

CRM in the person mask

If you open a person, the person appointment window appears to the right of the main window, which is used to file all information such as invoices, reminders, letters, emails etc. directly with this person. The big advantage of this is that you can save a lot of paper and space and store all the information in one place for this person. Changes to data records can also be tracked so that you know exactly who has changed what for which person. This is why password management makes sense, so that you can also see which employee has changed what for which customer. Additional contact persons can also be created.

The screenshot shows the CRM interface for a person named Susanne Sonnenschein. The interface is divided into several sections. On the left, there is a 'Name' section with fields for 'Suchkürzel' (sosu), 'Nr.' (041.7003.203600), 'Vorname' (Susanne), and 'Nachname' (Sonnenschein). Below this is a 'Merkmale' section with various attributes like 'Zusatz-Info', 'Objekt Feldgass', 'Elektro Caddie', etc. The main central area is a 'Korrespondenz' (Correspondence) table with columns for 'Vermerke', 'Offen', 'Ansprechpartner', 'Kontakt', and 'Übersicht über alles'. The table contains several entries, with the first one highlighted in green. Red circles with numbers 1 through 9 are placed over specific parts of the interface to indicate key features. On the right side, there is a 'Suche' (Search) section and a list of actions like 'Neu', 'Sichern', 'Löschen', 'Kopieren', 'Umsatzkonto', 'Drucken', 'Export', 'SMS', 'Online', 'Karte', and 'Sperrern'. At the bottom, there are keyboard shortcuts for 'Optionen', 'Neu', 'Edit', and 'Ende'.

1. Notes: This tab gives you an overview of the most recently stored and edited tickets and projects. You can also see when the person was newly created and which persons are stored in the family summary.
2. Open: all unfinished projects and tickets are summarised here.
3. Contact person: If the selected person is linked to other people, you will see this in this tab.
4. Contact:
5. Overview of everything: all entries saved for this person are listed here.
6. Correspondence: all letters sent/received by post are stored here
7. Email: all saved emails from and to this person are listed here
8. Search: Search for the desired entry using specific keywords.
9. Data record changes: All changes in the person mask (10) and all automatic entries generated during tournament registrations (11) and deregistrations (12) are documented and saved here.

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Vermerke	Offen	Ansprechpartner	Kontakt	Übersicht über alles	Korrespondenz	E-Mail
Datensatz-Änderungen				Suche		
✓	02.05.16	15:18	TURAN	OK:Testkurs Pitch & Pat / Sie wurden erfolgreich angemeldet. / Gh		
✓	25.06.16	20:57	TURAN	OK:25.04.16 16007 / SPED-test / @TURN:000108-01-1-0000341f		
✓	05.07.16	09:18	TURAN	OK:04.07.16 16011 / SPED-test / @TURN:000112-01-1-0000341:		
✓	13.09.16	17:49	TURAN	OK:16014 / Sie wurden erfolgreich angemeldet. / Ghisletti, Tamar:		
✓	06.10.16	11:33	TURAN	OK:30.09.16 16020 / SPED-test / @TURN:000136-01-1-0000417:		
	06.10.16	11:35	ÄND	CLUBCO: 390443-> 0		
	06.10.16	11:35	ÄND	CLUBSU:0443->		
	06.10.16	11:36	ÄND	CLUBKU:Freudenstein->		
✓	22.10.16	15:45	TURAN	OK:22.10.16 test farben / SPED-test / @TURN:000138-01-1-0000		
✓	15.01.17	18:32	TURAN	OK:25.10.16 16024 / SPED-test / @TURN:000140-01-1-0000433f		
	15.03.17	11:56	ÄND	MAILIN:-> :		
✓	06.04.17	15:42	TURAN	OK:06.04.17 17005 / SPED-test / @TURN:000147-01-1-0000462f		
✓	17.05.17	08:42	TURAN	OK:17.05.17 17009 / SPED-test / @TURN:000160-01-2-0000497:		
✓	23.06.17	09:42	TURAN	OK:22.02.17 test für ID / SPED-test / @TURN:000142-01-1-0000:		
	27.06.17	17:38	ÄND	INFO:001@@@0@0@0@->001@@@@@0@0@test@		
	27.06.17	17:38	ÄND	MAILIN: :->:-		
	27.06.17	17:39	ÄND	INFO:001@@@@@0@0@test@->001@@@@@0@0@44444@		
	27.06.17	17:39	ÄND	INFO:001@@@@@0@0@44444@->001@@@@@0@0@sdf@		
	27.06.17	17:56	ÄND	INFO:001@@@@@0@0@sdf@->001@@@@@0@0@sdf@		
✓	06.08.17	18:15	TURAN	OK:05.09.17 Ladies - Geburtstagsturn. / SPED-test / @TURN:000		
✓	06.09.17	12:23	TURAN	OK:05.09.17 Ladies - Geburtstagsturn. / SPED-test / @TURN:000		
✓	25.10.17	15:45	TURAN	OK:25.10.17 17023 / SPED-test / @TURN:000181-01-1-0000592:		
✓	25.10.17	15:45	TURAN	OK:25.10.17 17023 / SPED-test / @TURN:000181-01-1-0000592:		
✓	31.10.17	08:01	TURAB	OK:25.10.17 17023 / SL / @TURN:000181-01-1-00005923- 1 10:		
✓	31.10.17	08:01	TURAN	OK:17023 / Sie wurden erfolgreich angemeldet. / Ghisletti, Stefan		
✓	31.10.17	08:05	TURAB	OK:25.11.17 17023 / SL / @TURN:000181-01-2-00005923- 1 0:C		
✓	31.10.17	08:06	TURAN	OK:17023 / Sie wurden erfolgreich angemeldet. / Ghisletti, Stefan		
	07.12.17	09:47	ÄND	AUSWB:->20171207		
	11.12.17	09:48	ÄND	INFO:001@@@@@0@0@sdf@->001@@@@@0@0@sdf@@		
✓	27.12.17	15:37	TURAN	OK:05.01.18 Testturnier für doppelte / SPED-test / @TURN:0001		

Optionen (Ctrl) F5 + Neu (Ctrl) F6 Edit (Ctrl) F7

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