**SMART CRM**

# SMARTCRM.DMS.PROXESS

## DMS call

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

## Indexing

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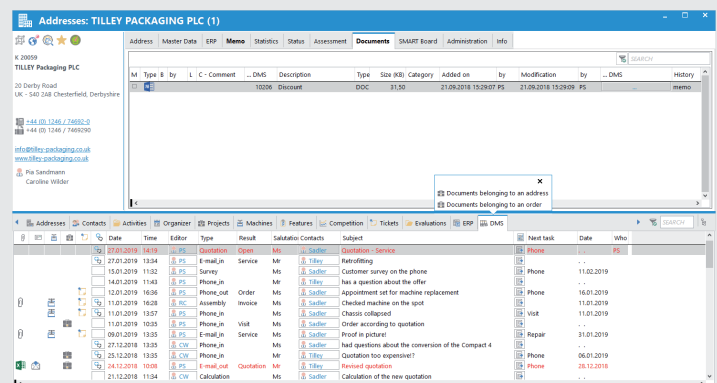
## Documentation in the CRM

- Simultaneous documentation in the CRM customer file

## Strong partners: SMARTCRM and PROXESS

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 PROXESS 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 PROXESS or by your services



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