# Email/Document Integration Service Instructions

The email/document integration service has the ability to apply an email from your current email program (Outlook, Gmail, etc.) to the correspondence and document section (if a document is attached) on the job!

A unique email address has been setup for your company and will need to be used for the email/document integration service to work.
Sample Email Address: training1@servicesoftwareinc.com training1 equals the beginning of the URL (web) address.
Example PLM URL: training1.punchlistmanager.net
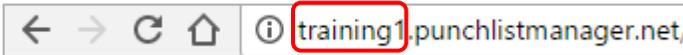
How the integration service works:
1. The email must be sent from the email account that was applied to your PLM employee record, this is typically your company email address. The service will fail if you're using a secondary email address. If you're unsure please check with your administrator of Punchlist Manager.
2. Choose the email that you would like sent to the job then select reply or forward. The Service Software email address that was setup for your company will need to be added in one of the following fields **To, CC or BCC**.
3. The Job ID must be included in the subject line followed by a comma (,) then a space only if the email will contain a subject. If the email will not have a subject then the Job ID is the only requirement.
   Examples of the email subject line format without a Subject: TS16-1013 and with a Subject: TS16-1013, Color Selections
   Note: The details after the comma in the email subject are added to the Job Correspondence Subject.
   Example: Color Selections (see screenshots below).
4. Click Send

Email with Document attached:
Note: Multiple documents can be attached however the maximum size (total documents) allowed is 10mb. If the 10mb is exceeded the documents will not upload.

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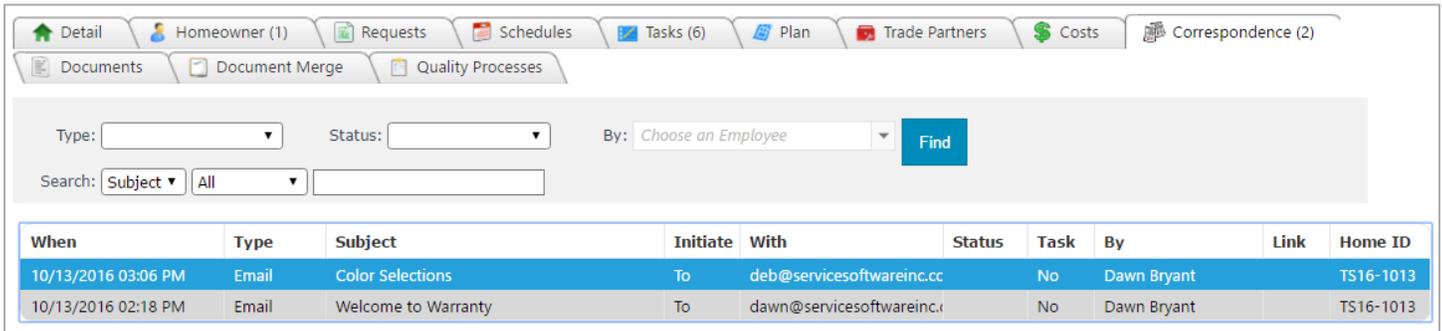**Sample of the Job Correspondence:**

When: *Date and time the email was sent*

Type: *Email*

Subject: *Subject of the Email (if applicable) otherwise it will state Email Generated Correspondence if the Job ID was the only information in the subject line.*

With: *The email address the email was sent to*

By: *The individual that sent the email*

When	Type	Subject	Initiate	With	Status	Task	By	Link	Home ID
10/13/2016 03:06 PM	Email	Color Selections	To	deb@servicesoftwareinc.cc		No	Dawn Bryant		TS16-1013
10/13/2016 02:18 PM	Email	Welcome to Warranty	To	dawn@servicesoftwareinc.c		No	Dawn Bryant		TS16-1013

Sample of Job Documents & Pics (*when documents are attached using the integration service***):**

Title: *Subject of the Email*

Description: *Subject of the Email along with the Date & Time the email was sent*

Documents
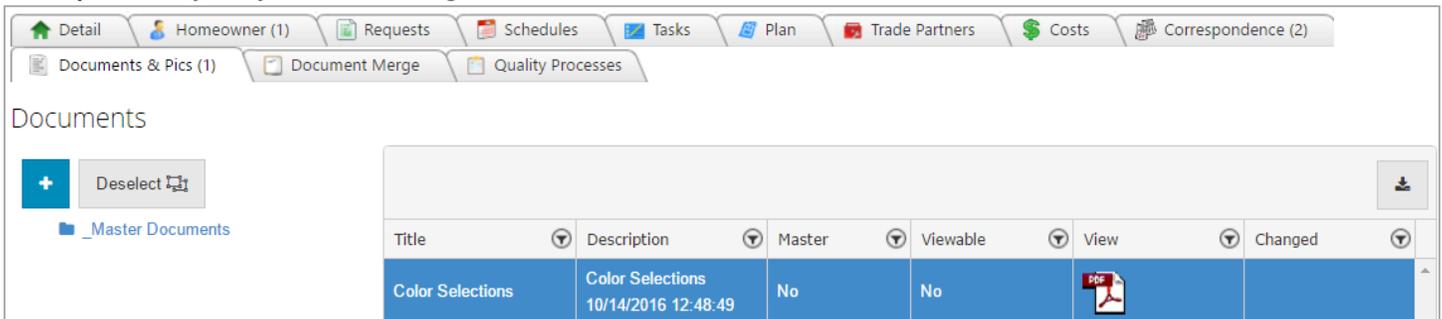
Title	Description	Master	Viewable	View	Changed
Color Selections	Color Selections 10/14/2016 12:48:49	No	No	PDF	