

CRM in the person mask

If you open a person, the Person's Appointment window, which is used to store all information such as invoices, reminders, letters, emails etc. directly with this person, appears to the right of the main window. The big advantage is that you can save a lot of paper and space and put all the information bundled together with this person. Also record changes can be tracked, so that you know exactly who changed what for each person. Therefore, the password management makes sense, so you also see which employee has made changes regarding a customer. You can also create additional contacts.

The screenshot displays the CRM software interface. On the left, the 'Person: Tester, Timo' window shows a form with fields for Name, Search abbr., Title, First name, Name, and various membership and status options. On the right, the 'Info: 6' window shows a list of appointments with columns for date, time, and type. The appointments are:

Date	Time	Type	Description
27.04.18	14:23	PROJ	Complaint
27.04.18	14:32	PROJ	Birthday party
27.04.18	14:39	TODO	Request a quote
27.04.18	14:49	OPIN	Invoice 20180427
27.04.18	15:09	PROJCL	Opening tournament
27.04.18	15:18	PROJCL	Basic course

1. Memo: this tab gives you an overview of the last entered and edited tickets and projects. It can also be seen when the person was newly created, and which persons are included in the family summary.
2. Todo: all unfinished projects and tickets are summarized here.
3. Contact person: if the selected person is linked to other people, you will see this in this tab.
4. Contact:
5. General overview: all entries stored for this person are listed here.
6. Correspondence: all letters sent/received by post are stored here.
7. E-Mail: all stored e-mails from and to this person are visible here.
8. Changes to the data: All changes in the personal mask and all automatic entries that are generated at tournament registration (10) and un-registration (11) (An- and Abmeldungen in German) are documented and stored here.
9. Search: Search with specific keywords for the desired entry.

Info: 33

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

✓	20.07.16	12:34	APP	OK:PC CADDIE Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (M
✓	20.07.16	15:38	TURAB	OK:20.07.16 PC CADDIE Cup / CD1 / @TURN:000015-01-1-00000022- 1 0
✓	21.07.16	11:54	TURAN	OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (M
✓	21.07.16	11:54	TURAN	OK:Monthly tournament / Sie wurden erfolgreich angemeldet. / Tester, Tin
✓	21.07.16	11:54	TURAN	ERR:PCC CUP / Anmeldungen derzeit gesperrt! / Tester, Timo (Member) B
✓	21.07.16	11:55	TURAB	OK:21.07.16 Gentlemen day / MTR.a / @TURN:000019-01-1-00000024- 1
✓	21.07.16	11:55	TURAB	OK:21.07.16 Monthly tournament / MTR.a / @TURN:000020-01-1-00000002
✓	21.07.16	11:57	APP	OK:Monthly tournament / 24.09.18-14:03-tito: von test auf VORS umgestel
✓	21.07.16	11:57	TURAN	OK:Gentlemen day / Sie wurden erfolgreich angemeldet. / Tester, Timo (M
✓	21.07.16	16:35	APP	OK:21.07.16 Monthly tournament
✓	28.09.16	09:56	APP	OK:1. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Gues
✓	28.09.16	09:56	APP	OK:2. Jura Cup / 27.04.18-15:06-tito: von test auf VORS umgestellt / -----
✓	28.09.16	09:56	TURAN	OK:5. Jura Cup / Sie wurden erfolgreich angemeldet. / Tester, Timo (Mem
✓	27.04.18	14:23	PROJ	Complaint
✓	27.04.18	14:31	TODO	Order cakes
✓	27.04.18	14:32	PROJ	Birthday party
→	27.04.18	14:39	TODO	Request a quote
✓	27.04.18	14:42	TODO	Send invitations
✓	27.04.18	14:46	TODO	Request a quote / (27.04.18-14:46) / -----
✓	27.04.18	14:47	LETT	Serial letter for golfers
✓	27.04.18	14:49	OPIN	Invoice 20180427
✓	27.04.18	15:09	PROJCL	Opening tournament
✓	27.04.18	15:10	APP	OK:27.04.18 Opening tournament / SPED-tito / @TURN:000037-01-1-00000
✓	27.04.18	15:18	PROJCL	Basic course
✓	27.04.18	15:24	TTB	
✓	09.08.18	13:20	TURAN	ERR:18004 / Anmeldungen derzeit gesperrt! / Tester, Timo (Member) BUC
✓	24.09.18	13:54	TURAN	OK:Basic Tournament / Sie wurden erfolgreich angemeldet. / Tester, Timo
✓	24.09.18	14:27	CALLU	reason

↑ Tester, Timo

Options Strg F5 + New Strg F6 ○ Edit Strg F7

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