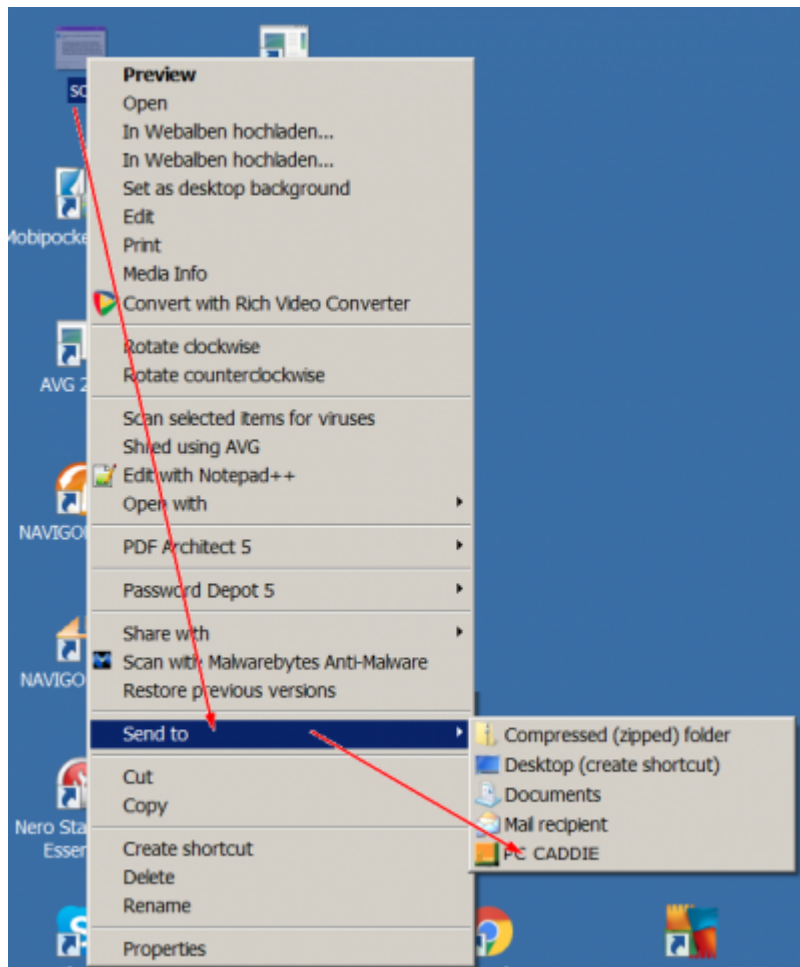


Send document to CRM

Right-click a document that you want to send to PC CADDIE using Explorer or My computer. Then select the option **Send to PC CADDIE**:



The following window opens in PC CADDIE:

Info: ✕

Address: Interested, Sarah 📄 🔍

Contact person: Select F3

Project: F4

Category: Attachment ⌵ 🔧 Edit

Subject:

Fixed date: 24.09.18 Time: 14:58 Duration: :

Follow-up: 24.09.18 Time: 14:58 0 🔍

For: 👤 Timo Tester ⌵ From: Timo Tester

Visible: 👥 All users ⌵ Done:

Status: ✅ done ⌵ on:

Created: Changed:

☐ Show in staff timetable ☒ New entry

Attachment: C:\Users\monstruletul\Desktop\scr.png 📄 🔍


🔗 open attachment F6 🔗 open address F7

✅ OK F12
💾 Save F11
✅ Done F9

📁 Project
❓ Checkback
📧 Answer
🕒 Stamp

🔗 Link info
🔒 Private F5
📞 Call

✖ Cancel


 The original document remains in the original folder. PC CADDIE saves an additional document in the „Attached“ folder. If you have a lot to import at a later stage or are just starting out, you simply have to open the affected folder and PC CADDIE and then import the documents into the person's mask by drag and drop.

HINT: If a document (for example, the contract of a member) is stored according to the schema Last name, First name-Subject (Schmedding, Benedict-contract.doc), PC CADDIE searches for the appropriate person directly after the import and inserts the subject accordingly.

www.pccaddie.com

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