CRM\DMS

With the CRM\DMS add-on module, you can expand your PC CADDIE customer management with essential task, appointment and information functions for seamless documentation. This module, when used by the entire 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 a systematic maintenance of the customer relationship. **DMS** in turn stands for **Document Management System**the **document management**i.e. the centralised storage of data.

With the CRM/DMS, you can digitally map all your everyday work processes. You can find examples of this at Projects Whether at 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 move. The module therefore stands for seamless communication. Thanks to Customer Relationship Management and the Document Management System, times when information was lost and communication did not work properly are a thing of the past.

CRM

We work 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, for storing information, for passing on work that still needs to be done, for planning to-dos and appointments and as reminders for these. Tickets are subordinate 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
- Appointment window
- Tickets
- Projekte
- Drucken
- CRM-Einstellungen (Optionen-Button unten links)
- Basic settings
- 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 scanner to PC CADDIE and they are automatically saved to the correct person, provided the mail address is stored in the data. You can also link your telephone system to PC CADDIE and thus see who is calling and document and save the calls with details of their 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 long searches in various folders. Another important advantage is that you can access this data at any time and from anywhere.

It is possible to manage documents with specific access authorisations. This allows you to decide which documents can be viewed by whom.

The individual points are also listed here:

- Dokument an PC CADDIE senden
- PC CADDIE und Outlook
- PC CADDIE und Thunderbird
- E-Mail direkt aus der Person erstellen
- Queries during the saving process