

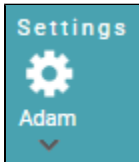
# Resource Planner - Configuring a PA mailbox in Chase

Chase allows you to add Bookings via Outlook and sync them to Chase. The PA mailbox serves as a link between Chase and your Outlook. This PA email address needs to be an active email account which will receive emails.

Below are steps to show you how to configure a PA mailbox in Chase.

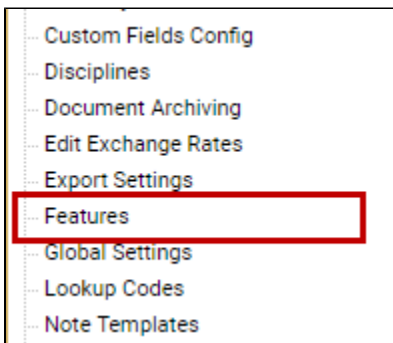
## Step-by-step guide

1. Click the **Settings** button on the Ribbon.



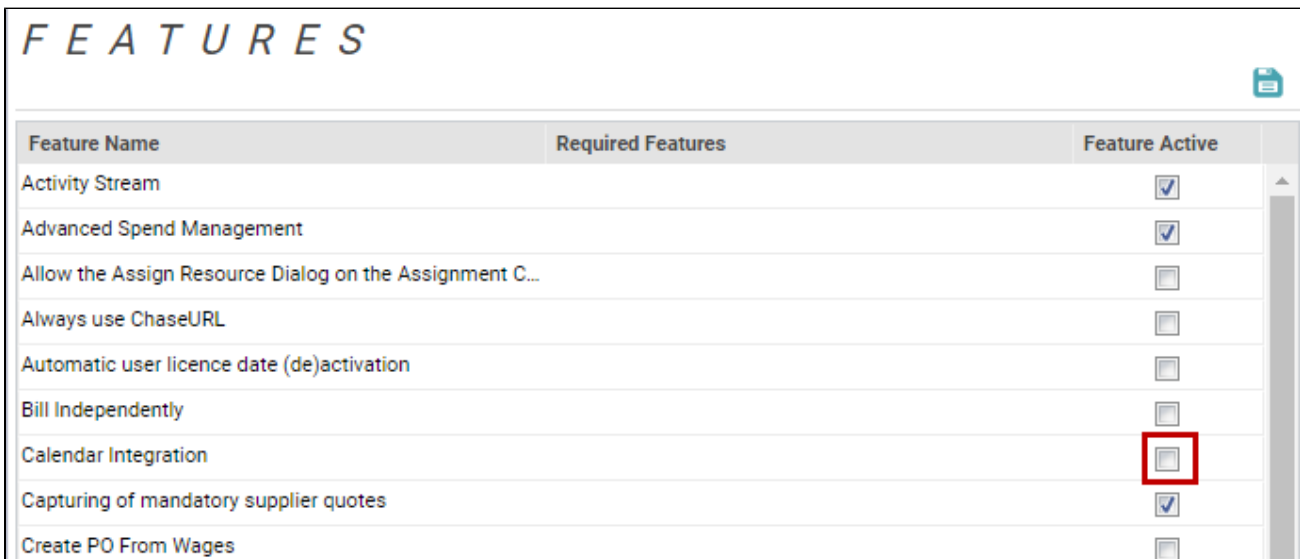
The *Configuration* screen appears.

2. Click the **Features** item in the Configuration tree.



The *Features* screen opens.

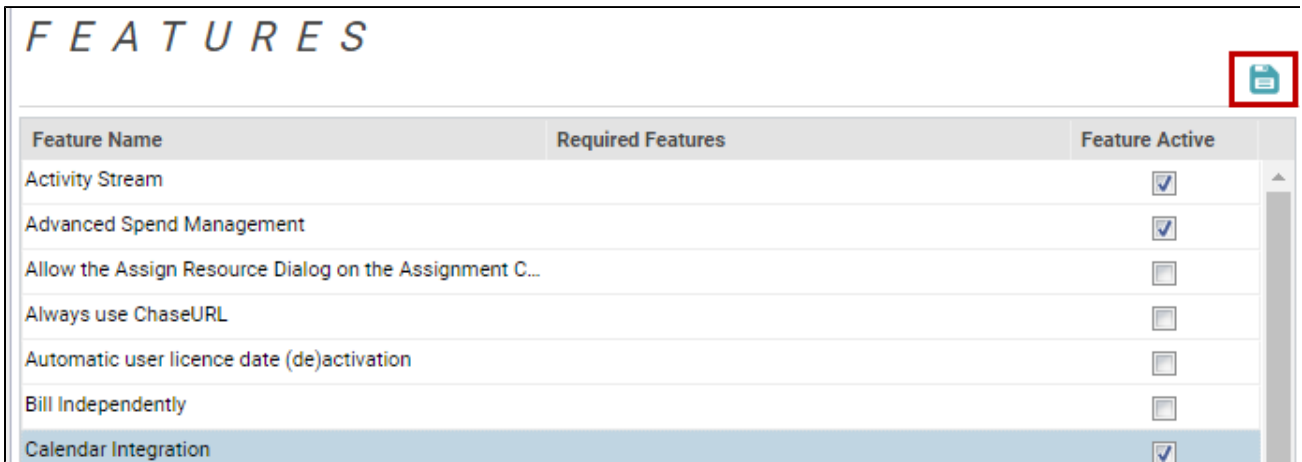
3. Check the **Calendar Integration** checkbox to enable this feature.



The screenshot shows the "FEATURES" configuration screen. At the top, the word "FEATURES" is displayed in a large, spaced-out font. Below it is a table with three columns: "Feature Name", "Required Features", and "Feature Active". The "Calendar Integration" row is highlighted with a red box around its checkbox, which is currently unchecked.

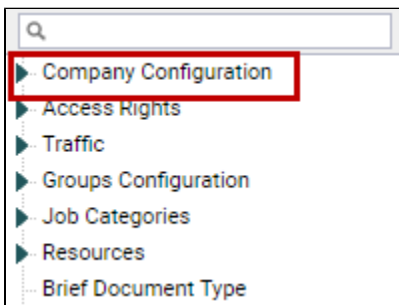
Feature Name	Required Features	Feature Active
Activity Stream		<input checked="" type="checkbox"/>
Advanced Spend Management		<input checked="" type="checkbox"/>
Allow the Assign Resource Dialog on the Assignment C...		<input type="checkbox"/>
Always use ChaseURL		<input type="checkbox"/>
Automatic user licence date (de)activation		<input type="checkbox"/>
Bill Independently		<input type="checkbox"/>
Calendar Integration		<input type="checkbox"/>
Capturing of mandatory supplier quotes		<input checked="" type="checkbox"/>
Create PO From Wages		<input type="checkbox"/>

4. Click the **Save** button to make your changes permanent.

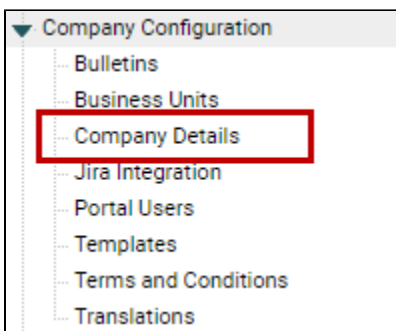


Feature Name	Required Features	Feature Active
Activity Stream		<input checked="" type="checkbox"/>
Advanced Spend Management		<input checked="" type="checkbox"/>
Allow the Assign Resource Dialog on the Assignment C...		<input type="checkbox"/>
Always use ChaseURL		<input type="checkbox"/>
Automatic user licence date (de)activation		<input type="checkbox"/>
Bill Independently		<input type="checkbox"/>
Calendar Integration		<input checked="" type="checkbox"/>

5. Navigate to the configuration items on your left-hand side, and click the **Company Configuration** group to expand it.



6. Select **Company Details**.



The *Company Details* screen appears.

7. Click the **Traffic Settings** tab.

# COMPANY DETAILS

License Unlock

Navigation: Contact Details | Company Settings | Declaration Settings | **Traffic Settings** | Forecast Settings

Company:

Full Name:

Tel 1:

Tel 2:

Fax:

Postal Address:

8. Enter all details about the PA email, in the **Calendar Integration** fields.

1. Enter your email provider (Outlook) in the **Mail Provider** field.
2. In the **PA Username** field, enter the email address that Bookings will be sent to. The PA email address is specific to each company.
3. In the **Password** field, enter a password for this PA email.
4. Check the **Chase To Calendar Sync** checkbox to allow Bookings from Chase to be synced to the assigned User's Calendar.
5. Check the **Enable Clash Management** checkbox to ensure that Calendar Bookings from Outlook are not created in Chase when they have the same time slot as existing Bookings in Chase.
6. Check the **Request Availability From Mail Provider** checkbox. Chase will check the assigned User's Calendar for availability.
7. Check the **Allow Auto-Fill On Timeheets For Incoming Bookings** checkbox.
8. Select the **Clear All User Overrides** button to enable the **Auto-Fill Time** button for all Users in Chase. For more details on how to enable **Allow Auto-Fill On Timesheets For Incoming Bookings** on individual Users, please see [How to setup users for Calendar Integration](#).
9. In the **Auto Fill Setting** drop down, select if you want all or selected Tasks Types to be used on the Auto-Fill feature.

This allows you to select if you want None, All or Specific Tasks Type to appear as bookings in the Auto-Fill button on the Timesheet screen.


**Auto-Fill Setting** available options:


None: No Task Types will be used as Auto-Fill bookings on the Timesheet screen.

All: All active Client, Job, and Timesheet Tasks Types will be used as Auto-Fill bookings on the Timesheet screen.

Selected: Only selected Tasks Types will be used as Auto-Fill bookings on the Timesheet screen. If this option is selected you will be able to specify these Tasks Types on the Task Types drop down below.

Allow Auto-Fill On Timesheets For Incoming Bookings:  Apply to All Users

Auto Fill Setting:  

Task Types:  

- None
- All
- Selected

10. If the option chosen on the **Auto Fill Setting** is **Selected** you need to specify Task Types that will be used as Auto-Fill bookings on the Timesheet screen. This can be achieved by clicking the Task Types drop down and select all required tasks.

# COMPANY DETAILS

< Contact Details
Company Settings
Declaration Settings
Traffic Settings

**Calendar Integration**

Mail Provider:

PA Username:

Password:

PA Email Address:

Google Application Name:

Chase To Calendar Sync:

Calendar To Chase Sync:

Enable Clash Management:

Enable Email Archiving:

Request Availability From Mail Provider:

Auto Complete Tasks from Calendar:

Allow Auto-Fill On Timesheets For Incoming Bookings:  Apply to All Users

Auto Fill Setting:

Task Types:

9. Click the **Save** button to make your changes permanent.

# COMPANY DETAILS

License Unlock

< Contact Details
Company Settings
Declaration Settings
Traffic Settings
Forecast Settings
Server Setup
Chase Setup
Ri >

**Calendar Integration**

Mail Provider:

PA Username:

Password:

PA Email Address:

Google Application Name:

Chase To Calendar Sync:

Calendar To Chase Sync:

Enable Clash Management:

Enable Email Archiving:

Request Availability From Mail Provider:

Auto Complete Tasks from Calendar:

Allow Auto-Fill On Timesheets For Incoming Bookings:  Apply to All Users

Auto Fill Setting:

Task Types:

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