SMARTCRM.DMS.ELO

DMS call

- Direct call of ELOprofessional out of SMARTCRM
- Call the ELOprofessional research from SMARTCRM to look for documents of a specific address
- Possible consideration of the rights defined in ELOprofessional for the search
- Predefined document type in the search
- Search for documents over a definable period of time (optional)
- Call of receipts from ELOprofessional 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 ELOprofessional
- Automatic transfer of specified documents to ELOprofessional (optional)
- Provision of address and contact information to PROXESS for e-mail archiving (optional)

Indexing

- Automatic indexing of document during the transfer to ELOprofessional (optional)
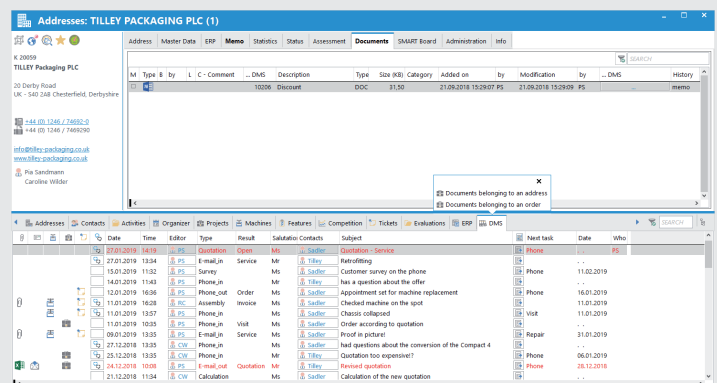
Documentation in the CRM

- Simultaneous documentation in the CRM customer file

Strong partners: SMARTCRM and ELOprofessional

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 ELOprofessional 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

As of: June 2022