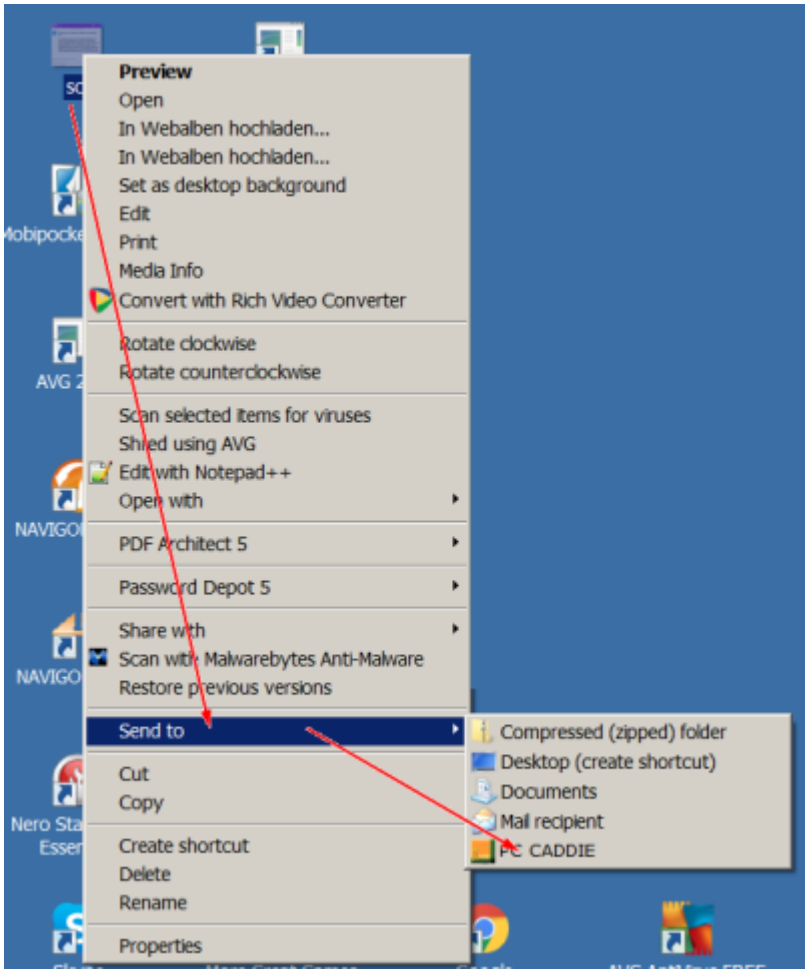
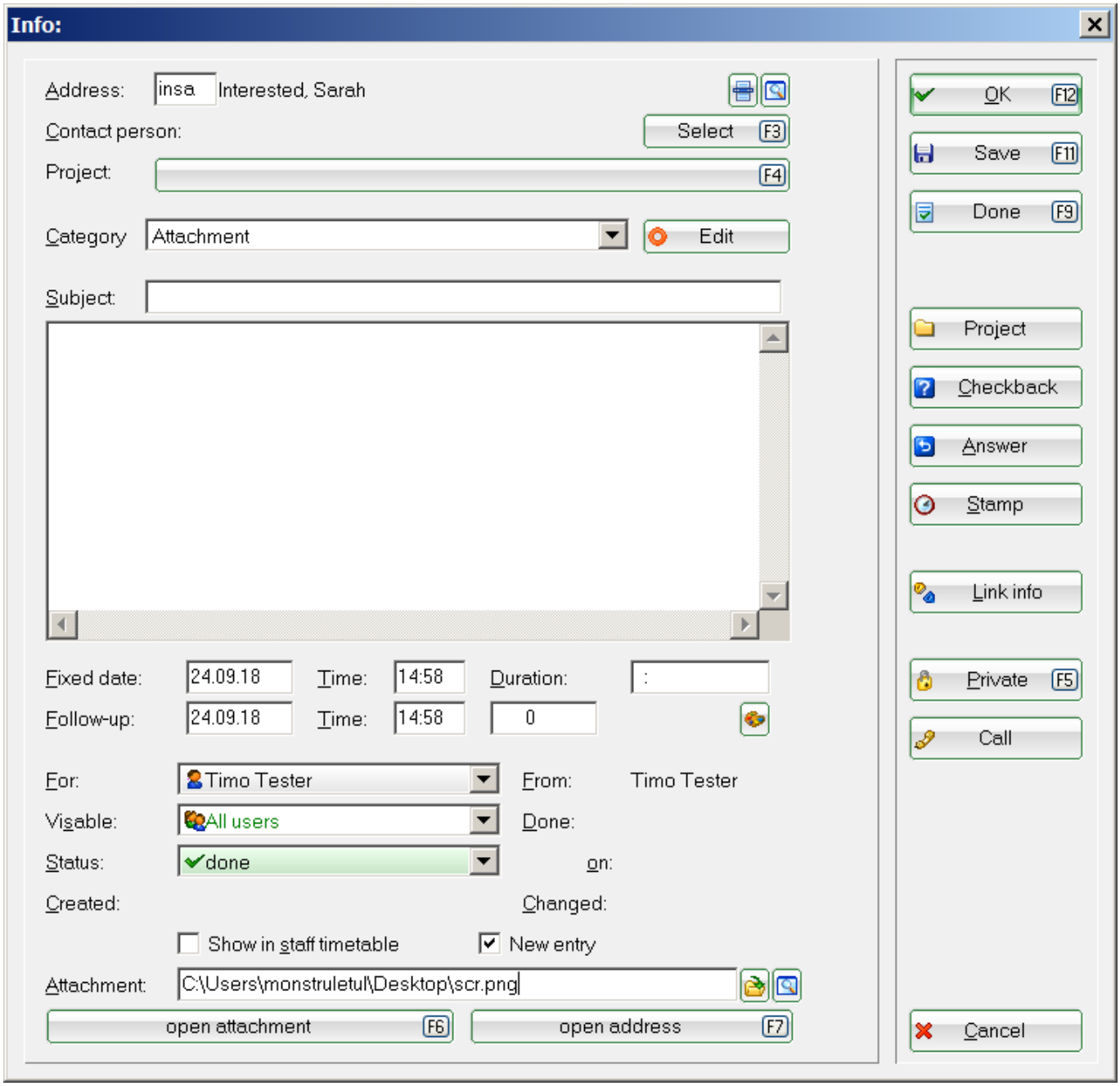
Send document to CRM

Right-click a document that you want to send to PC CADDIE using Explorer or My computer. Then select the option ***Send to PC CADDIE:***



The following window opens in PC CADDIE:



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 stage or are just starting out, you simply have to open the affected folder and PC CADDIE and then import the documents into the person's mask by drag and drop.

HINT: If a document (for example, the contract of a member) is stored according to the schema Last name, First name-Subject (Schmedding, Benedict-contract.doc), PC CADDIE searches for the appropriate person directly after the import and inserts the subject accordingly.