# **CRM** settings

These settings are available to you with the module  $\ensuremath{\mathsf{CRM}\ensuremath{\backslash}\mathsf{DMS}}$  .

Select **Settings/Programme settings/Settings for appointments and person history.** The following window opens:

CRM	settings	×
	Which settings do you want to see?	
0	Define categories	]
2	Automatic data import	
3	Persons pictures parameter	
4	Ticket generator	
	🛛 Quit	

- 1. Select **Define categories**, to view and customise predefined settings or to create new categories.
- 2. Select **Automatic data import**, to make settings for the automatic data import to PC CADDIE, e.g. also an Outlook plugin.
- 3. If you use the module *People pictures* module, you can import images here.

### **Define categories**

Edit categories			×
Edit categories	Appointment Attachment Back office-work Call Call back Call back, useless Change to record Contact person Contract Crypt-Info Data Link Email Fax ID card order Information link Internal inquiry Internet link		X Cancel
INTIN LINK JGA JGI LETT NEW NOTE	Internal inquiry Internet link Joint Golfing Action Joint Golfing Invitation Letter, general New record Note	~	
🔶 New	F9 📀 Edit F7 🗙 Delete (	FS	

You can edit the categories here.

- Click on **New**, to create a new category.
- Click on *Edit,* to edit a category.

Edit category		×
Short abbr.: Description: Type Type: Groups:	REQ         Request from others         Standard       Follow-up entry         Information <ul> <li>Memo</li> <li>Alert</li> <li>Alert when open</li> <li>Contact person</li> <li>Contact</li> <li>Correspondence</li> <li>E-Mail</li> <li>Ideas/projects</li> <li>Invoice</li> <li>Appointment</li> <li>Data changes</li> <li>Client's status</li> <li>Multiline</li> </ul>	✓ <u>O</u> K ズ <u>C</u> ancel
Selectable in thes	e situations: ▼ Project ▼ Follow-up entry	

You can find a detailed description under Define and change categories for the CRM/DMS.

## **Crypt entry**

Under Options/Basic settings

Reservations (10)					$\times$
processed last current todo Invoice	Ideas/Projects	All projects todo in future	ongoing and in pro	Ongoing projects ogress   Urgent   Appointm	ients
<ul> <li>27.09.18 13:24 tet2</li> <li>27.09.18 14:20</li> <li>27.09.18 14:20</li> <li>12.11.18 10:37 tet2</li> <li>26.09.18 14:36</li> <li>27.09.18 14:20</li> <li>29.09.18 18:01</li> <li>22.10.18 15:11</li> <li>24.10.18 12:06</li> <li>12.11.18 10:46 tet2</li> </ul>	APP Attend LETT Send of REG Golfe CALL Call f DLINK OPIN LETT PCC LETT PCC LETT PCC DLINK CALL Call f	the training sircular <b>Options</b> Select an option <u>Select an option</u> <u>Print list</u> <u>Print task I</u> <u>Print daily I</u> <u>Show CRM wind</u> <u>Show task wind</u> <u>Show alarm wind</u> <u>Open messages</u> <u>Basic setting</u> <u>Cancel</u>	x m: rmann / 1 7 Dr Pau ist ist dow dow	Sonnenallee 1 / 12345 Sonn ul von Member / 1234 Examp	enstac le / (F
☑ <u>O</u> ptions		<u>N</u> ew		<u>E</u> dit	

#### Select categories

CRM settings	х
Which settings do you want to see?	
Define categories	]
Automatic data import	] [
Persons pictures parameter	] [
Ticket generator	
🛛 Quit	

Then click on **NEW** 

Edit category		×
Short abbr.: Description: Type: 3 Groups: 4	CRYPT       1         Encrypted Info       2         Standard       Follow-up entry         Encrypted information       •         Encrypted information       •         Alert       •         Alert when open       •         Contact person       •         Contact       •         Correspondence       •         E-Mail       •         Ideas/projects       •         Invoice       •         Data changes       •         Client's status       •	Cancel
Selectable in the Person	se situations: ▼ Project ▼ Follow-up entry	

- 1. enter short code
- 2. enter description

<u>Tab: Type</u>

3. type: change to: Encrypted information - this is the password query later in the entry

4. groups: Note

Tab: Standard

1st operator: switch to: Private

2. status: change to: done

The colour can be assigned here if desired.

Tab: Follow-up entry

Edit category	×
Short abbr.:     CRYPT       Description:     Encrypted Info       Type     Standard     Follow-up entry	✓ <u>□</u> K X <u>C</u> ancel
Category:	
Adjustment:	
<ul> <li>several follow-up entries for a new entry</li> <li>several follow-up entries when done</li> </ul>	
Move this booking as follow-up booking	
in relation to origin:	-

Nothing needs to be filled in.

You can now use this category to store password-protected messages. You call up the category: Crypt under New and are asked twice for a password. This password then protects the message and is requested each time it is called up. But ATTENTION: lost and forgotten passwords remain lost and forgotten - even we in Support cannot crack password-protected entries without the password!

### Automatic data import

- You can install the Outlook plugin in the following ways:
- Way 1: People / Appointments / Options / Automatic data import/
- Path 2: Settings / Programme settings / CRM settings / Automatic data import
- Path 3: New/create/edit/delete persons / Options / Basic settings / Automatic data import
- The automatic*import* is set by default and should not be changed. However, several directories can be entered. The folder **to PC CADDIE** is created as soon as you click on **OK** was clicked once.

Attachment settings	×
Import       Display       Scanner       Fax/Phone         Automatic import from this directory:	✓ <u>O</u> K ★ <u>C</u> ancel
Install Outlook plugin PC CADDIE instance: 1  Mame of instance: PC CADDIE 1	

• Here you can **Display programmes** here. The corresponding file types are opened with the selected programme.

Attachment se	ettings	×
Import Display prog <u>E</u> xtension: <u>P</u> rogram:	Display     Scanner     Fax/Phone       rams:	<b>)</b> )
<u>E</u> xtension: <u>P</u> rogram:	open with	
<u>E</u> xtension: <u>P</u> rogram:	open with	
<u>E</u> xtension: <u>P</u> rogram:	open with	
<u>E</u> xtension: <u>P</u> rogram:	open with	

• Nowadays it is recommended to use the programmes included with the scanning programme. Your technician can install these so that the scanner scans into a folder. This folder can then be selected in the *Import* tab.

Attachment settings	×
Import       Display       Scanner       Fax/Phone         Image coding:	✓ <u>O</u> K

 Under Fax/Telephone you can configure the settings required for the interface to the software package supplied by AVM with a FRITZ!Box or FRITZ!Card. Select the database directories for faxes and telephone calls here. PC CADDIE is then able to transfer incoming faxes directly from the FRITZ!fax software or recorded messages from the FRITZ!fon software directly to CRM\DMS

Import	gs	>
Env database:	Display Scarrier Faxy Hone	
C:\Document:	s and settings\All Users\Application Data\F 🙈	X Cancel
Status filter:	a,b,x	
Timestamp:	201610180000000	
I▼ Show rax aut	omatically	
Phone database:	omatically :: rs\Application Data\F0N\FRITZF0N.DBF 🎮	
Phone database: sttings\All Use Status filter:	romatically rs\Application Data\FON\FRITZFON.DBF 🗃 a,b,x	
Phone database:  ettings\All Use  Status filter: 	ers\Application Data\FON\FRITZFON.DBF	