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:

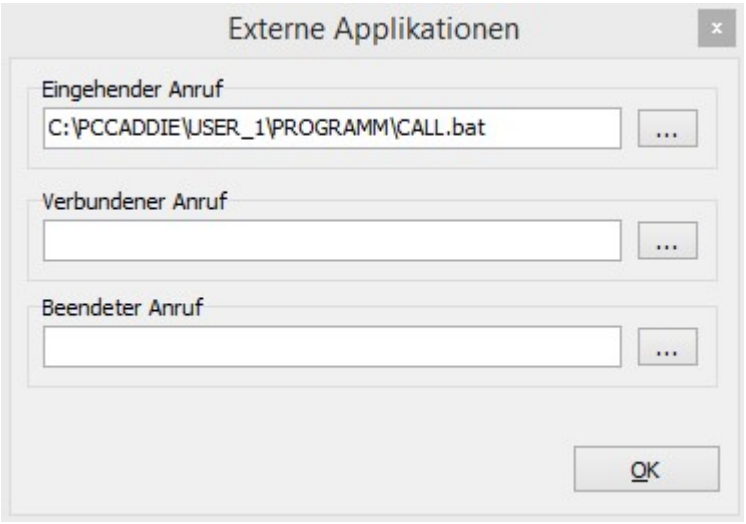
First download and install the external „Phoner“ software. Download

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!

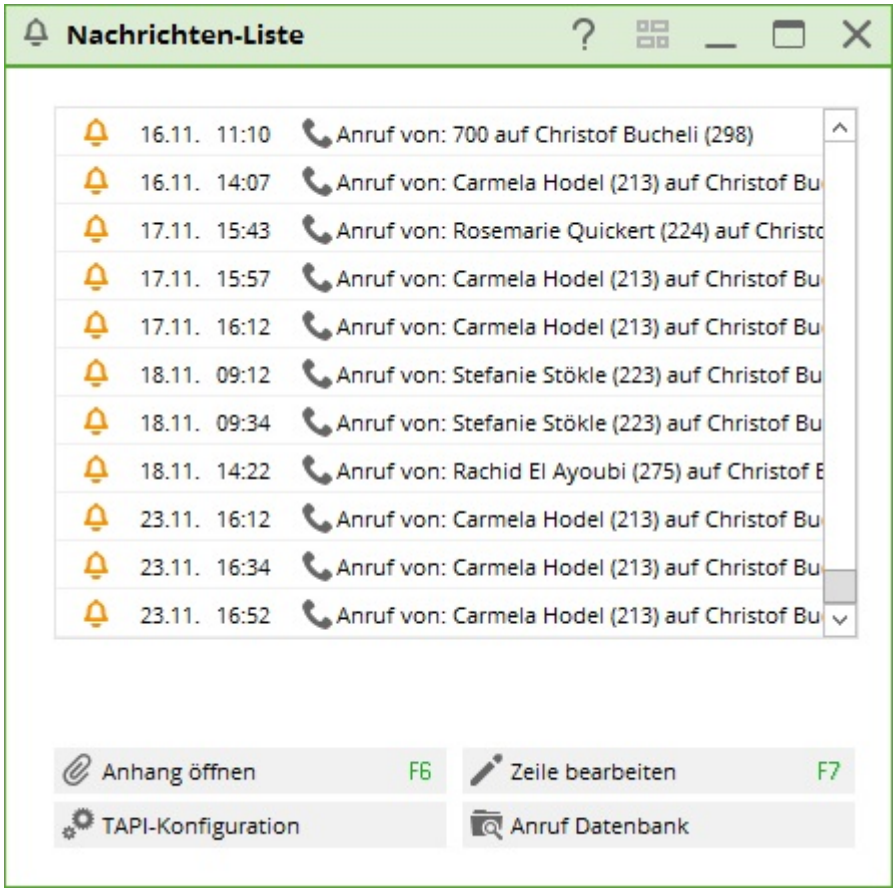
Now download the file </ignore>CALL.bat file and save it in the local PC Caddie directory. (Normally C:\PCCADDIE\USER_1\PROGRAMME)

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.

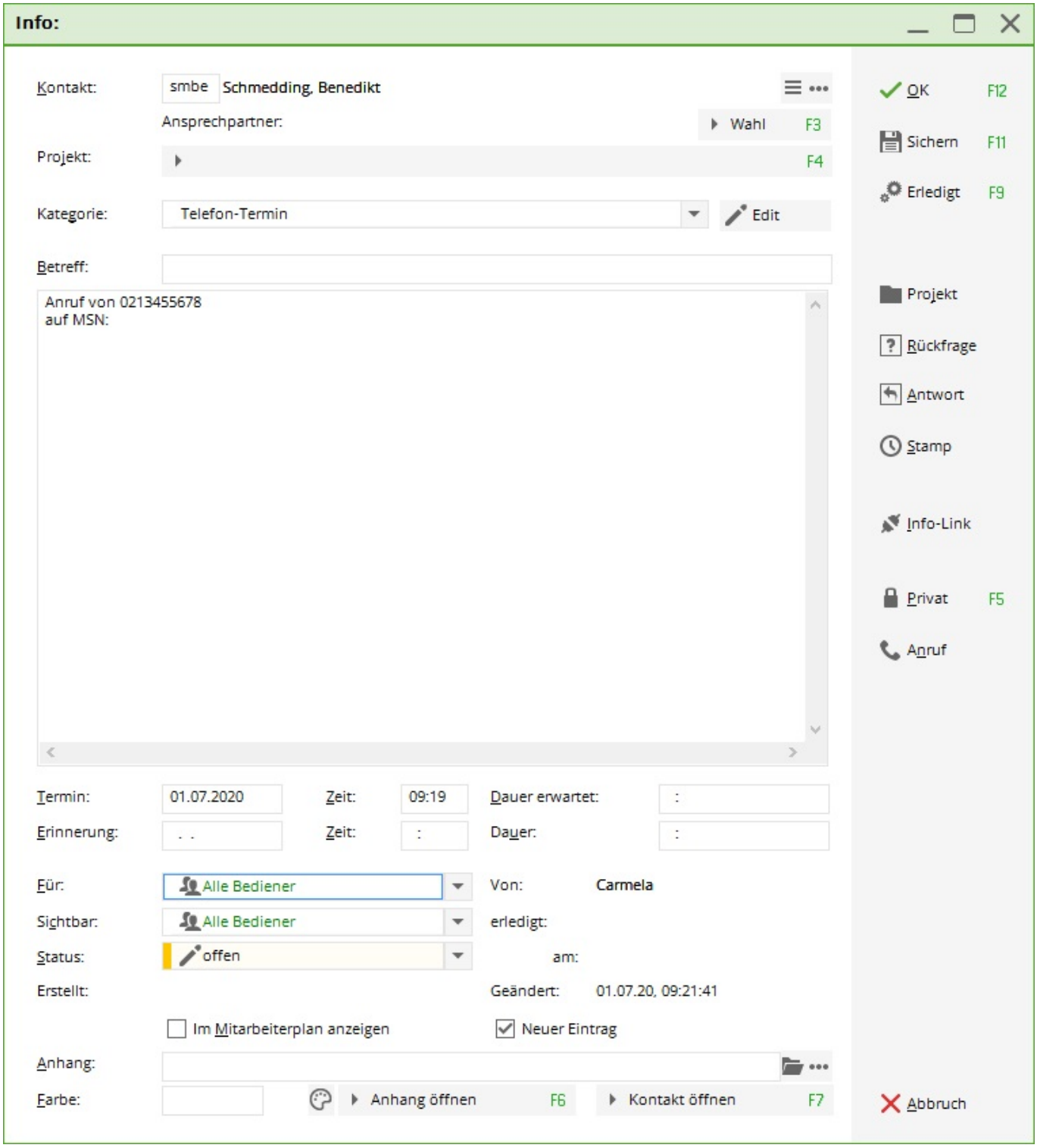
The CALL.bat file can now be selected from the PC Caddie folder in the Phoner software under → Options → External application:



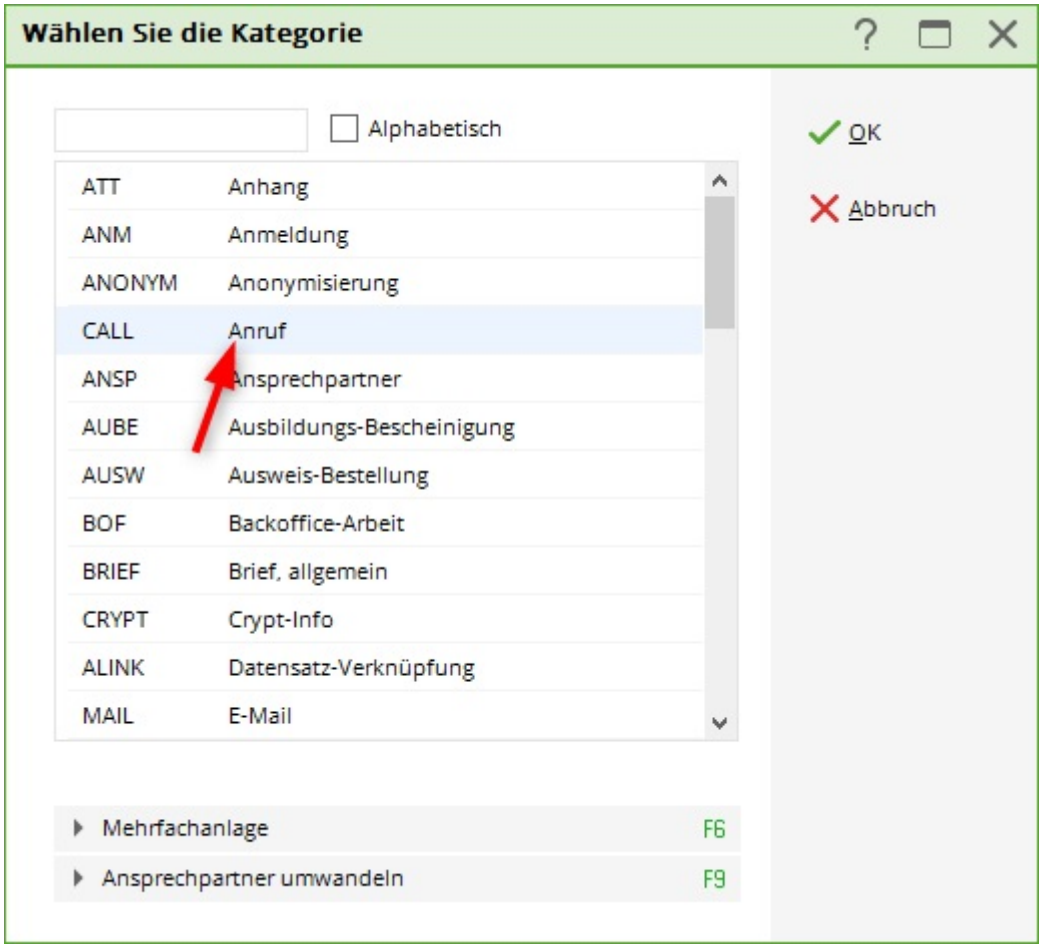
Once these steps have been carried out, calls can be opened in PC Caddie in CRM.



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



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.