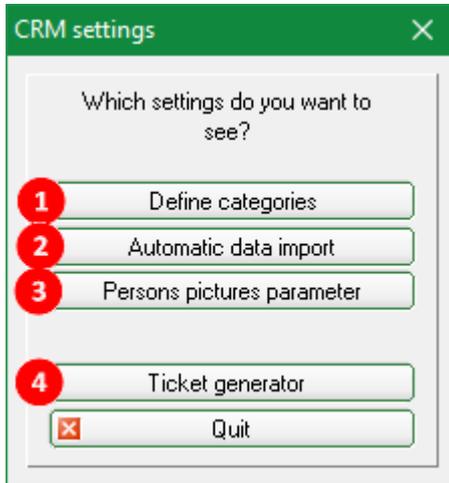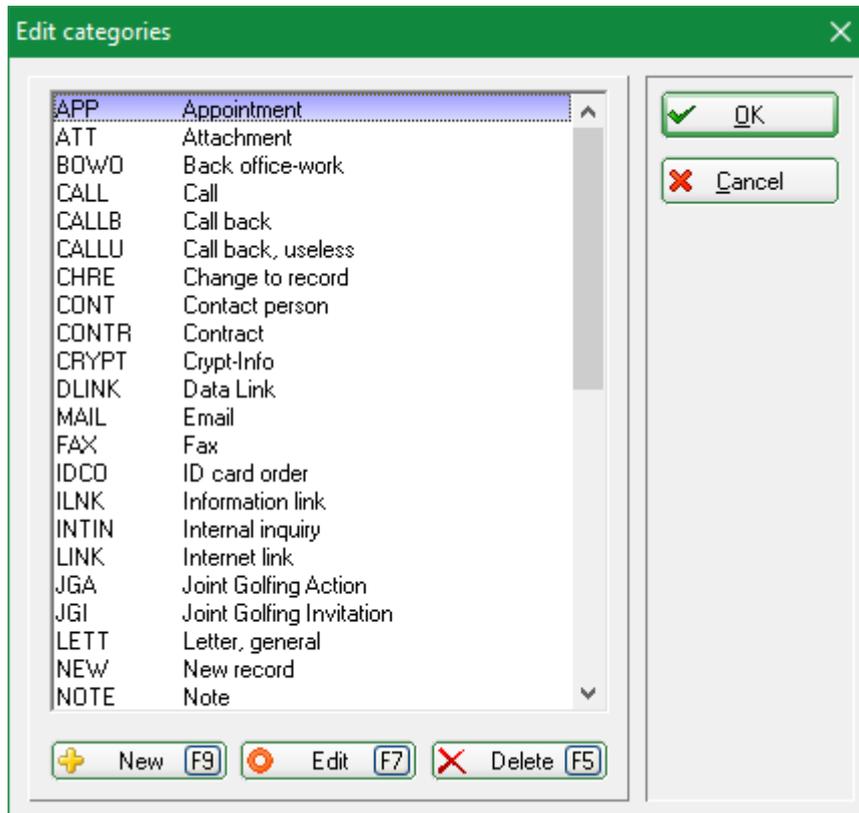# CRM settings

These settings are available to you with the module [CRM\DMS](#) .

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


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.
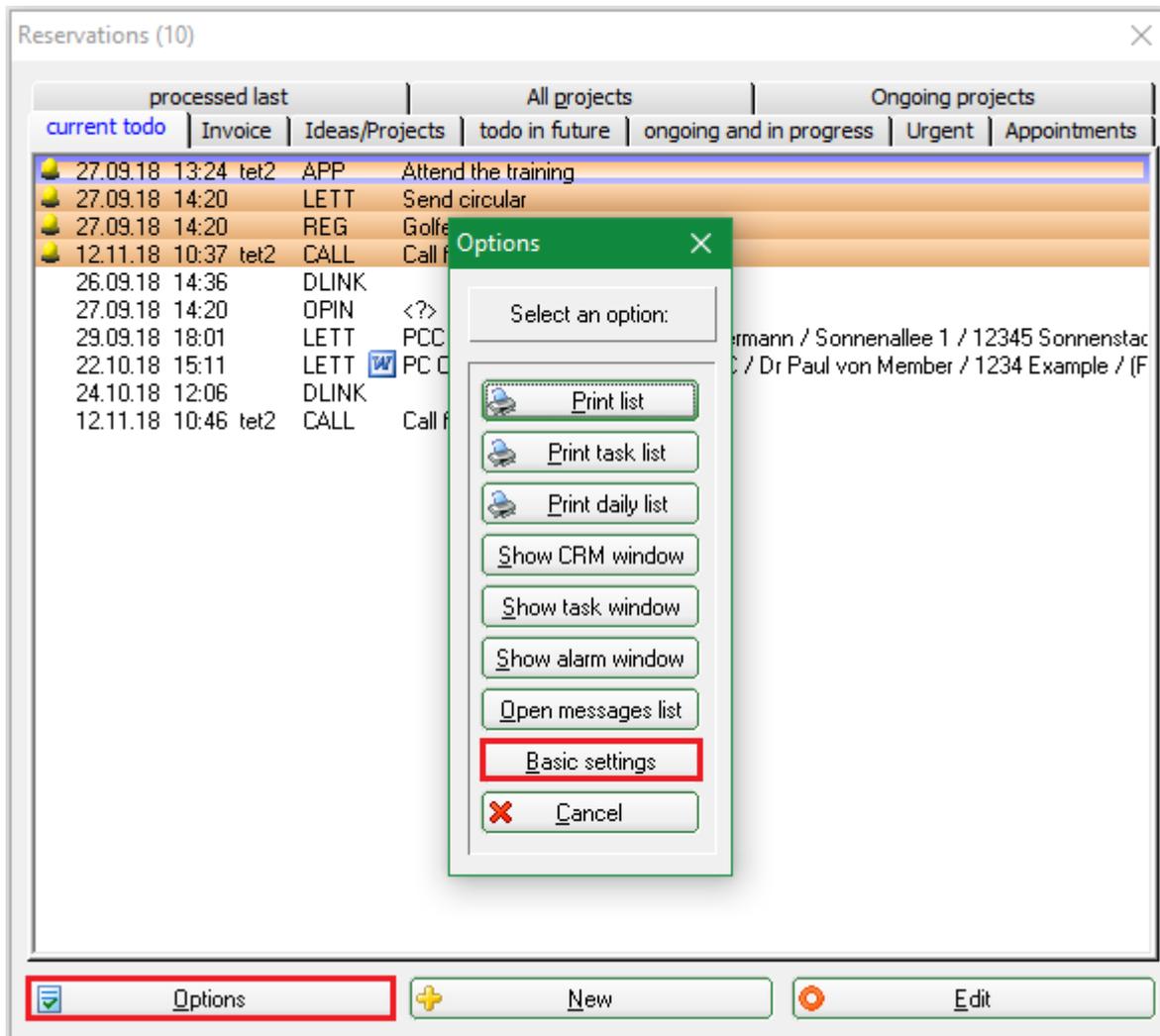
Define categories

You can edit the categories here.

- Click on **New,** to create a new category.
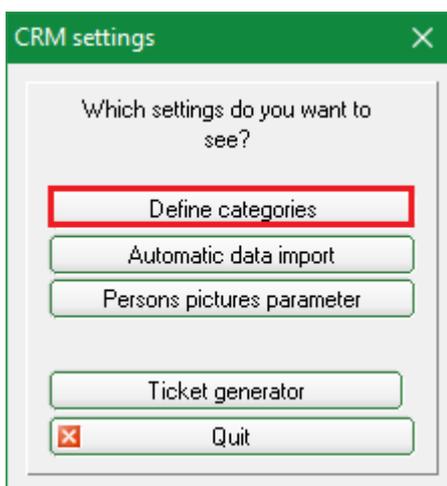- Click on **Edit,** to edit a category.
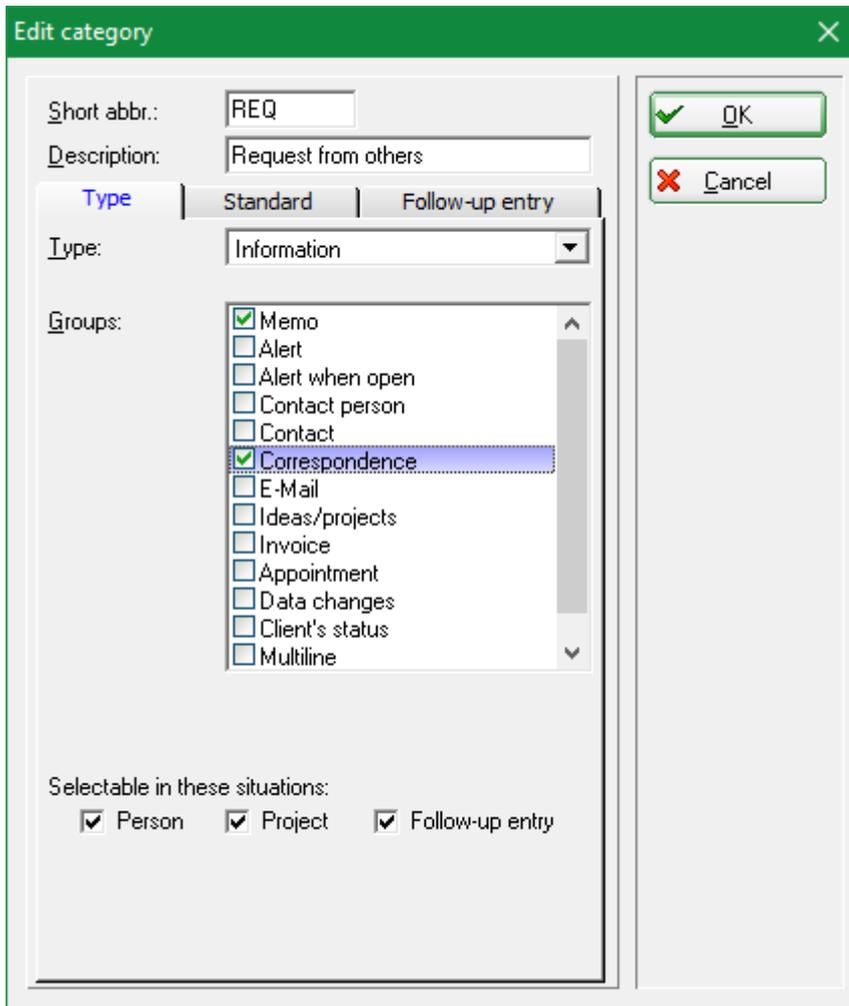
You can find a detailed description under Define and change categories for the CRM/DMS.
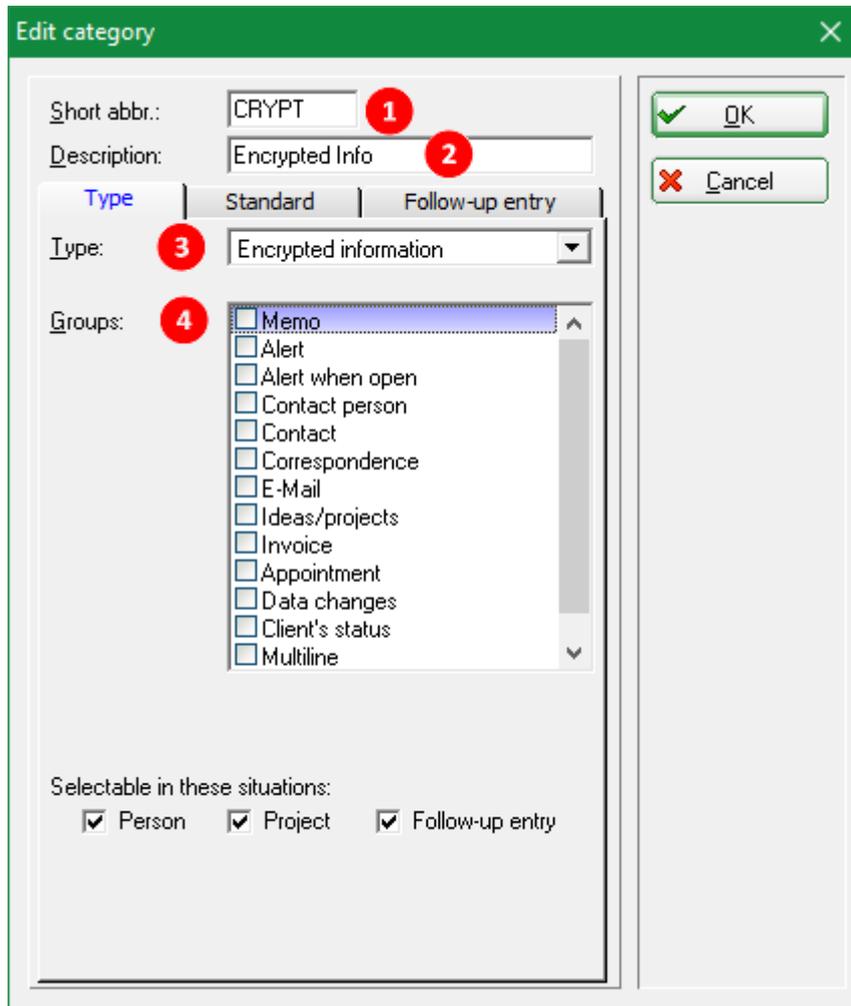
Crypt entry

Under **Options/Basic settings**

Select categories

Then click on **NEW**

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

<u>Tab: Standard</u>

1st operator: switch to: Private

2. status: change to: done

The colour can be assigned here if desired.

Tab: Follow-up entry

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.
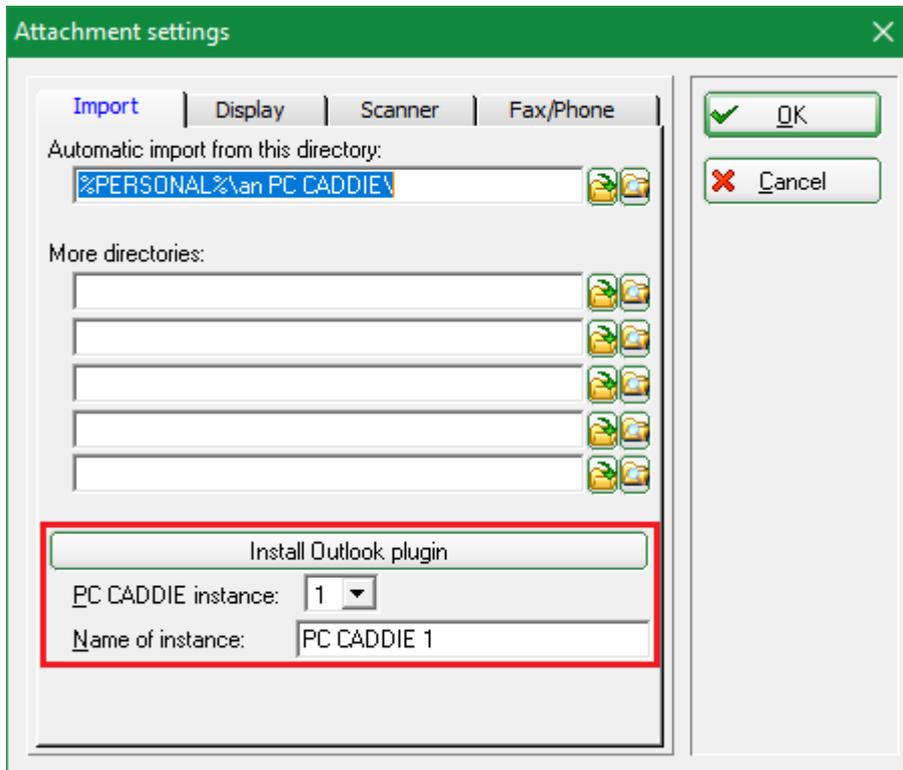
- Here you can **Display programmes** here. The corresponding file types are opened with the selected programme.
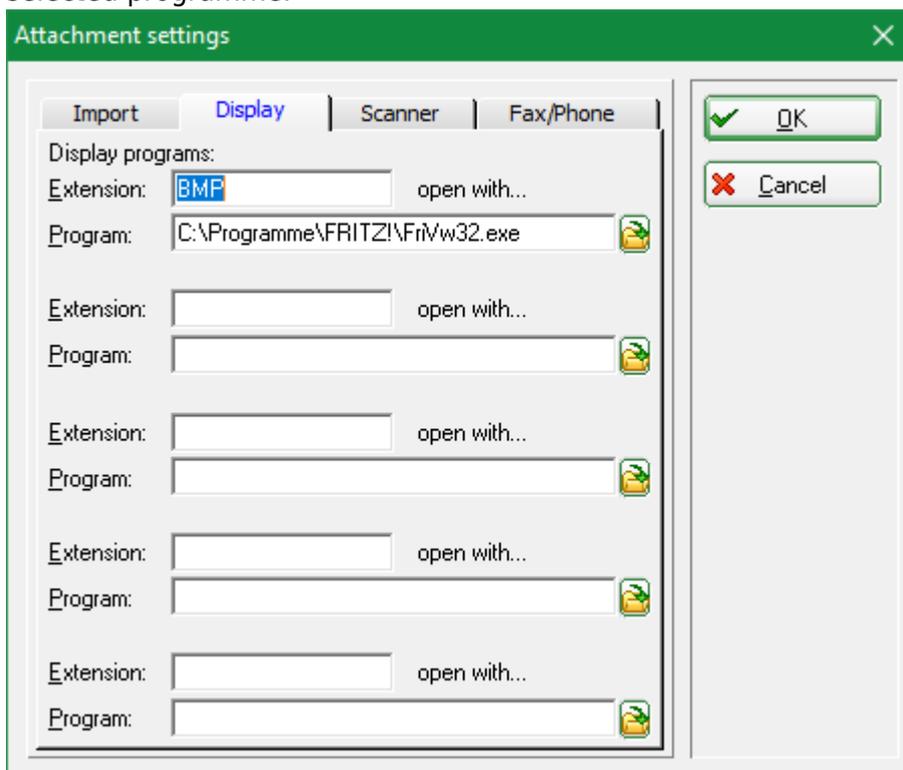
- Nowadays it is recommended to use the programmes included with the scanning programme. Your technician can install these so that the scanner scans into a folder. This folder can then be selected in the **Import** tab.
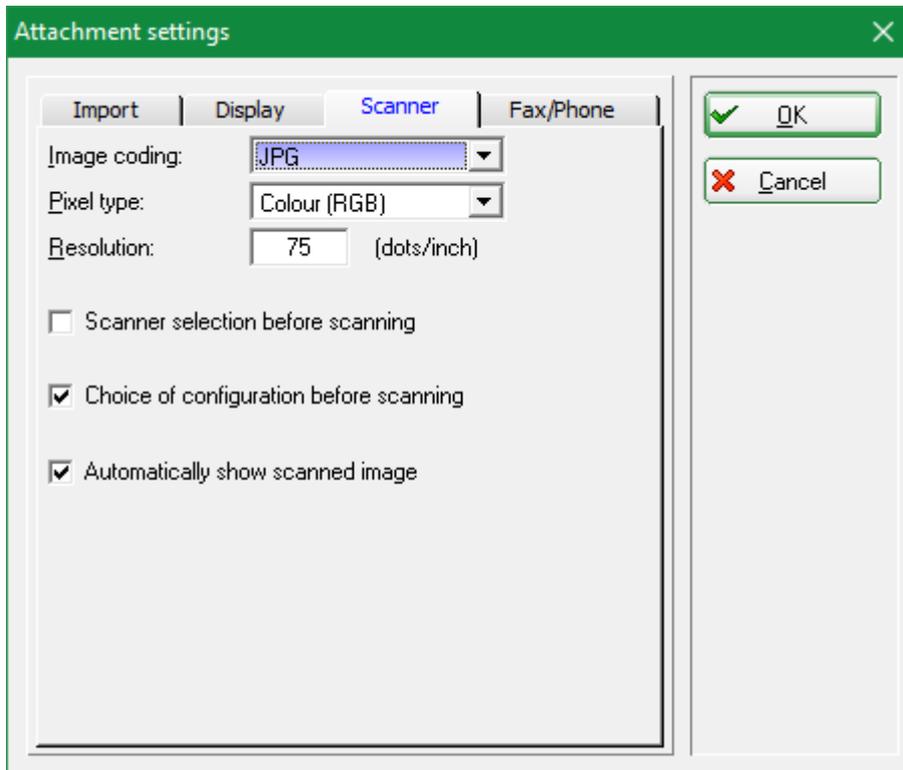
- Under **Fax/Telephone** you can configure the settings required for the interface to the software package supplied by AVM with a FRITZ!Box or FRITZ!Card. Select the database directories for faxes and telephone calls here. PC CADDIE is then able to transfer incoming faxes directly from the FRITZ!fax software or recorded messages from the FRITZ!fon software directly to CRM\DMS .