



Always connected in the field



Regular customer visits:

- When was the last time the customer was visited?
- What is the agreed frequency of visits?
- Which customer visits are planned in the near future?



Visit planning made easy with SMARTCRM:

- Automatic follow-ups
- Reminder of the next due visit to a customer within a defined frequency



Planning field service tours:

- Is the next weekly planning pending?
- Which customer should be visited on the tour?
- Which appointments have been already made?
- To which tour can you combine them with?



Schedule sales and service tours at the blink of an eye with SMARTCRM.TourPlanning:

- Free assignment of addresses to tours
- Easy creation of tours
- Generation of visit appointments in the Organizer
- Preparation of plan activities for later documentation of the visit
- Tour overviews on the SMART Board



Determining and visualizing routes:

- On the roads and time for a spontaneous visit, perhaps meeting a customer with an open offer?
- Looking at a map of all customers with declining purchasing volumes in the sales territory and planning the optimal route?
- And integrating the new customers into existing sales tours?



Finding the direct path to customers with SMARTCRM.GeoMap:

- Area search with extensive filter options
- Export of selected addresses and visualization on a map of the online map service Bing Maps
- Display of additional information, such as performance indicators
- Online route planning in Bing Maps
- Display of addresses within a corridor along the route
- Representation of sales territories on a map
- Access to the maps for all employees at any time



Providing information even on the roads:

- Much needed information while at a customer's site?
- Regardless whether an Internet connection is available?
- Updating the schedule when on your way?
- And promptly inform the colleagues in the office?



SMARTCRM always available with the mobile solutions:

- SMARTCRM.Offline: offline access using notebooks
- SMARTCRM.App: online access via app for iOS/Android
- SMARTCRM.Web: online call through the web browser
- SMARTCRM.Exchange.Sync: appointments, tasks and contact on mobile terminals



Visit planning and follow-up:

- What did the colleagues discuss with the customer?
- Seeing the current sales development just before the meeting?
- Unveiling cross-selling and up-selling potentials?
- Immediately documenting the discussion after the visit, on the way, for instance, via speech recognition?
- And sending tasks to the back office staff?



Up-to-date with SMARTCRM:

- Complete activity history
- Schedule and task management
- Recording of visit reports directly in SMARTCRM, with SMARTCRM.App also with speech recognition
- Questionnaires and templates for uniform reports
- With SMARTCRM.Sales and SMARTCRM.ERP:
 - Import of the figures from your ERP system
 - Extensive BI functionalities
 - Analysis of the sales figures, comparison of target values and actual figures



Preparing and following up quotations:

- Are there still open quotations to be discussed with the customer?
- How does the current forecast look like?
- What are the chances of success?
- Create a new offer when meeting the customer?
- Which arguments can convince the decision-makers?



Preparing and monitoring quotations with SMARTCRM.Projects:

- Panoramic view in project business
- Full project history
- Template-driven offer preparation
- Defined multi-lingual text modules
- Quotation follow-ups and deadlines monitoring



Lead management at trade fairs:

- How does the stack of business cards get into the CRM system?
- And how to import contacts out of Microsoft Outlook?
- Preferably right during the fair, since the prospective customers want to receive information material quickly?



Into the CRM in no time with SMARTCRM:

- Import of contacts out of Microsoft Outlook
- SMARTCRM.App: Importing business cards via the camera
- Duplicate check
- Capture further lead information and pre-defined fair report forms
- Features for evaluations and marketing actions

Take off with CRM in field service now

Whether at the office, working from home, on your way or at a customer's: with SMARTCRM, you can easily plan your tours, collect all information regarding the customers and document your visit in no time.

All modules for your field service at a glance:

Get to know our CRM software SMARTCRM free of charge and non-binding directly on your screen:

smartcrm.gmbh/en/company/online-demo/



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