



# The sound basis for successful controlling



## Analyzing and comparing ERP figures:

- How do the current sales figures look like? Not yet on your radar, given that the next Excel evaluation is expected tomorrow by e-mail?
- For which product do the sales development tend to be negative, which counteraction can be taken?
- How are sales revenues developing in the individual sales territories in comparison to the current overall development?
- How did the year to date values look like in the previous year? Are the figures better or worse?



## Up-to-date analyses at all times with SMARTCRM.ERP and SMARTCRM.Sales:

- Import of the data material from the ERP system and analysis of the sales figures
- BI functionalities
- Daily overview of sales revenues, orders, contribution margin, open items, etc.
- Different diagram representations
- Perspectives per customer, product, sales territory, country etc.
- Drill down function
- Daily comparisons of target values and actual figures
- Monthly and annual evaluations with daily comparisons for definable previous years
- Representation in different currencies
- Client-specific and cross-client evaluations



## Defining and monitoring target figures:

- Annual planning based on territories, key accounts, individual customers and even consider seasonal curves?
- Do target values and actual figures coincide?
- Do measures have to be taken or plans adjusted?



## Focus on the target figures with SMARTCRM.ERP and SMARTCRM.Planning:

- Planning on different levels
- Assignment and accumulation of plan values per customer, seller, client
- Display for the comparison values
- Planning distribution depending on seasonal curves
- Identification plannable products, product groups
- Updated target/performance comparisons



## Keeping track of the development of the target agreements:

- Are all indicators of the aspired sales targets within the green range?
- Are there any discrepancies with individual employees, for whom countermeasures must be taken?
- For which customer is a trend reversal noticeable?



## Keeping the target in mind with SMARTCRM.ERP and SMARTCRM.Targets:

- Target agreements per employee, team
- Definable criteria, for sales, new customers etc.
- Early warning system, target/performance comparisons
- Plus/Minus lists of customer revenues, trend reversal



**Project calculation and follow-up:**

- How high are the chances of success of the current project?
- Which ones are the top projects?
- What is the outlook of the expected incoming orders? What is the current project forecast?



**Project management with panoramic view with SMARTCRM.Projects:**

- Organization and documentation of sales projects
- Project assessment
- Success statistics, calculation
- Forecast per month, quarter, 24 months rolling



**Who can access which information:**

- Should employees only see the information they actually need for their work?
- Should the management level gain a company-wide overview of the BI analyses and sales agreements?



**Managing rights in detail with SMARTCRM:**

- Extensive access rights management for detailed assignment of user rights
- Such as for addresses, sales evaluations, target agreements etc.
- Reading, editing and deleting data
- Executing functions
- Definition of rights at group or employee level

**Take off with CRM in controlling now**

SMARTCRM delivers all current information and analyses that you need as a founded basis for your management.

All modules for your controlling at a glance:

SMARTCRM.Projects	SMARTCRM.Sales	SMARTCRM.Planning	SMARTCRM.Targets
SMARTCRM.Inxmail	SMARTCRM.Basis		SMARTCRM.GeoMap
SMARTCRM.DMS			SMARTCRM.TourPlanning
SMARTCRM.ERP			SMARTCRM.Ticket
SMARTCRM.Exchange.Sync			SMARTCRM.Machines
SMARTCRM.Web			SMARTCRM.App

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

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



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