SMARTCRM.DMS.d.3

DMS call

- Direct call of d.3 out of SMARTCRM
- Call the d.3 research from SMARTCRM to look for documents of a specific address
- Possible consideration of the rights defined in d.3 for the search
- Predefined document type in the search
- Search for documents over a definable period of time (optional)
- Call of receipts from d.3 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 d.3
- Automatic transfer of specified documents to d.3 (optional)
- Transfer of address and contact information to d.3 for e-mail archiving (optional)

Indexing

- Automatic indexing of document during the transfer to d.3 (optional)
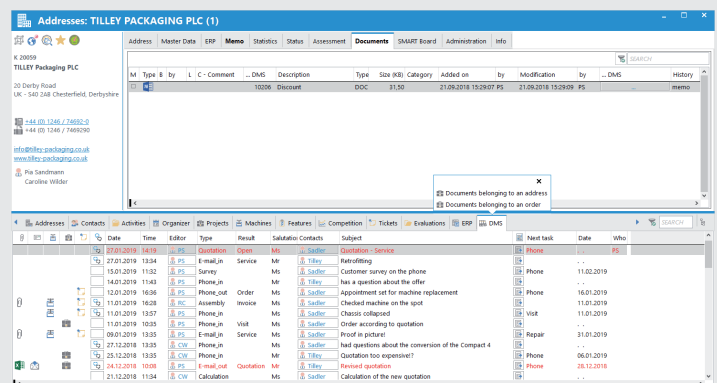
Documentation in the CRM

- Simultaneous documentation in the CRM customer file

Strong partners: SMARTCRM and d.3

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 d.3 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