Cashbook

6.Scan document via web app

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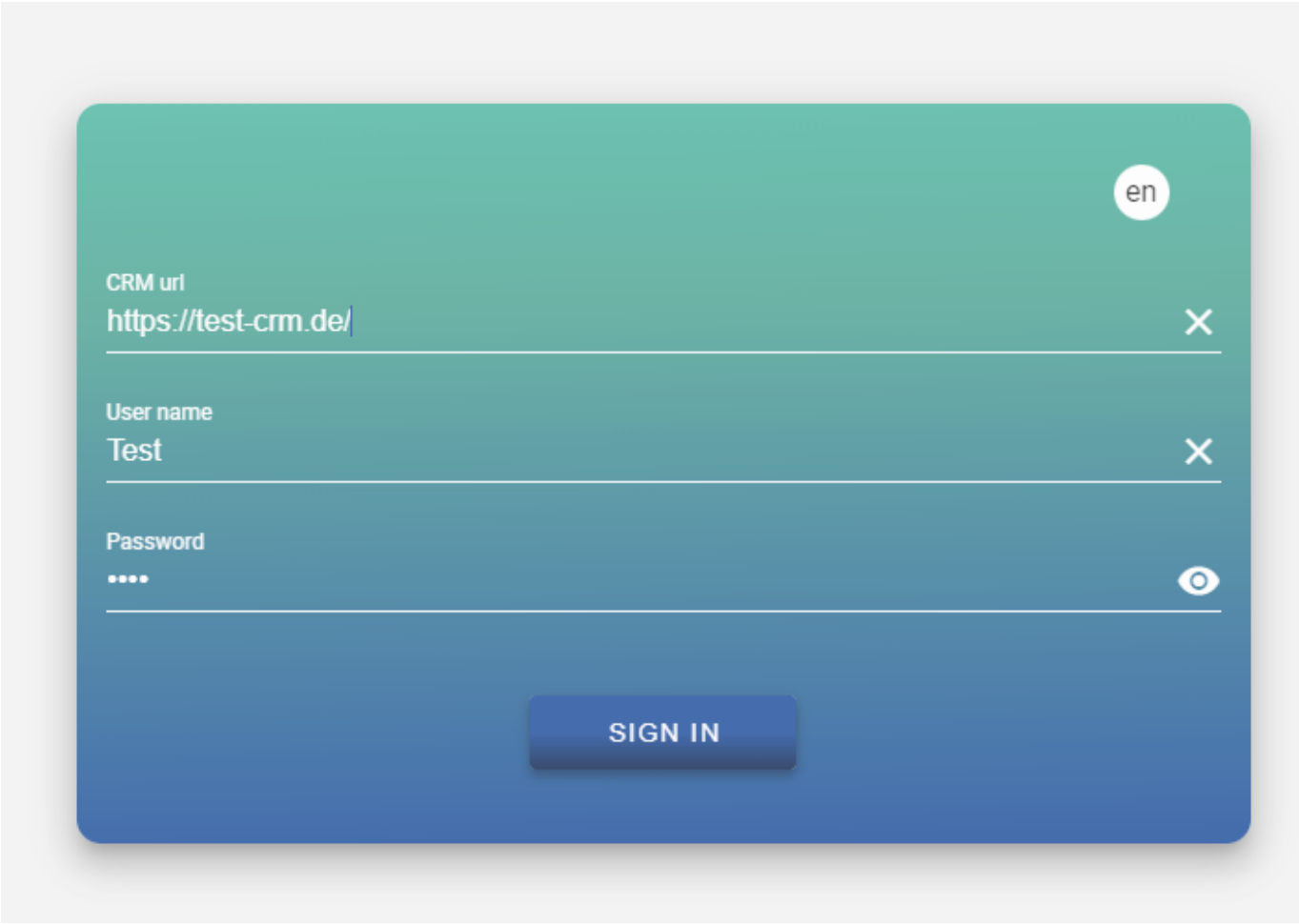
First, log in to the Cashbook app. To do this, go to the following page on your device:

https://cashbook.redoo.cloud/#/

In the “URL” field, insert a URL from the CRM you are currently using. Enter your login data in the appropriate fields. The login and password are identical to the ones you use to log in to the CRM.



Click on the “Log in” button as soon as you are done with the information.

Now select the desired cash book. The users who do not have predefined rights for multiple locations will see only the open cash book from your location.

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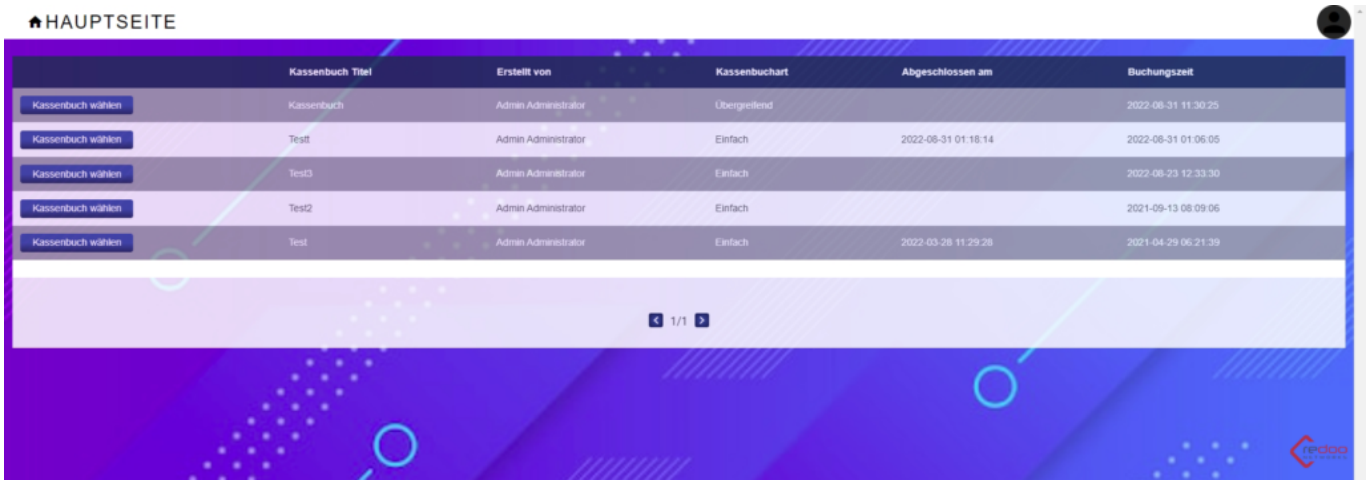

Your selected cash book appears and you can record your entry via the green “Enter new entry” button

You can take a picture of the receipt for posting using a camera on your mobile device, but you can also upload the receipt from your storage. In this case, they must be in an image file.

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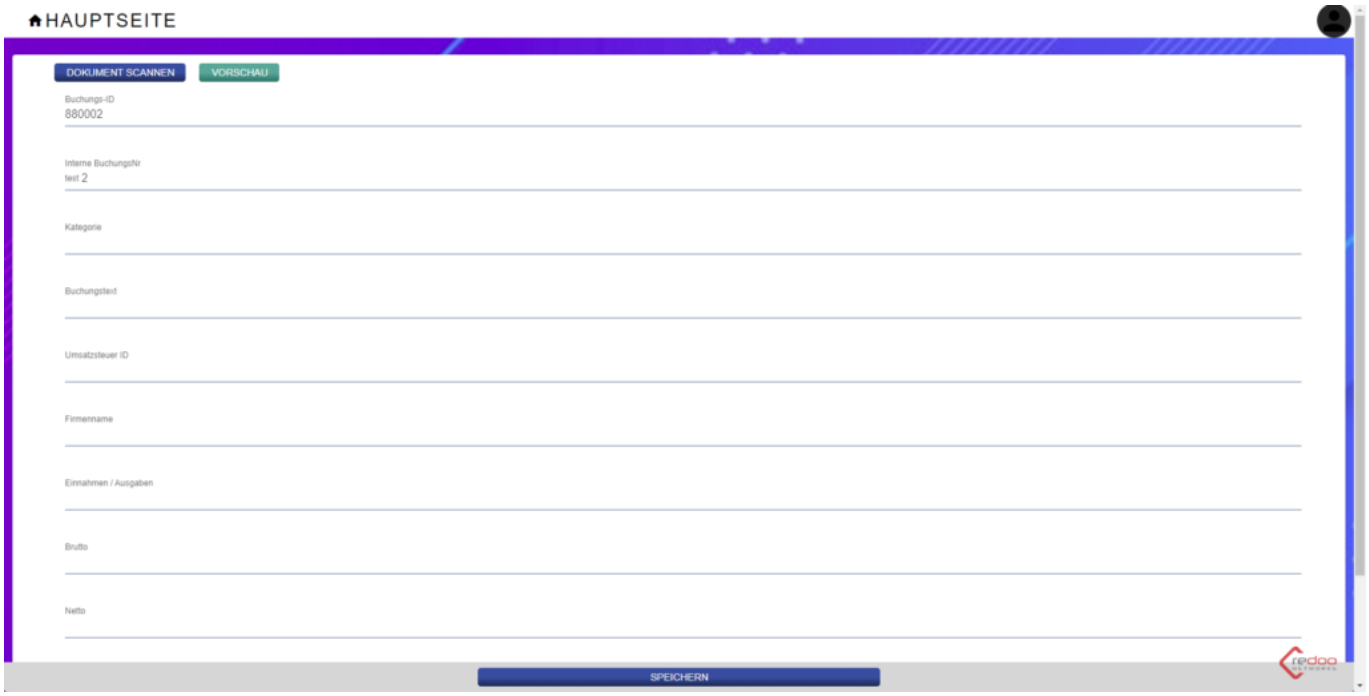
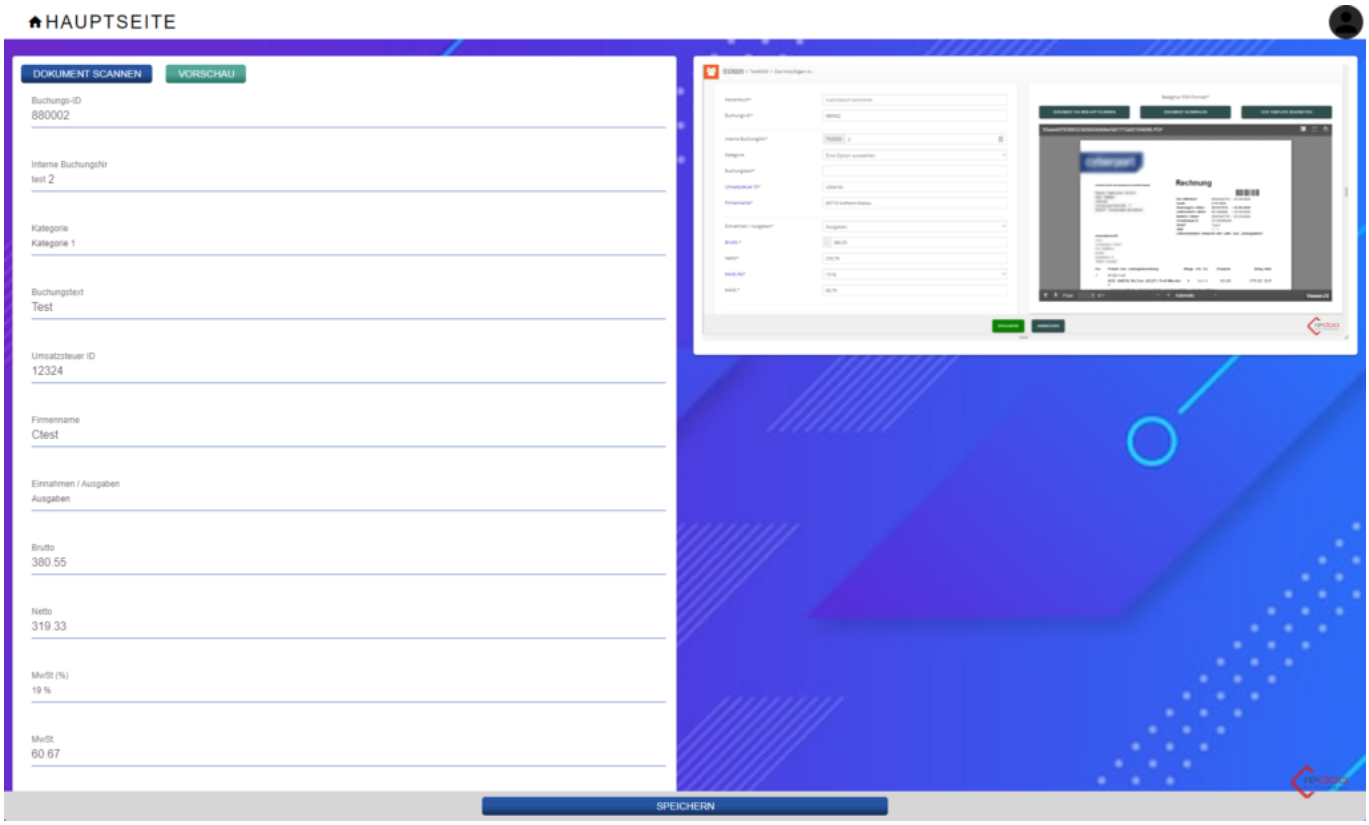


Again, you must make the appropriate entries (identical to CRM).



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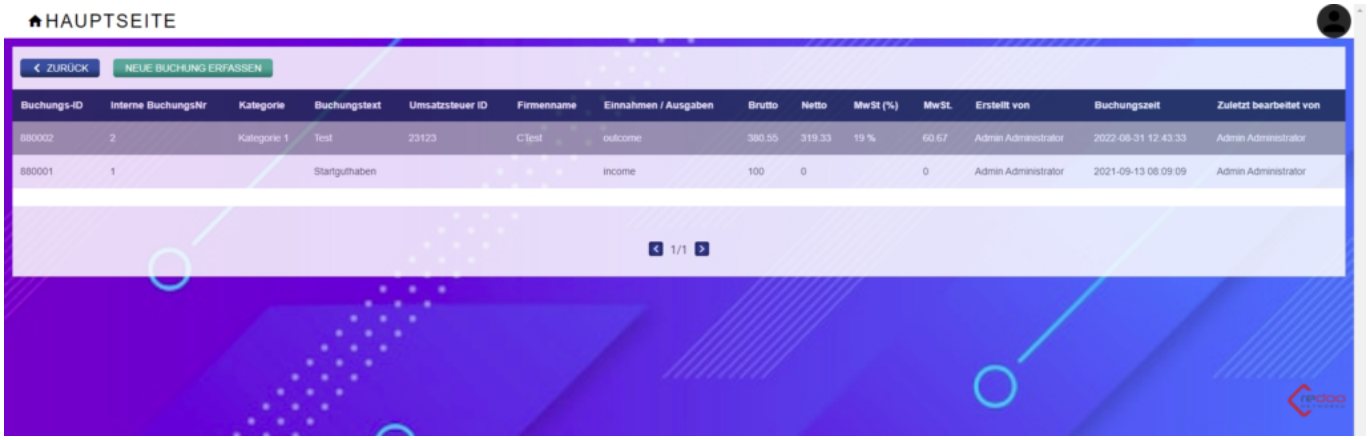
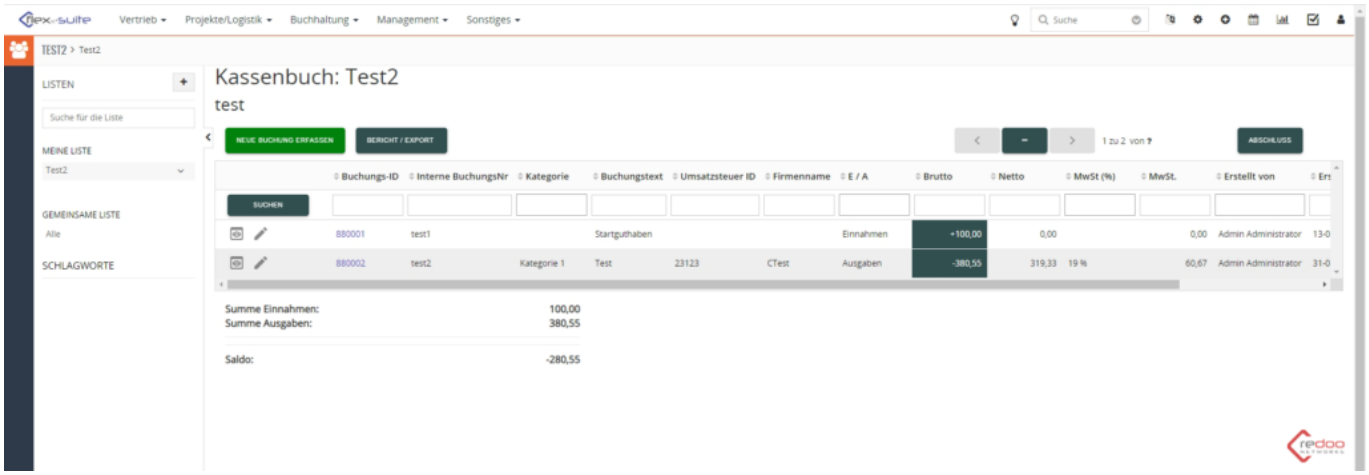
Your booking now appears in the overview of the corresponding cash book in your web app.



The transaction also appears in your CRM cash book.



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