



SMARTCRM.ERP.AX



Multi clients

Possible representation of multiple clients



Figures in CRM

Combined with SMARTCRM.Sales:

 Current sales figures and sales development for field service and back office at the press of a button



Analyses

Combined with SMARTCRM.Sales and SMARTCRM.Planning:

Advanced analysis and planning possibilities



Uncovering potential

Combined with SMARTCRM.Sales:

Unveiling of cross-selling potentials



Offline capability with SMARTCRM.Offline

Combined with SMARTCRM.Offline:

 Permanent availability of the data from Microsoft Dynamics AX on notebook or Windows Tablet



App for iOS and Android

Combined with SMARTCRM.App:

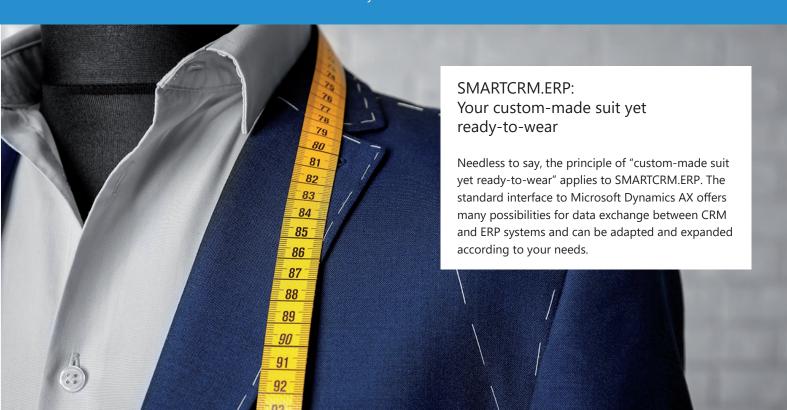
Information from Microsoft Dynamics AX on your mobile devices per online access

ERP interface: standard with our customers

98%

of our customers use an interface between SMARTCRM and their ERP solution.

With the standard interface to Microsoft Dynamics AX, all customer-related ERP information can be found directly in SMARTCRM.





Microsoft

Dynamics AX





- Customers, suppliers, prospective customers
- Relationships and hierarchies
- Employees
- Contacts
- Visit reports
- Product, multilingual product text modules, pictures, prices, price lists, product groups, merchandise groups
- Quotation items, quotation pdf, automated tasks to follow up with quotation threshold
- Incoming order items
- Order back log items
- Invoice items, contribution margin per item
- Open items
- Planning
- Projects
- Machines
- Features
- Complaints
- Value tables
- Discount prices
- Targets
- Orders, order confirmation, outstanding invoices



From SMARTCRM to Microsoft Dynamics AX

Microsoft





Upon request, the following data may also be provided to Microsoft Dynamics AX:

This way, you can exactly select the data you want to see in

SMARTCRM from the following options:

- Customers, suppliers, prospective customers
- Contacts
- Quotation items
- Order items
- Visit reports
- Machines
- DMS documents

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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