



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

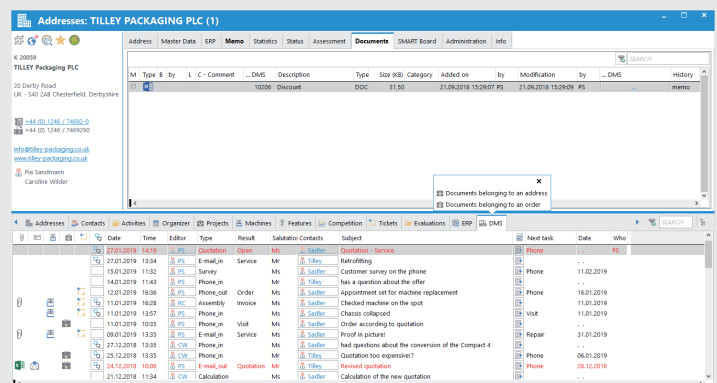
- Simultaneous documentation in the CRM customer file

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



Date	Time	Editor	Type	Result	Calculation	Contacts	Subject	Need task	Date	Who
27.01.2019	14:19	ps	Question	Open	Ms	Sadler	Question - Service	Phone	..	..
27.01.2019	13:54	ps	Service	..	Ms	Sadler	Patrol/ffing	Phone	..	..
15.01.2019	11:28	ps	Survey	..	Ms	Sadler	Customer survey on the phone	Phone	11.02.2019	..
14.01.2019	11:43	ps	Phone_in	..	Ms	Sadler	has a question about the offer	..	..	..
12.01.2019	16:06	ps	Phone_out	Order	Ms	Sadler	Appointment set for machine replacement	Phone	16.01.2019	..
11.01.2019	16:28	ps	Assembly	Invoice	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	..
11.01.2019	10:35	ps	Phone_in	visit	Ms	Sadler	Order according to quotation	..	..	..
09.01.2019	13:35	ps	Service	..	Ms	Sadler	Proof of picture	Repair	31.01.2019	..
27.12.2018	13:35	ps	Phone_in	..	Ms	Sadler	had questions about the conversion of the Compact 4	..	..	..
25.12.2018	13:35	ps	Phone_in	..	Ms	Sadler	Quotation too expensive?	Phone	06.01.2019	..
14.12.2018	10:08	ps	..	..	Ms	Sadler	Personal question	Phone	28.12.2018	..
21.12.2018	11:34	ps	Calculation	..	Ms	Sadler	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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