



SMARTCRM.DMS.PROCESS



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

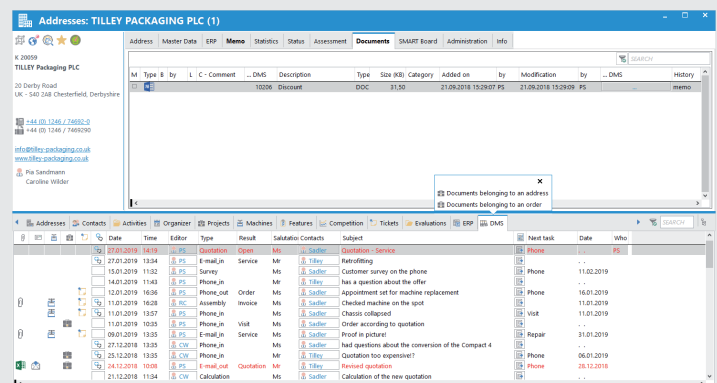
- Simultaneous documentation in the CRM customer file

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



The screenshot displays the SMARTCRM interface for a customer named TILLEY PACKAGING PLC. The top section shows the customer's address and contact information. Below this, there is a table of activities with columns for Date, Time, Editor, Type, Result, Status, and Subject. The activities include various interactions such as 'Quotation', 'Service', 'Survey', 'Phone_in', 'Order', 'Assembly', 'Visit', 'Service', 'Phone_in', and 'Calculation'.

Date	Time	Editor	Type	Result	Status	Subject
27.01.2019	14:19	PS	Quotation	Open	Ms	Quotation - Service
27.01.2019	13:34	PS	Service	Mr	PS	Rate-offering
19.01.2019	11:52	PS	Survey	Ms	PS	Customer survey on the phone
14.01.2019	11:43	PS	Phone_in	Mr	PS	has a question about the offer
12.01.2019	16:36	PS	Phone_out	Order	Ms	Appointment set for machine replacement
11.01.2019	16:28	PS	Assembly	Ms	PS	Checked machine on the spot
11.01.2019	13:57	PS	Phone_in	Ms	PS	Chassis collapsed
11.01.2019	10:35	PS	Phone_in	Visit	Ms	Order according to quotation
09.01.2019	13:55	PS	Service	Ms	PS	Print in picture!
27.12.2018	13:35	CW	Phone_in	Ms	PS	had questions about the conversion of the Compact 4
24.12.2018	13:35	CW	Phone_in	Mr	PS	Quotation too expensive?
24.12.2018	10:08	PS	E-mail_out	Question	Mr	Revised quotation
21.12.2018	11:34	CW	Calculation	Ms	PS	Calculation of the new quotation

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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