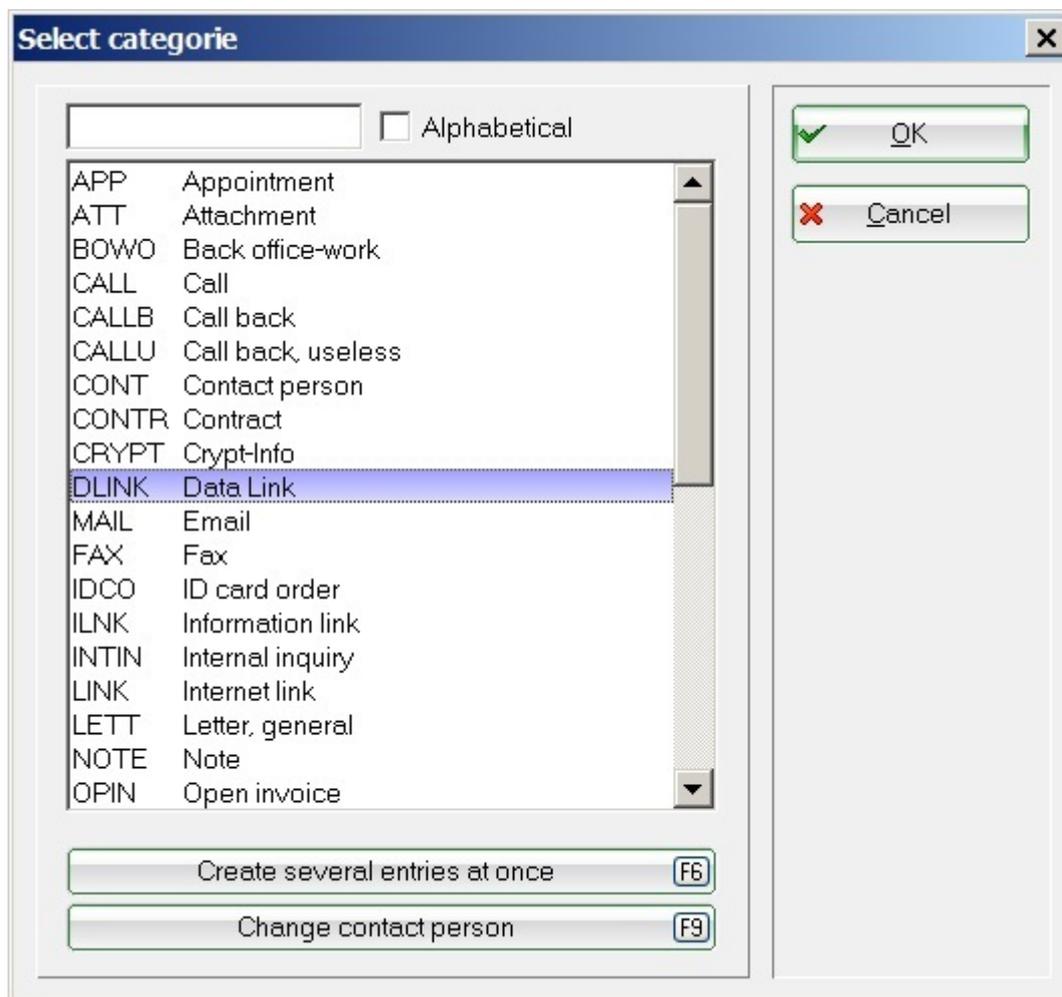


Special ticket categories

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*.



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

Data-set link

Appendant: Hotel Sonne

Info:

Address: Mustermann, Gunter

Colour: 

Created: by: Tester, Timo

Changed: by:

OK

Cancel

Person: Hotel Sonne

Name

Search abbr. No

Firm

Head person

Title

First name

Name

Status | 1st Addr. | Extras | payment | Infs | Memo

Department/Position Print with

Homeclub

Gender

Age group

Membership

Status

Unused

Additional info

D.O.B.

Entry

Resigned

Filter (F2)

New

Change (F1)

Delete (FS)

Copy (FS)

Account

Print (FB)

Export

SMS

Card

Close

Discount

Quit

Info: 2

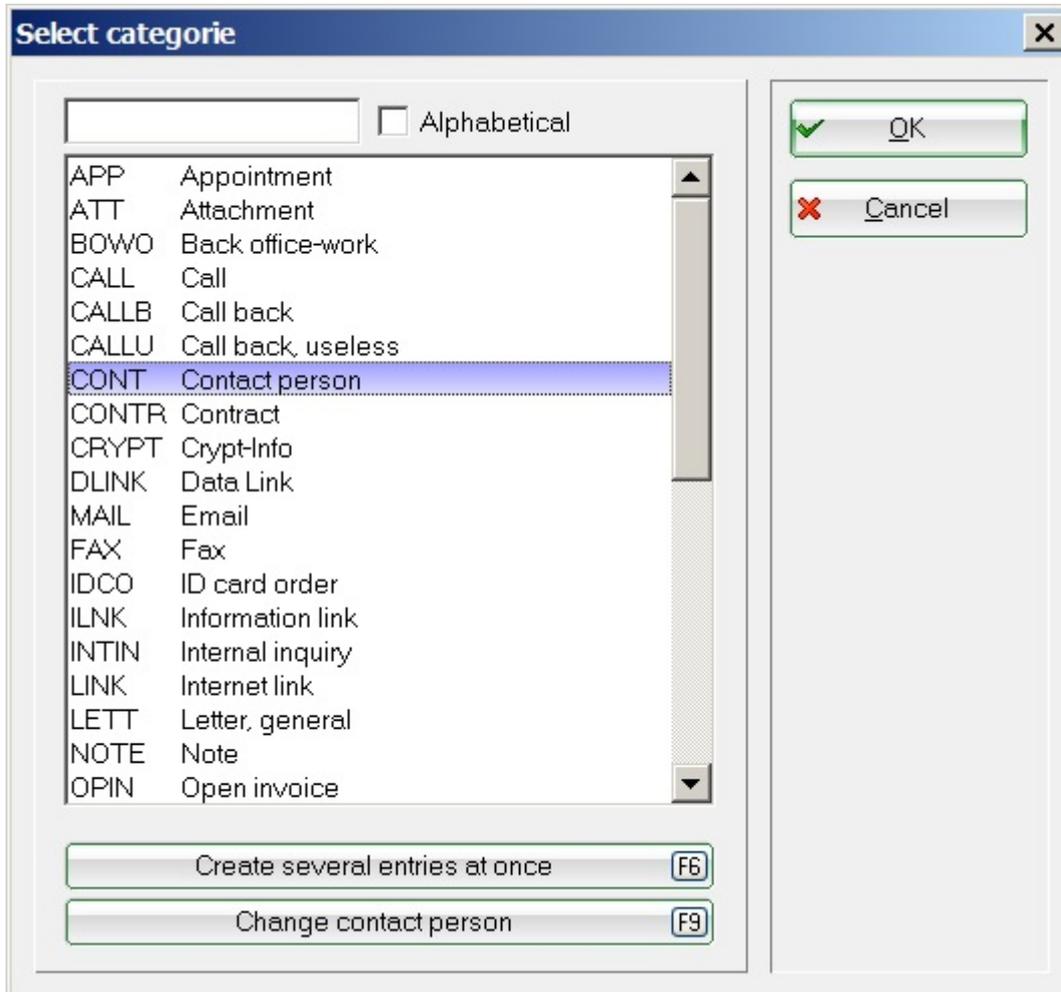
memo | todo | contact person | Contact | general overview | correspondence | E-Mail | Changes to the data | Search

✓ 26.09.18 14:58 NOTE note  Mustermann, Gunter

Options (F5) New (F6) Edit (F7)

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.



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
✕

Company: Hotel Sonne 🖨️ 📧

Title: First name:

Name:

Gender: Enc.:

Add.info: 🖨️

Remark:

Special salutation:

Phone: Mobile:

Tel.priv: Fax:

Email:

Entry: D.o.b.: Del:

For this person send to this address:

Company:

Department: Print:

Street:

Postcode: City:

This is the contact person for: letters invoices

Select this contact person without any request

Export this contact person additionally

✓ OK
F12

↻ Replace
F4

✗ Cancel

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 [X]

Company: fuch Fuchsbau Hotel AG [Print] [Info]

Title: [] First name: Ludwig

Name: Gangerer

Gender: M [v] Enc.: Club manager [v]

Add.info: [] [Print]

Remark: []

Special salutation: []

Phone: [] Mobile: []

Tel.priv: [] Fax: []

Email: []

Entry: 26.09.18 D.o.b.: [] Del: []

For this person send to this address:

Company: Company name

Department: [] Print: do not print [v]

Street: Street

Postcode: 1234 City: City

This is the contact person for: letters invoices

Select this contact person without any request

Export this contact person additionally

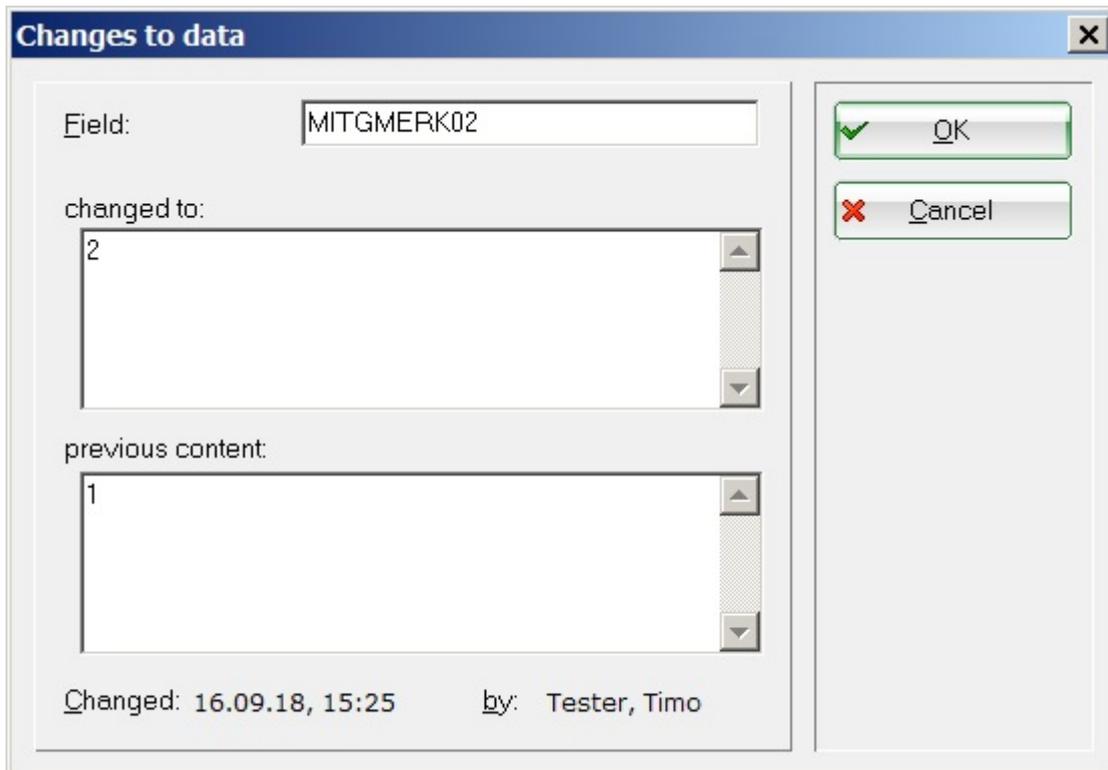
[OK F12] [Replace F4] [Cancel]

The following window opens:

- 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:



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:



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

Information [X]

Firm: Mustermann, Gunter [Print] [Copy]

Cue:

Colour: [Color Picker]

Date: Time:

private (F5)

Created: to: Timo Tester

Changed: to:

[OK] F12
[Cancel]

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.