



SMARTCRM.DMS

- DMS call**

 - Direct call of your Document Management System out of SMARTCRM
 - Call the DMS research from SMARTCRM to look for documents of a specific address
 - Possible consideration of the rights defined in your DMS for the search
 - Predefined document type in the search
 - Search for documents over a definable period of time (optional)
 - Call of receipts from your 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 your DMS
 - Automatic transfer of specified documents to your DMS (optional)
 - Provision of address and contact information to your DMS for e-mail archiving (optional)
- Indexing**

 - Automatic indexing of document during the transfer to your DMS (optional)

Documentation in the CRM

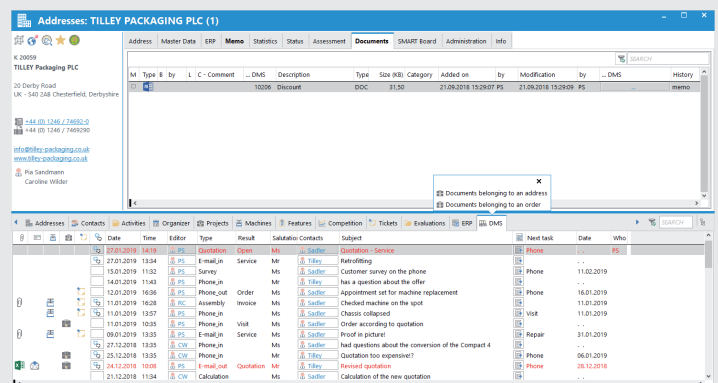
 - Simultaneous documentation in the CRM customer file

Strong partners: SMARTCRM and your 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 your Document Management System is carried out by SMARTCRM GmbH



Date	Editor	Type	Result	Calculation	Contacts	Subject
27.01.2019 14:19	Ms	Question	Open	Ms	Sadler	Question - Service
27.01.2019 13:34	Ms	E-mail	Jan	Service	Ms	Patrolfiling
15.01.2019 11:26	Ms	Survey	Mr	Ms	Sadler	Customer survey on the phone
14.01.2019 11:43	Ms	Phone	Jan	Mr	Ms	has a question about the offer
12.01.2019 16:36	Ms	Phone	out	Order	Ms	Appointment set for machine replacement
11.01.2019 16:28	Ms	assembly	Invoice	Ms	Sadler	Checked machine on the spot
11.01.2019 13:57	Ms	Phone	Jan	Ms	Sadler	Chassis collapsed
11.01.2019 10:35	Ms	Phone	Jan	Visit	Ms	Order according to quotation
09.01.2019 13:25	Ms	E-mail	Jan	Service	Ms	Printed as picture
27.12.2018 13:35	Ms	Phone	Jan	Ms	Sadler	had questions about the conversion of the Compact 4
25.12.2018 13:35	Ms	Phone	Jan	Mr	Ms	Question too expensive?
24.12.2018 10:08	Ms	E-mail	out	Question	Ms	Forward question
21.12.2018 11:54	Ms	Calculation	Ms	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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