

Save calls in CRM

TIP If your telephone system has a TAPI interface, you can record your incoming calls in PC Caddie in just a few steps:

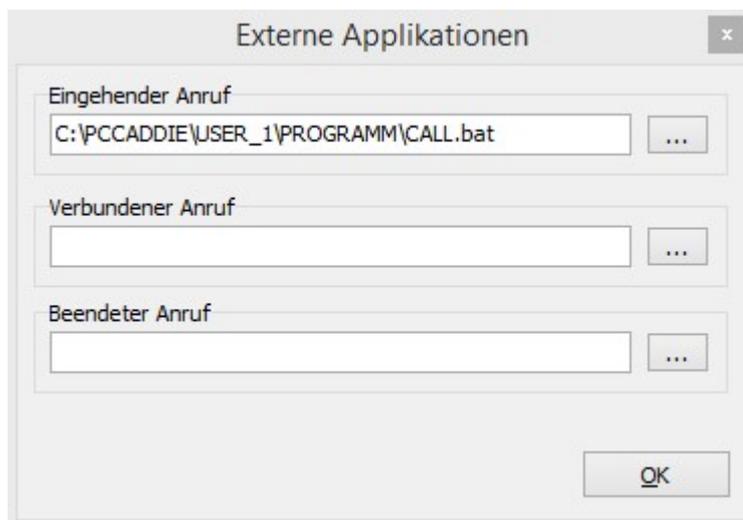
First download and install the external „Phoner“ software. [Download](#)

Access to the telephone system must be installed during the installation routine. IMPORTANT: The Phoner programme should be able to receive and make calls after correct installation!

Now download the file [CALL.bat](#) file and save it in the local PC Caddie directory. (Normally C:\PCCADDIE\USER_1\PROGRAMME)

CALL.bat contains the call for PC Caddie with the telephone number to be called. IMPORTANT: If PC Caddie is not started under C:\PCCADDIE\USER_1\PROGRAMM, the path in the file must be adjusted.

The CALL.bat file can now be selected from the PC Caddie folder in the Phoner software under → Options → External application:



Once these steps have been carried out, calls can be opened in PC Caddie in CRM.

Nachrichten-Liste ? [Grid Icon] [Minimize Icon] [Maximize Icon] [Close Icon]

	16.11. 11:10		Anruf von: 700 auf Christof Bucheli (298)	^
	16.11. 14:07		Anruf von: Carmela Hodel (213) auf Christof Bu	
	17.11. 15:43		Anruf von: Rosemarie Quickert (224) auf Christo	
	17.11. 15:57		Anruf von: Carmela Hodel (213) auf Christof Bu	
	17.11. 16:12		Anruf von: Carmela Hodel (213) auf Christof Bu	
	18.11. 09:12		Anruf von: Stefanie Stökle (223) auf Christof Bu	
	18.11. 09:34		Anruf von: Stefanie Stökle (223) auf Christof Bu	
	18.11. 14:22		Anruf von: Rachid El Ayoubi (275) auf Christof E	
	23.11. 16:12		Anruf von: Carmela Hodel (213) auf Christof Bu	
	23.11. 16:34		Anruf von: Carmela Hodel (213) auf Christof Bu	
	23.11. 16:52		Anruf von: Carmela Hodel (213) auf Christof Bu	v

Anhang öffnen **F6** Zeile bearbeiten **F7**

TAPI-Konfiguration Anruf Datenbank

The only thing missing now is the category, e.g. telephone call, to automatically open the ticket for incoming calls.

Info:
— □ ×

Kontakt: Schmedding, Benedikt ☰ ...

Ansprechpartner: ▶ Wahl F3

Projekt: F4

Kategorie: ✎ Edit

Betreff:

Anruf von 0213455678 auf MSN:

Termin: **Zeit:** **Dauer erwartet:**

Erinnerung: **Zeit:** **Dauer:**

Für: Von: Carmela

Sichtbar: erledigt:

Status: am:

Erstellt: Geändert: 01.07.20, 09:21:41

Im **Mitarbeiterplan** anzeigen Neuer Eintrag

Anhang: ☰ ...

Farbe: ▶ Anhang öffnen F6 ▶ Kontakt öffnen F7

✓ OK F12

☰ Sichern F11

⚙ Erledigt F9

📁 Projekt

? Rückfrage

↩ Antwort

🕒 Stamp

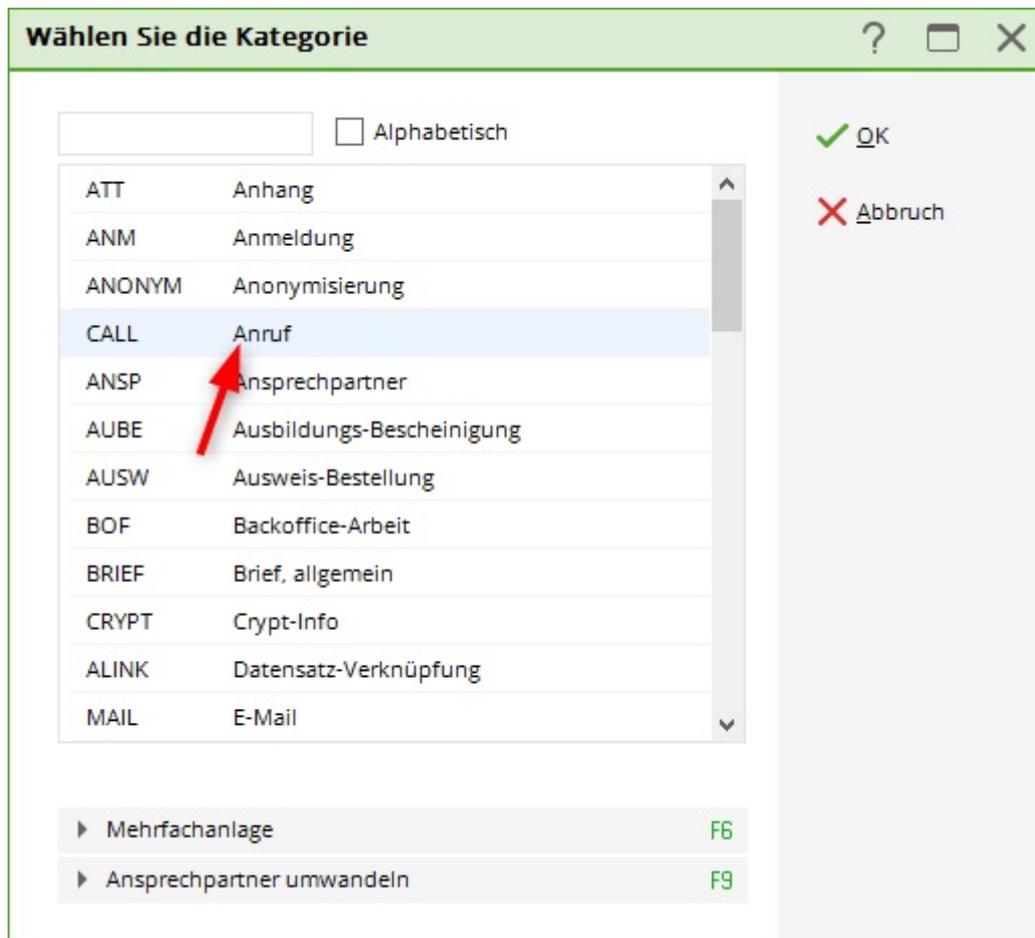
🔗 Info-Link

🔒 Privat F5

☎ Anruf

✗ Abbruch

If you click on New in the category selection and enter CALL as the short code and e.g. Telephone call as the description, PC Caddie will open the ticket directly.



From now on, a CRM entry will open for every call when the Phoner software and PC Caddie are started. TIP If the phone number is stored correctly in PC Caddie, the call is even assigned directly to the correct contact person.