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**:

SC Pobipocke	Preview Open In Webalben hochladen In Webalben hochladen Set as desktop background Edit Print Media Info		
AVG 2	Convert with Rich Video Converter Rotate clockwise Rotate counterclockwise		
NAVIGO	Scan selected items for viruses Shied using AVG Celt with Notepad++ Open with PDF Architect 5 Password Depot 5	* * *	
NAVIGO	Share with Scan with Malwarebytes Anti-Malware Restore previous versions Send to	•	, Compressed (zipped) folder
Nero Sta Esser	Cut Copy Create shortcut Delete Rename		Desktop (create shortcut) Documents Mal recipient PC CADDIE
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The following window opens in PC CADDIE:

Info:	×
Address: insa Interested, Sarah Contact person: Select 3 Project: 4 Category Attachment	✓ <u>OK</u> F12 ► Save F11 ■ Done F9
Subject	Project Project Project Project Answer Answer
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Attachment: C:\Users\monstruletul\Desktop\scr.png	
open attachment F6 open address F7	X 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.