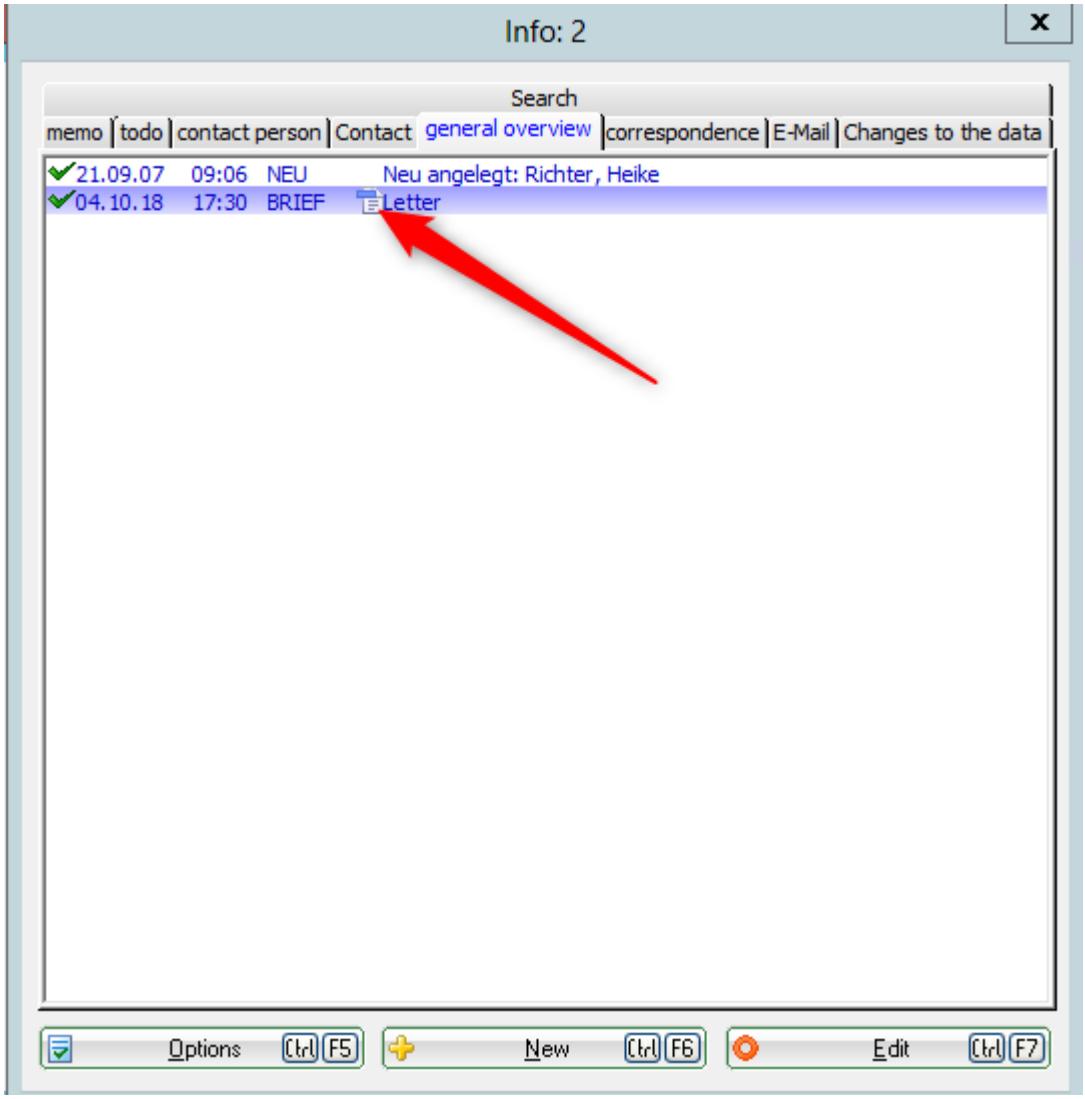
PC CADDIE and Outlook

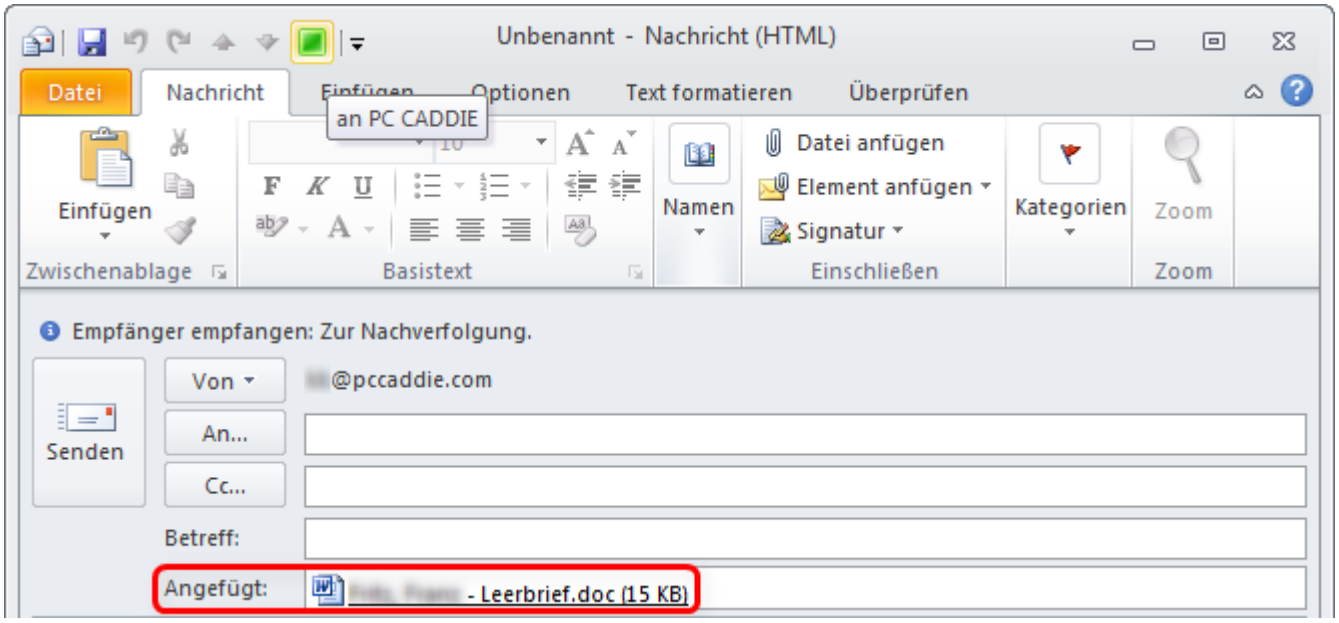
Each attachment in the CRM\DMS can be easily copied as an attachment in Outlook:

For example, do you want to send a letter via e-mail?

Move the cursor to the line where the letter is located and press Ctrl + C for Copy.

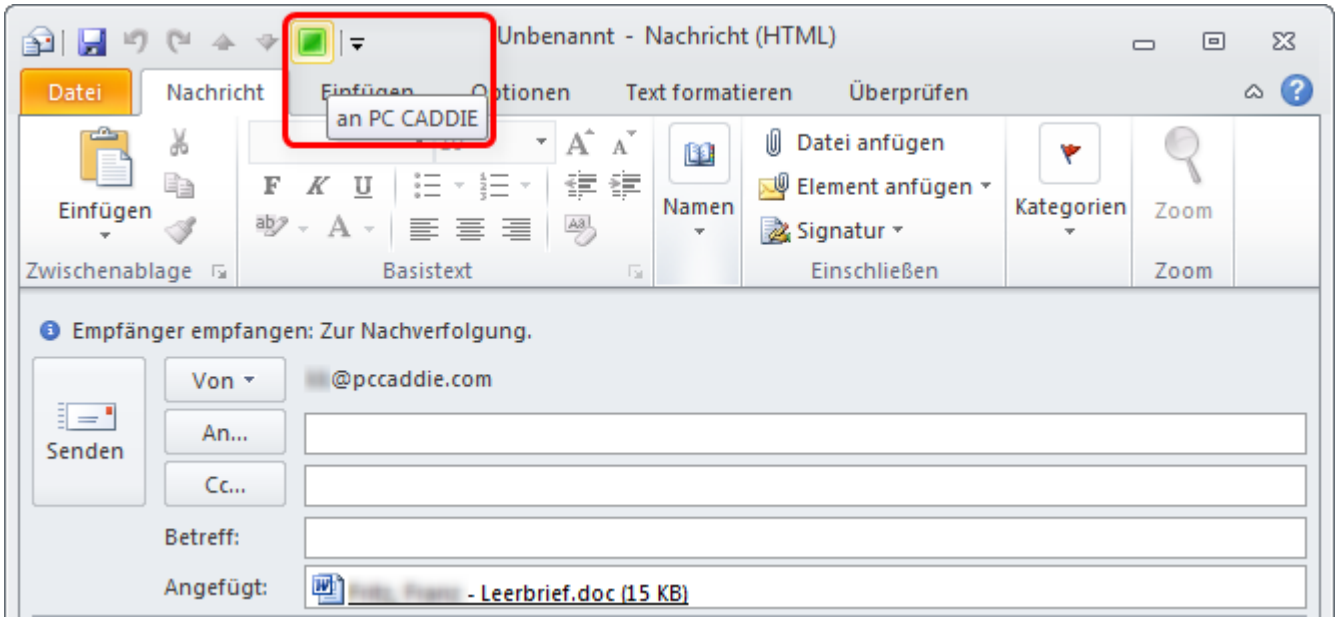


Then switch to Outlook and move the cursor to the actual text field. Ctrl + V automatically attaches the document:

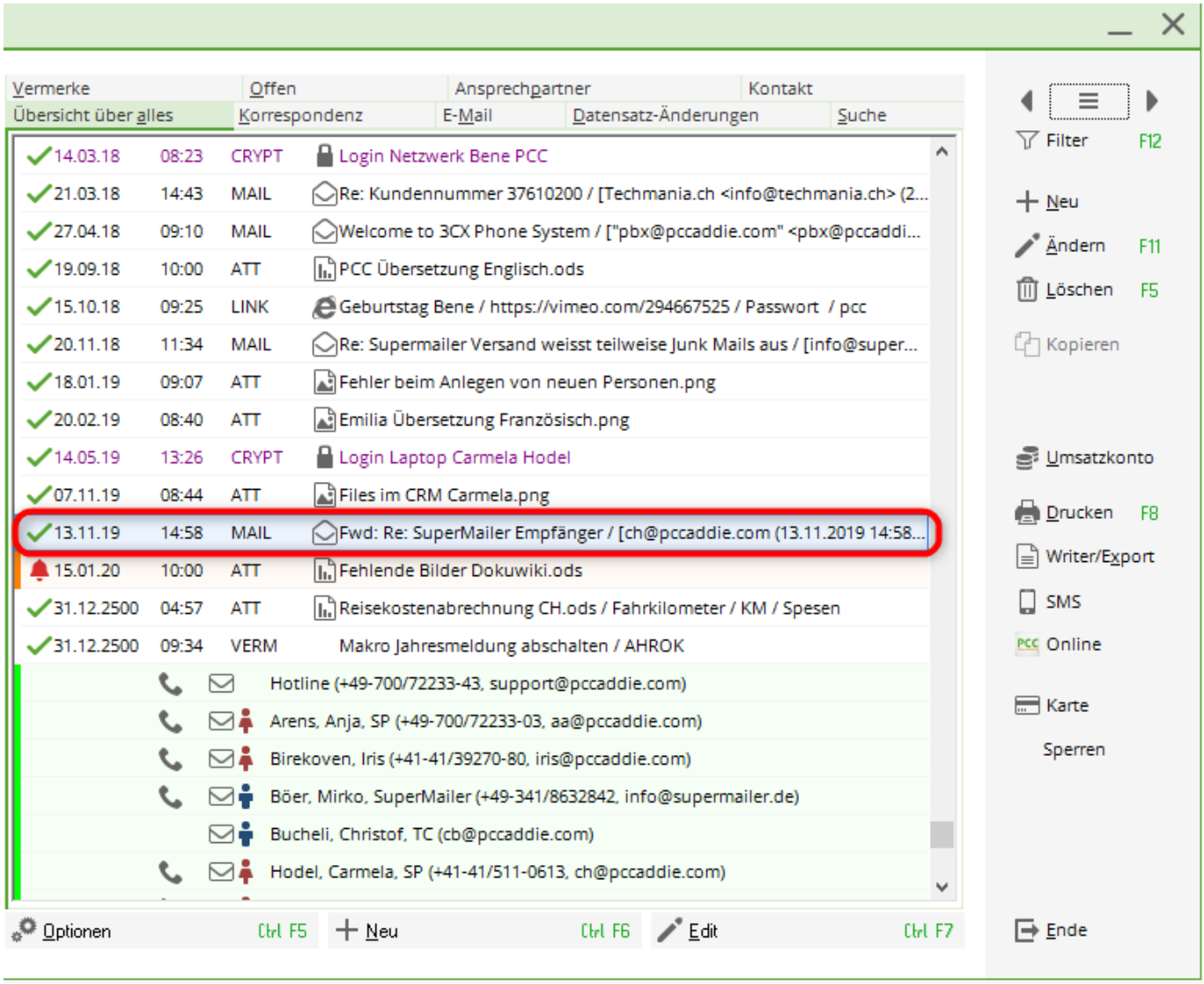


You can also press Ctrl + V in Explorer, then the document will be copied to the desired location in Explorer. Holding down the control key (Ctrl) allows you to select and copy several entries in the customer info windows.

HINT: A macro can be used to connect PC CADDIE to Outlook. When doing so, an additional button with the name „to PC CADDIE“ is installed in Outlook. This allows you to save incoming and outgoing emails in the CRM\DMS under the appropriate persons. Please contact PC CADDIE Support to set up the Outlook macro.



This mail is then sent to „PC CADDIE“ at the push of a button and at the same time filed in CRM\DMS:



Back to the Overview.