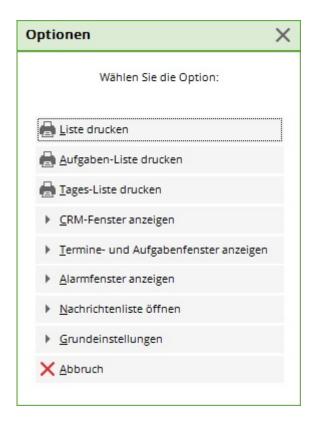
CRM settings (Options button at the bottom left)

You can use the buttons at the bottom of the appointment window to:

🗘 Termine (9)		88 _ O ×
Zuletzt bearbeitet	Alle <u>P</u> rojekte	Offene Projekte
Aktuell offen Rechnung	Ideen/Projekte Zukünftig offen	Offen und in Arbeit Dringend Termine
🌲 22.01.19 11:22 str5	ATT 🕞 Strasse Feld Perimeter 19.0ds	
🌲 03.12.19 08:55 imir	ATT 🕞 50 Jahre Hochzeit Mama und F	apa 2020 / Ferien 2020 Jubiläum.ods
🌲 15.01.20 10:00 PCC	ATT 📊 PC CADDIE Fehlende Bilder Do	vkuwiki.ods
🌲 25.02.20 09:25 imir	ATT 📄 Re%3A Anfrage Hotebuchung	[reservas@hotelbahia.com %2825.02.2020 09%3A25
10.02.20 17:00 matt	MAIL 🔘 Ihre Webshop-Bestellung / [int	fo@matterhornparadise.ch (10.02.2020 17:00:12) R].
03.04.20 11:25 payp	MAIL 🔘 Sie haben eine Rückzahlung v	on Blue Tomato GmbH erhalten / [service@paypal.
03.04.20 19:04 RECH	MAIL 🔘 Bestellbestätigung geschenkid	ee.ch / [noreply@reply.geschenkidee.ch (03.04.202(
06.04.20 11:12 hoca	MAIL 🚫 Ihr Profity-Gutschein für Gesch	nenkidee.ch / [info@profity.ch (06.04.2020 11:12:
06.04.20 11:41 flas	MAIL O Herzlich Willkommen bei Flass	henpost! / [newsletter@flaschenpost.ch (06.04.202(
[©] Optionen 1	+ <u>N</u> eu 2	<u>▶ B</u> earbeiten

- 1. print processes or make basic settings
- 2. create a new entry
- 3. Edit the selected entry

Options - Print and settings. PC CADDIE gives you two options for **options** to call up the options. Via **Persons/appointment window** and via the CRM window to the right of each person mask. By pressing the button **Options** button opens this window:



The chapter **Print** all information is summarised.

Print list

A variety of information can be extracted from PC CADDIE. This can relate to a predefined data area, specific persons or categories:

Pr	int information			×
	Status Date / User / Sortir	y Keyword / Person Output Outp	<u>P</u> rint	F8
	Data area:	from 14.06.16 to 14.06.16 Main date in this area Resubmission in this area New entry in this area Change in this area Completed in this area		F5 F9 F1
	From:	New All users		
	For:	All users		
	Done:	🗞All users 🔽		
	Sorting:	By time (main date) By category By customer By "from" employee By "for" employee By "completed by" employee	<u>Q</u> uit	

Date/user/sorting

Under the tab *Date/user/sorting* tab, you can first define the data range for printing. You determine whether only the main date or both the resubmission, new creation, change or completion date must fit into the time period entered. The more check marks you set, the longer it takes to print the list, as all entries are searched through once for each check mark. For the function **Print list** function (in the select **Von:** and **Für:** it is best to select "All operators". For **sorting** we recommend sorting "by category", although you can of course customise the settings according to your requirements.

For the tab **Output** tab, you can also specify which information for the entries should be printed.

Pr	int information				×
	Date / User / Sorting Status / Key	Categories Projects / Entries / Duration Time accounts word / Person Output	۶	<u>P</u> rint	F8
	Times:	Print reminder time			
		Print estimated time and accounts	2	Reset	FS
	Information:	Print details (multiline)		Load	F9
	Status:	Print completed by		Save	F11
	Entries:	✓ Print entries			
	Statistics:	Print topics and tasks			
	Total:	Print total			
	Output media:	Print			
		List			
		Export (CSV-File):			
			×	<u>Q</u> uit	

Category filter

In the tab *Category filter* tab, you determine which categories are to be printed. Here you also have the choice of whether to print with new creation or with change.

Print information

Status / Ke	yword / Person Output	- 👰	Print F8
Date / User / Sorting	Categories Projects / Entries / Duration Time account	is in the second s	
Categories:	ANFA Anfrage durch anderen		
calegones.	ATT Anhang		
	ANM Anmeldung		
nothing activated	ANSP Ansprechpartner	2	Reset F5
=> print all	AUSW Ausweis-Bestellung		
	AND Änderung am Datensatz		Load F9
	BOF Backoffice-Arbeit		
with new entries	BRIEF Brief, allgemein		
	CRYPT Crypt-Info		Save F11
with changes	ALINK Datensatz-Verknüpfung		
	MAIL E-Mail		
	🗆 FAX Fax		
	INTR Interessenten-Nachfrage		
	INTRF Interne Rückfrage		
	LINK Internet-Link		
	MAHN Mahnung		
	NEU Neuanlage des Datensatzes		
	🗖 RBEZ Rechnung zu bezahlen		
	RECH Rechnung zu schreiben		
	BÜCK Rückruf		
	RÜVE Rückruf, vergeblich		
	□ TERM Termin □ TODO To-do		
	VERB Verbesserungs-Vorschlag		
			<u>Q</u> uit

TIP If you have not activated any categories, all categories will be printed.

You can define further filtering processes under the tab **Status/keyword/person tab.** Again, if nothing is activated, all statuses are printed. It is also possible to print only on the basis of a keyword, a person or a person filter.

×I

Pri	nt information				×
		Categories Projects / Entries / Duration Time accounts	\$	<u>P</u> rint	F8
	Status: nothing acti∨ated => print all	Otodo ▲ Jurgent ▲ Alert (urgent) ↓ Jongoing, do not remind → Jin progress ✓ ✓done ☆ ☆Priority info ✓ ✓seen->OK ● Ieft impossible unnecessary ↓ double ▼	★	Reset Load Save	F5 F9 F1
	Keyword:				
	Subject area:				
	Output:	(comma separated, if multiple entries)			
	Person: Filter:	(neutral)	×	<u>Q</u> uit	

Once you have made all the settings according to your wishes, you can start printing by clicking on *Print* (F8) to start printing.

List of changes to membership features

Take the path via **Persons/appointment window** and then click on **Options** You will then see this selection and select **Print list**

ptio	ns	×
	Select these options:	
۶	<u>P</u> rint list	
	<u>P</u> rint task list	
	<u>P</u> rint daily list	
	Show CRM window	
	<u>S</u> how task window	
	Show alarm window	
	Open messages list	
	<u>B</u> asic settings	
×	<u>C</u> ancel	
		<u>Print list</u> Print task list Print daily list Show CRM window Show task window Show alarm window Open messages list Basic settings

Print information	×
Status / Keyword / Person Output Date / User / Sorting Categories Projects / Entries / Duration Time accounts	😂 <u>P</u> rint F8
Data area: from 14.06.16 to 14.06.16 Main date in this area Resubmission in this area New entry in this area Change in this area Completed in this area	😒 Reset F5
From: Image: All users For: Image: All users Image: and members of the group	
Done: All users Sorting: By time (main date) By category By customer By ustomer By "from" employee By "for" employee By "for" employee By "completed by" employee	⊠ <u>Q</u> uit

Select the date here and tick the box only for **Main date in this area**. Additional selections would only delay the the list unnecessarily.

Then select the tab Category filter tab at the top and tick the Change to data record

Status / Ke	word / Person	Ou	tput		Print	(F8
Date / User / Sorting	Categories	Projects / Entries / Duration	Time accounts	(Jan	<u>_</u>	
Categories:	ANFA ATT	Anfrage durch anderen Anhang				
nothing acti∨ated => print all		Anmeldung Ansprechpartner Ausweis-Bestellung			Reset	F5
-	► 🗹 ÄND	Änderung am Datensatz Backoffice-Arbeit			Load	F9
with new entries	BRIEF CRYPT				Save	F11
with changes	 ALINK MAIL FAX INTR INTRF LINK MAHN NEU RBEZ 	Datensatz-Verknüpfung E-Mail Fax Interessenten-Nachfrage Interne Rückfrage Internet-Link Mahnung Neuanlage des Datensatzes Rechnung zu bezahlen Rechnung zu schreiben Rückruf Rückruf, vergeblich Scan				
		Telefon-Termin Termin To-do Verbesserungs-Vorschlag	-	X	Quit	

Then go on to **Status/keyword/person** and make a note under Keyword as shown in the screenshot:

Pr	int information				×
	Date / User / Sorting Status / Key	Categories Projects / Entries / Duration Time accounts word / Person Output	-	<u>P</u> rint	F8
	Status: nothing acti∨ated => print all	● todo ▲ ● urgent ● ● Alert (urgent) ● ● ongoing, do not remind ● ● in progress ● ● done ☆Priority info ● seen->OK ● ● answered left □ impossible unnecessary □ double ▼	*	Reset Load Save	F5 F9 F1
	Keyword:	MERK02,MERK03			
	Subject area:				
	Output:	(comma separated, if multiple entries)			
	Person:				
	Filter:	(neutral)		<u>Q</u> uit	

MERK02 evaluates the known field <MERKMAL02> which is called membership in most clubs. MERK03 evaluates the known field <MERKMAL03> which is often called status or contribution status. Of course, you could also select MERK04. However, in most clubs this field is not additionally required to differentiate between memberships. memberships.

Print now. Your list will look something like this:

🔍 🔍 🖺 Kopieren F6 🔑 Speicherr F7 🔒 Drucken F8 Seite 1/1 100% Informationen

Informationen - 22.01.20

01.01.19 - 22.01.20 Hauptdatum in diesem Bereich

nauptuatumm	uleselli Delele					Stand: 2	2.01.20, 09:34 Uhr
Pos Datum Zeit Dau∈Kat.	Information			Konte	ext	Von	Für Status
15.10.1:17:4100:0(Kunde)	Re: Zahlung Nr. 10088 0:00 / Neutral 0:00 / PC /einclub Oktober 2019	C 0:00	<u> </u>	nt 0:00	Rechnungen	carr	carr D
	Anzahl Einträ(Da	auer erw	/arl tatsä	ch Kunde	Neutral	PCC	Gebucht
Summe	1 Einträge	0:00	0:00	0:00	0:00	0:00	0:00
PC CADDIE 2019 © 1988-20	19 PC CADDIE AG				Golfclut	Sonnen	schein, Schöndorf

TO EXPLAIN the abbreviations: Look at a person for comparison.

www.pccaddie.com

_ 🗆 X

Kontakt: Sonnenschein, Susanne

Name	
Suchkürzel	sosu Nr. 041.7003.203600 Nr. wählen
Titel	B <u>r</u> iefanrede
Vorname	Susanne
Nachname	Sonnenschein
Tevent	Lasse Ö <u>T</u> imetable
Merkmale Adre	sse <u>2</u> .Adresse Zahlung Inf <u>o</u> s Memo
Exact HCP	Best HCP Hcp-Spezial
Heimatclub	gast Gast ≡ ••• +
Heimatclub-ID	
Geschlecht	2 - 🖡 Weiblich 💌
Altersklasse	4 - Erwachsen 💌
Mitgliedschaft	1 - Mitglied 👻
Status	1 - Einzelperson 👻
Verschiedenes	0-
Zusatz-Info	=
Geburt	• •
Eintritt	22.01.2020 😯 Datenschutz
Austritt	

Membership = MERK02 Contribution status = MERK03 The membership and contribution types are listed with the numbers only. There are 1 - 9 and A to Z. On the list, however, A becomes 10, B becomes 11, C becomes 12, etc.

Print task list

We have compiled this information for you in the chapter Print to-do list.

Print to-do list

Read how to print a print a daily list

Show CRM window

With the button **Show CRM window** button takes you, as with the **Cancel**, button takes you back to the previous window from which you opened the options.

Show appointment and task window

With the button *Show appointments and tasks window* button opens the appointment window; can be used, for example, if you have opened the options from the People CRM window.

Show alarm window

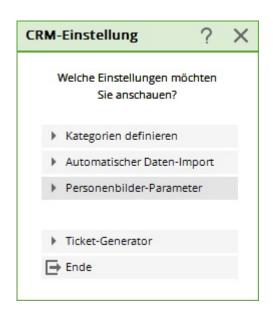
With the button *Alarm window* button to open the window manually; normally the window opens automatically at regular intervals.

Open message list

If your telephone system is linked to PC CADDIE, incoming calls are displayed here.

Open attachment F6 O Edit line F7
:

CRM settings



The basic settings can also be accessed via *Settings/Programme settings/CRM settings* to access the basic settings.

Continue directly to automatic data import

Go directly to the Personal image parameters

Define or change categories

The CRM\DMS already contains some predefined categories. We will go into the individual categories with their individual characteristics in the next section. However, we would like to point out here that you can change the existing categories or define your own categories. Depending on the task area for which you need CRM\DMS, you may be happy to have additional categories. To create a new category or change an existing one, please click on the button **Categories definieren:**

hlen Sie d	ie Kategorie		? 🗆
	Alphabetisch		√ <u>о</u> к
ATT	Anhang	^	X Abbruch
ANM	Anmeldung		
ANONYM	Anonymisierung		
CALL	Anruf		
ANSP	Ansprechpartner		
AUBE	Ausbildungs-Bescheinigung		
AUSW	Ausweis-Bestellung		
BOF	Backoffice-Arbeit		
BRIEF	Brief, allgemein		
CRYPT	Crypt-Info		
ALINK	Datensatz-Verknüpfung		
MAIL	E-Mail	v -	
Mehrfach	anlage	F6	
Ansprech	partner umwandeln	F9	

With *Edit* (F7) an existing category is changed and with *Delete* (F5) to remove it from the list. We will now briefly show you how to create a new category. To do this, click on *New* (F9), the following window will open:

eiten			
ANSP			√ <u>о</u> к
Ansprechpa	artner		X Abbruch
andard	Folgeeintrag		~-
Ansprech	partner	•	
Verme	erk	^	
Warnu	Ing		
Warnu	ung wenn offen		
Anspr	echpartner		
Konta	kt		
Rechn	ung	$\mathbf{v}_{\mathbf{r}}$	
✓ Projekt	✓ Folgebuchur	ng	
	Ansprechpa andard Ansprechp Verme Warnu Warnu Warnu Anspre Konta E-Mail Ideen Rechn	Ansprechpartner Ansprechpartner Ansprechpartner Ansprechpartner Vermerk Warnung Warnung wenn offen Warnung wenn offen Mansprechpartner Kontakt Korrespondenz E-Mail Ideen/Projekte Rechnung sen Situationen:	Ansprechpartner andard Folgeeintrag Ansprechpartner Ansprechpartner Vermerk Warnung Warnung wenn offen Warnung wenn offen Mansprechpartner Kontakt Korrespondenz E-Mail Ideen/Projekte Rechnung v

For example, you want to make sure that complaints are forwarded and processed. All complaints should therefore be forwarded to the managing director immediately. In this case, it is worth opening a separate category. Under **short code** we enter "REKL" for this example and under **Description** "Complaint".

Туре

You can select different category types under the Type tab.

ATT	Anhang	1
ANM	Anmeldung	
ANONYM	Anonymisierung	
CALL	Annut	
ANSP	Ansprechpartner	
AUBE	Ausbildungs-Bescheinigung	
AUSW	Ausweis-Bestellung	
ĀND	Anderung am Datensatz	
BOF	Backoffice-Arbeit	
BRIEF	Brief, allgemein	
CRYPT	Crypt-Info	
ALINK	Datensatz-Verknüpfung	
MAIL	E-Mail	

Information

are normal entries without special additional criteria

Project

If this type is selected, a project opens directly instead of a simple ticket

Encrypted information

are entries that are password-protected

Contact person

these entries are highlighted in green by default and are used to store contact persons, e.g. for companies

Person link

these entries are highlighted in blue by default and are used to link second data records

Data record change

are entries that document changes and registrations in the data record

Customer status

???

For our example, we have opted for "Information".

<u>K</u> urzkennung:	REKL			<u>✓ о</u> к
<u>B</u> eschreibung:	Reklamatio	n		X Abbruch
yp St	tandard	Folgeeintrag		× Approch
<u>T</u> yp:	Informatio	on	•	
<u>G</u> ruppen:	Verme	rk	^	
	Varnu	Ing		
	Varnu 🗸	ung wenn offen		
	Anspr	echpartner		
	Konta	kt		
	Korres	spondenz		
	E-Mail			
	Ideen/	/Projekte		
	Rechn	ung	Υ.	
Auswählbar in die	sen Situatione	en:		
Person	🗹 Projekt	V Folgebucht	ing	

Further down, you determine which group the category should be assigned to. These groups are fixed and cannot be changed.

",Selectable in these situations" - here you decide when this type of entry can be created, whether from the CRM in the person mask, whether from a project or whether this entry can only be created as a follow-up entry.

In our case, we activate the "Note" and "Correspondence" groups and select all situations.

Standard

In the Standard tab, you can configure the entry so that the ticket not only pops up when you select it, but also displays help in text form.

1 Standard text

If you enter a text in this field, it will automatically appear as a suggestion as soon as you make a new entry in CRM\DMS with this category. This gives you the opportunity to provide your employees with supporting information so that you have all the details for later processing.

<u>K</u> urzkennung: <u>B</u> eschreibung:	REKL			
Beschreibung:				<u>√ о</u> к
-	Reklamation			X Abbruch
Typ St	andard	Folgeeintrag		Abbruch
Standard-Text:				
Beschreibung de geführt hat:	r Situation, das zu	ur Reklamation	~	0
Auswahl der 1 Dokument:	Textbausteine			2
<u>B</u> ediener:	🧏 Hauptmita	arbeiter	T	3
Sichtbar:	Alle Bedie	ner	•	
<u>W</u> iedervorlage:				_
Status:	🜲 Alarm (dri	ngend)	-	4
<u>F</u> arbe:	#FF0000	Ô		
Muss einem <u>P</u> Es muss eine	rojekt zugewiese Dauer eingegeber			5
Diese Buchun	gen im Timetable	speichern		

2 Selection of text modules

This option allows you to standardise the entries despite free text by storing predefined texts for the subject line and for the text field. In this way, the individual points can be easily processed.

For example, if you enter the following in the top field for the *standard text* enter the following...

Complaint regarding installation Complaint regarding the condition of the course Complaint regarding the staff Complaint regarding other incident Was there a lot going on that day? Information about the weather: Mood of the customer: Description of the problem:

...and then tick the box, all lines up to the blank line are queried as alternatives first. You select a line and this is entered in the subject line. Everything after an <u>blank line</u> is then taken as an effective default text and can be filled in by the employee.

3 Document

If the complaint has been received in writing, it can be integrated into the ticket here.

4 Visibility

Define to whom these entries are assigned by default and for whom they are visible.

5 Resubmission / status / colour

If you want all tickets in this category to appear again in the appointment window at a later date, define the resubmission date here. You also decide the urgency of the entry and the colour in which it is displayed. From now on, all entries made will be adopted as the default for the category.

Attention: Please ensure that you do not use countless different colours for the categories. The CRM\DMS should remain clear. Only use colours if the information should actually be highlighted.

6 Mandatory entries

In our case, we want to collect all complaints in the project created for this purpose. Set the first tick and the entry *must be assigned to a project*. This ensures that individual entries are not lost.

If you want to know how much time is spent on certain work, you can check the entry with this tick at *a duration must be entered* to force the entry.

If you manage your calendar in PC CADDIE, you can, for example, tick the checkbox **Save this booking in the timetable** and this will also be displayed in the corresponding timetable.

Follow-up entry

To ensure that work processes are continued automatically, you can use follow-up entries to schedule the next actions. This way you can ensure that nothing is forgotten and you don't have to write any manual reminders. In our example, we are dealing with a visitor who is interested in the course offer. His visit is documented with the category interested party enquiry. This category is stored in such a way that another ticket opens and reminds the operator to ask the customer again whether they need

further information:

REKL		<u>✓ о</u> к
Reklamat	ion	
andard	Folgeeintrag	
Interess	enten-Nachfrage 👻	
	96 Std	2
		3
er Buchung rsprung:	als Folgebuchung 96 Std	
	Interess	Interessenten-Nachfrage

1 Category

Here you select the category to which the follow-up ticket is assigned

2 and 4 Postponement

Define the time at which the ticket should appear in the appointment window. If you do not enter anything, the follow-up entry is set to today. If you would like the follow-up ticket to appear in the appointment window at a later time, enter the time offset in hours in the upper or lower field.

3 Multiple follow-up bookings

Tick this box if the workflow provides for more than one direct next step. In our example, this could be

very practical if we want to send the customer an offer for the various courses at the same time. The option "on new entry" brings you the further tickets when they are created as soon as the first followup ticket is confirmed with OK. With "on completion", the first ticket must be set to completed status before the following window appears:

×
X Abbruch

Here you can now tick which and how many additional tickets should be created. In our case, in addition to the follow-up ticket for the follow-up (1), there would be an additional ticket for the abovementioned offer.

Automatic data import

tachmer	achment-Einstellungen				
Import	Anzeige	Scanner	Fax/Telefon		
	-Import aus die ONAL%\an PC (× <u>A</u> bbruch			
Weitere Ve	rzeichnisse:				
c:\Mein	ne Scans\		<u>–</u>		
C:\Use	rs\CH\Documen	ts\an PC CADDIE\	- 		
E:\Dok	E:\Dokumente\an PC CADDIE\				
C:\User	rs\CH\an PC CAI	DDIE\	- R		
			<u>ল</u> ই		
Outlo	ok-Plugin instal	lieren		2	
PC CADI	DIE Instanz:	1 💌		-	
Name d	er Instanz:	PC CADDIE 1			

1 Import paths

The paths used to import data between the mail programme, scanner, fax, photo camera, etc. and PC CADDIE are stored here. If you would like to configure a new device for the import, we will be happy to help you. Please contact Support for this

2 Install Outlook plugin

This button takes you to the wizard that helps you to link your Outlook with PC CADDIE for importing the mail. The following windows are displayed, which you can simply confirm with Ok and continue:

🖶 PC CADDIE Archiv Outlook Addln		\$	-		×
Willkommen beim Setup-A Archiv Outlook AddIn	Assistenten v	on PC CA	DDIE		
Der Installer wird Sie durch die zur Ir erforderlichen Schritte führen.	nstallation von PC	CADDIE Arc	hiv Outlo	ok Addlr	n
WARNUNG: Dieses Programm ist du internationale Urheberrechtsverträge unbefugter Vertrieb dieses Program auch zivilrechtlich verfolgt und kann zur Folge haben.	e geschützt. Unbel ms oder eines Tei	iugte Vervieli ils davon wir	ältigung d sowohl	oder straf- als	s
	Abbrechen	< Zurüc	k	Weiter	>
🕼 PC CADDIE Archiv Outlook AddIn		8	_		×
Installationsordner wähler					
Der Installer wird PC CADDIE Archiv	Outlook Addln in	folgendem (Ordner in	stallierer	n.
Um in diesem Ordner zu installieren vorhandenen Ordner zu installieren, Ordner:					
Ordn <u>e</u> r: C:\Program Files (x86)\codecan s	olutions GmbH\P	C CADDIE ,	Durc	hsucher	n
			Speiche	erplatzbe	ədarf
Installieren Sie PC CADDIE Archiv alle Benutzer dieses Computers.	Outlook Addin nur	für den aktue	llen Benu	tzer oder	r für
O Aktueller Benutzer					
	Abbrechen	< Zurüc	k	Weiter	>

醇 PC CADDIE Archiv Outlook Addln		\$	_	•	×
Installation bestätigen					5
Der Installer ist zur Installation von PC CAD	DIE Archiv Outlook A	ddin au	f Ihrem Com	puter bereit	
Klicken Sie auf "Weiter", um die Installation	zu starten.				
	Abbrechen	<	Zurück	Weit	er >
🛃 PC CADDIE Archiv Outlook AddIn			_	•	×
Installation beendet					5
PC CADDIE Archiv Outlook AddIn w	urde erfolgreich in	stallier	t.		
Klicken Sie auf "Schließen".	-				
Prüfen Sie mit Windows Update, ob Verfügung stehen.	wichtige Aktualisie	runger	n für .NET	Framewo	rk zur
	Abbrechen	<2	Zurück	Schlie	eßen

If this service is already installed, you will be asked in this process whether you want to repair or uninstall it.

Information on handling the import can be found in the Send DMS document to PC CADDIE

Personal images - parameters

Back to the Overview