

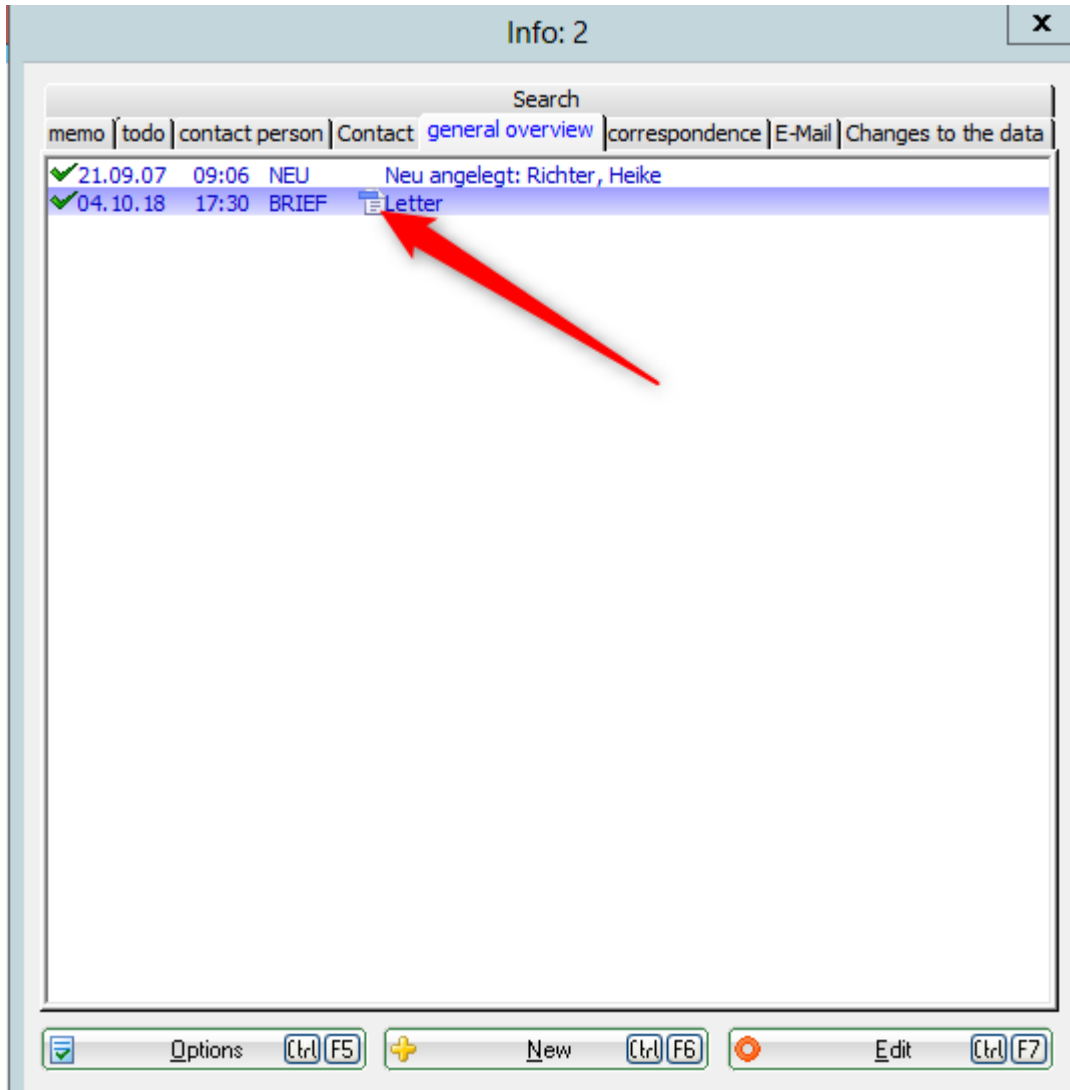
PC CADDIE and Outlook

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

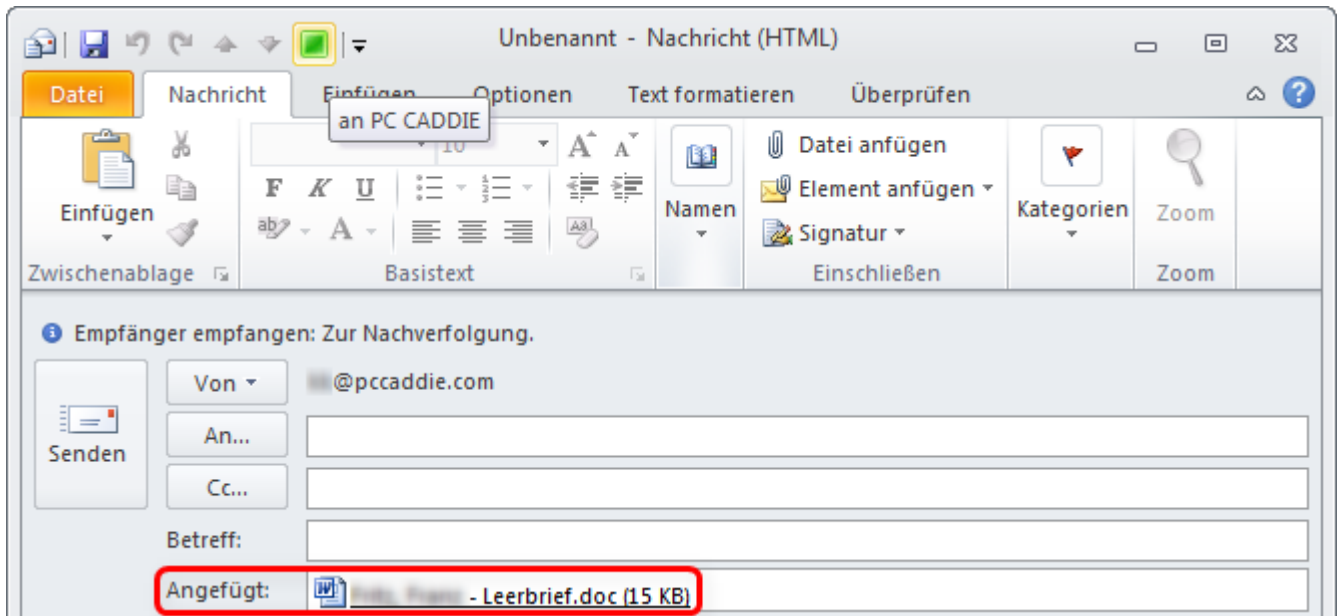


For example, do you want to send a letter via e-mail?

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

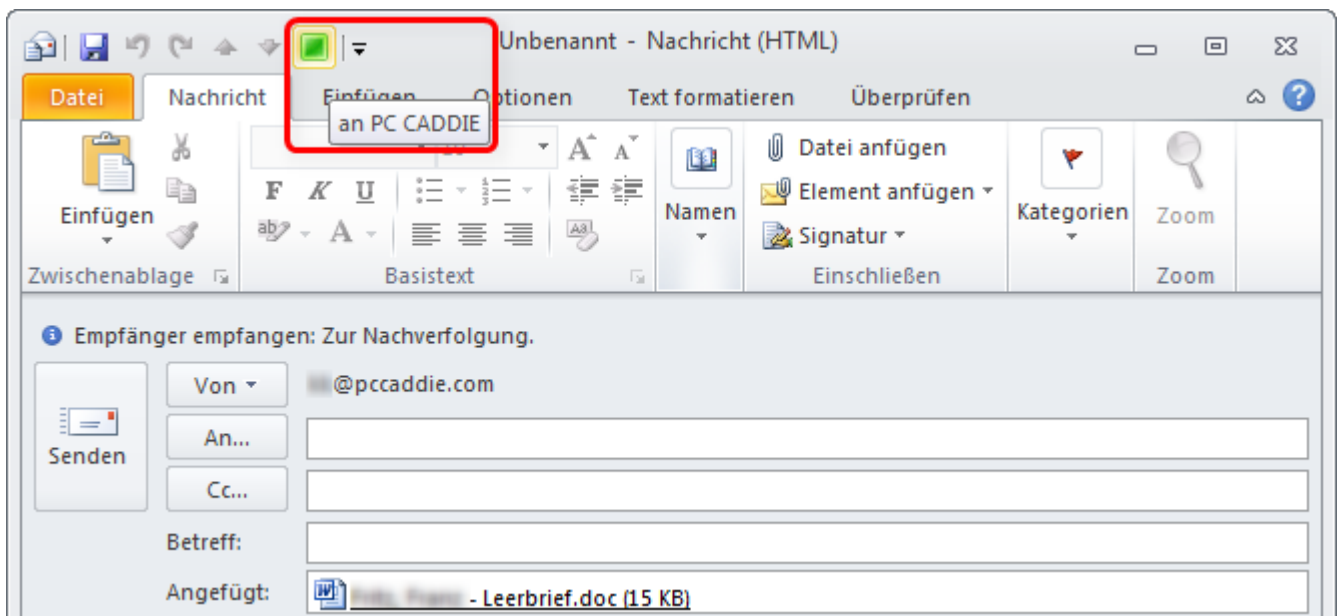


Then switch to Outlook and move the cursor to the actual text field. Ctrl + V automatically attaches the document:



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:

Vermerke	Offen	Ansprechpartner	Kontakt
Übersicht über alles	Korrespondenz	E-Mail	Datensatz-Änderungen
Suche			
✓ 14.03.18	08:23	CRYPT	🔒 Login Netzwerk Bene PCC
✓ 21.03.18	14:43	MAIL	✉️ Re: Kundennummer 37610200 / [Techmania.ch <info@techmania.ch> (2...
✓ 27.04.18	09:10	MAIL	✉️ Welcome to 3CX Phone System / ["pbx@pccaddie.com" <pbx@pccaddi...
✓ 19.09.18	10:00	ATT	📎 PCC Übersetzung Englisch.ods
✓ 15.10.18	09:25	LINK	🌐 Geburtstag Bene / https://vimeo.com/294667525 / Passwort / pcc
✓ 20.11.18	11:34	MAIL	✉️ Re: Supermailer Versand weiss teilweise Junk Mails aus / [info@super...
✓ 18.01.19	09:07	ATT	📎 Fehler beim Anlegen von neuen Personen.png
✓ 20.02.19	08:40	ATT	📎 Emilia Übersetzung Französisch.png
✓ 14.05.19	13:26	CRYPT	🔒 Login Laptop Carmela Hodel
✓ 07.11.19	08:44	ATT	📎 Files im CRM Carmela.png
✓ 13.11.19	14:58	MAIL	✉️ Fwd: Re: SuperMailer Empfänger / [ch@pccaddie.com (13.11.2019 14:58...
🔔 15.01.20	10:00	ATT	📎 Fehlende Bilder Dokuwiki.ods
✓ 31.12.2500	04:57	ATT	📎 Reisekostenabrechnung CH.ods / Fahrkilometer / KM / Spesen
✓ 31.12.2500	09:34	VERM	Makro Jahresmeldung abschalten / AHROK
		☎️	📧 Hotline (+49-700/72233-43, support@pccaddie.com)
		☎️	📧 👤 Arens, Anja, SP (+49-700/72233-03, aa@pccaddie.com)
		☎️	📧 👤 Birekoven, Iris (+41-41/39270-80, iris@pccaddie.com)
		☎️	📧 👤 Böer, Mirko, SuperMailer (+49-341/8632842, info@supermailer.de)
			📧 👤 Bucheli, Christof, TC (cb@pccaddie.com)
		☎️	📧 👤 Hodel, Carmela, SP (+41-41/511-0613, ch@pccaddie.com)

Filter F12

+ Neu

✎ Ändern F11

🗑 Löschen F5

📄 Kopieren

📊 Umsatzkonto

🖨 Drucken F8

📄 Writer/Export

📱 SMS

🌐 PCC Online

🗺 Karte

🔒 Sperren

➡ Ende

⚙ Optionen Ctrl F5 + Neu Ctrl F6 ✎ Edit Ctrl F7

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