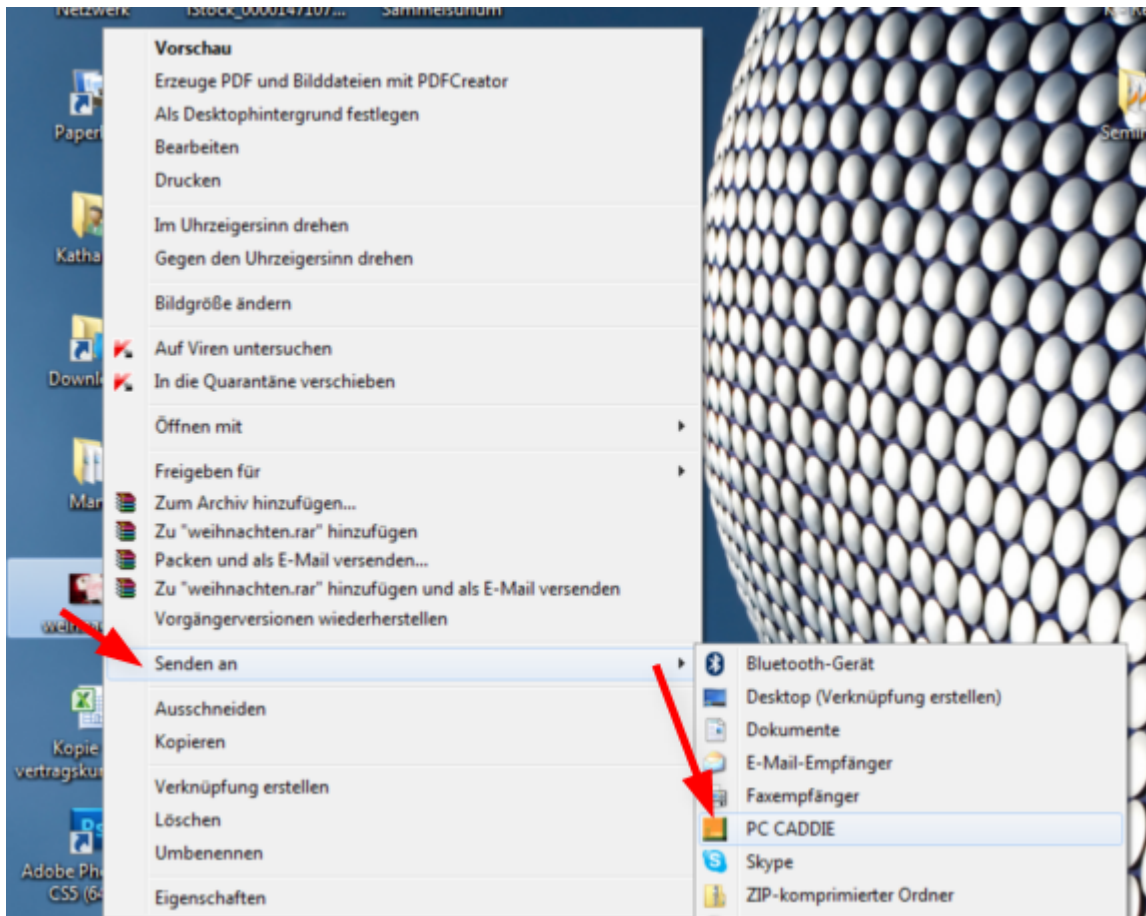


Send document to CRM

In Explorer or My Computer, right-click on a document that you want to send to PC CADDIE. Then select the option **Send an/PC CADDIE:**



The following window opens in PC CADDIE:

Info: Leistungsabrechnung-16042020.pdf
_ □ ×

Kontakt: Sonnenschein, Susanne ☰ ...

Ansprechpartner: ▶ Wahl F3

Projekt: F4

Kategorie: ✎ Edit

Betreff:

Termin: **Zeit:** **Dauer erwartet:**

Erinnerung: **Zeit:** **Dauer:**

Für: Von: Carmela

Sichtbar: erledigt:

Status: am:

Erstellt: Geändert:

Im Mitarbeiterplan anzeigen Neuer Eintrag

Anhang: 📁 ...

Farbe: ▶ Anhang öffnen F6 ▶ Kontakt öffnen F7

✔ OK F12
📄 Sichern F11
⚙ Erledigt F9
📁 Projekt
? Rückfrage
↩ Antwort
🕒 Stamp
🔗 Info-Link
🔒 Privat F5
☎ Anruf
✖ Abbruch



The original document remains in the original folder. PC CADDIE saves an additional document in the „Attached“ folder. If you have a lot to import at a later date or you are just starting out, you simply need to open the relevant folder and PC CADDIE and then import the documents into PC CADDIE by activating and dragging („drag and dropping“) them into a person's info window with the mouse button.

TIP If a document (e.g. a member's contract) is saved according to the pattern last name, first name-subject (Schmedding,Benedikt-Vertrag.doc), PC CADDIE searches for the appropriate person directly after the import and inserts the subject accordingly.