# **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*.

	Alphabetical		✓ <u>о</u> к
APP	Appointment		
ATT	Attachment		🔀 <u>C</u> ancel
BOWO	Back office-work		
CALL	Call		
CALLB	Call back		
CALLU	Call back, useless		
CONT	Contact person		
CONTR	Contract		
CRYPT	Crypt-Info		
DLINK	Data Link		
MAIL	Email		
FAX	Fax		
IDCO	ID card order		
ILNK	Information link		
INTIN	Internal inquiry		
LINK	Internet link		
LETT	Letter, general		
NOTE	Note		
OPIN	Open invoice		
	Create several entries at once	F6	
	Change contact person	F9	

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

)ata-set link		×
<u>A</u> ppendant:	hote Hotel Sonne	
<u>I</u> nfo:		× <u>C</u> ancel
<u>A</u> ddress:	mugu Mustermann, Gunter	
<u>C</u> olour:	0	
<u>C</u> reated:	<u>b</u> y: Tester, Timo	
<u>C</u> hanged:	<u>b</u> y:	



#### **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.

	gone			
	Alphabetical		✓ <u>о</u> к	
	Appointment	•	Concel	_
	Attachment Reak office work			
	Call			
CALLE	Call back			
CALLU	Call back useless			
CONT	Contact person			
CONTR	Contract			
CBYPT	Crynt-Info			
	Data Link =			
MAIL	Email			
FAX	Fax			
IDCO	ID card order			
ILNK	Information link			
INTIN	Internal inquiry			
LINK	Internet link			
LETT	Letter, general			
NOTE	Note			
OPIN	Open invoice	-		
	Create several entries at once	5		
	Change contact person	9		

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: hote Hotel Sonne	<ul> <li>✓ <u>Q</u>K F12</li> </ul>
<u>T</u> itle: <u>F</u> irst name:	2 Replace F4
Name:	Canaal
Gender: M 🔽 Enct.: Club manager 💌	
Add.info:	
Remark:	
Special salutation:	
Phone: <u>M</u> obile:	
Tel.priv: Eax	
Email:	
Entry: 26.09.18 <u>D</u> .o.b.: <u>D</u> el:	
For this person send to this address:	
Company: Company name	
Department: Print: do not print	
Street Street	
Postcode: 1234 <u>City</u> : City	
This is the contact person for:  ■ letters  invoices Select this contact person without any request Export this contact person additionally	

#### **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.

Company: tuch Fuchsbau Hotel AG   Title: Eirst name:   Ludwig   Name: Gangerer   Gender: M   M Enct:   Club manager   Add.info:   Bemark:   Special salutation:   Phone:   Mobile:   Tel.priv:   Email:   Entry:   26.09.18   D.o.b.:   For this person send to this address:   Company:   Company name   Department:   Print:   do not print   Street:   Street:   Street:   Street:   Postcode:   1234   City   This is the contact person for:   Image:	Contact person	×
Ittle: Eirst name:   Name: Gangerer   Gender: M   M Fnct:   Club manager Add.info:   Bernark: Image: Image	Company: fuch Fuchsbau Hotel AG	✓ <u>O</u> K F12
Name: Gangerer   Gender: M   M Enct:   Club manager     Add.info:   Bemark:   Special salutation:     Phone:   Mobile:   Iel.priv:   Email:   Entry:   26.09.18   D.o.b.:     Department:   Print:   Department:   Print:   Street:   Street:   Street:   Street:   Street:   Destcode:   1234   City   This is the contact person for:   Image:	<u>T</u> itle: <u>E</u> irst name: Ludwig	Replace F4
Gender: M   M   Add.info:   Bemark:   Special salutation:     Phone:   Mobile:   Iel.priv:   Email:   Entry:   26.09.18   D.o.b.:     Del:     Por this person send to this address:   Company:   Company name   Department:   Print:   do not print   Street   Street   Street   Ital Qity:   City   This is the contact person for:	Name: Gangerer	
Add.info:   Bemark:   Special salutation:     Phone:   Mobile:   Iel.priv:   Email:   Email:   Entry:   26.09.18   D.o.b.:     Department:   Print:   do not print   Street:   Street:   Street:   Street:   Street:   Street:   Street:   Inis is the contact person for:   Image: I	Gender: M 💌 Enct.: Club manager 💌	
Bernark:   Special salutation:     Phone:   Mobile:   Tel.priv:   Email:   Email:   Entry:   26.09.18   D.o.b.:     Por this person send to this address:   Company:   Company name   Department:   Print:   do not print   Street:   Street:   Street:   Postcode:   1234   City:   This is the contact person for:   Invoices	Add.info:	
Special salutation:   Phone:   Mobile:   Tel.priv:   Email:   Email:   Entry:   26.09.18   D.o.b.:     Por this person send to this address:   Company:   Company name   Department:   Print:   do not print   Street: Street: Street: 1234 City: City This is the contact person for: I letters: I nivoices	Remark:	
Phone: Mobile:   Tel.priv: Eax:   Email: Eax:   Emtry: 26.09.18   D.o.b.: Del:   For this person send to this address:   Company: Company name   Department: Print:   Department: Print:   Street: Street   Postcode: 1234   Qity: City	Special salutation:	
Iel.priv:   Email:   Entry:   26.09.18   D.o.b.:     Del:     Por this person send to this address:   Company:   Company name   Department:   Print:   do not print   Street:   Postcode:   1234   City:   Init: is the contact person for:	Phone: Mobile:	
Email:   Entry:   26.09.18   D.o.b.:   □   For this person send to this address:   Company:   Company name   Department:   Print:   do not print   Street:   Street:   Postcode:   1234   City:   City:   This is the contact person for:     Image:	<u>T</u> el.priv: <u>E</u> ax:	
Entry: 26.09.18   □ For this person send to this address:   Company:   Company name   Department:   Print:   do not print    Street: Street Street Destcode: 1234     City:     This is the contact person for:  Itelters   Invoices	<u>E</u> mail:	
□ For this person send to this address:   Company:   Company name   Department:   Print:   do not print    Street  Postcode:    1234   City:    This is the contact person for:      Print:	Entry: 26.09.18 D.o.b.: . Del:	
Company:       Company name         Department:       Print:         Street:       Street         Postcode:       1234         City:       City:         This is the contact person for:       Image: I	For this person send to this address:	
Department:       Print:       do not print         Street:       Street         Postcode:       1234       City:       City         This is the contact person for:       I letters       I invoices	Company: Company name	
Street       Street         Postcode:       1234       City:       City         This is the contact person for:       Itelters       Invoices	Department: Print: do not print	
Postcode:       1234       City:       City         This is the contact person for:       Itelters       Invoices	Street Street	
This is the contact person for:	Postcode: 1234 <u>C</u> ity: City	
	This is the contact person for:	
Select this contact person without any request	Select this contact person without any request	
Export this contact person additionally	Export this contact person additionally	

The following window opens:

Transfer entries	×
Erom: 1 fuch Fuchsbau Hotel AG Elect F3	✓ <u>O</u> K ズ <u>C</u> ancel
To:     Image: Top Select       To:     Image: Top Select	
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	

- 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:

hanges to data		×
<u>F</u> ield:	MITGMERK02	✓ <u>0</u> K
changed to:	×	X <u>C</u> ancel
previous conter	nt:	
, <u>C</u> hanged: 16.0	9.18, 15:25 <u>b</u> y: Tester, Timo	

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:

Password	×
Please enter your password Password:	✓ <u>O</u> K ★ <u>C</u> ancel

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

Information		×
<u>F</u> irm:	mugu Mustermann, Gunter	
<u>C</u> ue:	Password PC CADDIE Online	X <u>C</u> ancel
mg@mail.c Password	com	
<u>C</u> olour: <u>D</u> ate:	0	
<u>C</u> reated:	<u>t</u> o: Timo Tester	
<u>C</u> hanged:	ţo:	

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.