



SMARTCRM.DMS.HABEL



DMS call

- Direct call of HABEL out of SMARTCRM
- Call the HABEL research from SMARTCRM to look for documents of a specific address
- Possible consideration of the rights defined in HABEL for the search
- Predefined document type in the search
- Search for documents over a definable period of time (optional)
- Call of receipts from HABEL 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 HABEL
- Automatic transfer of specified documents to HABEL (optional)
- Provision of address and contact information to PROXESS for e-mail archiving (optional)
- Automatic storage of the files transferred to HABEL in TIF format, according to the GDPdU - Principles of data access and auditing of digital documents – (optional, requires an additional module of HABEL)



Indexing

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



Documentation in the CRM

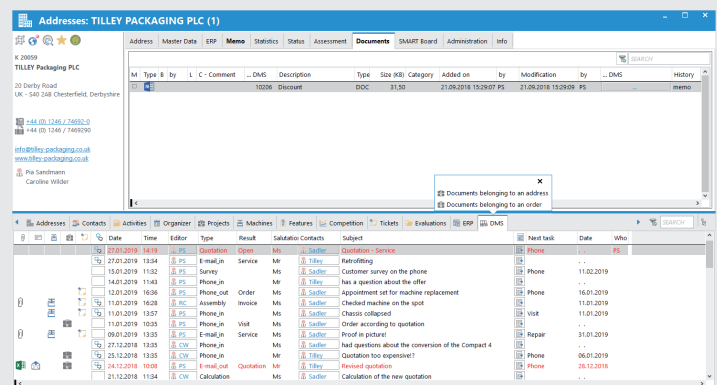
- Simultaneous documentation in the CRM customer file

Strong partners: SMARTCRM and HABEL

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 HABEL is carried out by SMARTCRM GmbH
- The possibly necessary configuration of the spool service for the automatic transfer of defined documents can be taken over by HABEL or by your services



M	Type	Editor	Time	Editor	Type	Result	Salutation	Contacts	Subject	Navitask	Date	Who
	27.01.2019	14:19	ps	Quotation	Open	Ms.	Sadler	Quotation - Service		Phone		PS
	27.01.2019	13:34	ps	E-mail_in	Service	Mr	T. Frey	Rat-offing		Phone		
	19.01.2019	11:52	ps	Survey	Ms	Sadler		Customer survey on the phone		Phone	11.02.2019	
	14.01.2019	11:43	ps	Phone_in	Mr	T. Frey		has a question about the offer		Phone		
	12.01.2019	16:36	ps	Phone_out	Order	Ms	Sadler	Appointment set for machine replacement		Phone	16.01.2019	
	11.01.2019	16:26	ps	Assembly	Ms	Sadler		Checked machine on the spot		Phone	11.01.2019	
	11.01.2019	13:57	ps	Phone_in	Ms	Sadler		Chassis collapsed		Visit		
	11.01.2019	10:35	ps	Phone_in	Visit	Ms	Sadler	Order according to quotation		Phone		
	09.01.2019	13:55	ps	E-mail_in	Service	Ms	Sadler	Proof in picture!		Phone	31.01.2019	
	27.12.2018	13:35	ps	Phone_in	Ms	T. Frey		had questions about the conversion of the Compact 4		Phone		
	24.12.2018	13:35	ps	CW	Mr	T. Frey		Quotation too expensive?		Phone	06.01.2019	
	14.12.2018	14:08	ps	E-mail_out	Question	Mr	T. Frey	Revised quotation		Phone	08.12.2018	
	21.12.2018	11:34	ps	CW	Calculation	Ms	Sadler	Calculation of the new quotation		Phone		

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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