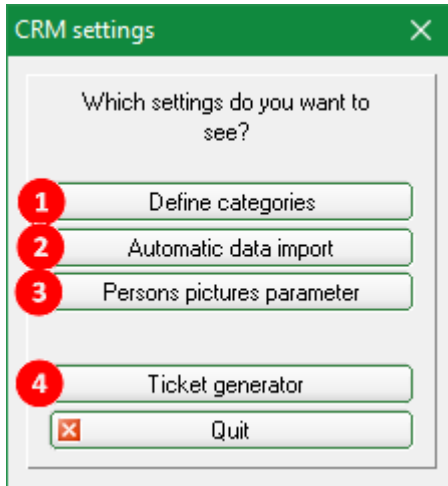


# CRM settings

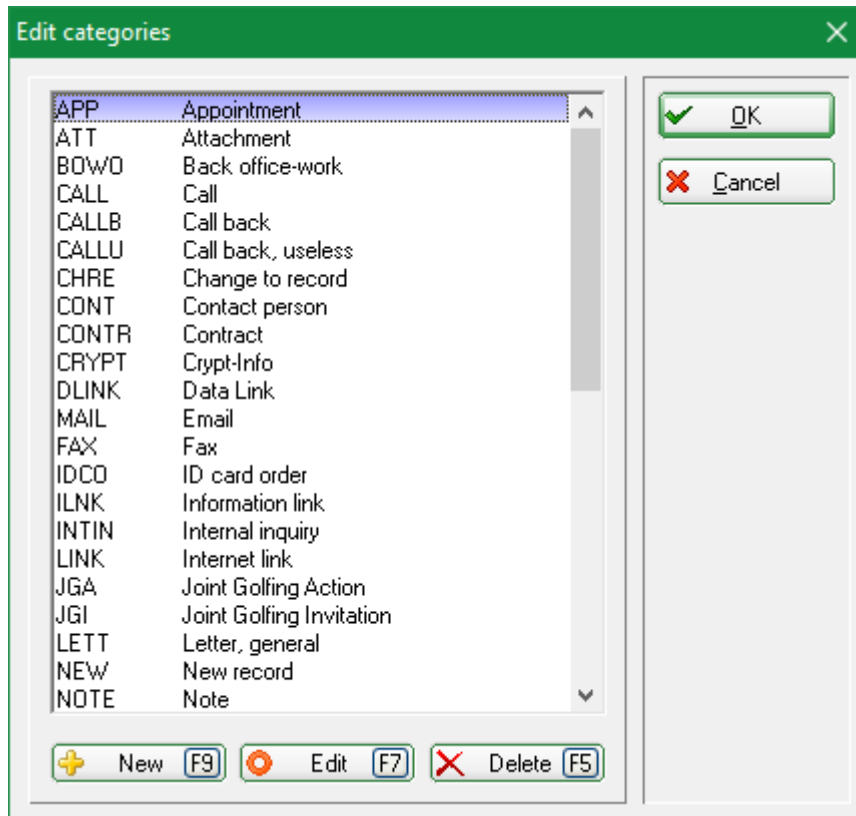
This settings are available once you installed the [CRM\DMS](#) module.

Select **Setup/Program Options/Reminder and History Settings**. The following window opens:



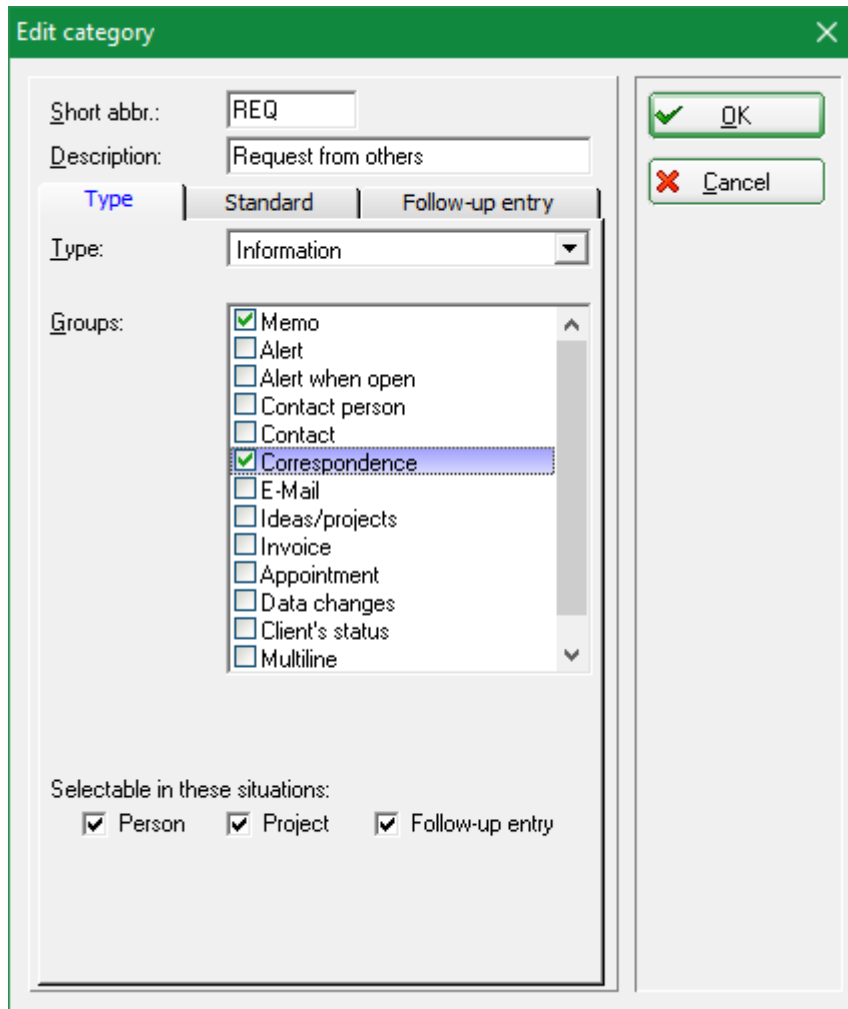
1. Select **Define categories** to view predefined settings and adjust them, or to create new categories.
2. Select **Automatic data import** to make settings for automatic data import to PC CADDIE, for example an outlook plug-in.
3. You can import pictures if you use the module **Person pictures**.

## Defined categories



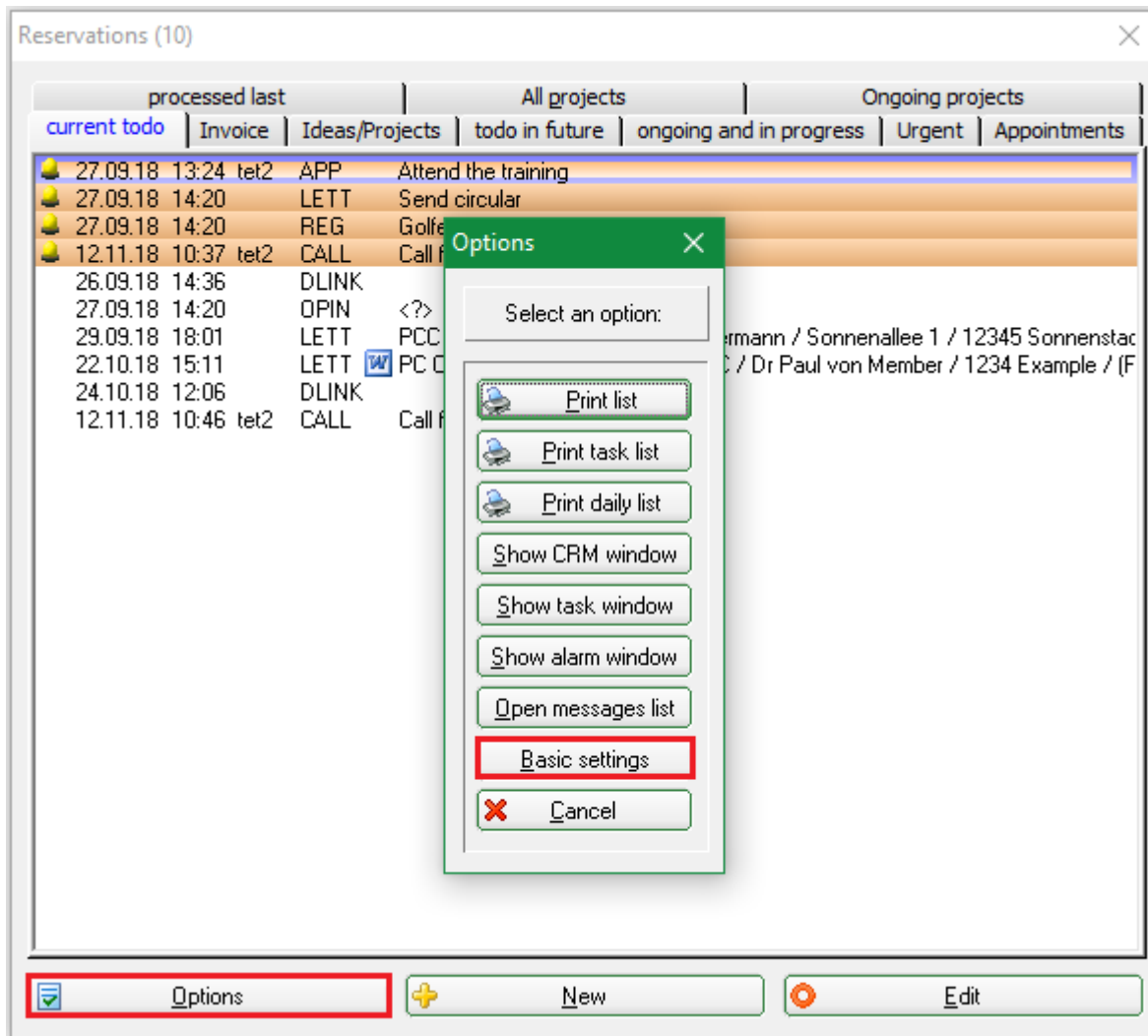
Here you can edit the categories.

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

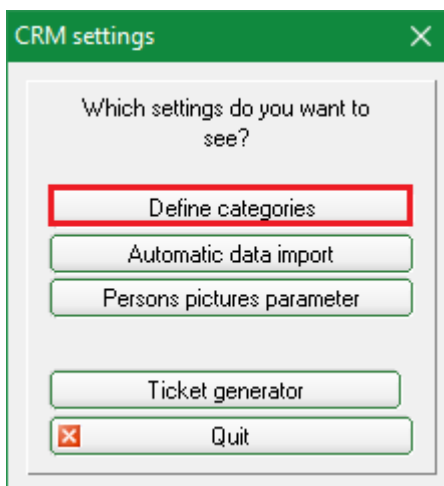


## Encrypted entry

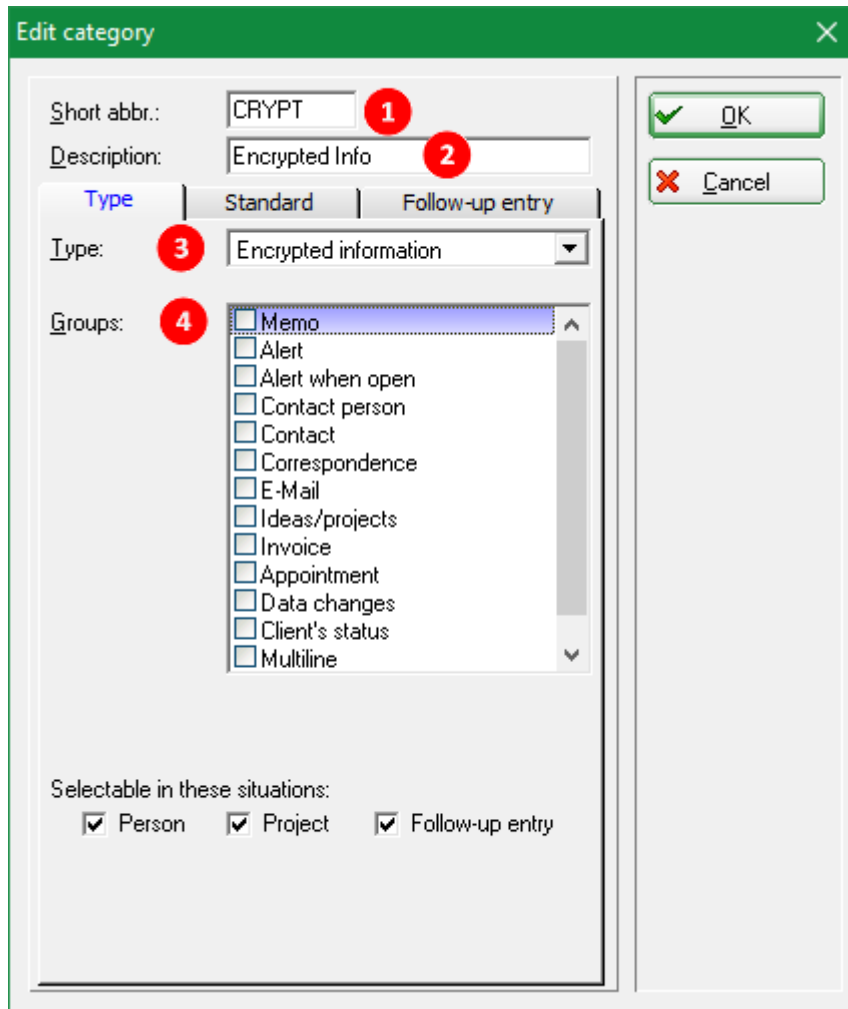
Under **Options/Basic settings**



Select „Define categories“:



Press **New**:



1. Enter abbreviation

2. Enter description

Tab: Type

3. Type: switch to: encrypted information - you will be asked later to provide a password

4. Groups: Memo

Tab: Standard

Short abbr.: CRYPT

Description: Encrypted Info

Type: Standard | Follow-up entry

Standard-Text:

Choice of auto text

Document:

User: 1 Private

Visible:

Hold file:

Status: 2 done

Colour: #000000

Must be assigned to a project

A time period must be entered

Save this booking in the timetable

OK

Cancel

1. User: switch to: private

2. Status: switch to: done

You can also assign a color, if needed.

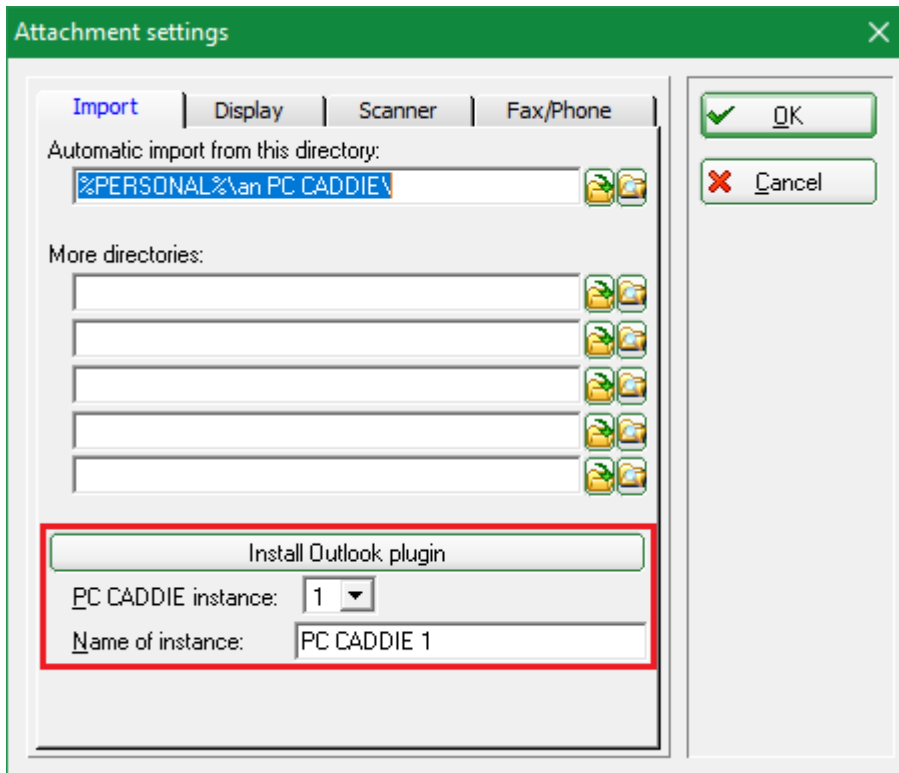
Tab: Follow-up entry

Can be left with blank fields.

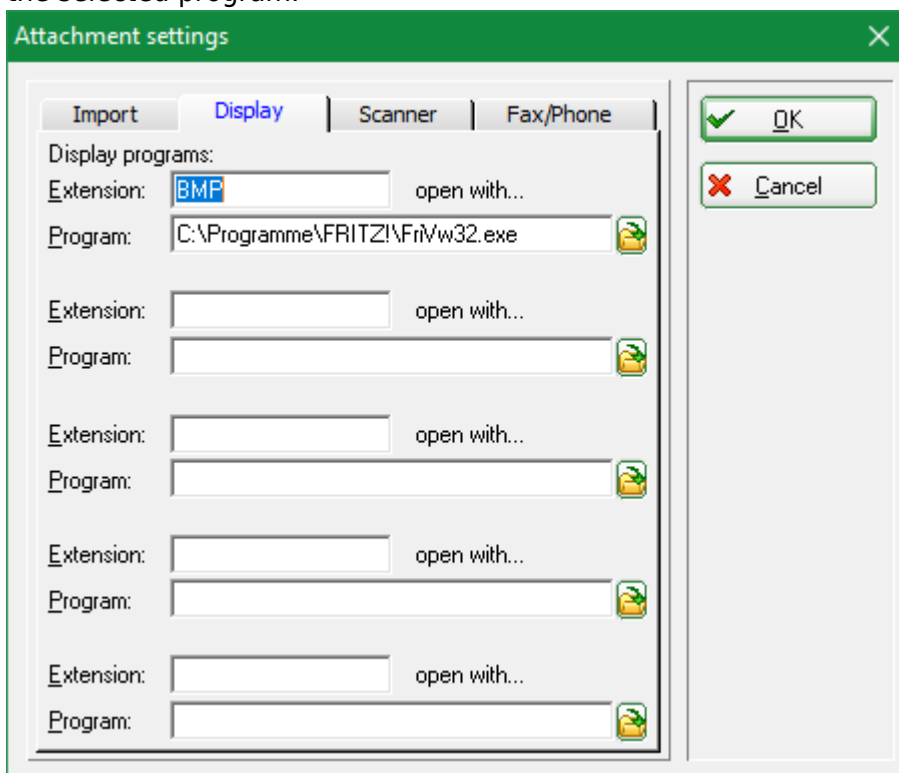
Now you can store password-protected messages. Go to the category with „New“: Encrypt and you are asked to enter the password twice. This password then protects the message. ATTENTION: lost and forgotten passwords are really lost and forgotten - password-protected entries cannot be opened without the password, not even by the support team!

## Automatic data import

- You have the following options for installing the Outlook plugin:
- Option 1: Persons / Reminder window / Options / [Basic settings](#) / Automatic data import
- Option 2: Setup / Program Options / Reminder and History Settings / Automatic data import
- Option 3: Persons new/change/delete/ Options / Basic settings / Automatic data import
- The **Automatic import** is standard and should not be changed. However, you can enter several directories. The folder **to PC CADDIE** will be created as soon as you click on **OK** after setting the appropriate path.

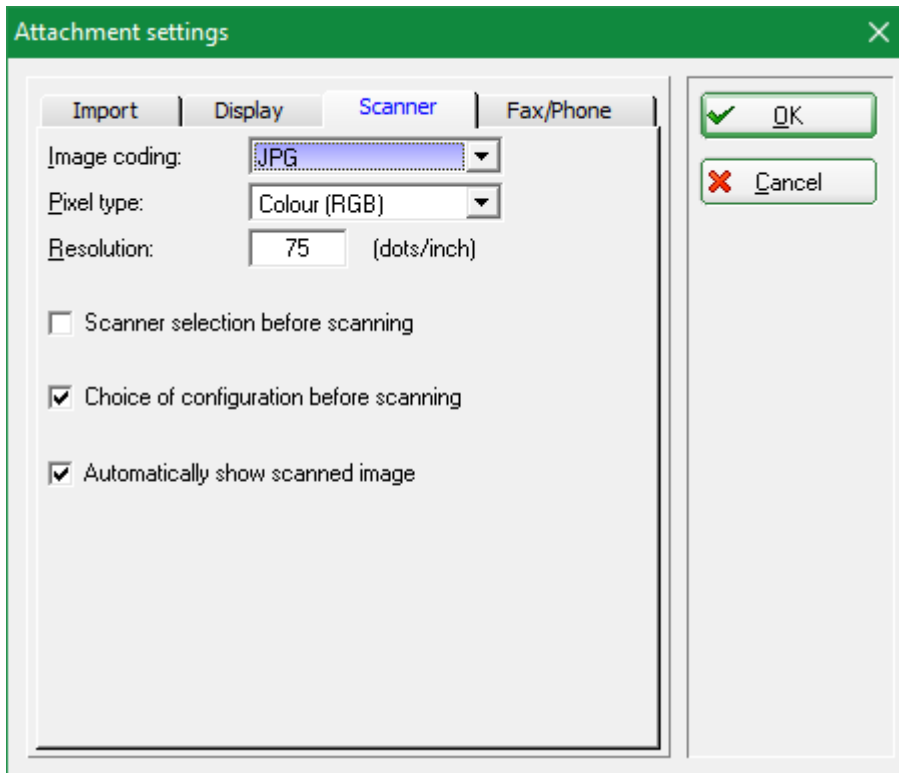


- Here you can select the **Displayed programs**. The corresponding file types are opened with the selected program.



- It is nowadays recommended to use the programs included in the scan program. This can be done by your technician, so that the scanned documents are saved into a folder. This folder can then be specified in the tab **Import**. \\





- You can configure the settings necessary for the interface to the software package supplied by the company AVM with a FRITZ!Box or a FRITZ!Card under **Fax/Phone**. Select the database directories for faxes or telephone calls. PC CADDIE is then able to transfer incoming faxes directly from the software FRITZ!Fax or recorded messages from the software FRITZ!Phone directly into the CRM\DMS. \\

