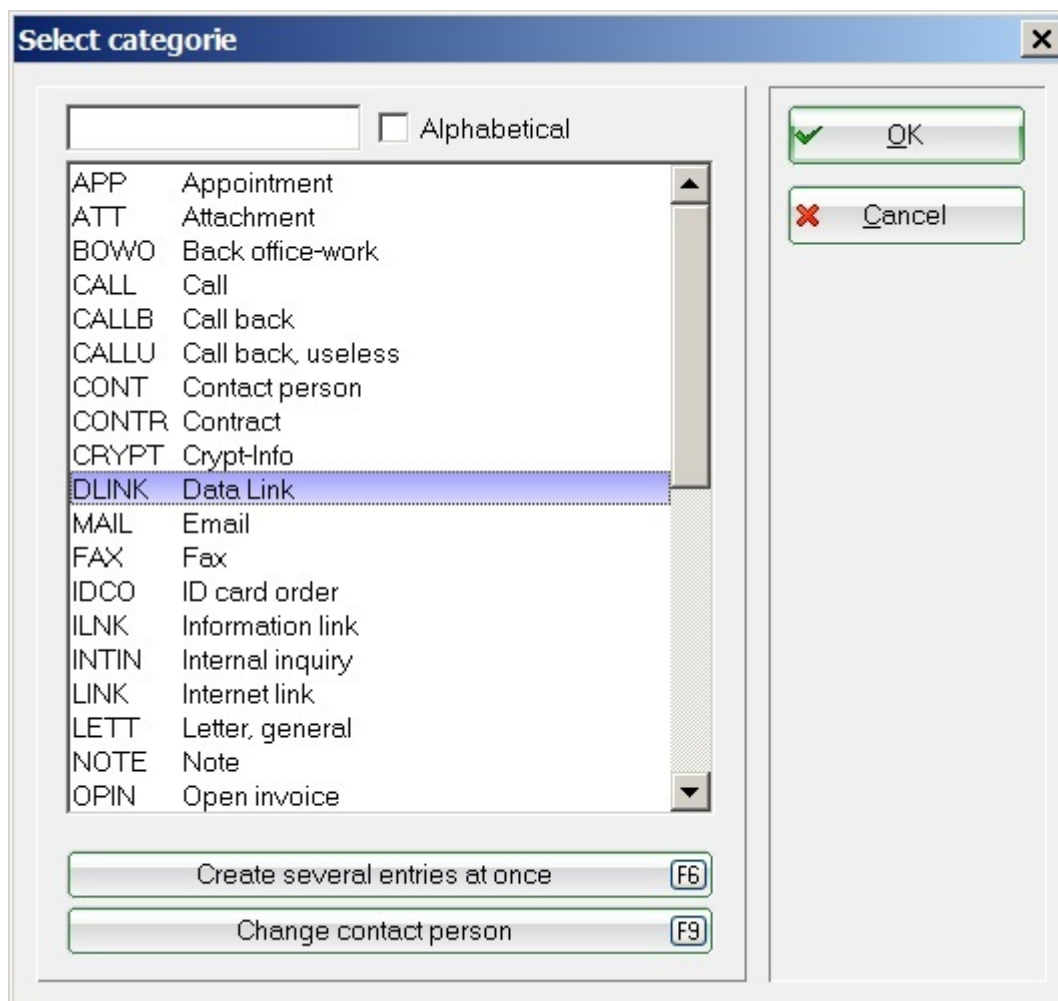


Special ticket categories

Brief explanation of some categories

DLINK (Data link)

The **DLINK** category is used when you want to associate a person with a company or another person. It is usually not the contact person of a company, but maybe an employee or a reference person. You will then see the summary in the person mask at first glance. First of all, check whether the person you want to link to is stored in PC CADDIE or has yet to be created. Then click on the button NEW in the CRM/DMS window of the company and select the category *DLINK*.




For address, select the person you want to associate with the company.

Data-set link

Appendant: Hotel Sonne

Info:

Address: Mustermann, Gunter

Colour: 

Created: by: Tester, Timo

Changed: by:

OK

Cancel

Person: Hotel Sonne

Name

Search abbr. No

Firm

Head person

Title

First name

Name

Status | 1st Addr. | Extras | payment | Infs | Memo

Department/Position Print with

Homeclub

Gender

Age group

Membership

Status

Unused

Additional info

D.O.B.

Entry

Resigned

Filter (F2)

New

Change (F1)

Delete (FS)

Copy (FS)

Account

Print (FB)

Export

SMS

Card


Close

Discount

Quit

Info: 2

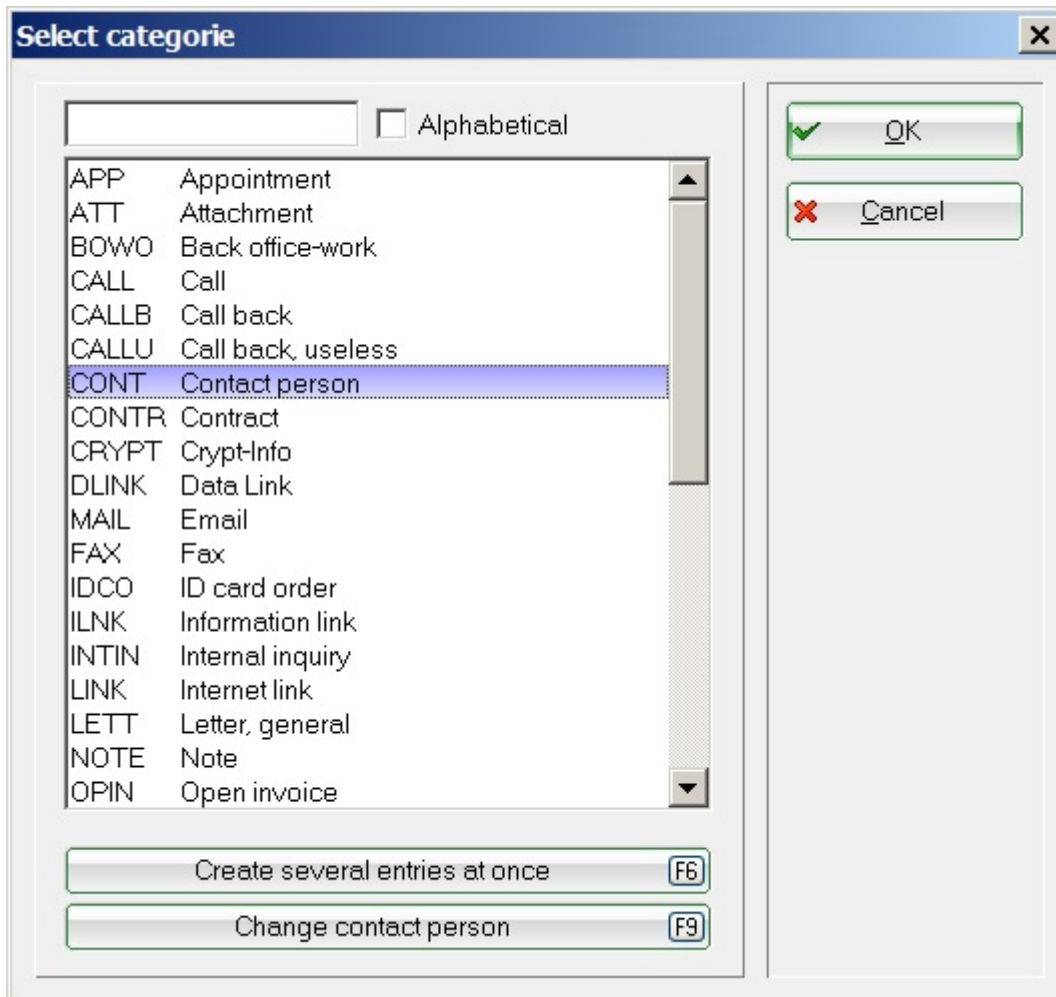
memo | todo | contact person | Contact | general overview | correspondence | E-Mail | Changes to the data | Search

✓ 26.09.18 14:58 NOTE note  Mustermann, Gunter

Options (F5) New (F6) Edit (F7)

CONT (Contact person)

If you need contact persons distinct from individual persons in your system, you can also set contact persons directly at the company. Select the category contact person.



You can now enter all information about this contact person.

It is very helpful for the contact person function, that you also enter a different address, which is used, for example, for letters or invoices. (For companies or suppliers you only have the tab **Address** in the personal mask).

Contact person
✕

Company: Hotel Sonne 🖨️ 📧

Title: First name:

Name:

Gender: Enc.:

Add.info: 🖨️

Remark:

Special salutation:

Phone: Mobile:

Tel.priv: Fax:

Email:

Entry: D.o.b.: Del:

For this person send to this address:

Company:

Department: Print:

Street:

Postcode: City:

This is the contact person for: letters invoices

Select this contact person without any request

Export this contact person additionally

✔️ OK
F12

🔄 Replace
F4

❌ Cancel

Convert CONT into DLINK

If you wish to create an DLINK from a contact, first create the person you want to link to. Open the contact record with a double click and click **Swap** F4.

Contact person [X]

Company: fuch Fuchsbau Hotel AG [Print] [Info]

Title: [] First name: Ludwig

Name: Gangerer

Gender: M [v] Enc.: Club manager [v]

Add.info: [] [Print]

Remark: []

Special salutation: []

Phone: [] Mobile: []

Tel.priv: [] Fax: []

Email: []

Entry: 26.09.18 D.o.b.: [] Del: []

For this person send to this address:

Company: Company name

Department: [] Print: do not print [v]

Street: Street

Postcode: 1234 City: City

This is the contact person for: letters invoices

Select this contact person without any request

Export this contact person additionally

[OK F12] [Replace F4] [Cancel]

The following window opens:

Transfer entries

From: **1** fuch Fuchsbau Hotel AG
 Contact: Gangerer, Ludwig

To: **2** fuch Fuchsbau Hotel AG
 Contact:

Date from: .. to: 26.09.2018

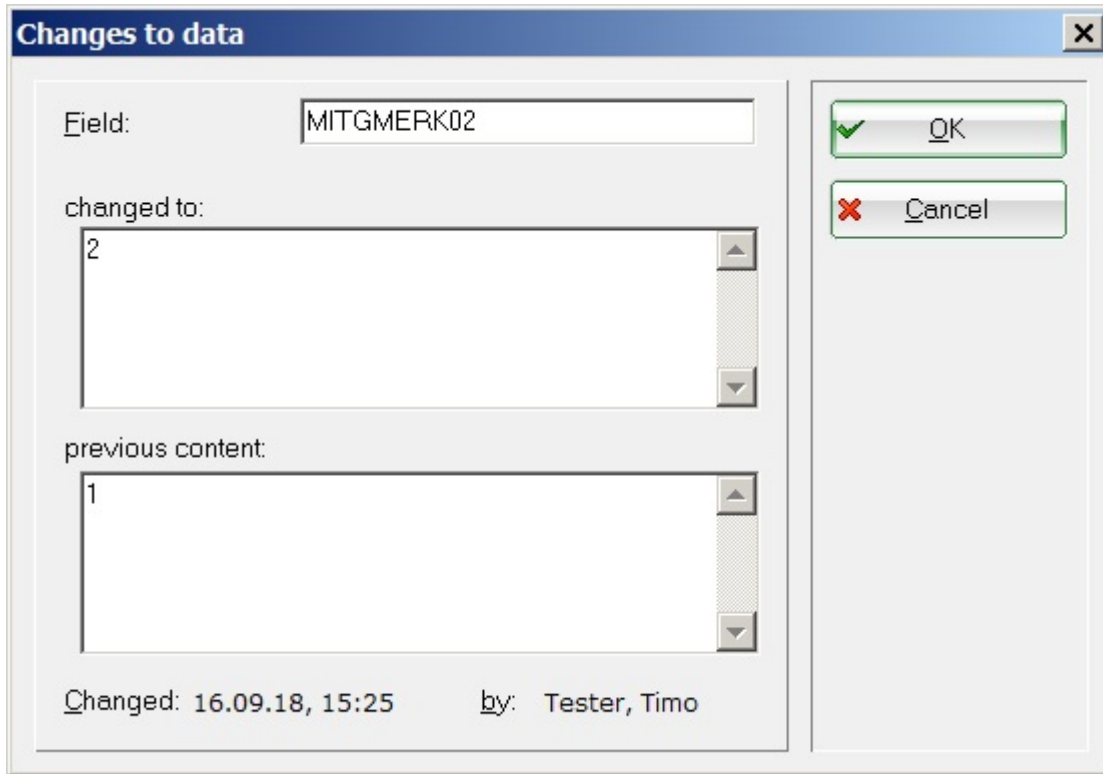
Delete old contact person if there is no date limit
 and change the person in 'To' to a linked contact person **3**

OK
 Cancel

- 1) Hotel Fuchsbau with contact person Gangerer
- 2) is transferred to Ludwig Gangerer;
- 3) Check the box so that the old record receives the updated info.

PCHG (Change to the record)

Entries with this category cannot be created manually. If something changes in a personal record, PC CADDIE automatically creates an entry. These can be found in the CRM window under the tab **Data record changes**. Double-click to open the individual entries. Here you can see what has been changed and how:



The categories „DLINK“ (Data link) and „NEW“ (New record) are constructed in the same way.

CRYPT (Crypt Info)

„CRYPT“ requires a password to access the stored information. If, for example, you want to enter a password or a PIN code, you can password protect it with the category CRYPT. First, you will be prompted twice to enter a personal password:



After confirmation with **OK**, please enter the PIN code or any other information worthy of protection:

Information [X]

Firm: Mustermann, Gunter [Print] [Refresh]

Cue:

mgj@mail.com
Password

Colour: [Color Picker]

Date: Time:

private (F5)

Created: to: Timo Tester

Changed: to:

[OK] [F12]

[Cancel]

Confirm the entries with **OK** or Enter. From now on you will only be able to access the entry via your password.

Please note the following important points:

1. Attachments **cannot** be stored or encrypted.
2. If you forget the password, there is **no** possibility to replace it with a new one or look it up somewhere.

SCAN (Scan)

Selecting this category automatically starts scanning, if you have a working scanner. Read more in the chapter [Automatic data import](#).