

Inbound Email Setup Guide

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

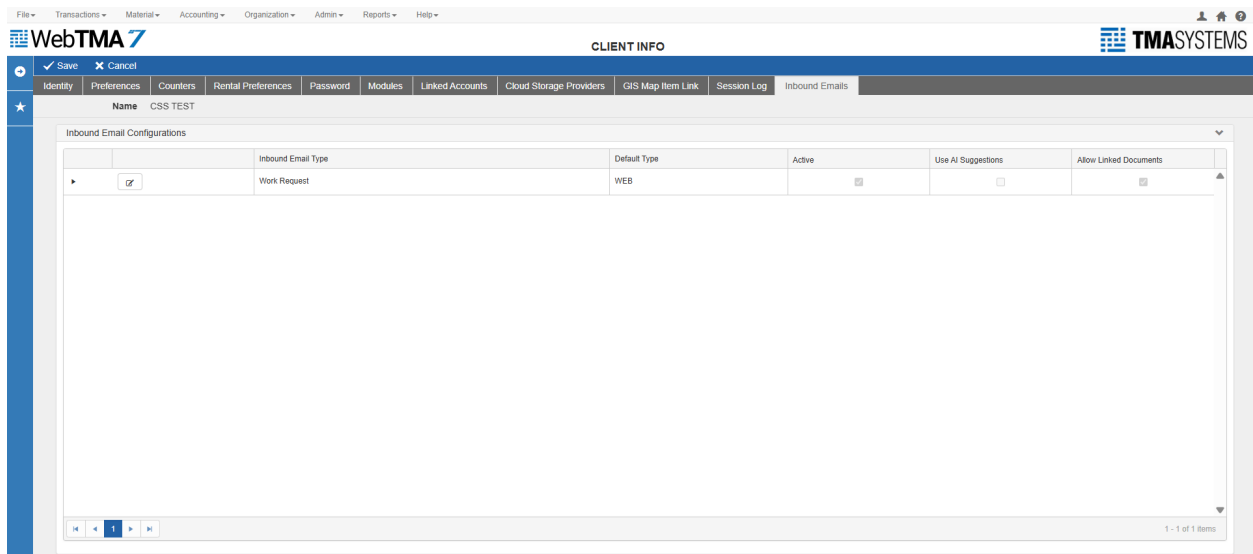
NOTE: This feature is part of the additional Integration Suite module. The *Client Info / Inbound Emails* Tab is only available if you have this module.

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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.



WebTMA 7 CLIENT INFO

Identity Preferences Counters Rental Preferences Password Modules Linked Accounts Cloud Storage Providers GIS Map Item Link Session Log Inbound Emails

Name CSS TEST

Inbound Email Configurations

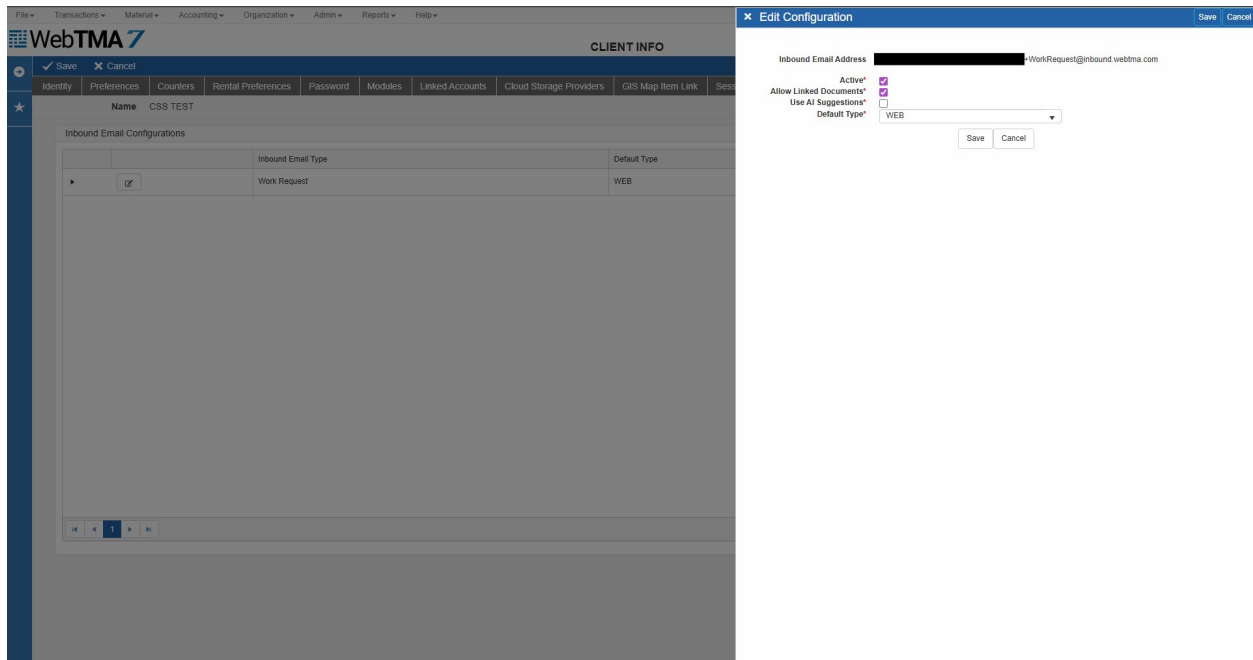
Inbound Email Type	Default Type	Active	Use AI Suggestions	Allow Linked Documents
Work Request	WEB	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 1 of 1 items

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.



The screenshot displays the WebTMA 7 software interface. The main window shows the 'CLIENT INFO' section with a table for 'Inbound Email Configurations'. The table has columns for 'Inbound Email Type' and 'Default Type'. A single row is visible with 'Work Request' in the first column and 'WEB' in the second column. To the right, an 'Edit Configuration' dialog box is open, showing the 'Inbound Email Address' field with a masked value and a dropdown menu set to 'WEB'. The dialog also includes checkboxes for 'Active', 'Allow Linked Documents', and 'Use AI Suggestions', all of which are checked. The 'Default Type' dropdown is set to 'WEB'. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

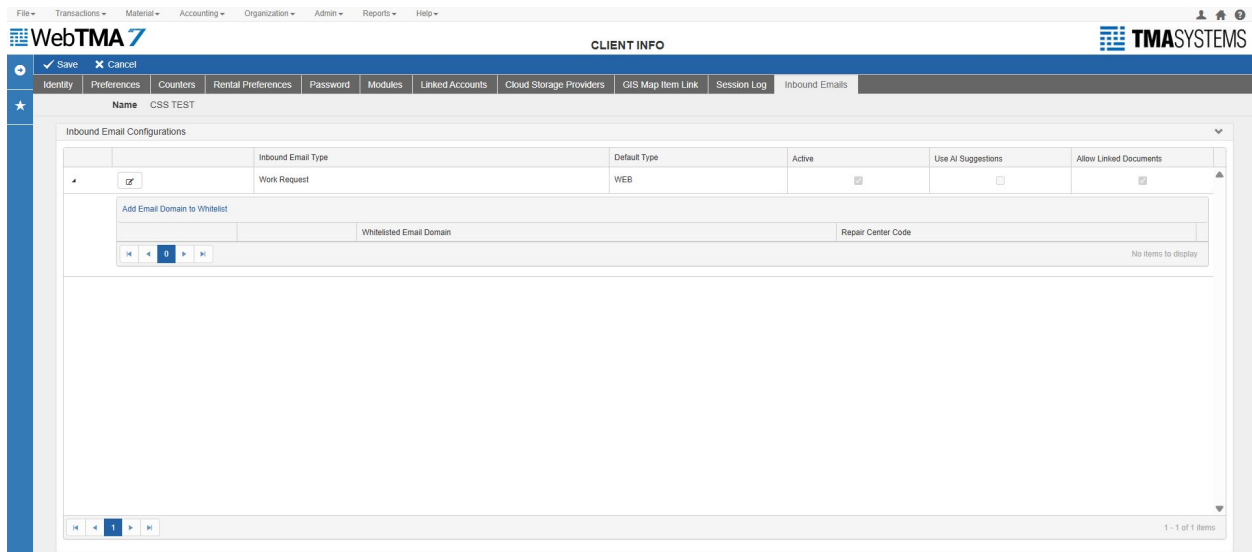
Inbound Email Type	Default Type
Work Request	WEB

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.

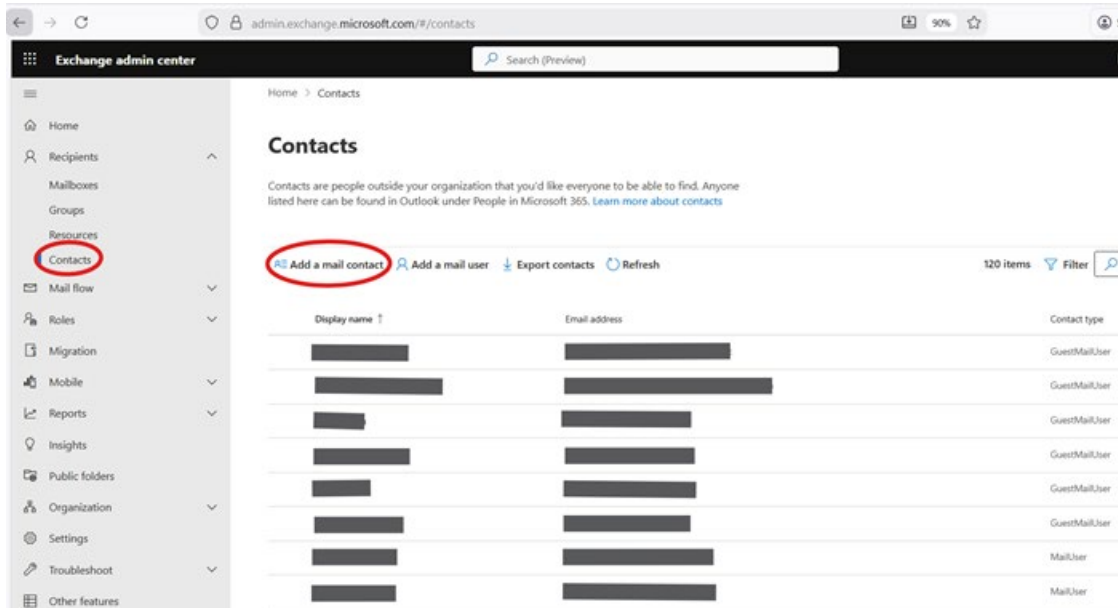


The screenshot shows the WebTMA 7 software interface. At the top, there's a menu bar with options like File, Transactions, Material, Accounting, Organization, Admin, Reports, and Help. Below this is a 'CLIENT INFO' header with the TMA SYSTEMS logo. The main navigation bar includes tabs for Identity, 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 active, showing 'Inbound Email Configurations'. A table lists email types, with 'Work Request' selected. Below the table is a section titled 'Add Email Domain to Whitelist' with input fields for 'Whitelisted Email Domain' and 'Repair Center Code'. The interface also shows a 'Save' button and a 'Cancel' button. At the bottom, there's a pagination bar indicating '1 - 1 of 1 items'.

Step 4: Configure Email Forwarding

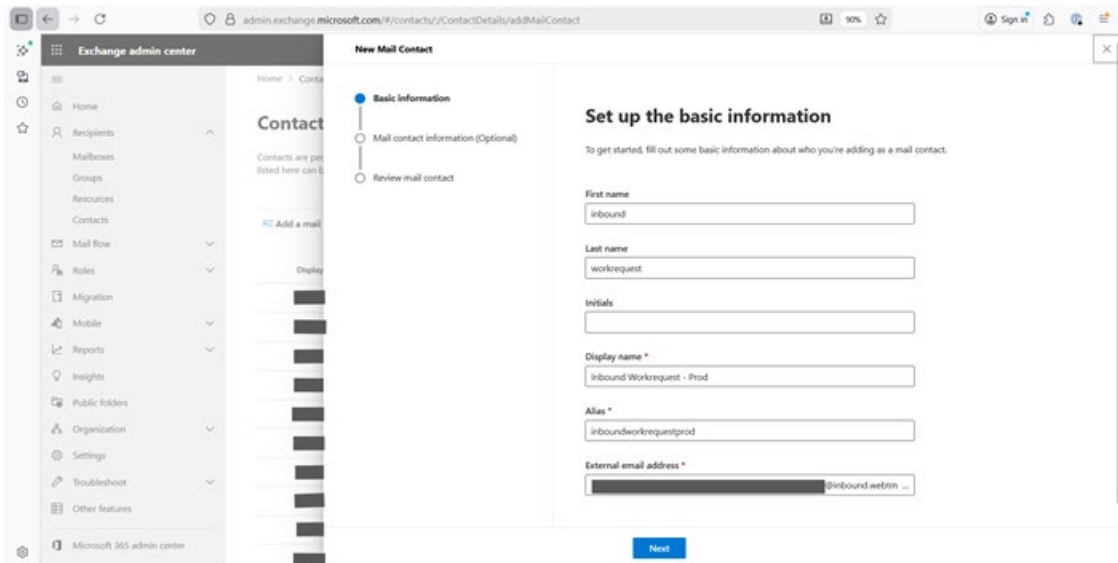
Set up email forwarding to the Inbound Email Address from Step 2 if you are using Exchange to manage your email. This allows the user friendly email to be forwarded to the system-specific email address used by WebTMA and ensures incoming emails are automatically processed and converted into Work Requests.

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



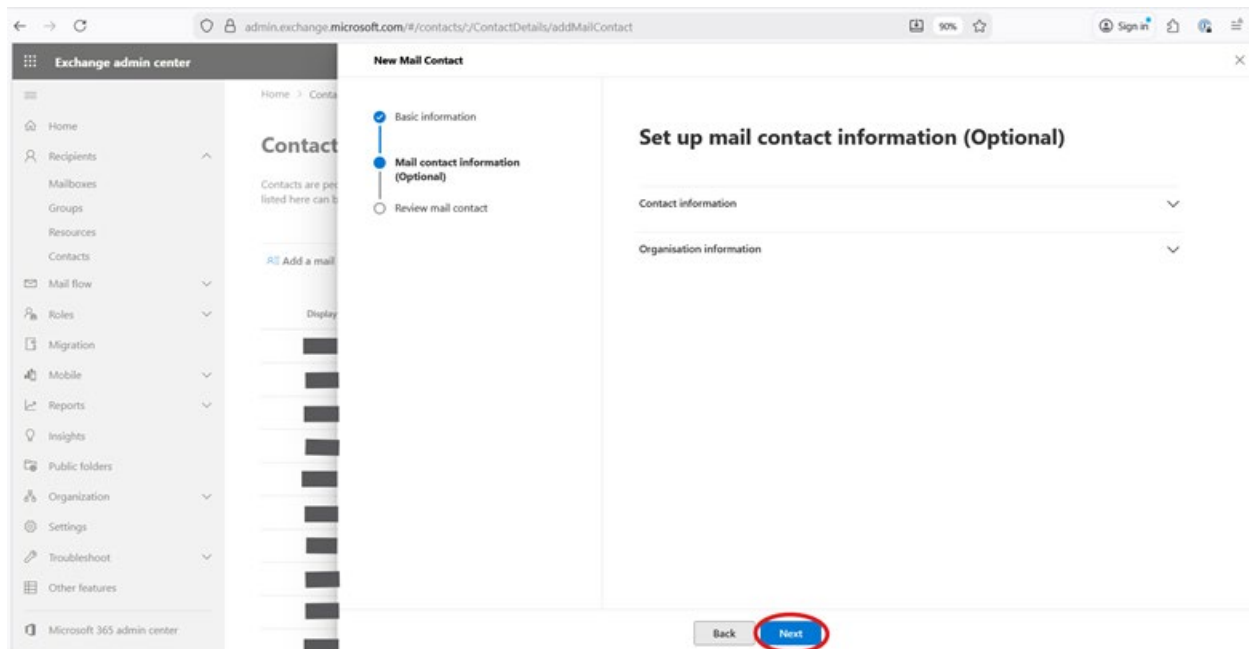
2. From the New Mail Contact panel, supply the following (required fields):
 - Display name
 - Work Request Inbound email address

- Email alias

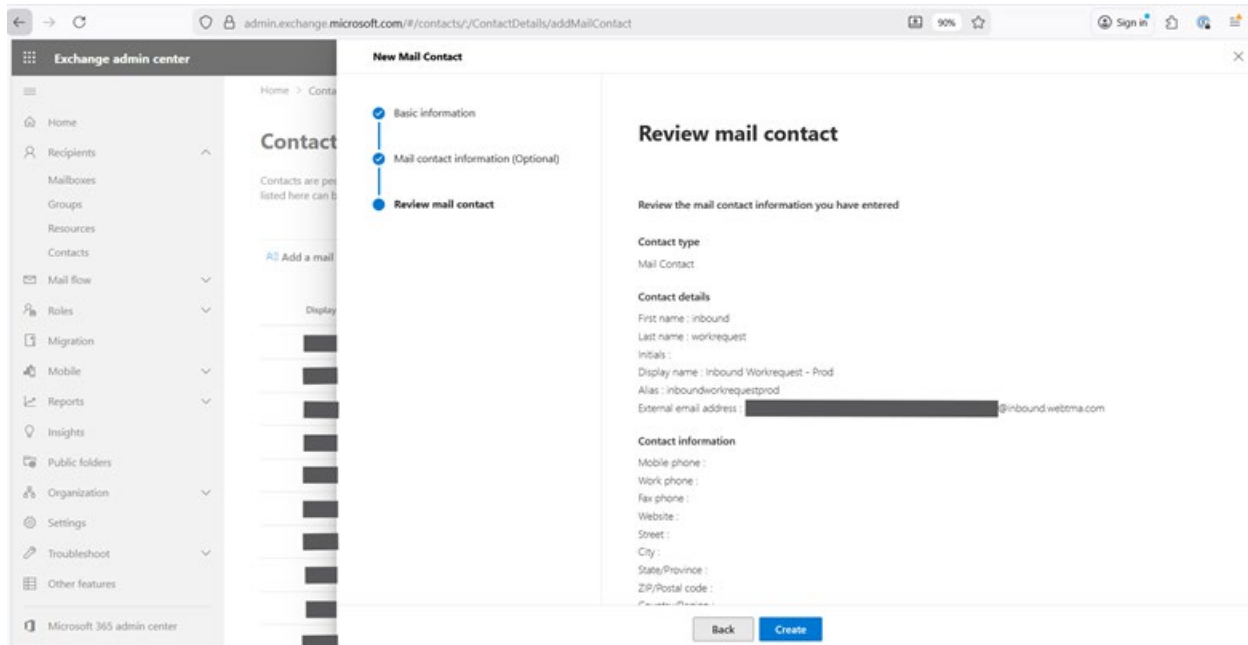


Click **Next** to continue.

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

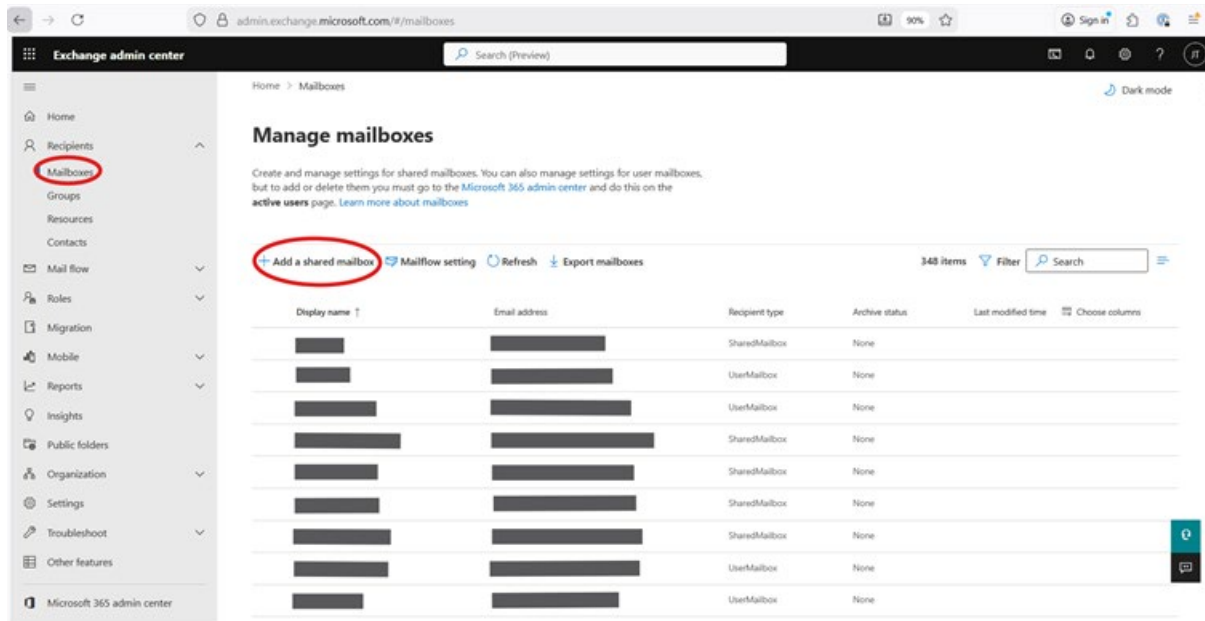


4. Review the contact information and click **Create** once validated.

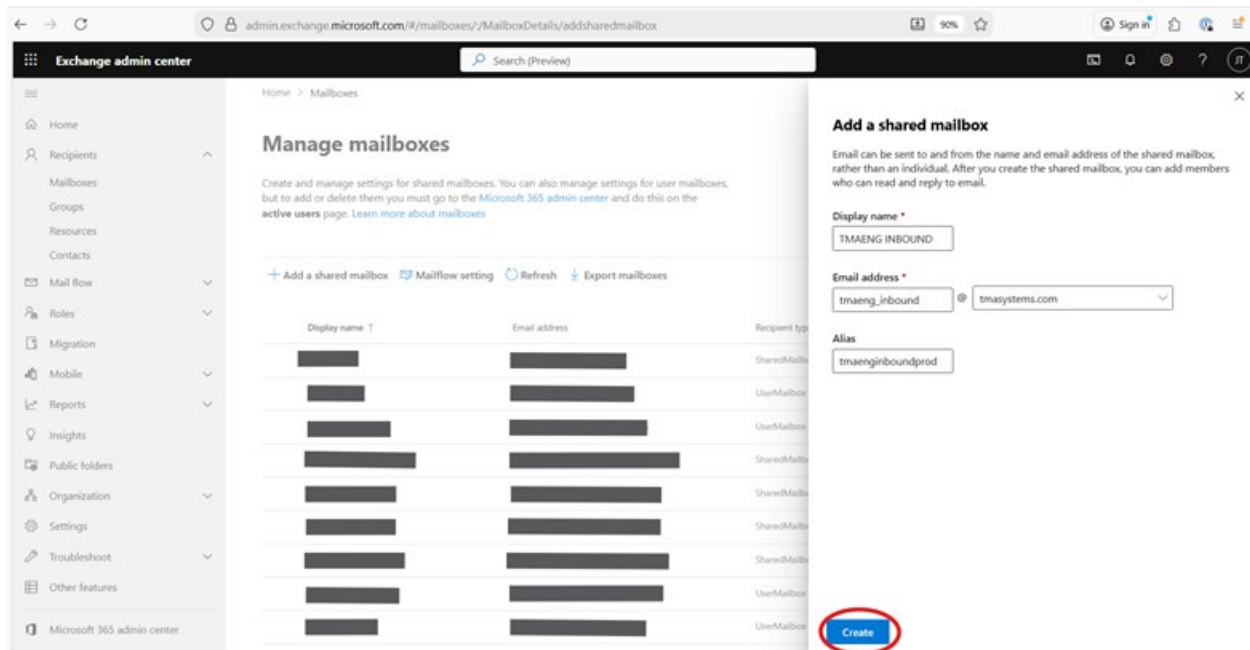


Configure the Forwarding Mailbox (eg. myorg.com support email to TMA System email)

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.*

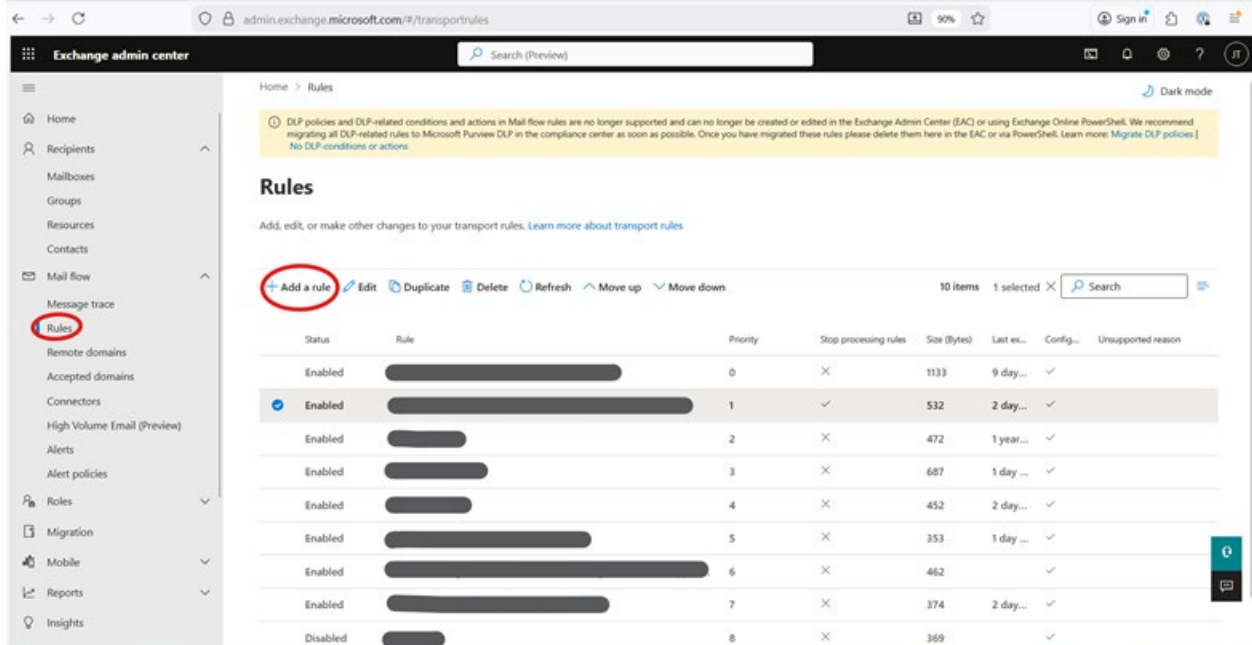


- Supply a display name, the desired email address, and select the domain. Optionally, you may supply an alias for the mailbox. Click **Create** to have the new mailbox provisioned.

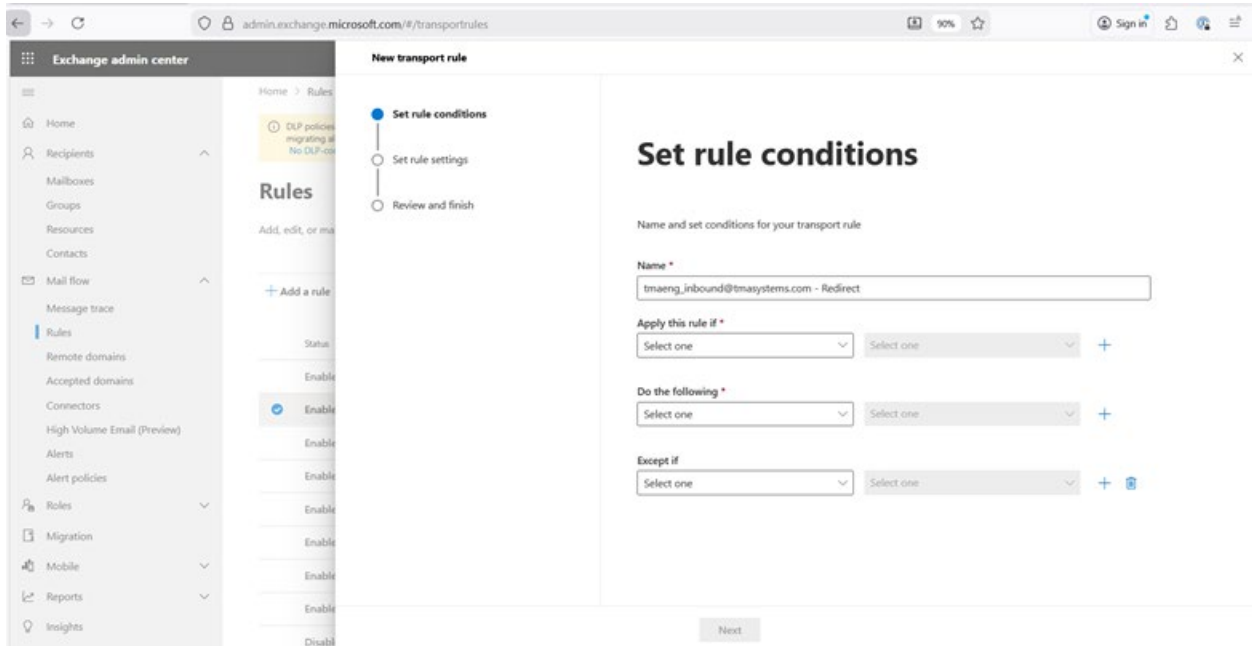


Configure an Exchange Transport Rule

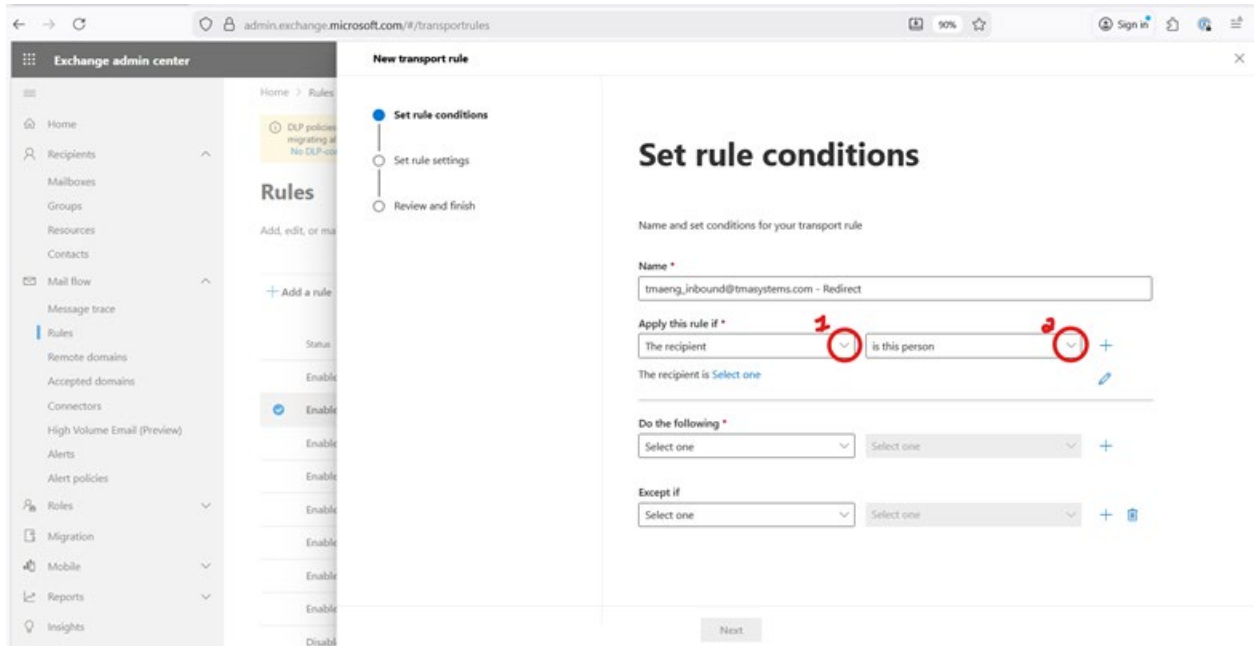
- In the Exchange Admin center, expand **Mail flow** -> **Rules**.
- Click on **+ Add a rule** and select **Create a new rule**



3. Name the new rule using the following format:
newemail_inbound@yourdomain.com – Redirect

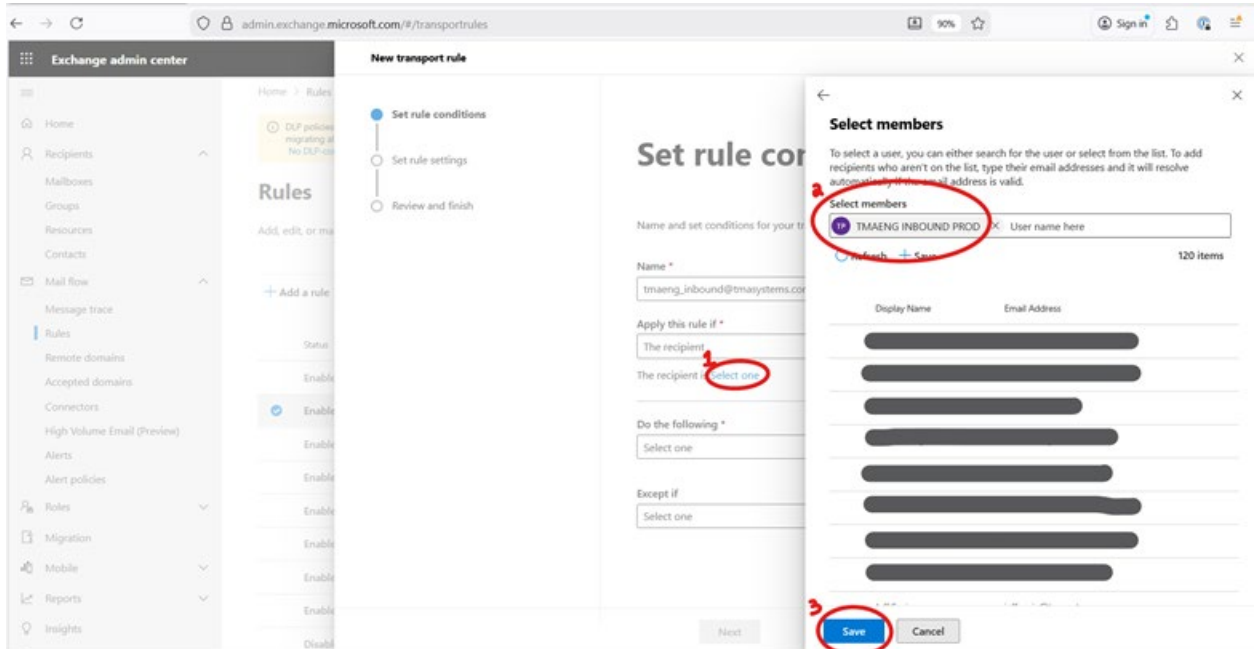


4. Expand the **Apply this rule if** dropdown and select **The Recipient** from the list of options.
5. Select **Is this person** from the list of options in the adjacent dropdown.



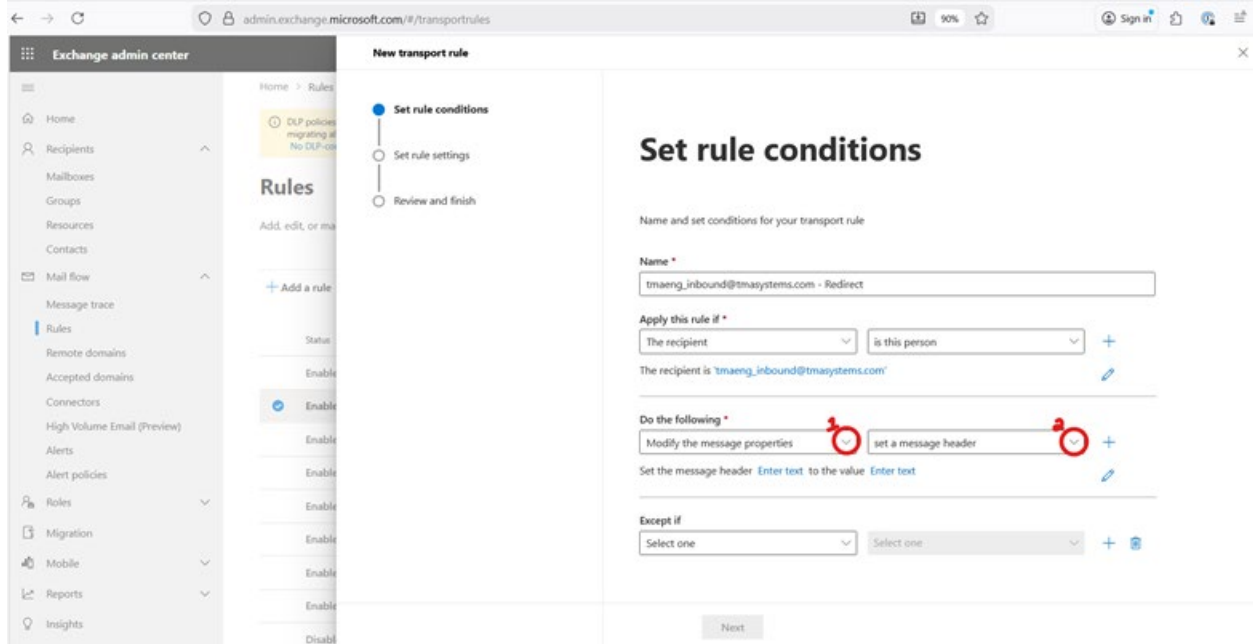
6. Click on **Select one**, locate the newly created **shared mailbox**.

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

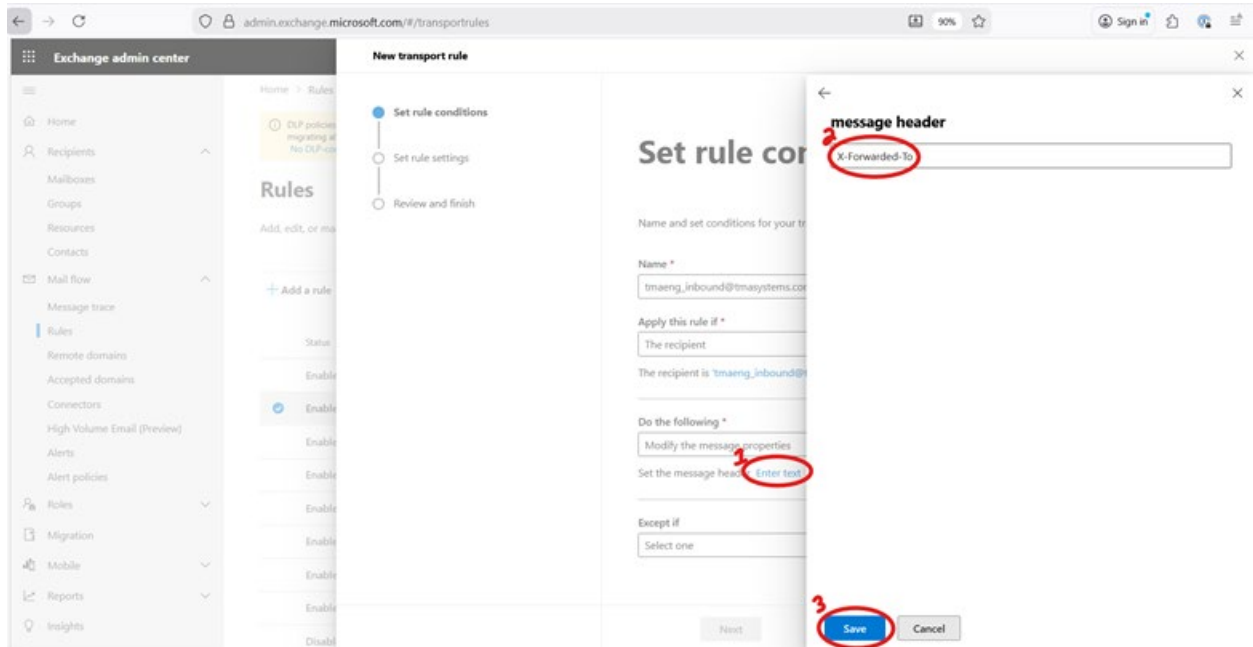


8. Expand the **Do the following** dropdown and select **Modify the message properties** from the list of options.

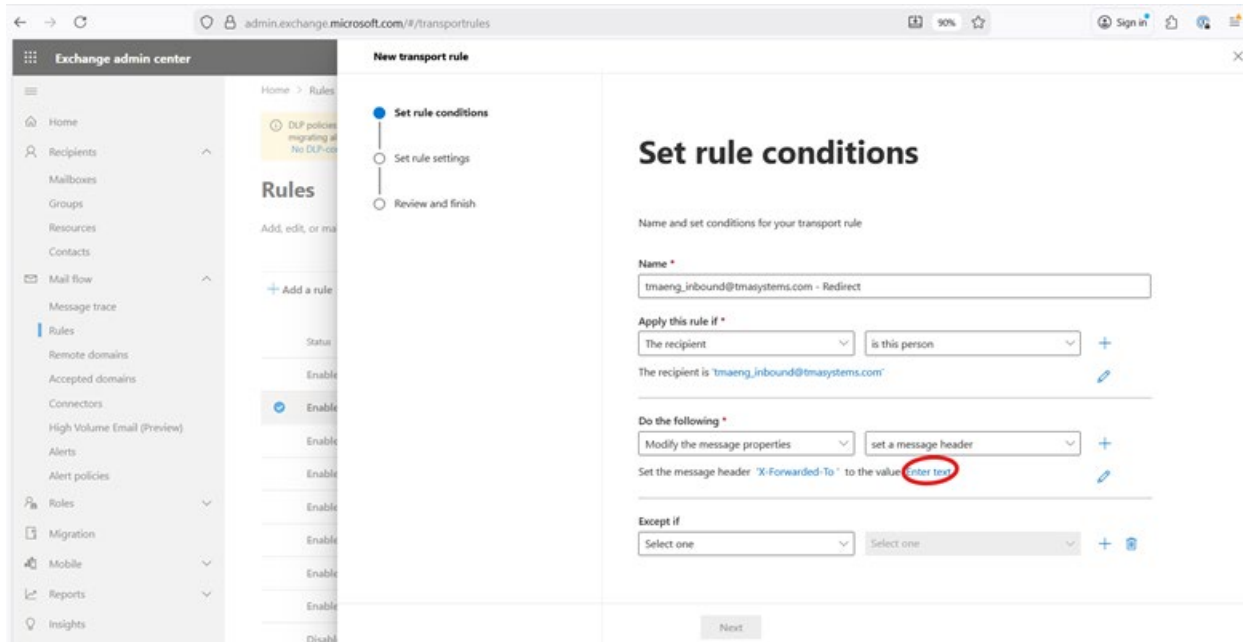
9. Select **Set a message header** from the list of options in the adjacent dropdown.



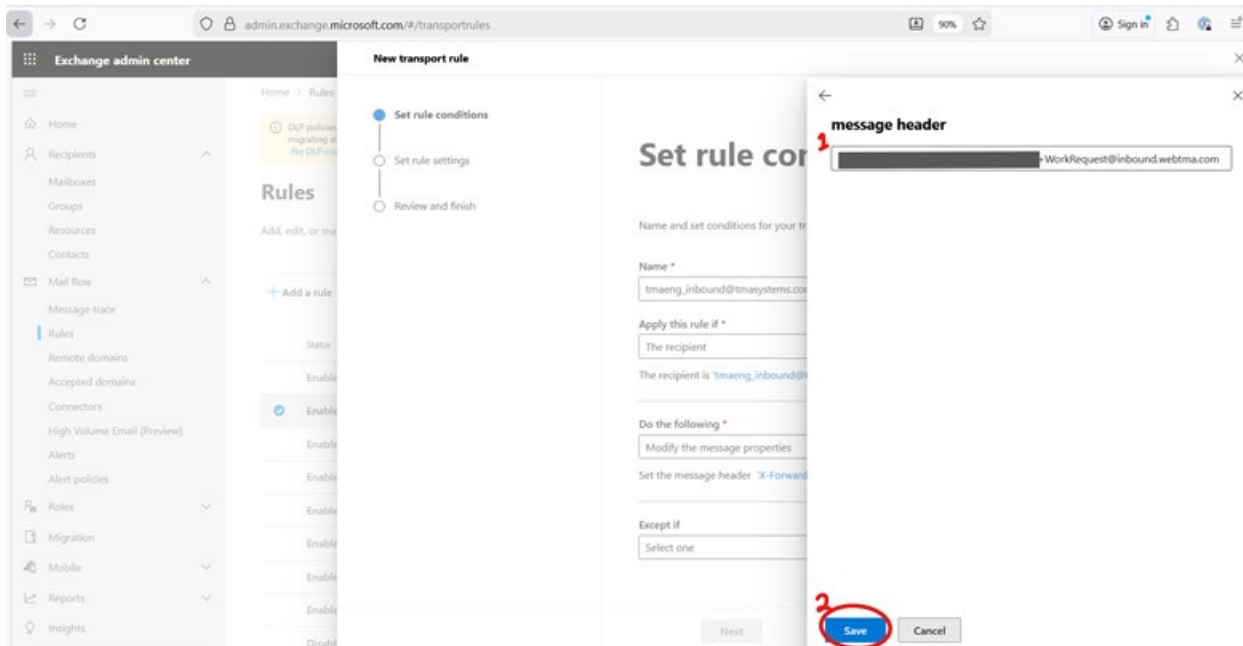
10. Click **Enter text** and supply the following in the text field: **X-Forwarded-To**
Click **Save**



11. Click **Enter text**, supply the Work Request Inbound email address and click **Save**.

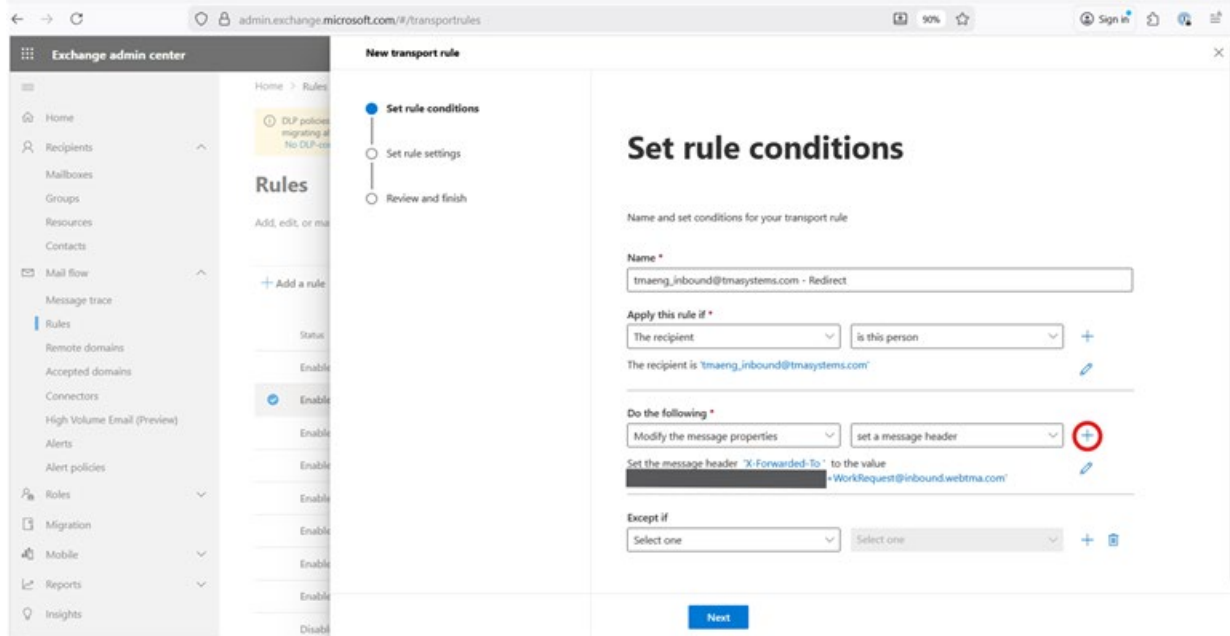


The screenshot shows the 'New transport rule' wizard in the Exchange admin center. The 'Set rule conditions' step is active. The rule name is 'tmaeng_inbound@tmasystems.com - Redirect'. The condition is 'The recipient is tmaeng_inbound@tmasystems.com'. The action is 'Set the message header X-Forwarded-To to the value Enter text'. A red circle highlights the 'Enter text' placeholder.



The screenshot shows the same 'New transport rule' wizard, but with a modal open for setting the message header value. The modal title is 'message header'. The value entered is 'WorkRequest@inbound.webtma.com'. A red circle highlights the 'Save' button. A red arrow points to the 'message header' title.

12. Click on the + icon to add another action



Exchange admin center

Home > Rules

Rules

Add, edit, or manage rules

+ Add a rule

Status: Enabled

Enable/Disable buttons

New transport rule

Set rule conditions

Set rule settings

Review and finish

Set rule conditions

Name and set conditions for your transport rule

Name *

tmaeng_inbound@tmasystems.com - Redirect

Apply this rule if *

The recipient is this person

The recipient is tmaeng_inbound@tmasystems.com

Do the following *

Modify the message properties

set a message header

Set the message header 'X-Forwarded-To' to the value WorkRequest@inbound.webtma.com

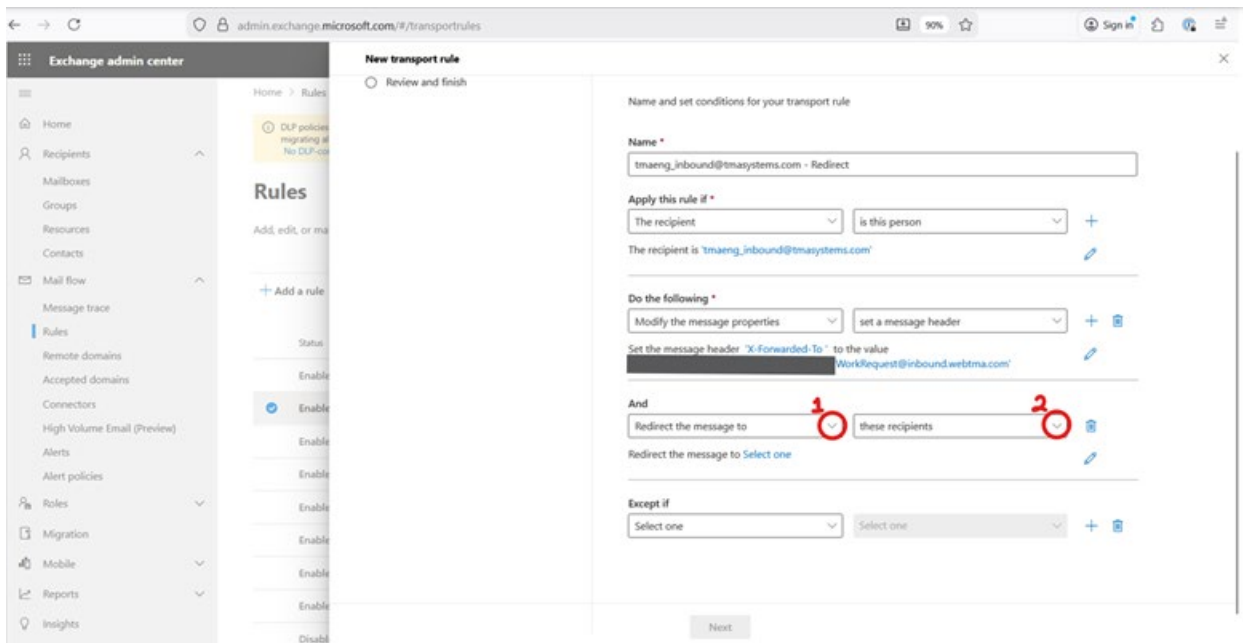
Except if

Select one

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.



Exchange admin center

Home > Rules

Rules

Add, edit, or manage rules

+ Add a rule

Status: Enabled

Enable/Disable buttons

New transport rule

Review and finish

Set rule conditions

Name and set conditions for your transport rule

Name *

tmaeng_inbound@tmasystems.com - Redirect

Apply this rule if *

The recipient is this person

The recipient is tmaeng_inbound@tmasystems.com

Do the following *

Modify the message properties

set a message header

Set the message header 'X-Forwarded-To' to the value WorkRequest@inbound.webtma.com

And

Redirect the message to

these recipients

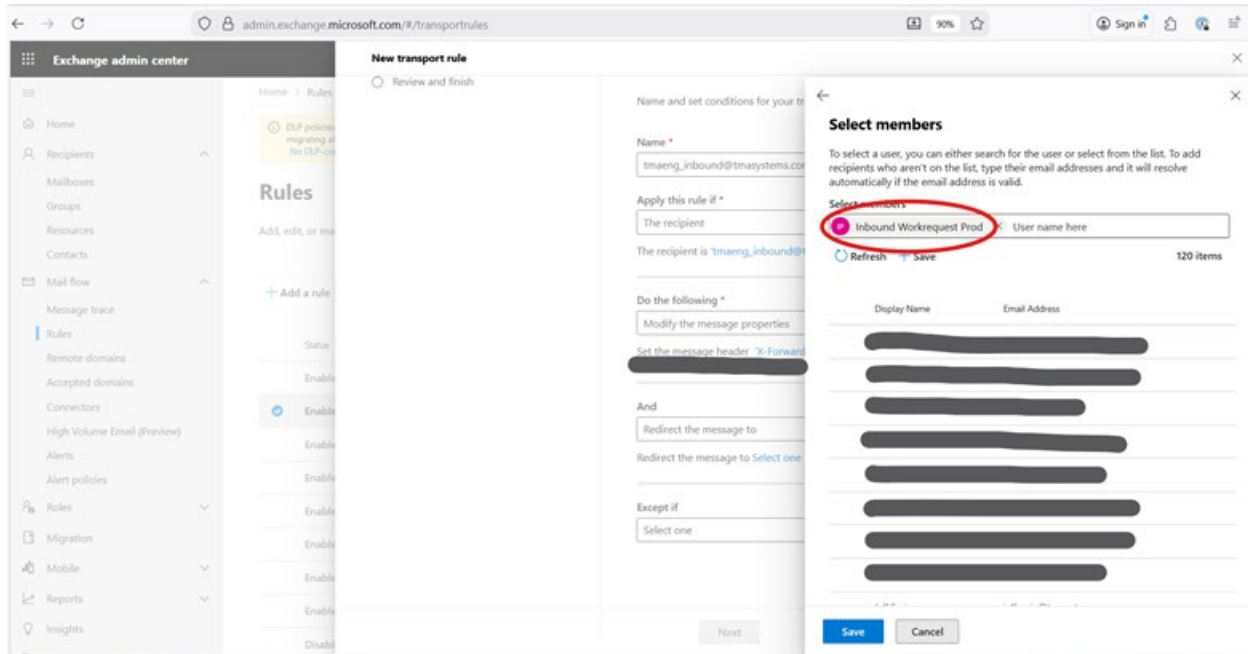
Redirect the message to Select one

Except if

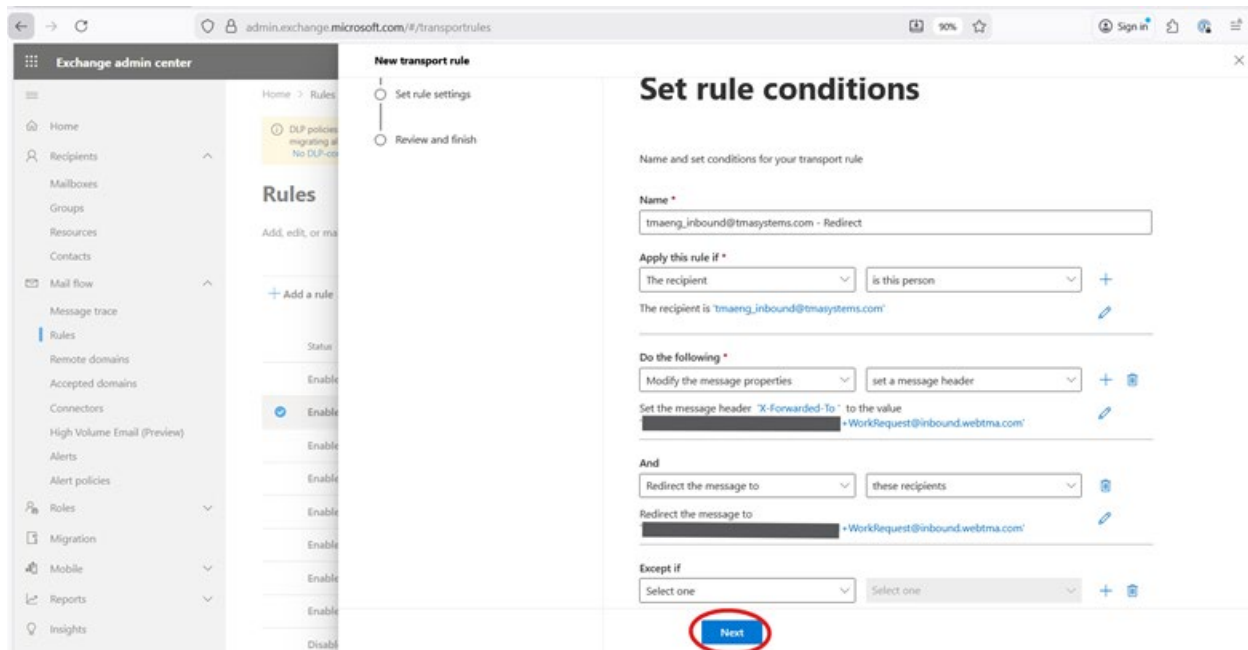
Select one

Next

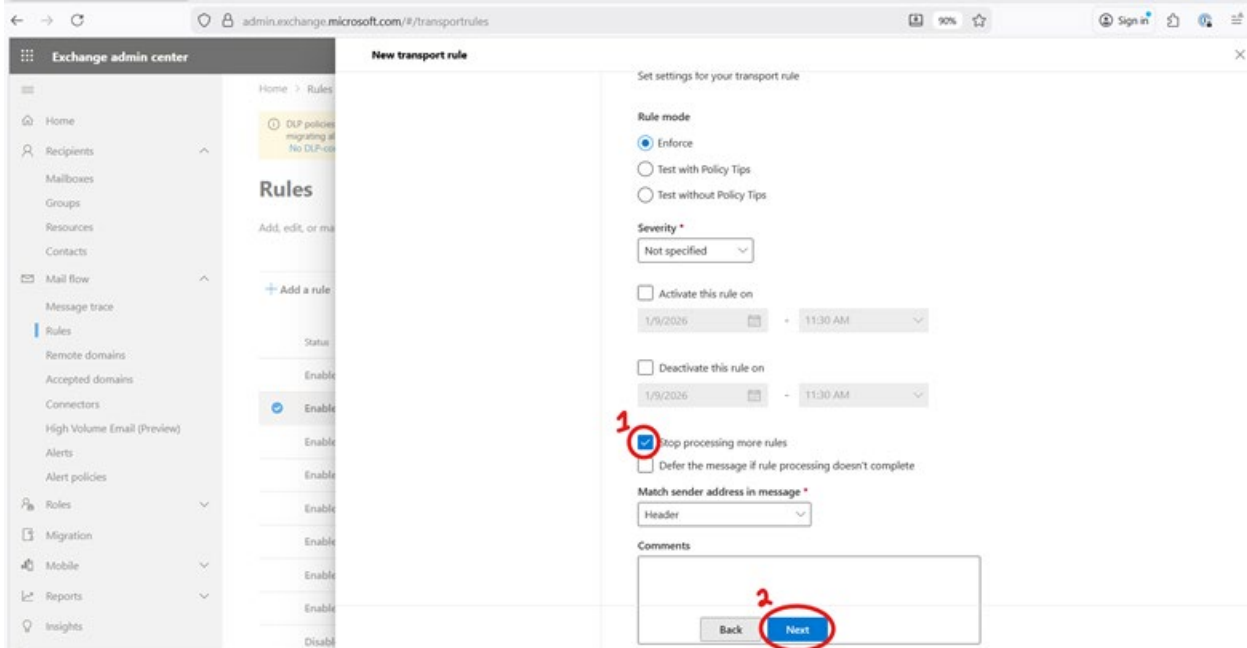
15. Select the newly created Inbound Work Request email **contact** and click **Save**.



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



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



Exchange admin center

Home > Rules

Rules

Add, edit, or manage rules

+ Add a rule

Status

Enable

Enable

Enable

Enable

Enable

Enable

Enable

Enable

Disable

New transport rule

Set settings for your transport rule

Rule mode

☒ Enforce

☐ Test with Policy Tips

☐ Test without Policy Tips

Severity *

Not specified

☐ Activate this rule on

1/9/2026 11:30 AM

☐ Deactivate this rule on

1/9/2026 11:30 AM

☒ Stop processing more rules

☐ Defer the message if rule processing doesn't complete

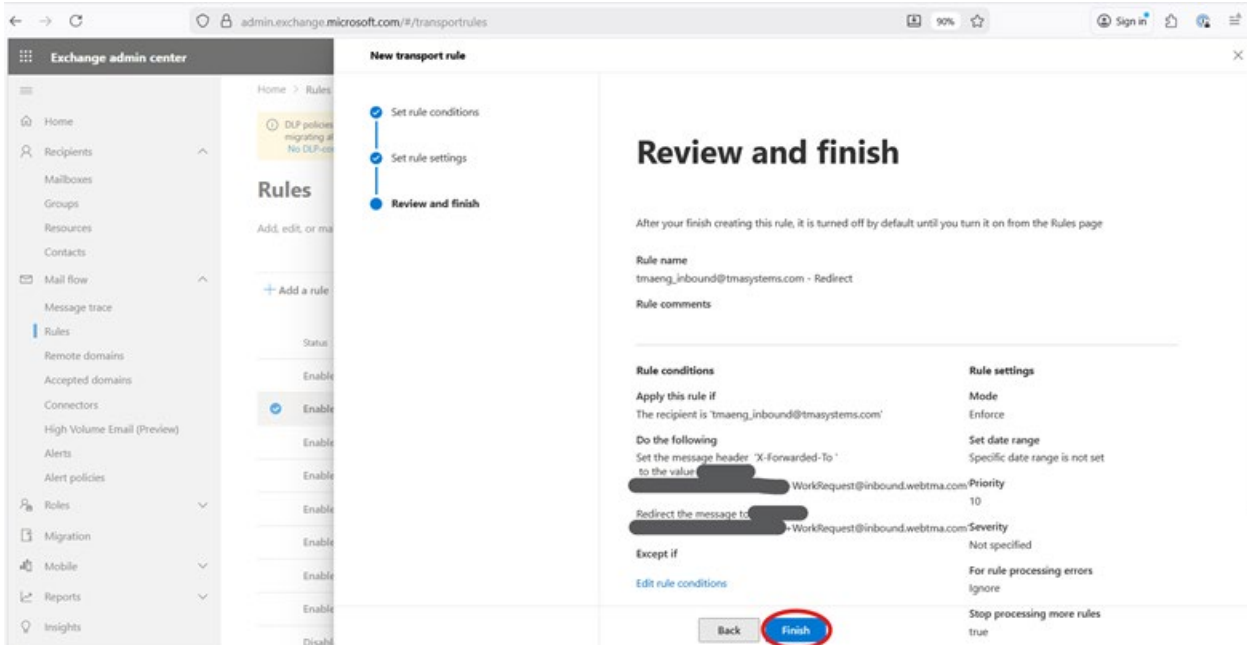
Match sender address in message *

Header

Comments

Back Next

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



Exchange admin center

Home > Rules

Rules

Add, edit, or manage rules

+ Add a rule

Status

Enable

Enable

Enable

Enable

Enable

Enable

Enable

Disable

New transport rule

Set rule conditions

Set rule settings

Review and finish

Review and finish

After you finish creating this rule, it is turned off by default until you turn it on from the Rules page

Rule name

tmaeng_inbound@tmasystems.com - Redirect

Rule comments

Rule conditions

Apply this rule if

The recipient is 'tmaeng_inbound@tmasystems.com'

Do the following

Set the message header 'X-Forwarded-To' to the value [redacted]

Redirect the message to [redacted]

Except if

Edit rule conditions

Rule settings

Mode

Enforce

Set date range

Specific date range is not set

Priority

10

Severity

Not specified

For rule processing errors

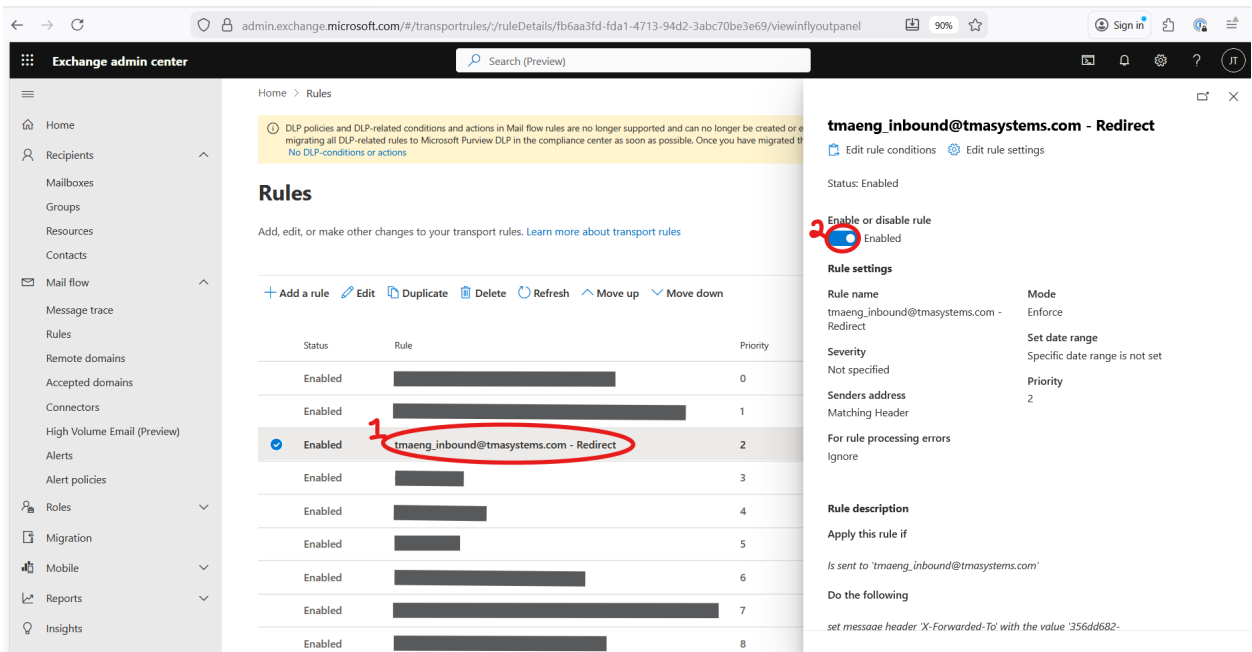
Ignore

Stop processing more rules

true

Back 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**.



The screenshot shows the Exchange Admin Center interface. On the left is a navigation pane with options like Home, Recipients, Mailboxes, Groups, Resources, Contacts, Mail flow, Message trace, Rules, Remote domains, Accepted domains, Connectors, High Volume Email (Preview), Alerts, Alert policies, Roles, Migration, Mobile, Reports, and Insights. The main area is titled 'Rules' and shows a list of transport rules. The rule 'tmaeng_inbound@tmasystems.com - Redirect' is highlighted with a red circle and a red '1'. To the right of the list, the rule's settings are displayed, including a toggle switch for 'Enable or disable rule' which is currently set to 'Enabled' (indicated by a red '2').

Status	Rule	Priority
Enabled	[Redacted]	0
Enabled	[Redacted]	1
Enabled	tmaeng_inbound@tmasystems.com - Redirect	2
Enabled	[Redacted]	3
Enabled	[Redacted]	4
Enabled	[Redacted]	5
Enabled	[Redacted]	6
Enabled	[Redacted]	7
Enabled	[Redacted]	8

Rule settings

- Status: Enabled
- Rule name: tmaeng_inbound@tmasystems.com - Redirect
- Mode: Enforce
- Severity: Not specified
- Set date range: Specific date range is not set
- Senders address: Matching Header
- Priority: 2
- For rule processing errors: Ignore

Rule description

Apply this rule if

Is sent to 'tmaeng_inbound@tmasystems.com'

Do the following

set message header 'X-Forwarded-To' with the value '356dd682'

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.