



Anleitung: Eingehende E-Mails und Kontakte

In dieser Anleitung zeigen wir Ihnen, wie Sie eingehende E-Mails einem Kontakt in der Praxismanagementsoftware prima! zuordnen können.

Zum Zwecke der besseren Lesbarkeit verzichten wir teilweise auf geschlechtsspezifische Formulierungen, bspw. Benutzer/innen. Sämtliche Rollenbezeichnungen gelten im Sinne der Gleichbehandlung grundsätzlich für alle Geschlechter.

Wir empfehlen Ihnen, zu Beginn eines Arbeitstages immer die Praxismanagementsoftware prima!, *Microsoft Outlook* und auch gleich den Office Connector zu starten.



prima!

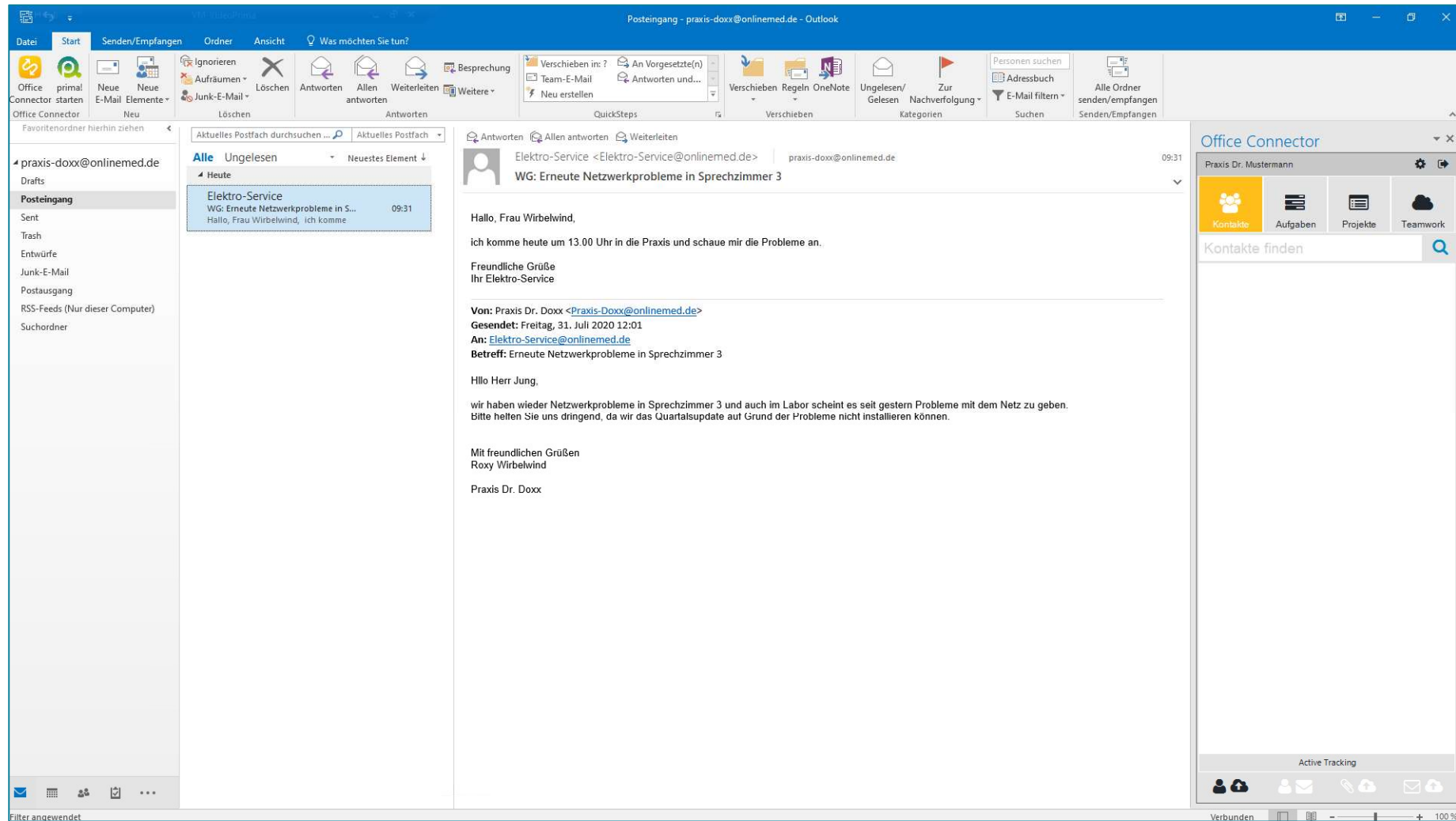


Microsoft Outlook



Office Connector

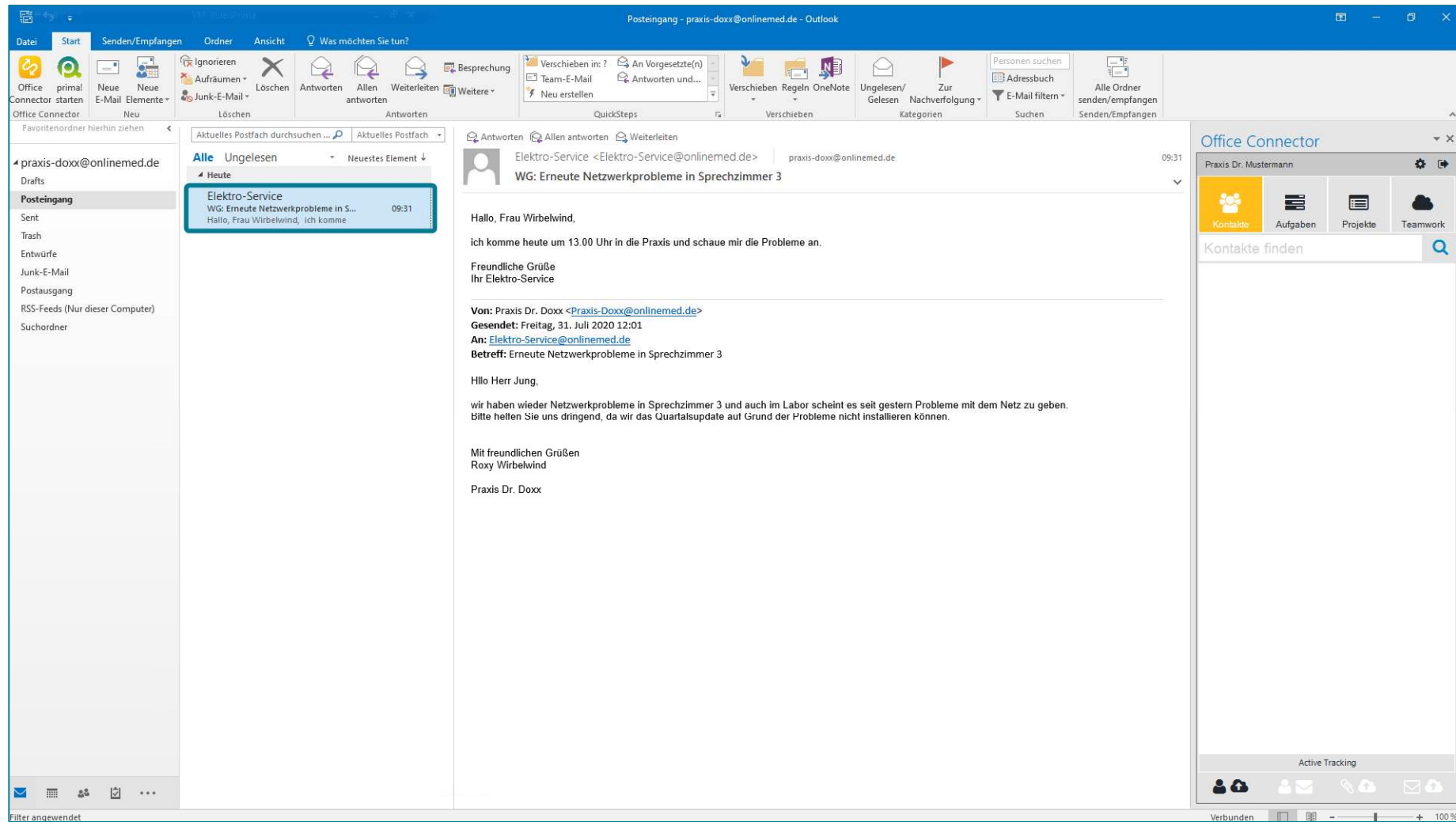
Mit dem Office Connector können Sie eingegangene oder bereits versendete E-Mails einem Kontakt zuordnen. Um die Zuordnung vorzunehmen, gehen Sie wie folgt vor:



The screenshot shows the Outlook interface for the account 'praxis-doxx@onlinemed.de'. The main pane displays an email from 'Elektro-Service <Elektro-Service@onlinemed.de>' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind', a message about network issues at 13:00, and a signature from 'Praxis Dr. Doxx'.

The Office Connector pane on the right is open, showing the contact 'Praxis Dr. Mustermann'. It has tabs for 'Kontakte', 'Aufgaben', 'Projekte', and 'Teamwork'. A search bar labeled 'Kontakte finden' is visible. At the bottom of the pane, there is an 'Active Tracking' section with icons for various tracking features.

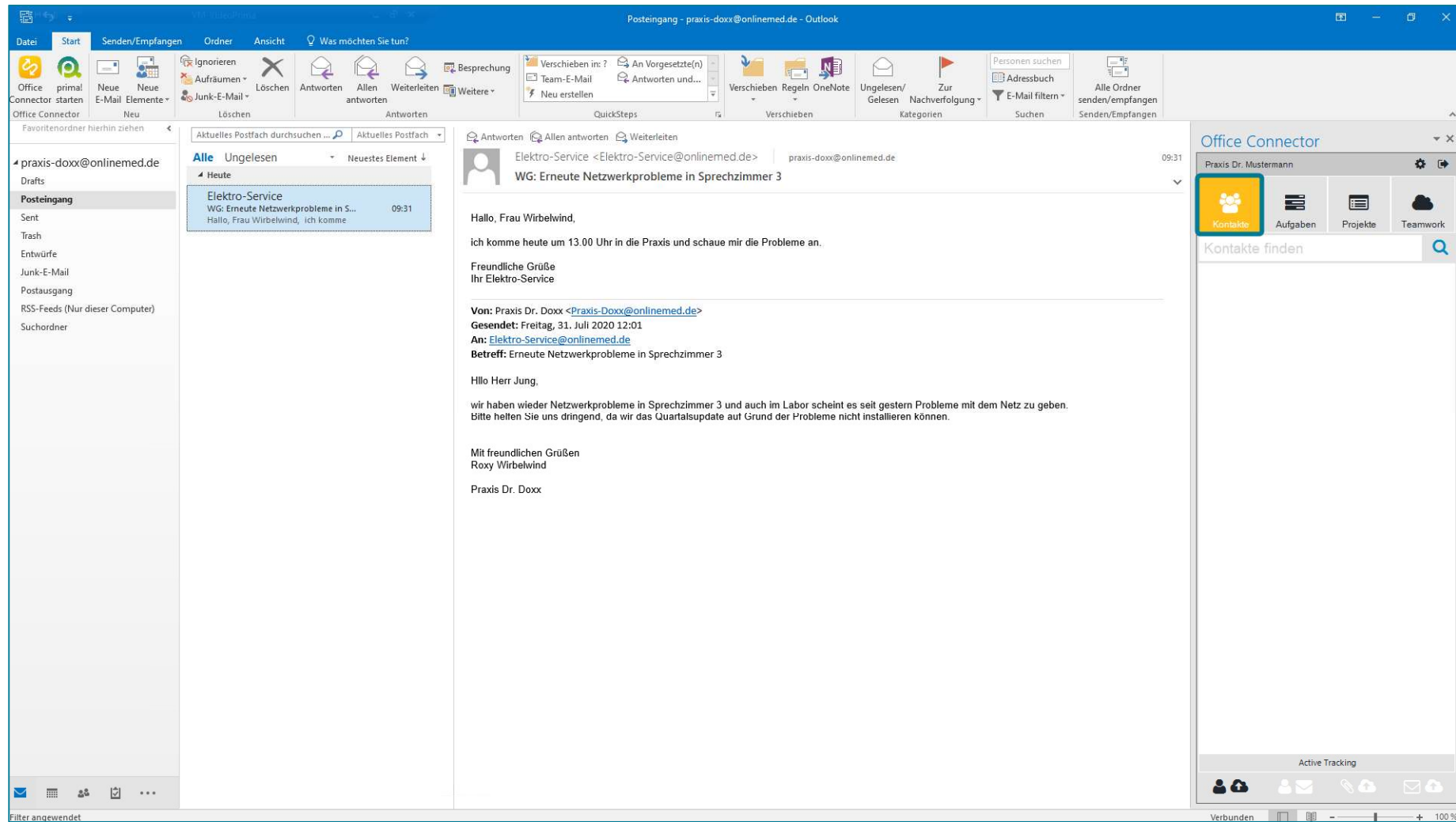
Wählen Sie für die Zuordnung in Microsoft Outlook die zu dokumentierende E-Mail aus...



The screenshot shows the Microsoft Outlook interface. The main window displays an email from 'Elektro-Service' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind', a message about network issues at 13:00, and a signature for 'Praxis Dr. Doxx'.

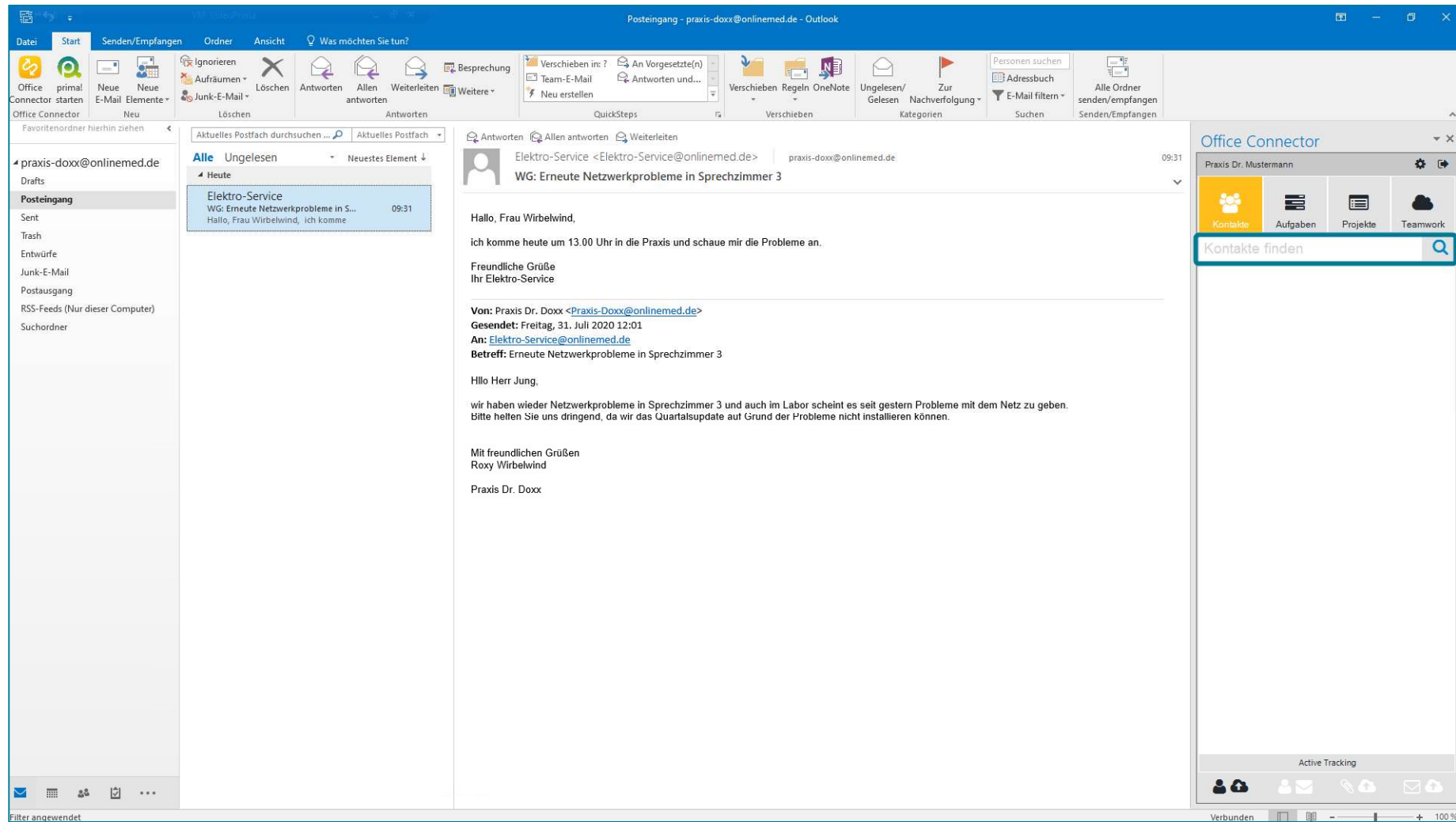
On the right side, the 'Office Connector' task pane is open, showing 'Praxis Dr. Mustermann' with icons for 'Kontakte', 'Aufgaben', 'Projekte', and 'Teamwork'. Below these icons is a search bar labeled 'Kontakte finden' and an 'Active Tracking' section at the bottom.

...und aktivieren Sie im Office Connector die Schaltfläche **Kontakte**.



The screenshot shows the Microsoft Outlook interface. The main window displays an email from 'Elektro-Service' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind' and a message about network issues in the office. The Office Connector sidebar is visible on the right, with the 'Kontakte' button highlighted in orange. Other buttons in the sidebar include 'Aufgaben', 'Projekte', and 'Teamwork'. The bottom status bar shows 'Verbunden' and '100%'.

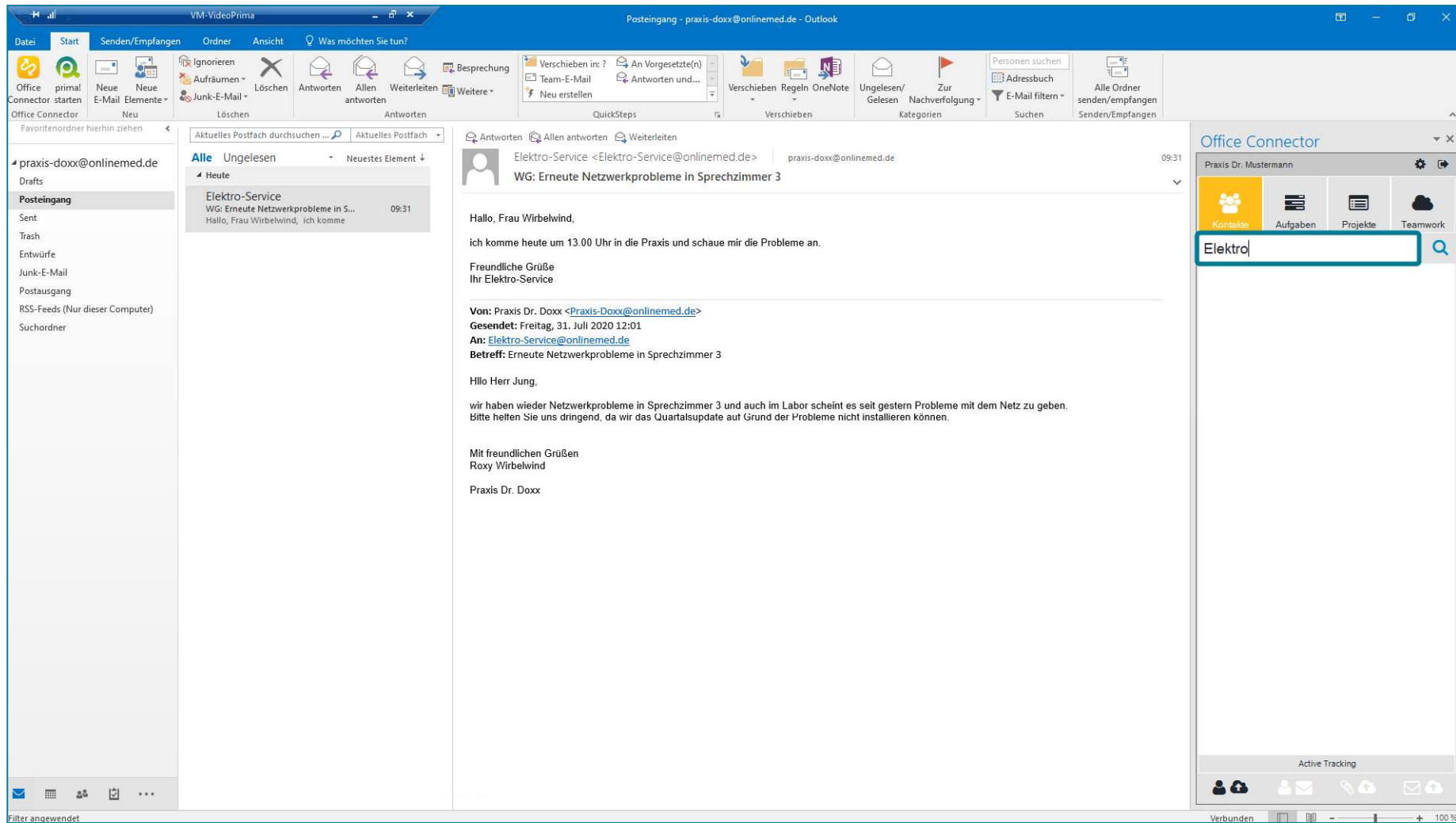
Tragen Sie hier in der Zeile *Kontakte finden*...



The screenshot shows the Outlook interface for the account 'praxis-doxx@onlinemed.de'. The main window displays an email from 'Elektro-Service' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind', a message about a 13:00 meeting, and a follow-up message to 'Herr Jung' regarding network issues in the lab and a failed update.

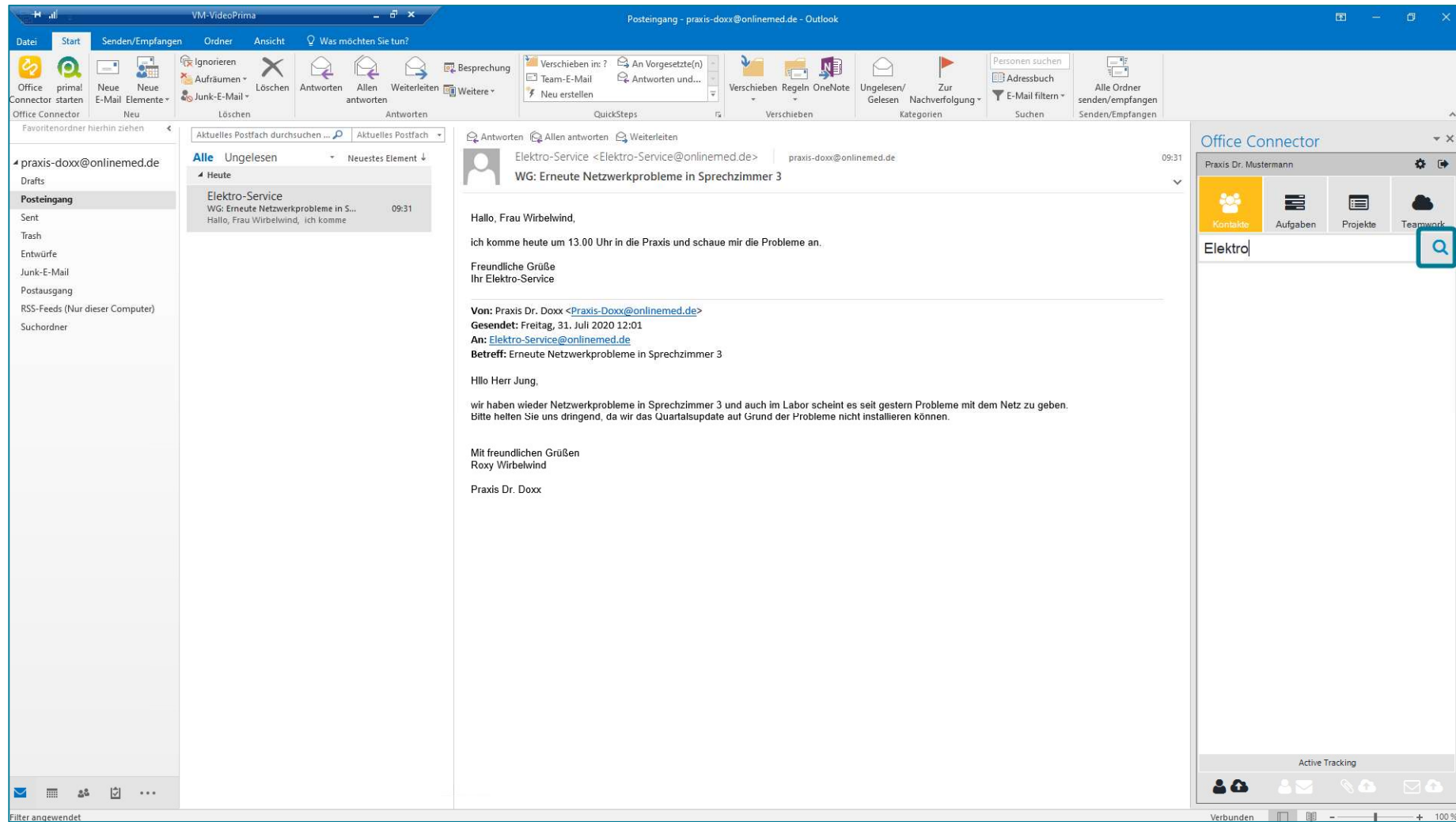
On the right side, the 'Office Connector' sidebar is open for 'Praxis Dr. Mustermann'. It features a search bar labeled 'Kontakte finden' with a magnifying glass icon, which is highlighted by a red box. Below the search bar are icons for 'Kontakte', 'Aufgaben', 'Projekte', and 'Teamwork'. At the bottom of the sidebar, there is an 'Active Tracking' section with several status icons.

...den gewünschten Text ein, um den Kontakt in prima! zu suchen.



The screenshot shows the Outlook interface for the account 'praxis-doxx@onlinemed.de'. The main pane displays an email from 'Elektro-Service <Elektro-Service@onlinemed.de>' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind' and a message about network issues in the consultation room. The 'Office Connector' pane on the right is open, showing a search bar with the text 'Elektro' entered, which is highlighted by a red box. The search bar is part of the 'Office Connector' interface for 'Praxis Dr. Mustermann', which includes tabs for 'Kontakte', 'Aufgaben', 'Projekte', and 'Teamwork'. The search results area is currently empty.

Nach einem Klick auf die Schaltfläche **Kontakte finden...**



The screenshot shows the Microsoft Outlook interface. The main window displays an email from Elektro-Service with the subject "WG: Erneute Netzwerkprobleme in Sprechzimmer 3". The email content includes a greeting to Frau Wirbelwind, a message about network issues at 13:00, and a request for help with a quarterly update. The Office Connector sidebar on the right is open, showing a search bar with the text "Elektro" and a magnifying glass icon. The sidebar also shows navigation buttons for Kontakte, Aufgaben, Projekte, and Teamwork.

Office Connector
Praxis Dr. Mustermann

Kontakte Aufgaben Projekte Teamwork

Elektro

Active Tracking

Verbunden

... werden alle relevanten Treffer aus den prima! -Kontakten aufgelistet.

The screenshot shows the Outlook interface for the account 'praxis-doxx@onlinemed.de'. The main pane displays an email from 'Elektro-Service <Elektro-Service@onlinemed.de>' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind', a message about network issues at 13:00, and a request for help with a quarterly update. The Office Connector pane on the right shows a contact list for 'Elektro' with the following data:

Name	Straße	PLZ Ort	E-Mail
Elektro-Service GmbH	Eltviller Straße 14	65399 Kiedrich	Elektro-Service@onlinemed.de
Jung, Paul	Eltviller Straße 14	65399 Kiedrich	Elektro-Service@onlinemed.de

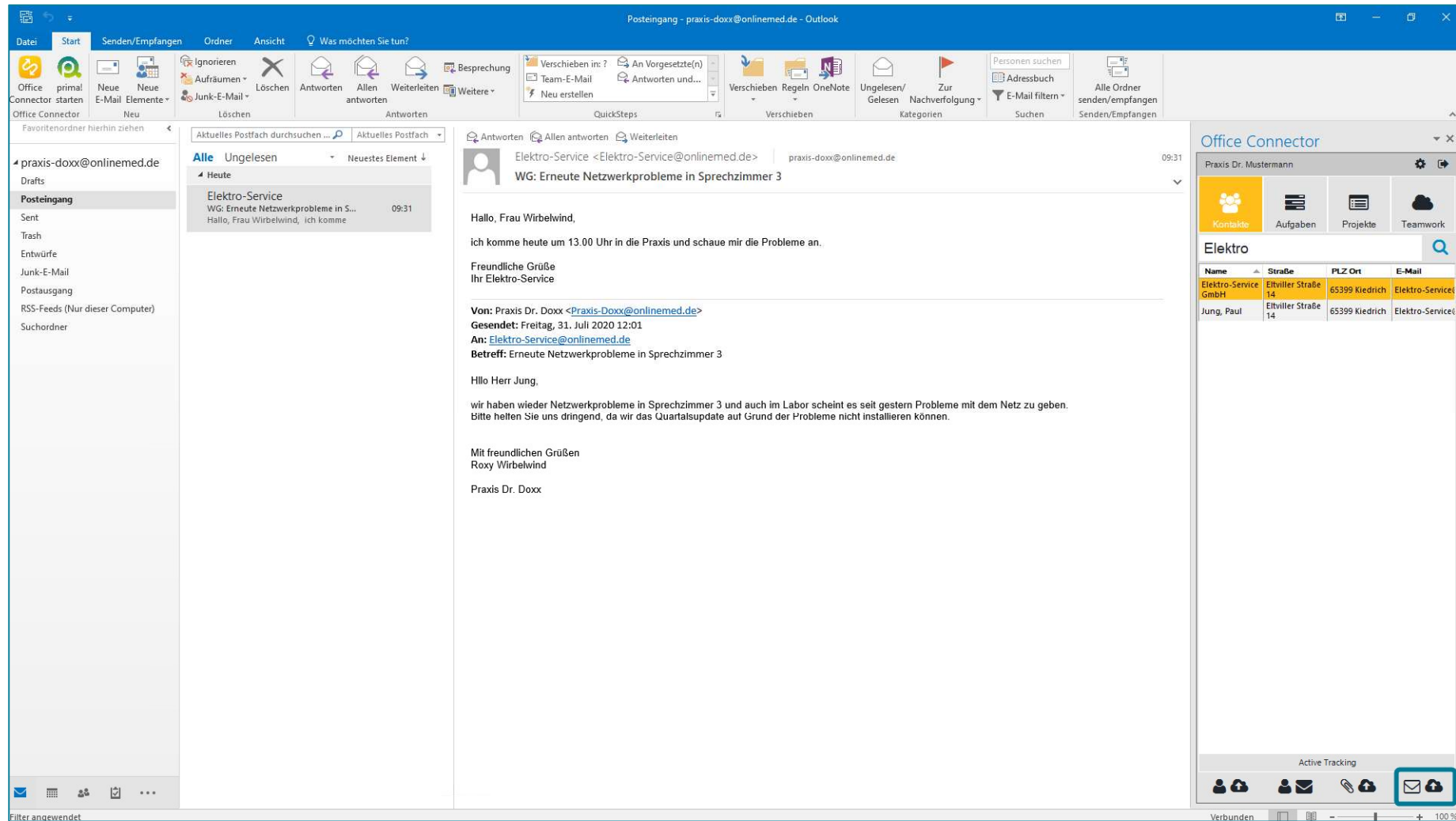
Markieren Sie den Kontakt, mit dem die eingegangene E-Mail verknüpft werden soll.

The screenshot shows the Outlook interface for the account 'praxis-doxx@onlinemed.de'. The main pane displays an email from 'Elektro-Service <Elektro-Service@onlinemed.de>' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind' and a request for help with network issues in Sprechzimmer 3.

The Office Connector pane on the right shows a contact list for 'Elektro'. The following table represents the data visible in the contact list:

Name	Straße	PLZ Ort	E-Mail
Elektro-Service Smart	Eltviller Straße 14	65399 Kiedrich	Elektro-Service@onlinemed.de
Jung, Paul	Eltviller Straße 14	65399 Kiedrich	Elektro-Service@onlinemed.de

Klicken Sie danach auf die Schaltfläche **Ausgewählte E-Mail dem Kontakt zuordnen** rechts unten in Ihrem Office Connector. Daraufhin wird die E-Mail in prima! eingepflegt und kann dort im Geschäftsobjekt **E-Mail** eingesehen werden.



The screenshot shows the Outlook interface for the account 'praxis-doxx@onlinemed.de'. The main pane displays an email from 'Elektro-Service' with the subject 'WG: Erneute Netzwerkprobleme in Sprechzimmer 3'. The email content includes a greeting to 'Frau Wirbelwind' and a message about network issues in Sprechzimmer 3. The Office Connector sidebar on the right is open, showing a contact list for 'Elektro' with columns for Name, Straße, PLZ Ort, and E-Mail. At the bottom right of the Office Connector, a red box highlights the button 'Ausgewählte E-Mail dem Kontakt zuordnen'.