CRM\DMS

With the add-on module CRM\DMS you can extend your PC CADDIE customer management with essential task, appointment and information functions for complete documentation. When used by the entire team, this module is an indispensable source of support for your employees and the foundation needed to turn your business into a profit center.

But what do these letters mean?

CRM stands for **Customer Relationship Management**, and we love talking about a systematic care of the customer relationship. **DMS** stands for **Document Management System**, i.e., the central storage of the data.

With the CRM/DMS you can digitally map all the daily workflows. Examples of this can be found at Projects. Whether at the reception, in the pro shop, at the golf pros, in the restaurant or in the management, it supports you in all matters and enables even remote access. The module thus stands for seamless communication. Loss of information and miscommunication belong to he past thanks to the Customer Relationship Management and the Document Management System.

CRM

The work is done based on projects and tickets. Projects are, so to speak, their digital folders, allowing you to keep a clear overview of all completed and pending tasks. The tickets are used to communicate among employees, to store information, to pass on work that still needs to be done, to schedule ToDos and appointments, and to get reminders about them. Tickets are subordinated to the individual projects or can be saved as such.

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

- CRM in the person mask
- Reservation window
- Tickets
- Projects
- Print
- Options (bottom left buttons)
- Grundeinstellungen
- Special ticket categories
- Transfer all entries
- Send document to CRM

DMS

The DMS allows you to save all documents in PC CADDIE under the appropriate person. Send the

documents directly from the email program or the scanner to PC CADDIE, and these will automatically be stored with the right person - provided that the email address is stored in the personal data. You can also link your telephone system with PC CADDIE and see who is calling, document and save the discussions with a subject. Once all contracts, agreements, documents, etc. are digitized and saved, you can easily retrieve them with just a few clicks. The long search in different folders thus has an end. Another important benefit is that you can access this data anytime, anywhere.

It is possible to manage the documents with certain access permissions. So you can decide which documents can be viewed and by whom.

Here is a list of the individual points:

- Send document to PC CADDIE
- PC CADDIE and Outlook
- PC CADDIE and Thunderbird
- Create an e-mail directly from the person's mask
- Queries during the saving process