SMART CRM

SMARTCRM.DMS.proALPHA

DMS call

- Direct call of proALPHA DMS out of SMARTCRM

- Call the proALPHA DMS research from SMARTCRM to look for documents of a specific address

- Possible consideration of the rights defined in proALPHA DMS for the search

- Predefined document type in the search

- Search for documents over a definable period of time (optional)

- Call of receipts from proALPHA DMS 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 proALPHA DMS

- Automatic transfer of specified documents to proALPHA DMS (optional)

- Provision of address and contact information to PROXESS for e-mail archiving (optional)

Indexing

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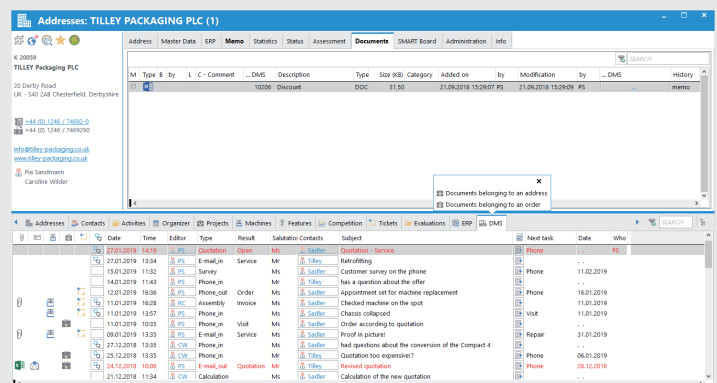
Documentation in the CRM

- Simultaneous documentation in the CRM customer file

Strong partners: SMARTCRM and proALPHA DMS

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 proALPHA DMS 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

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As of: June 2022