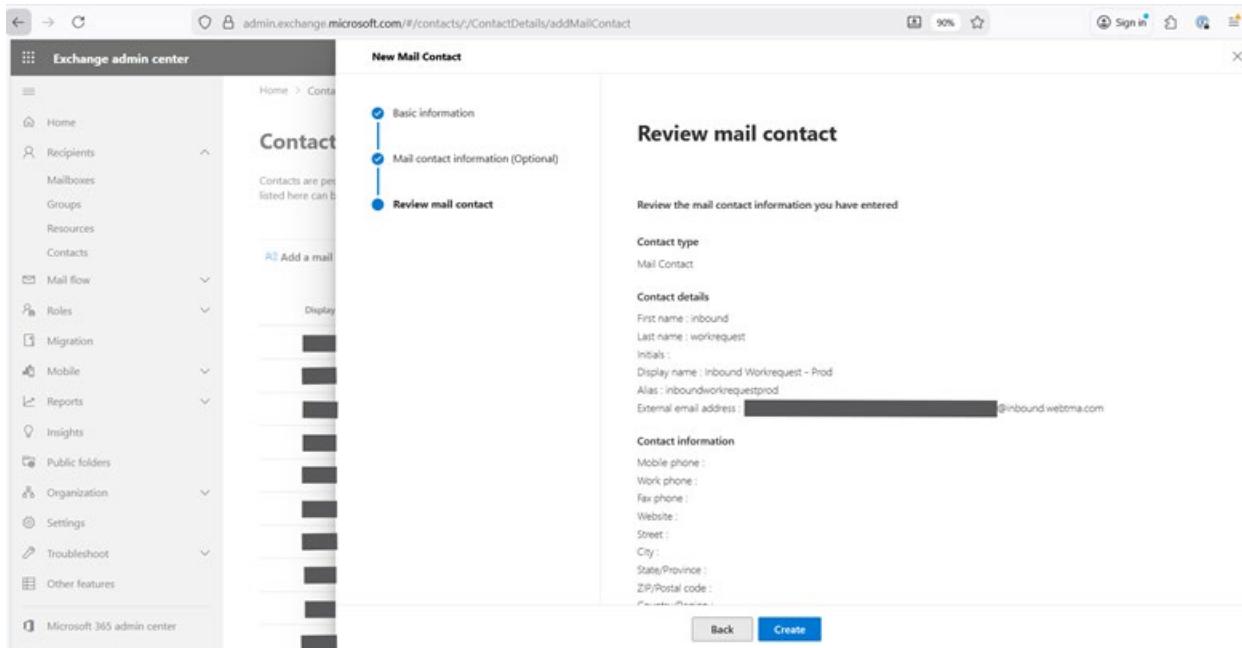


Click **Next** to continue.

### 3. Supply optional information if desired, otherwise, click **Next**

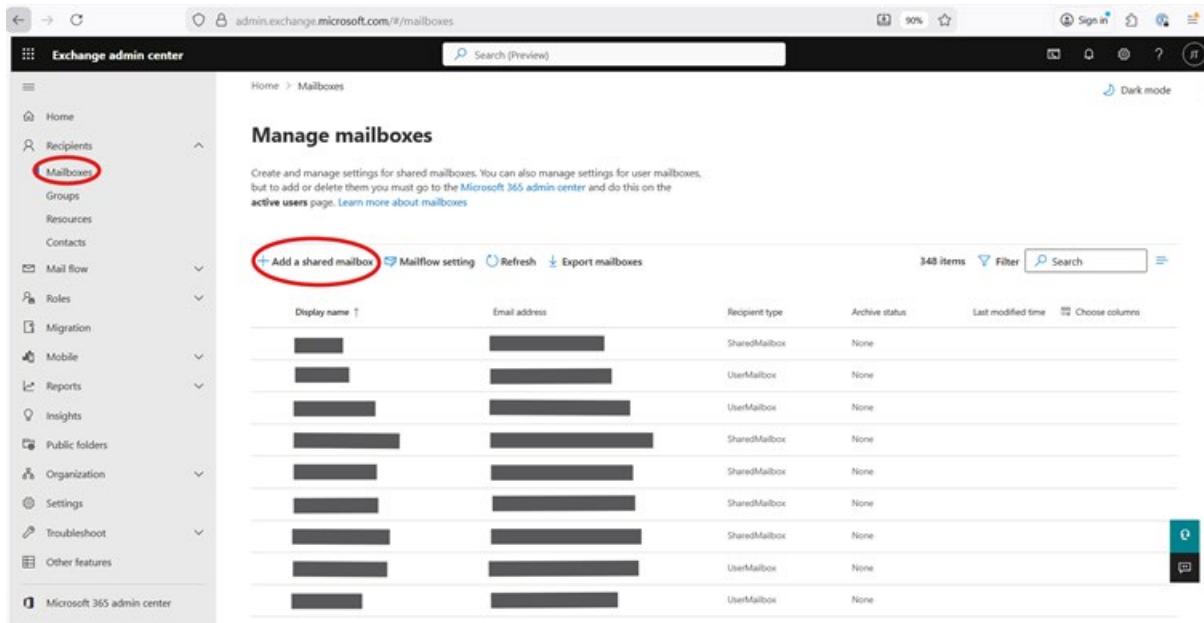


### 4. Review the contact information and click **Create** once validated.



## 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.*



Manage mailboxes

Create and manage settings for shared mailboxes. You can also manage settings for user mailboxes, but to add or delete them you must go to the Microsoft 365 admin center and do this on the [active users](#) page. [Learn more about mailboxes](#)

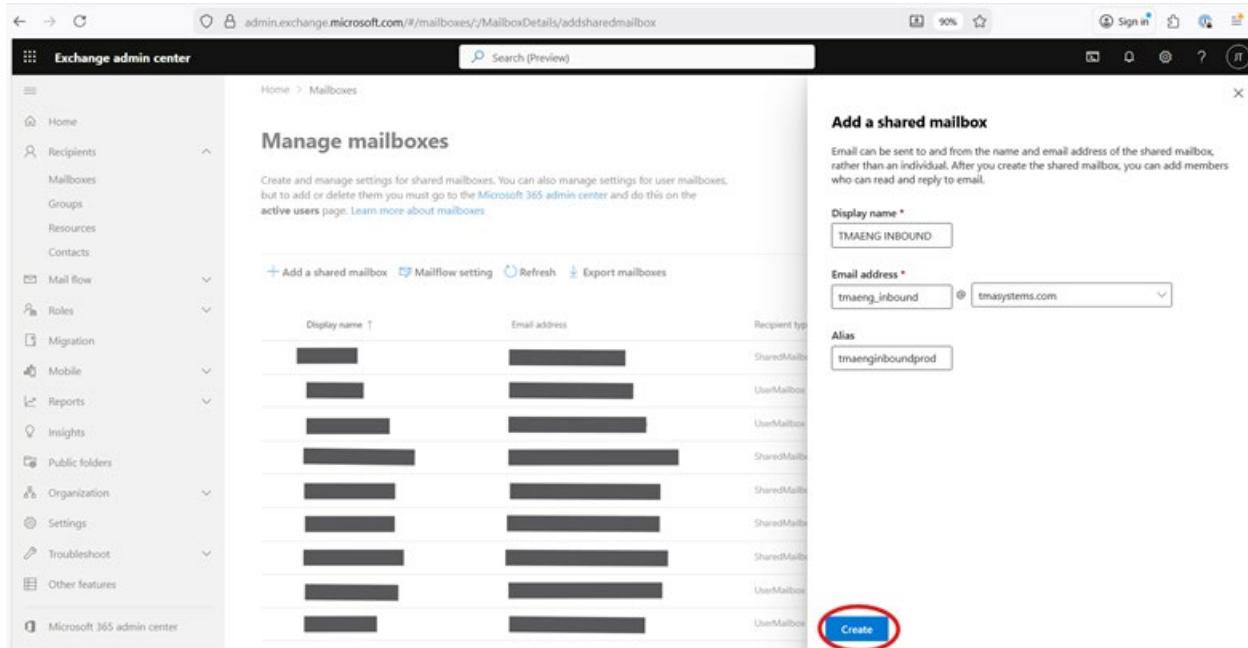
**+ Add a shared mailbox** Mailflow setting Refresh Export mailboxes

348 items Filter Search

Display name ↑	Email address	Recipient type	Archive status	Last modified time	Choose columns
[REDACTED]	[REDACTED]	SharedMailbox	None		
[REDACTED]	[REDACTED]	UserMailbox	None		
[REDACTED]	[REDACTED]	UserMailbox	None		
[REDACTED]	[REDACTED]	SharedMailbox	None		
[REDACTED]	[REDACTED]	SharedMailbox	None		
[REDACTED]	[REDACTED]	SharedMailbox	None		
[REDACTED]	[REDACTED]	UserMailbox	None		
[REDACTED]	[REDACTED]	UserMailbox	None		

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.



**Add a shared mailbox**

Email can be sent to and from the name and email address of the shared mailbox, rather than an individual. After you create the shared mailbox, you can add members who can read and reply to email.

**Display name \***  
TMAENG INBOUND

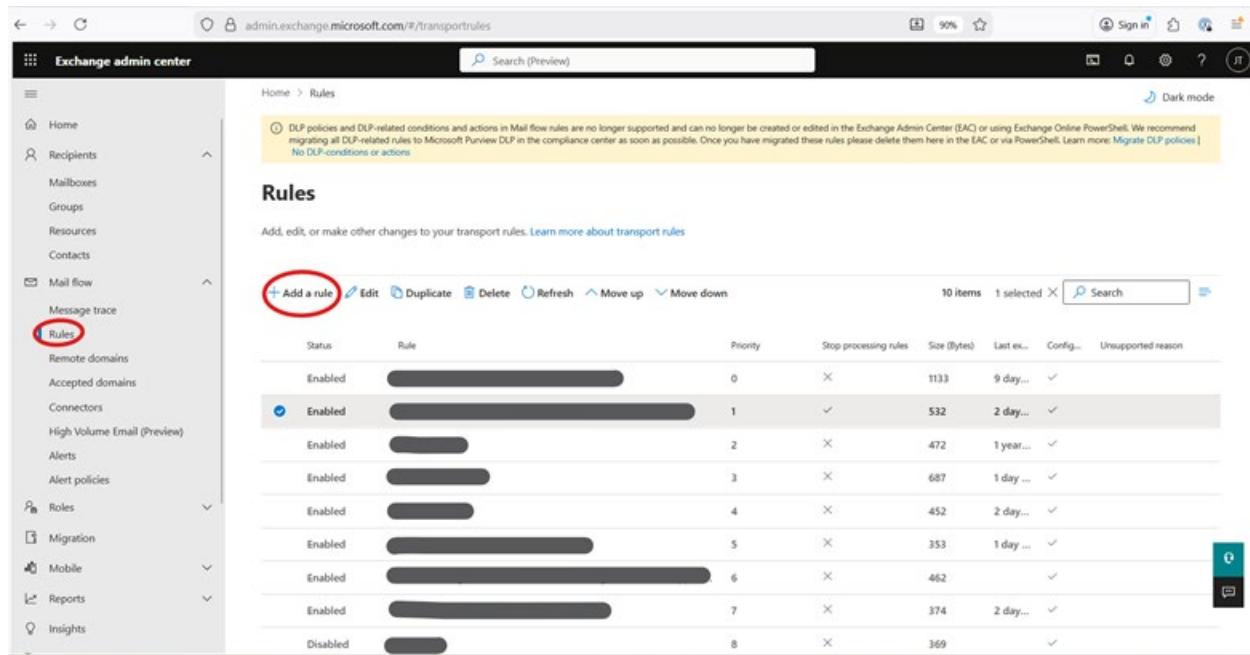
**Email address \***  
tmaeng\_inbound tmasystems.com

**Alias**  
tmaenginboundprod

**Create**

## 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**

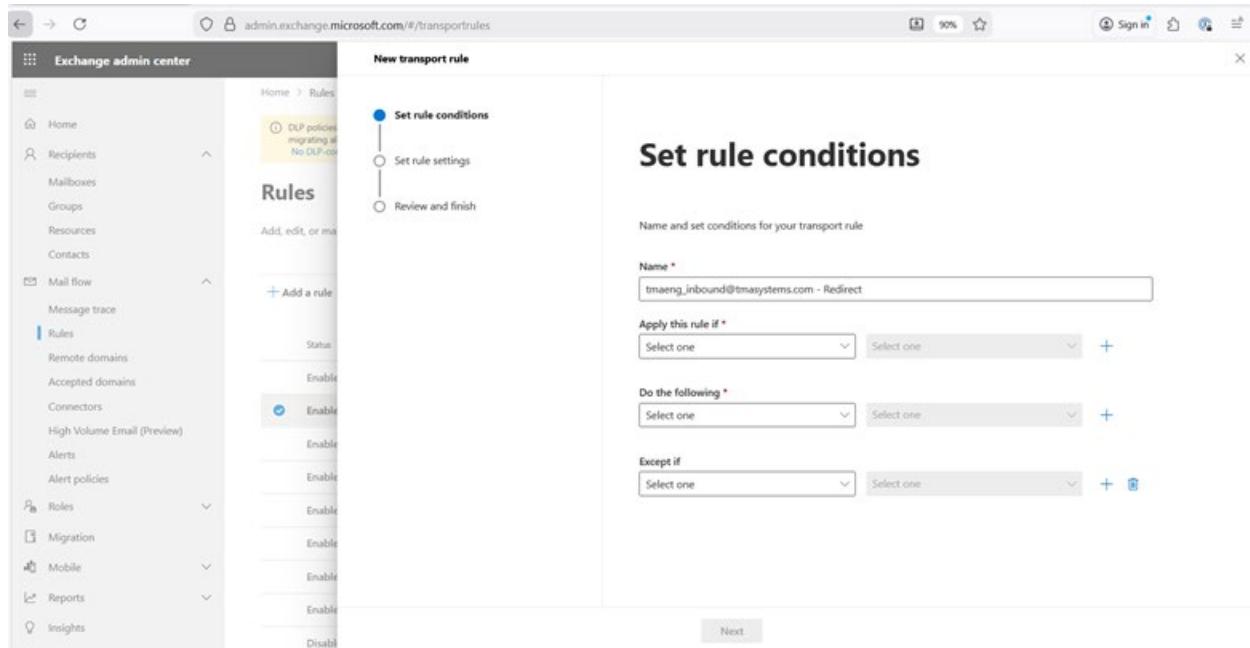


The screenshot shows the Exchange Admin Center interface with the 'Rules' list. The 'Add a rule' button is highlighted with a red circle. The table below lists various transport rules with columns for Status, Rule, Priority, Stop processing rules, Size (Bytes), Last ex..., Config..., and Unsupported reason.

Status	Rule	Priority	Stop processing rules	Size (Bytes)	Last ex...	Config...	Unsupported reason
Enabled	[Redacted]	0	×	1133	9 day...	✓	
Enabled	[Redacted]	1	✓	532	2 day...	✓	
Enabled	[Redacted]	2	×	472	1 year...	✓	
Enabled	[Redacted]	3	×	687	1 day ...	✓	
Enabled	[Redacted]	4	×	452	2 day...	✓	
Enabled	[Redacted]	5	×	353	1 day ...	✓	
Enabled	[Redacted]	6	×	462		✓	
Enabled	[Redacted]	7	×	374	2 day...	✓	
Disabled	[Redacted]	8	×	369		✓	

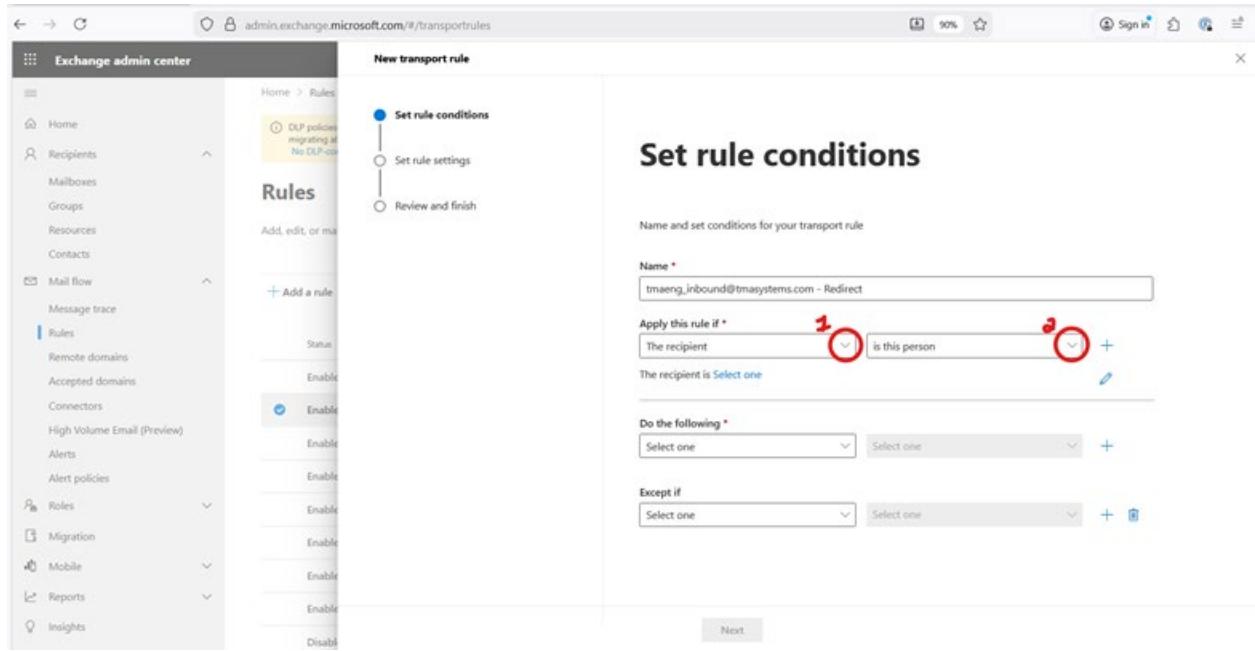
3. Name the new rule using the following format:

[newemail\\_inbound@yourdomain.com](#) – Redirect



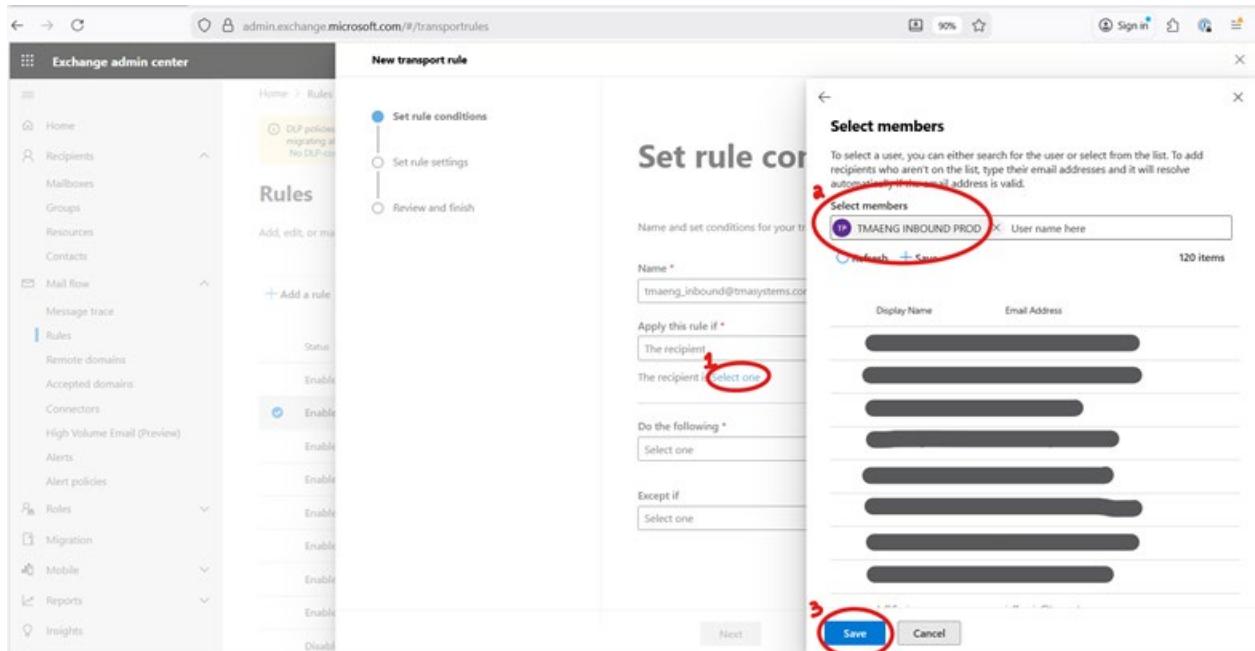
The screenshot shows the 'Set rule conditions' step of a new transport rule. The 'Name' field is set to 'tmaeng\_inbound@tmasystems.com - Redirect'. The 'Apply this rule if' dropdown is set to 'Select one'. The 'Do the following' dropdown is set to 'Select one'. The 'Except if' dropdown is set to 'Select one'.

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.



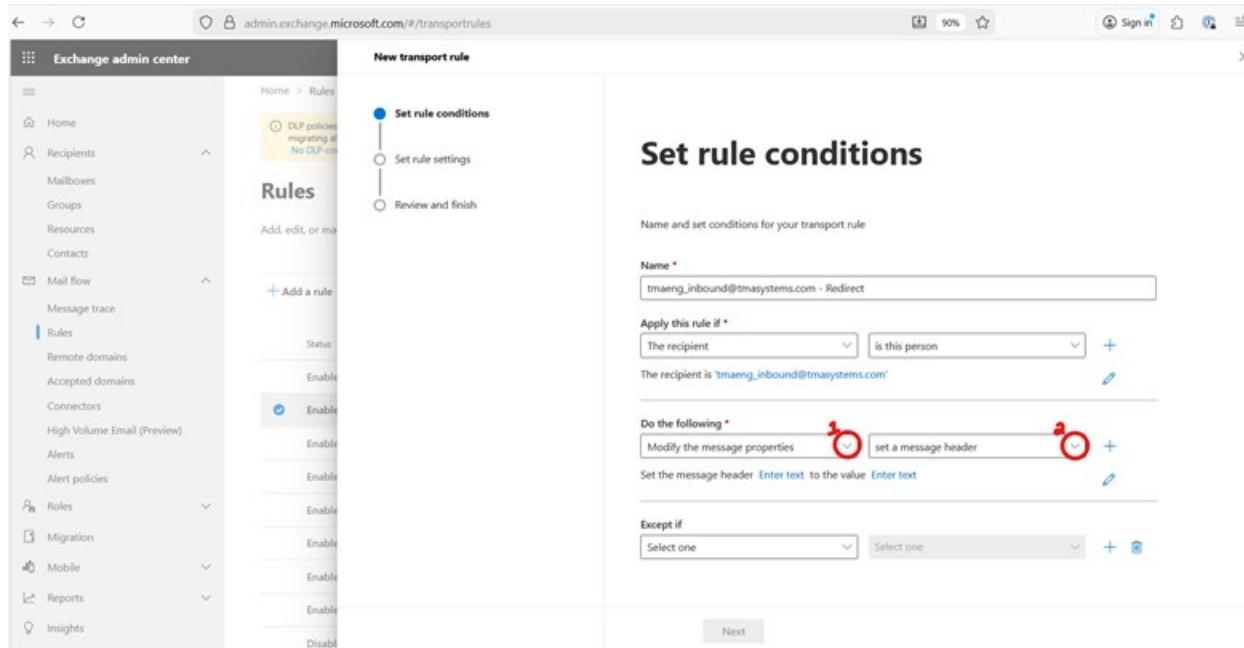
6. Click on **Select one**, locate the newly created **shared mailbox**.

7. Select it, and click **Save**

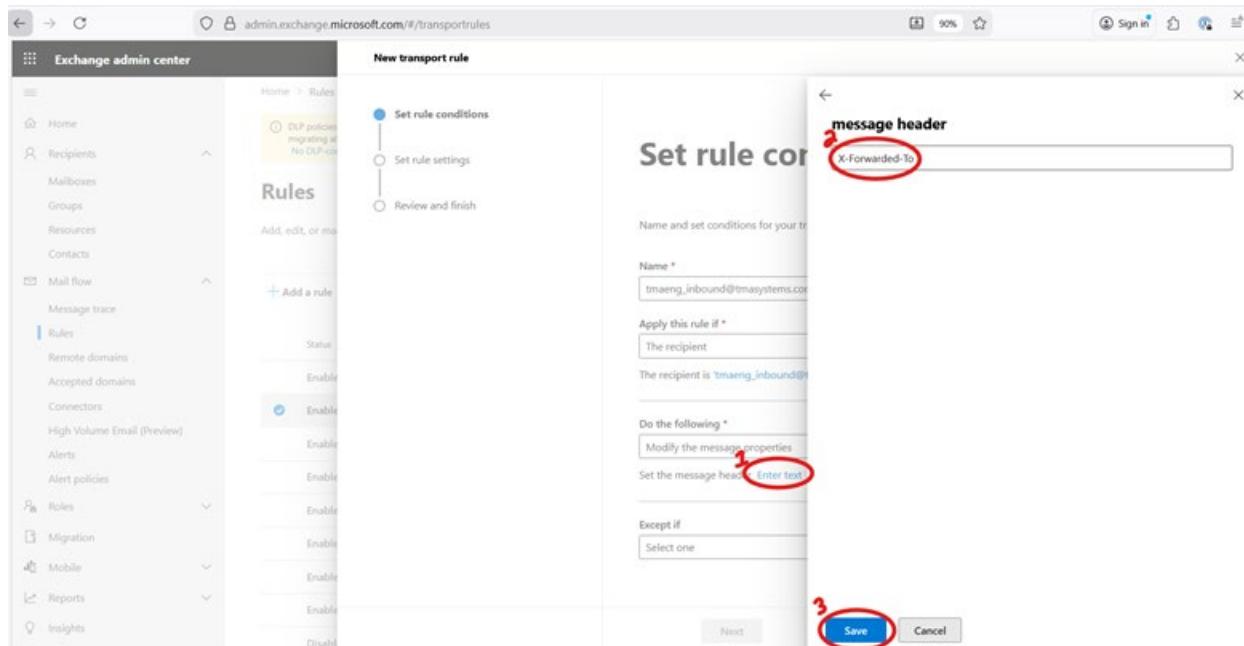


8. Expand the **Do the following** dropdown and select **Modify the message properties** from the list of options.

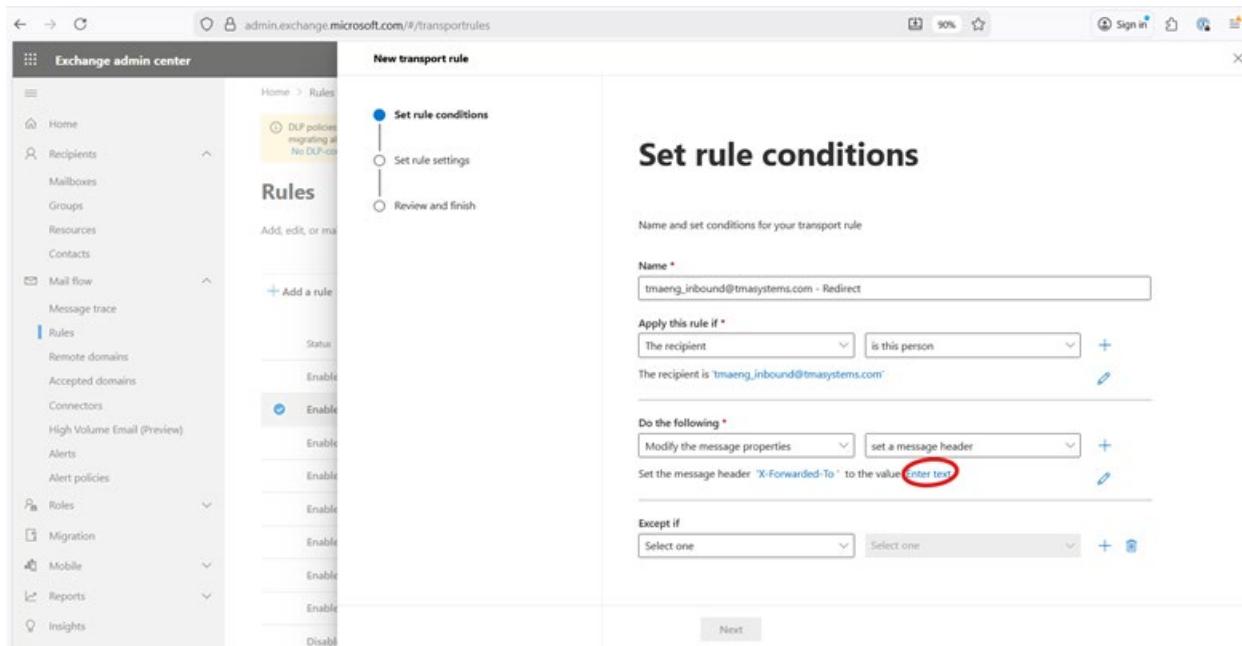
9. Select **Set a message header** from the list of options in the adjacent dropdown.



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**.



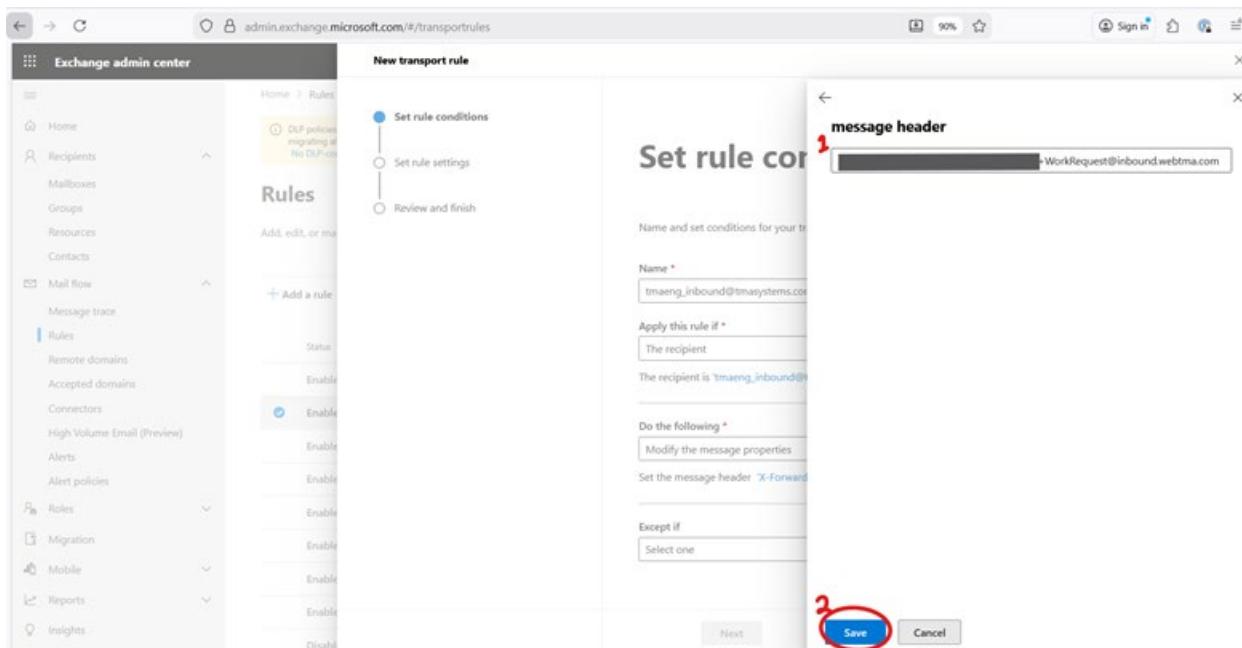
**Set rule conditions**

Name \*

Apply this rule if \*  
 The recipient   The recipient is 'tmaeng\_inbound@tmasytems.com'

Do the following \*  
 Modify the message properties   Set the message header 'X-Forwarded-To' to the value

Except if  
 Select one



**Set rule conditions**

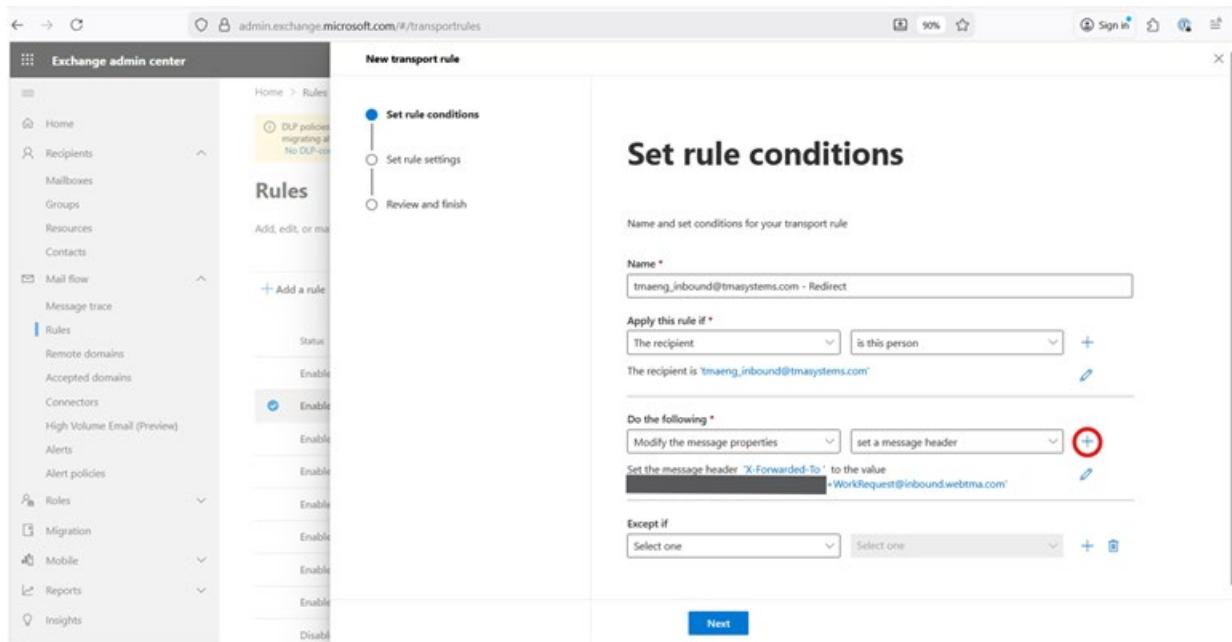
Name \*

Apply this rule if \*  
 The recipient

Do the following \*  
 Modify the message properties  
 Set the message header 'X-Forwarded-To'

Except if  
 Select one

12. Click on the + icon to add another action



**Set rule conditions**

Name \*

Apply this rule if \*

The recipient is this person

Do the following \*

Set a message header  to the value

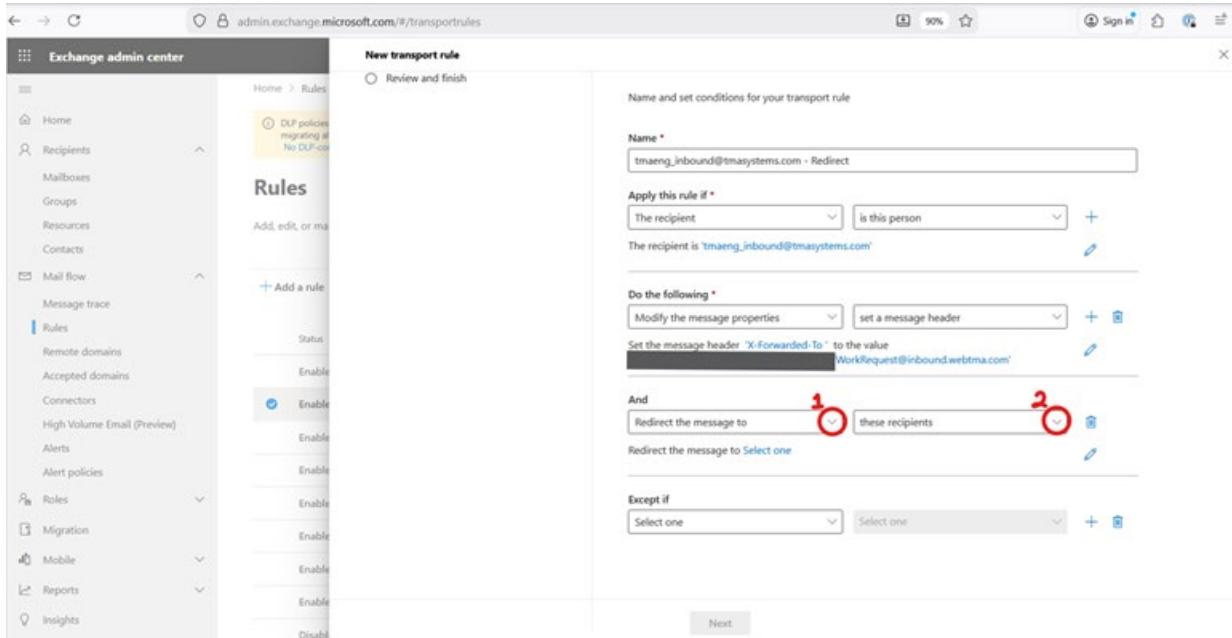
And

Redirect the message to

Next

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.



**Review and finish**

Name \*

Apply this rule if \*

The recipient is this person

Do the following \*

Set a message header  to the value

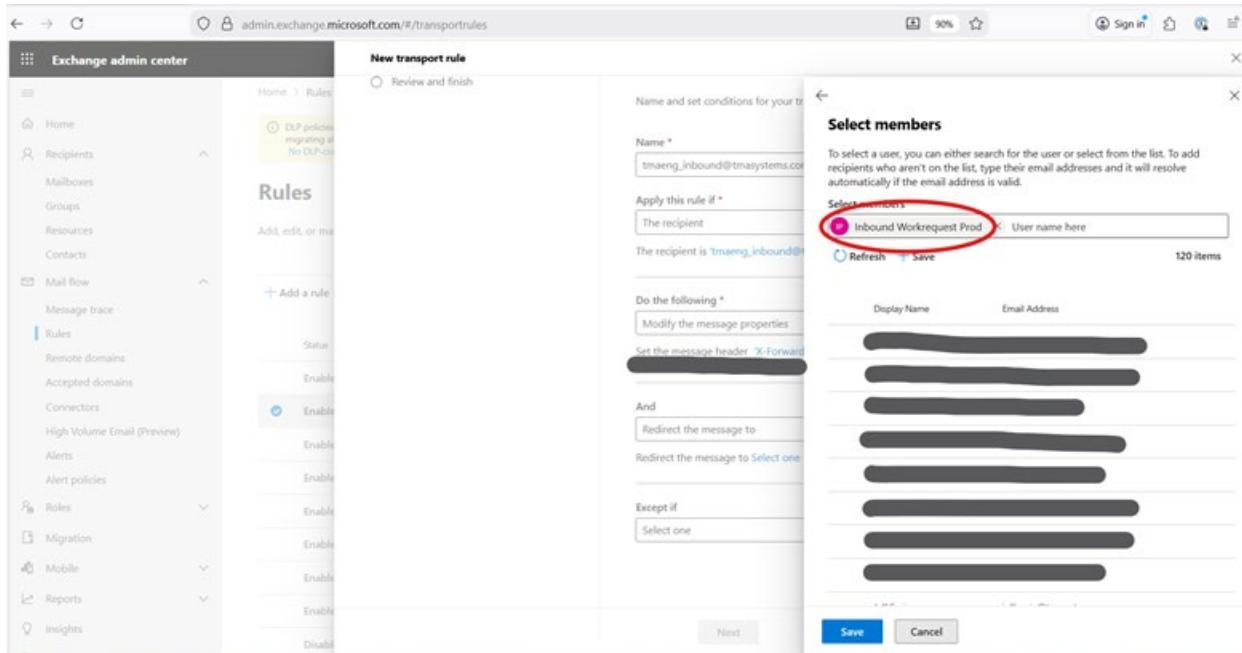
And

Redirect the message to

these recipients

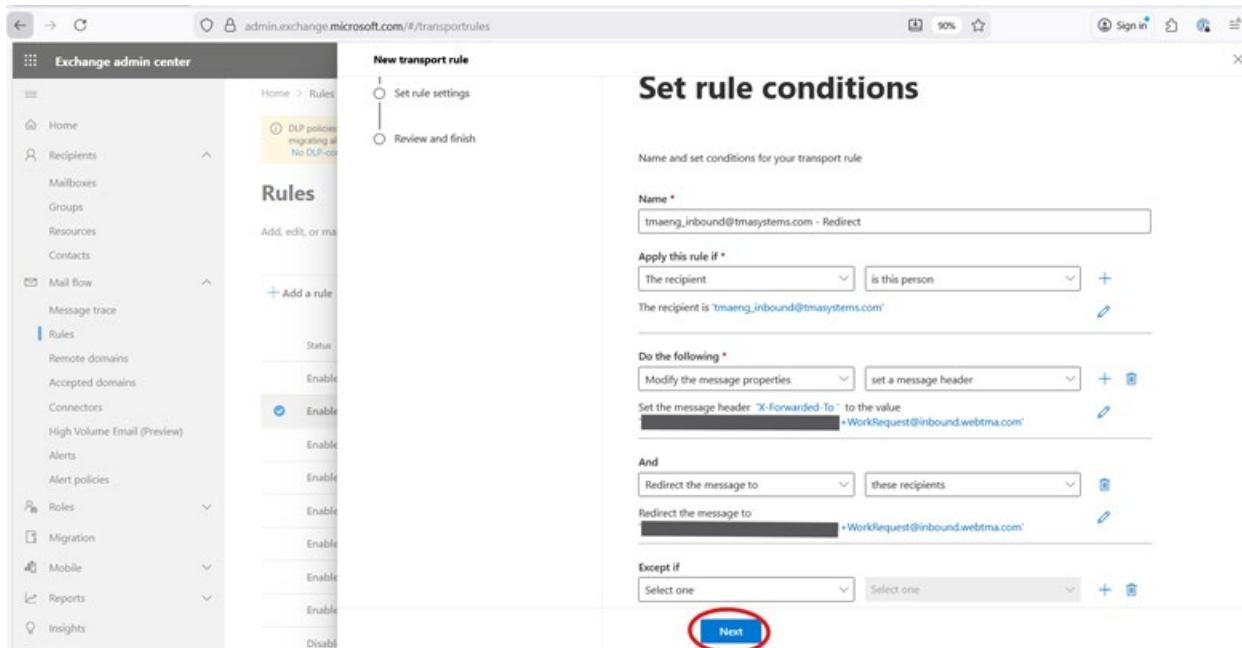
Next

15. Select the newly created Inbound Work Request email **contact** and click **Save**.



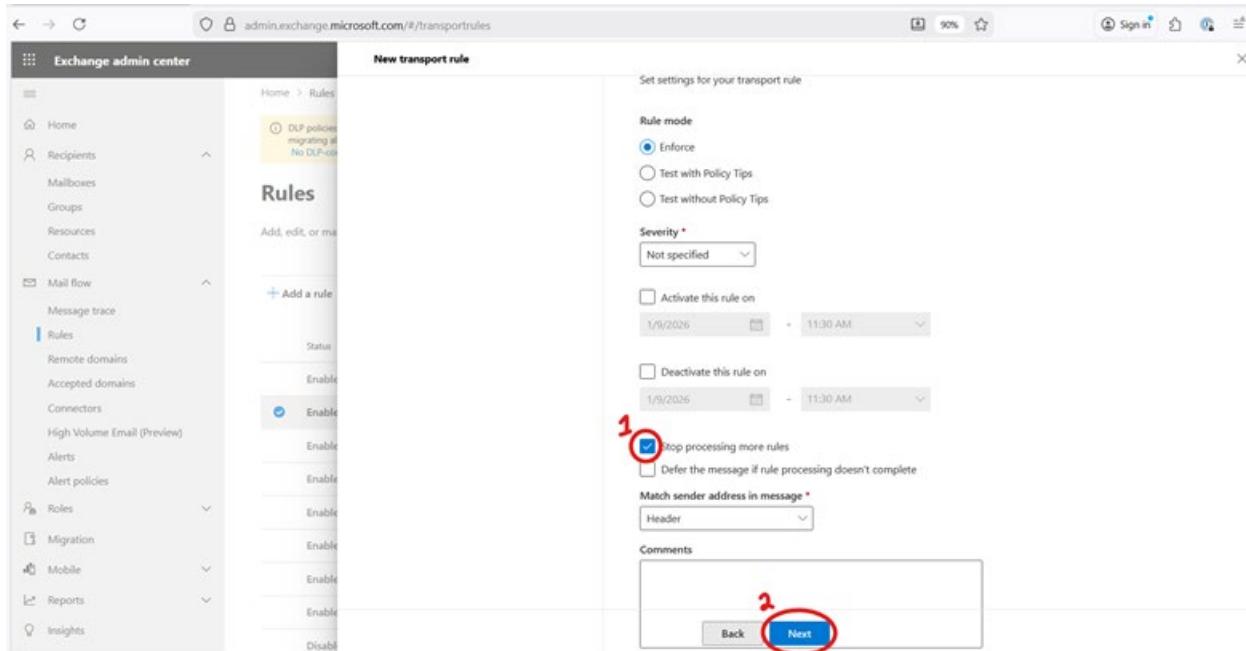
The screenshot shows the Exchange Admin Center interface. On the left, the 'Rules' section is selected. In the center, a 'New transport rule' is being configured. On the right, a 'Select members' dialog is open, showing a list of users. The user 'Inbound Workrequest Prod' is selected and highlighted with a red circle. The 'Save' button is visible at the bottom right of the dialog.

16. Review the new transport rule settings for accuracy and click **Next** to continue



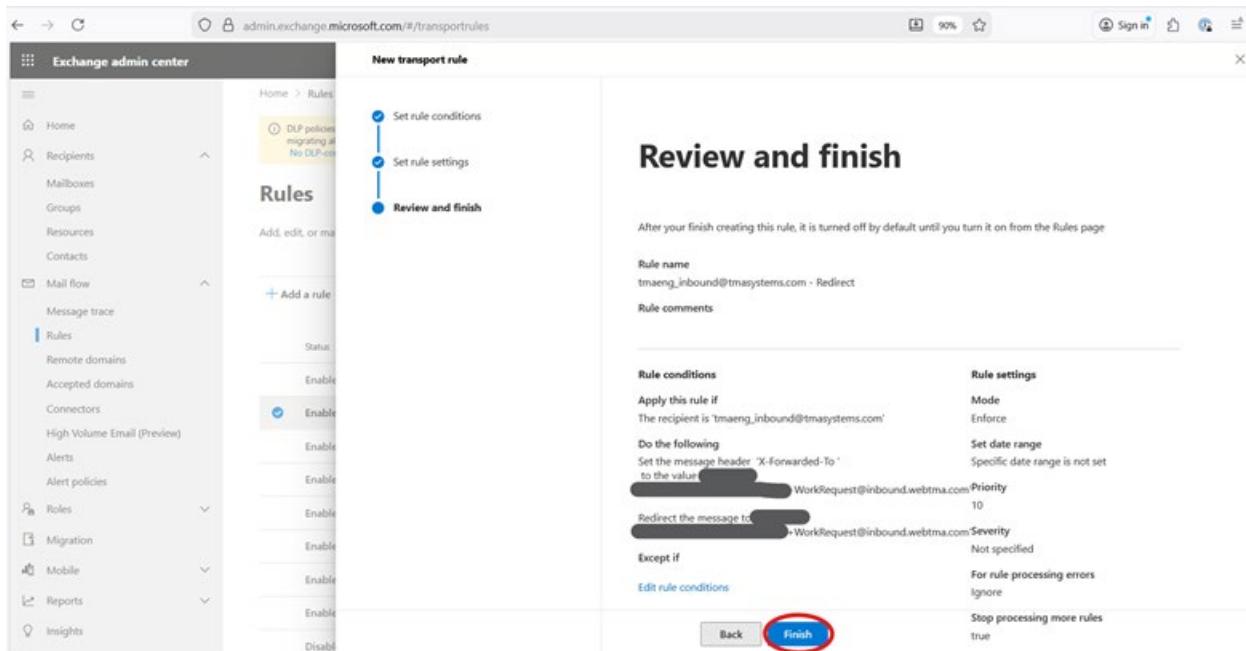
The screenshot shows the Exchange Admin Center interface. On the left, the 'Rules' section is selected. In the center, a 'Set rule conditions' dialog is open. The 'Next' button is highlighted with a red circle at the bottom right of the dialog.

**17. Select *Stop processing more rules* and click *Next***



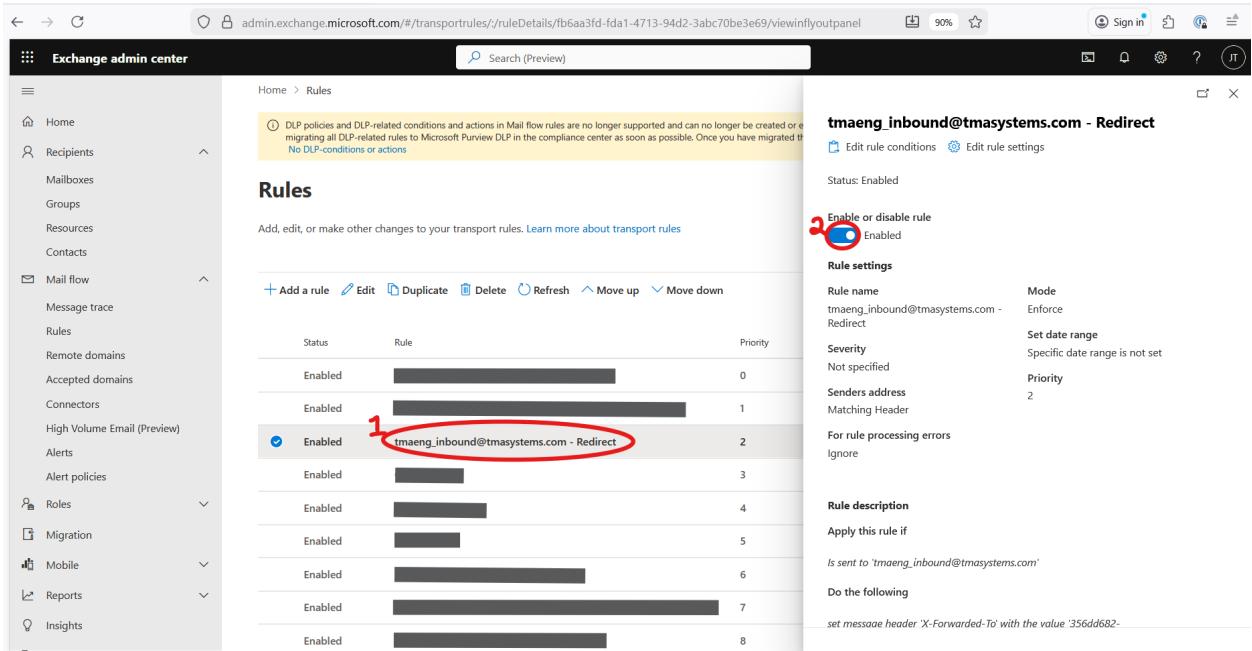
The screenshot shows the Exchange admin center interface for creating a new transport rule. The left sidebar is the 'Exchange admin center' with 'Rules' selected. The main pane is titled 'New transport rule' with the sub-section 'Set settings for your transport rule'. Under 'Rule mode', 'Enforce' is selected. The 'Severity' dropdown is set to 'Not specified'. There are two date and time fields: 'Activate this rule on' (1/9/2026, 11:30 AM) and 'Deactivate this rule on' (1/9/2026, 11:30 AM). A checkbox labeled '1 Stop processing more rules' is checked and circled with a red number 1. Another checkbox '2 Defer the message if rule processing doesn't complete' is unchecked. A dropdown 'Match sender address in message' is set to 'Header'. A 'Comments' text area is empty. At the bottom are 'Back' and 'Next' buttons, with 'Next' circled with a red number 2.

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



The screenshot shows the 'New transport rule' configuration page in the 'Review and finish' step. The left sidebar and main pane structure are identical to the previous screenshot. The 'Review and finish' step is highlighted in the center. The 'Rule name' is 'tmaeng\_inbound@tmasytems.com - Redirect'. The 'Rule conditions' section shows 'Apply this rule if' (The recipient is 'tmaeng\_inbound@tmasytems.com') and 'Do the following' (Set the message header 'X-Forwarded-To' to the value 'REDACTED'). The 'Rule settings' section includes 'Mode' (Enforce), 'Set date range' (Specific date range is not set), 'Priority' (10), 'Redirect the message to' (REDACTED + 'WorkRequest@inbound.webtma.com'), 'Severity' (Not specified), and 'Except if' (For rule processing errors, Ignore). The 'Edit rule conditions' and 'Stop processing more rules' (true) options are also shown. The 'Back' and 'Finish' buttons are at the bottom, with 'Finish' circled with a red number 2.

**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**.



The screenshot shows the Exchange Admin Center interface with the 'Rules' page selected. The left navigation pane includes 'Home', 'Recipients', 'Mailboxes', 'Groups', 'Resources', 'Contacts', 'Mail flow' (with 'Message trace', 'Rules', 'Remote domains', 'Accepted domains', 'Connectors', 'High Volume Email (Preview)', 'Alerts', 'Alert policies'), 'Roles', 'Migration', 'Mobile', 'Reports', and 'Insights'. The main content area displays a table of rules with columns for 'Status', 'Rule', and 'Priority'. One rule, 'tmaeng\_inbound@tmasytems.com - Redirect', is highlighted with a red circle and the number '1' above it, indicating it is the newly created rule. The 'Status' column shows 'Enabled' for this rule and 'Disabled' for others. The 'Rule' column shows the rule name and the 'Priority' column shows values from 0 to 8. To the right of the table, there are 'Rule settings' for the selected rule, including 'Mode: Enforce', 'Set date range: Specific date range is not set', 'Severity: Not specified', 'Senders address: tmaeng\_inbound@tmasytems.com', 'Priority: 2', 'Matching Header: None', 'For rule processing errors: Ignore', and 'Rule description: Apply this rule if: Is sent to: 'tmaeng\_inbound@tmasytems.com''. There are also buttons for 'Edit rule conditions' and 'Edit rule settings'.

**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.