Special ticket categories

Some categories briefly explained

Data record link

The category **ALINK** category is used if you want to link a person to a company or another person. As a rule, this is not the contact person of a company, but perhaps an employee or a reference person. You can then see the connection at first glance in the person mask. Firstly, check whether the person you want to link is already stored in PC CADDIE or has yet to be created. Then click on the NEW button in the CRM/DMS window of the company and select the category *ALINK*.

ect cate	gorie		
	Alphabetical		✓ <u>о</u> к
APP	Appointment		
ATT	Attachment		🗙 <u>C</u> ancel
BOWO	Back office-work		
CALL	Call		
CALLB	Call back		
CALLU	Call back, useless		
CONT	Contact person		
CONTR	Contract		
CRYPT	Crypt-Info		
DLINK	Data Link		
MAIL	Email		
FAX	Fax		
IDCO	ID card order		
ILNK	Information link		
INTIN	Internal inquiry		
LINK	Internet link		
LETT	Letter, general		
NOTE	Note		
OPIN	Open invoice	-	
	Create several entries at once	F6	
	Change contact person	F9	

Under Address, select the person you want to link to the company.

ata-set link		×
<u>A</u> ppendant:	hote Hotel Sonne	✓ <u>O</u> K
<u>I</u> nfo:		× <u>C</u> ancel
<u>A</u> ddress:	mugu Mustermann, Gunter	
<u>C</u> olour:	0	
<u>C</u> reated:	<u>b</u> y: Tester, Timo	
<u>C</u> hanged:	<u>b</u> y:	



ANSP (contact person)

If you do not want or need contact persons as individual persons in your system, you can also enter contact persons only for the company. To do this, select the Contact person category.

	🔲 Alphabetical		~	<u>0</u> K
APP	Appointment			
ATT	Attachment		×	<u>C</u> ancel
BOWO	Back office-work		-	
CALL	Call			
CALLB	Call back			
CALLU	Call back, useless			
CONT	Contact person			
CONTR	Contract			
CRYPT	Crypt-Info			
DLINK	Data Link	-		
MAIL	Email			
FAX	Fax			
IDCO	ID card order			
ILNK	Information link			
INTIN	Internal inquiry			
LINK	Internet link			
LETT	Letter, general			
NOTE	Note			
OPIN	Open invoice			
	Create several entries at once	ล		
		2		
	Change contact person [F9			

You can now enter all the information for this contact person.

A very helpful feature of the contact person function is that you can also enter different addresses here, e.g. for letters or invoices. (For companies or suppliers, you only have the tab **Address**)

Contact person					×
<u>C</u> ompany:	hote Hotel Sonne			<u>о</u> к	F12
<u>T</u> itle:	Eirst name:		2	Replace	F4
<u>N</u> ame:				Canaal	
<u>G</u> ender:	M <u>F</u> nct.: Club manager	-		<u>C</u> ancel	
<u>A</u> dd.info:					
<u>R</u> emark:					
Special salutat	ion:				
Phone:	Mobile:				
	<u>E</u> ax:				
<u>E</u> mail:					
<u>E</u> ntry:	26.09.18 <u>D</u> .o.b.: . <u>D</u> el:				
For this per	son send to this address:				
<u>C</u> ompany:	Company name				
<u>D</u> epartment:	Print: do not print	-			
<u>S</u> treet:	Street				
<u>P</u> ostcode:	1234 <u>C</u> ity: City				
<u>T</u> his is the cont	act person for: I letters invoices Select this contact person without any request Export this contact person additionally				

Convert ANSP to ALINK

If you want to create an Alink link from a contact person, first create the person to whom you want to link. Open the contact person data record with double-click and click on **Swap** F4.

Contact person		×
<u>C</u> ompany:	fuch Fuchsbau Hotel AG	<u>v</u> <u>o</u> k F2
<u>T</u> itle:	Eirst name: Ludwig	Replace F4
<u>N</u> ame:	Gangerer	
<u>G</u> ender:	M Enct.: Club manager	
<u>A</u> dd.info:		
<u>R</u> emark:		
<u>S</u> pecial saluta	tion:	
Phone:	Mobile:	
Tel priv:	Fax:	
Email:		
<u> </u>	26.09.18 <u>D</u> .o.b.: . <u>D</u> el:	
🔲 For this pe	rson send to this address:	
<u>C</u> ompany:	Company name	
<u>D</u> epartment:	Print: do not print	
<u>S</u> treet:	Street	
<u>P</u> ostcode:	1234 <u>C</u> ity: City	
This is the con	itact person for:	
	Select this contact person without any request	
	Export this contact person additionally	

The following window opens:

Transfer entries	×
Erom: 1 fuch Fuchsbau Hotel AG Image: Contact: Gangerer, Ludwig Select F3	✓ <u>O</u> K ズ <u>C</u> ancel
To: Image: Top Select Contact: Select	
Date from: to: 26.09.2018	
Delete old contact person if there is no date limit and change the person in 'To' to a linked contact person	

- 1) Hotel Fuchsbau with contact person Gangerer
- 2) is transferred to Ludwig Gangerer
- 3) Tick the box so that the old data record replaces the info *replaced* receives

ÄND (change to data record)

Entries with this category cannot be created manually. If something is changed in a personal data record, PC CADDIE automatically creates an entry. You can find this in the CRM window under the tab **Record changes tab.** Double-click to open the individual entries. Here you can see what has been changed and to what extent:

hanges to data					X
<u>F</u> ield:		<02		✓ <u>0</u> K	
changed to: 2			▲ ▼	X <u>C</u> ancel	
pre∨ious content:					
<u>C</u> hanged: 16.09	18, 15:25	<u>b</u> y: Teste	▼ er, Timo		

The categories "ANSL" (data record link) and "NEW" (new creation of the data record) are structured in the same way.

CRYPT (Crypt Info)

",CRYPT" requires a password in order to access the stored information. For example, if you want to store a password or a PIN code, you can protect it with a password using the CRYPT category. Firstly, you will be asked twice to enter a personal password:

Password	×
Please enter your password Password:	✓ <u>O</u> K ★ <u>C</u> ancel

After confirming with **OK** please enter the PIN code or any other sensitive information:

Information				×
<u>F</u> irm:	mugu Mustermar	nn, Gunter		
<u>C</u> ue:	Password PC CADDIE Online			X <u>C</u> ancel
mg@mail.c Password	com		×	
<u>C</u> olour: <u>D</u> ate:	0 26.09.2018 I private (F5)	© <u>T</u> ime: 15:26		
<u>C</u> reated:		<u>t</u> o: Timo Tester		
<u>C</u> hanged:		ţo:		

Confirm the entries with **OK** or Enter. From now on, you will only be able to access the entry using your password.

Please note the following important points:

- 1. Attachments can **not** be stored in encrypted form.
- 2. If you forget the password, there is **no** possibility of replacing it with a new one or looking it up somewhere.

SCAN (Scan)

If you have a functioning scanner, selecting this category will automatically start the scanning process. Read the chapter Automatic data import for more information.