



# SMARTCRM.ERP.Sage



## Multi clients

- Possible representation of multiple clients



## Figures in CRM

- Combined with SMARTCRM.Sales:
- Current sales figures and sales development for field service and back office at the press of a button



## Analyses

- Combined with SMARTCRM.Sales and SMARTCRM.Planning:
- Advanced analysis and planning possibilities



## Uncovering potential

- Combined with SMARTCRM.Sales:
- Unveiling of cross-selling potentials



## Offline capability with SMARTCRM.Offline

- Combined with SMARTCRM.Offline:
- Permanent availability of the data from Sage on notebook or Windows Tablet



## App for iOS and Android

- Combined with SMARTCRM.App:
- Information from Sage on your mobile devices per online access

## ERP interface: standard with our customers

# 98%

of our customers use an interface between SMARTCRM and their ERP solution.  
With the standard interface to Sage, all customer-related ERP information can be found directly in SMARTCRM.

### SMARTCRM.ERP: Your custom-made suit yet ready-to-wear

Needless to say, the principle of "custom-made suit yet ready-to-wear" applies to SMARTCRM.ERP. The standard interface to Sage offers many possibilities for data exchange between CRM and ERP systems and can be adapted and expanded according to your needs.



## From Sage to SMARTCRM

Sage ERP



Interface >>



- Customers, suppliers, prospective customers
- Relationships and hierarchies
- Employees
- Contacts
- Visit reports
- Product, multilingual product text modules, pictures, prices, price lists, product groups, merchandise groups
- Quotation items, quotation pdf, automated tasks to follow up with quotation threshold
- Incoming order items
- Order back log items
- Invoice items, contribution margin per item
- Open items
- Planning
- Projects
- Machines
- Features
- Complaints
- Value tables
- Discount prices
- Targets
- Orders, order confirmation, outstanding invoices

This way, you can exactly select the data you want to see in SMARTCRM from the following options:



## From SMARTCRM to Sage

Sage ERP



<< Interface



Upon request, the following data may also be provided to Sage:

- Customers, suppliers, prospective customers
- Contacts
- Quotation items
- Order items
- Visit reports
- Machines
- DMS documents

See our CRM system live – free of charge and non-binding directly on your screen:

[smartcrm.gmbh/en/company/online-demo](http://smartcrm.gmbh/en/company/online-demo)



Head Office: Georg-Todt-Straße 1, 76870 Kandel, Germany, Ph. +49 7275 98866-0,  
vertrieb@smartcrm.de, www.smartcrm.com

Office in Austria: Mayrwiesstraße 11, 5300 Hallwang bei Salzburg, Austria, Ph. +43 662 870952-0,  
vertrieb@smartcrm.at, www.smartcrm.at

Office in Switzerland: Juchstrasse 45, 8500 Frauenfeld, Switzerland, Ph. +41 52 770 00-50,  
vertrieb@smartcrm.ch, www.smartcrm.ch