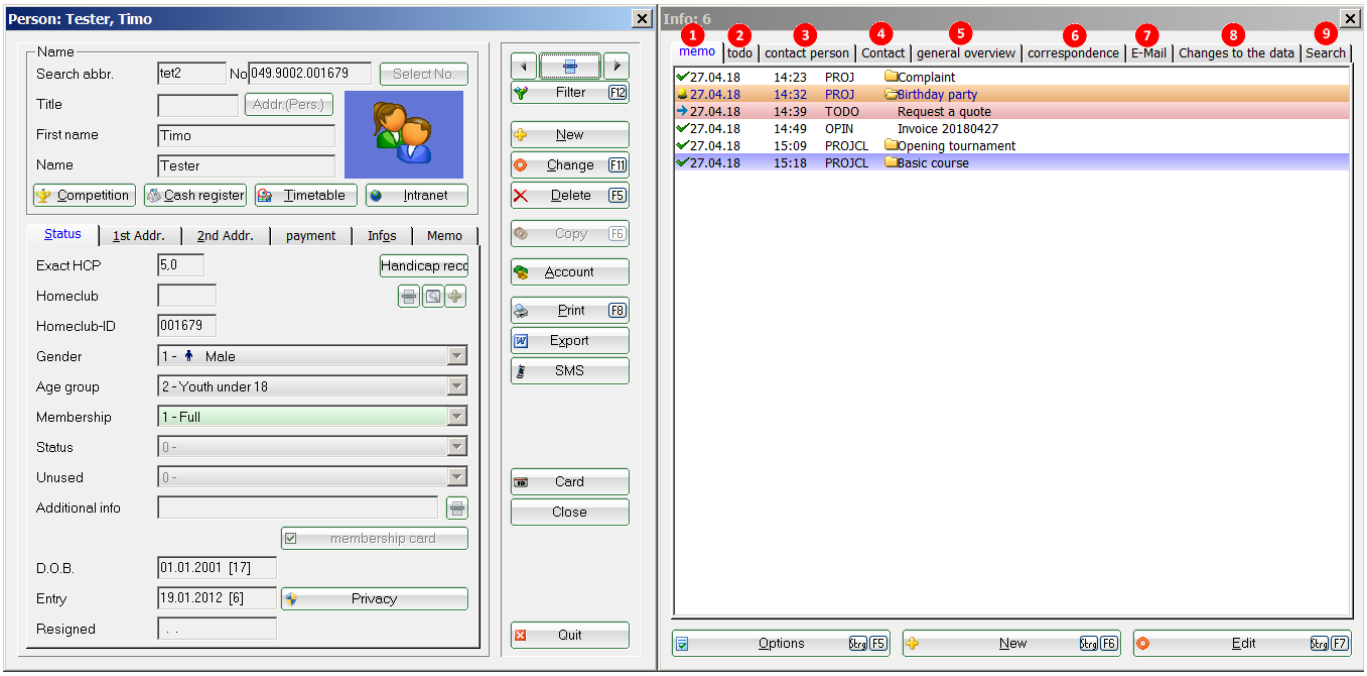
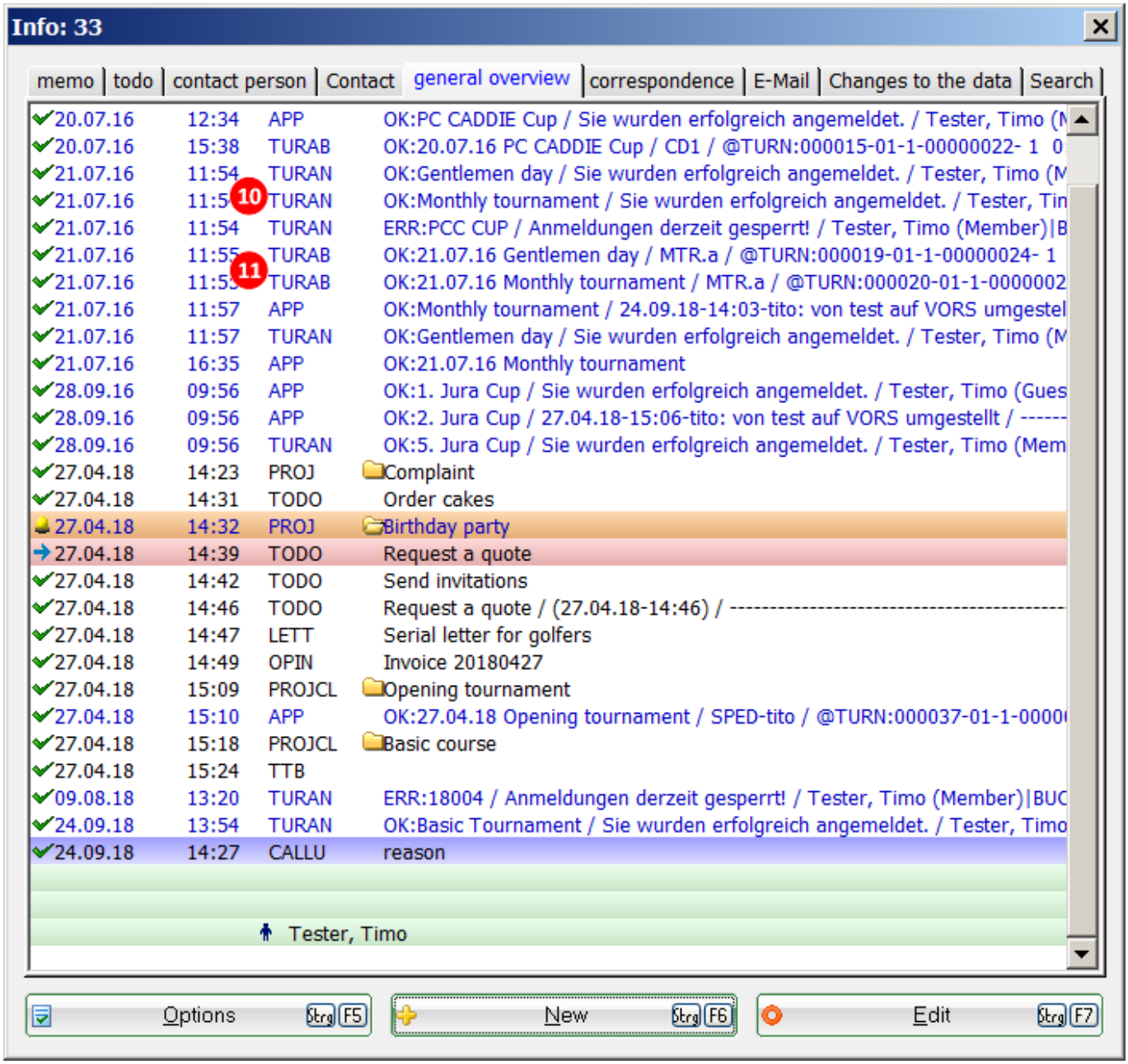
CRM in the person mask

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.



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.



Back to the Overview.