

CRM\DMS

With the additional module CRM\DMS, you can expand your PC CADDIE customer management with essential task, deadline and information functions for complete documentation. This module, when used by the whole team, is an indispensable competence support for your employees and the basis for your company to become a profit centre.

But what do these letters mean?

CRM stands for **Customer Relationship Management** which directly translates as **Customer Relationship Management** means. But we prefer to speak of systematic care of the customer relationship. **DMS** in turn stands for **Document Management System**, the **document management** the central storage of data.

With the CRM/DMS you can digitally map all the work processes of your everyday life. You can find examples of this under [Projects](#) Whether at the reception, in the pro shop, with the golf pros, in the restaurant or in the management, etc., it supports you in all matters and enables you to access information even when you are on the road. The module thus stands for seamless communication. Times when information was lost and communication did not work properly are a thing of the past thanks to the Customer Relationship Management and the Document Management System.

CRM

Work is done with projects and tickets. Projects are your digital folders, so to speak, and allow you to keep a clear overview of all completed and outstanding tasks. Tickets are used for communication between employees, to store information, to pass on work that still needs to be done, to plan to-dos and appointments and as reminders for these. Tickets are subordinated to the individual projects or can also be saved as such.

For a better overview, we list the short links to the individual topics below:

- [CRM in der Personenmaske](#)
- [Termin-Fenster](#)
- [Tickets](#)
- [Projekte](#)
- [Drucken](#)
- [CRM-Einstellungen \(Optionen-Button unten links\)](#)
- [Grundeinstellungen](#)
- [Spezielle Ticket-Kategorien](#)
- [Alle Einträge oder einzelne Projekte im CRM übertragen](#)
- [Dokument an CRM senden](#)

DMS

The DMS allows you to save all documents in PC CADDIE under the appropriate person. Send the documents directly from the mail programme or from the scanner to PC CADDIE, they are automatically saved to the correct person - provided the mail address is stored in the data. You can also link your telephone system with PC CADDIE and thus see who is calling and immediately document and save the conversation with information on the content. Once all contracts, agreements, documents, etc. have been digitised and stored, you can easily retrieve them with just a few clicks. This puts an end to the long search in various folders. Another important advantage is that you can access this data at any time and from anywhere.

It is possible to manage the documents with certain access rights. This allows you to decide which documents can be viewed by whom.

The individual points are listed here as well:

- [Dokument an PC CADDIE senden](#)
- [PC CADDIE und Outlook](#)
- [PC CADDIE und Thunderbird](#)
- [E-Mail direkt aus der Person erstellen](#)
- [Abfragen beim Speichervorgang](#)