



SMARTCRM.ERP.PSIpenta



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 PSIpenta on notebook or Windows Tablet



App for iOS and Android

Combined with SMARTCRM.App:

- Information from PSIpenta 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 PSIpenta all customer-related ERP information can be found directly in SMARTCRM.

SMARTCRM.ERP: Your custom-made suit yet ready-to-wear

Needless to say, the principle of "custom-made suit yet ready-to-wear" applies to SMARTCRM.ERP. The standard interface to PSIpenta offers many possibilities for data exchange between CRM and ERP systems and can be adapted and expanded according to your needs.



From PSIpenta to SMARTCRM

PSIpenta ERP



Interface >>



This way, you can exactly select the data you want to see in SMARTCRM from the following options:

- 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 PSIpenta

PSIpenta ERP



<< Interface



Upon request, the following data may also be provided to PSIpenta:

- 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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