



All around high visibility

Balanced to success

Whoever can just spring very high, rarely wins the decathlon. So it is with sales projects. Successes come when the required efforts on all "sites" are in the proper ratio, when each task receives the attention it really needs.

SMARTCRM.Projects ensures you a global view of your sales work. With this module, you know for each stage of the project where you have to start:

- SMARTCRM.Projects is your binocular: You create sound forecasts over detailed statistical analysis of expected incoming orders. You have the flexibility to take various angles for the forecast, such as corporate level, employees, time period, and reference to product/product groups.
- SMARTCRM.Projects is your scheduler: Here, you lay out your projects in details, e.g., responsibilities, intermediate steps, deadlines, etc... You monitor the project progress and recognize early enough if the targets are compromised in the process.
- SMARTCRM.Projects is your slide rule: You can calculate your offer through price lists from the product

master data, set discount or surcharges, calculate positions and project totals.

- SMARTCRM.Projects is your typing pool: Write your offers in a less time consuming way with integrated templates in different variations (also multilingual), e.g., with pre-configured text modules, products descriptions, pictures. It looks simply better and more professional.

Information channel to the outside

The module ensures that all data from ongoing projects are also available for mobile use and in field service.

The communication is not one-sided: projects must be newly evaluated for instance after a conversation with the customer, the data can be changed directly in the system. SMARTCRM.Projects automatically calculates the new forecast.

SMARTCRM.Projects



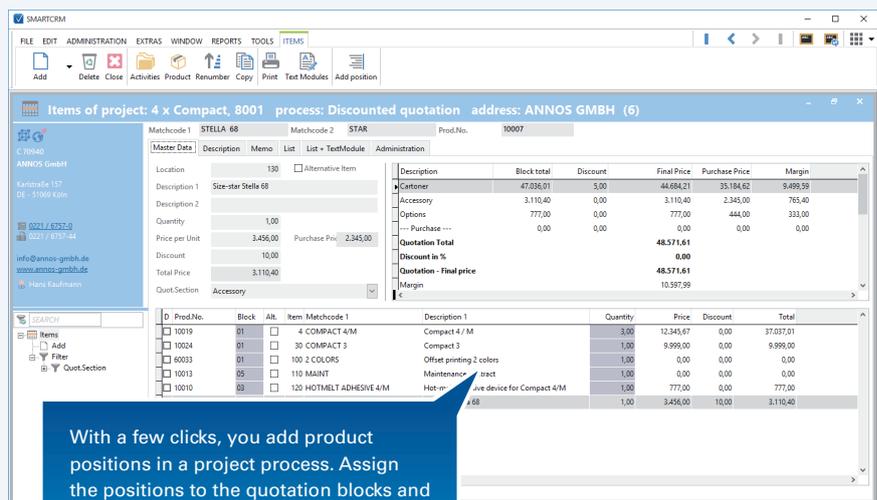
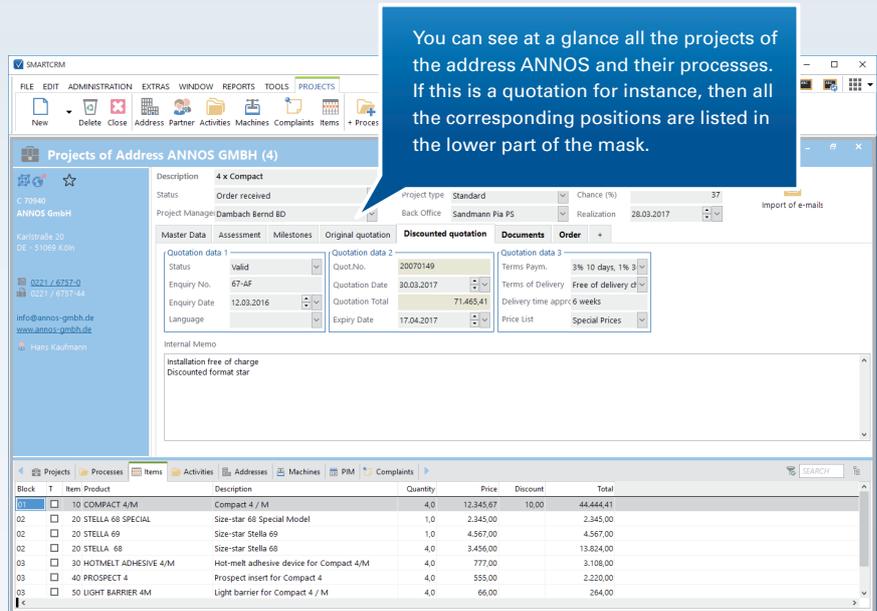
SMARTCRM.Projects is a guideline and an orientation guide for the sales work. In the module, you can completely plan, monitor and adjust sales projects.

- Forecasts based on detailed statistics
- Workflow management and projects monitoring
- Calculation for adjusted benchmarks
- Template-driven quotation
- System of "dummy products" that are not available in the ERP system but might be needed for the individual offers.

SMARTCRM.Projects

Technical features

- Organization and structuring of sales projects in all stages: forecast, calculation, offer writing, workflow management and monitoring
- Forecast per month, quarter, 24 months rolling
- Assignment of responsibilities and roles
- Multi-layer product management, including description, pictures, production costs, sales prices, warning notices, access to external information (e.g. data sheets)
- Any number of offer revisions, respectively variants, e.g., based on product master data, special conditions, assignment of the positions to product categories (product, accessories, services, etc...)
- Cost optimized quotation (multilingual) via standard text modules, product descriptions, pictures. Fixed layout for quick quotations
- Quotation tracking: appointments, tasks, workflow
- Complete project history: offer, documents, reports, e-mail, etc...
- Optional: Offline order entry including price determination



About SMARTCRM

Since 1992, SMARTCRM GmbH is successful with its own development for sales, marketing and service. The company offers with the eponym product SMARTCRM a complete CRM solution (Customer Relationship Management). With more than 14.000 users in European small and medium sized enterprises, SMARTCRM has already proved its excellence.

SMARTCRM GmbH completes its software solution by consulting and system analyze, customizing installation as well as comprehensive user and administrator trainings. Dedicated employees ensure the continuing development of SMARTCRM as well as comprehensive customer support.

Would you like more information about SMARTCRM.Projects?

You can contact our customer care at:

+49 7275 98866-0

We are looking forward to talking with you!



SMARTCRM GmbH
Simply MORE success

Georg-Todt-Straße 1, 76870 Kandel, Germany, Ph. +49 7275 98866-0, Fax +49 7275 98866-64
info@smartcrm.de, www.smartcrm.de

Filial in Austria: Sterneckstraße 37, 5020 Salzburg, Austria, Ph. +43 662 870952
vertrieb@smartcrm.at, www.smartcrm.at

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