



SMARTCRM.DMS



DMS call

- Direct call of your Document Management System out of SMARTCRM
- Call the DMS research from SMARTCRM to look for documents of a specific address
- Possible consideration of the rights defined in your DMS for the search
- Predefined document type in the search
- Search for documents over a definable period of time (optional)
- Call of receipts from your DMS over the module SMARTCRM.Sales, e.g., corresponding to a specific invoice or order number (optional)



DMS transfer

- Manual transfer of data from SMARTCRM to your DMS
- Automatic transfer of specified documents to your DMS (optional)
- Provision of address and contact information to your DMS for e-mail archiving (optional)



Indexing

- Automatic indexing of document during the transfer to your DMS (optional)



Documentation in the CRM

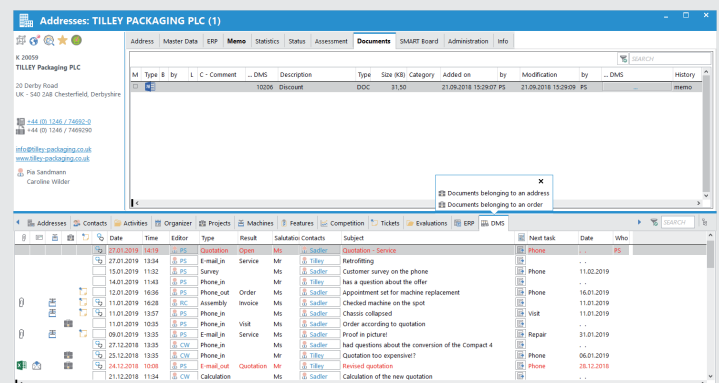
- Simultaneous documentation in the CRM customer file

Strong partners: SMARTCRM and your DMS

Combine the advantages of both CRM and DMS and connect SMARTCRM with your Document Management System.

Configuration

- The configuration of the standard interface between SMARTCRM and your Document Management System is carried out by SMARTCRM GmbH



See our CRM system live – free of charge and non-binding directly on your screen:
smartcrm.gmbh/en/company/online-demo



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