



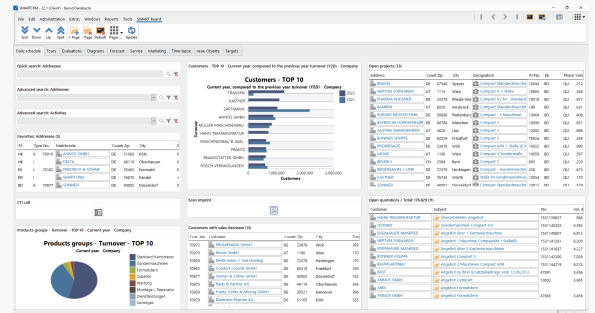
BASIS.Camp



Well-informed: everything of significance on the SMART Board

Right from the start, the most important information needed for the day are displayed on the SMART Board.

- Overviews
- Diagrams
- Search functions
- Favorites
- Individually expandable

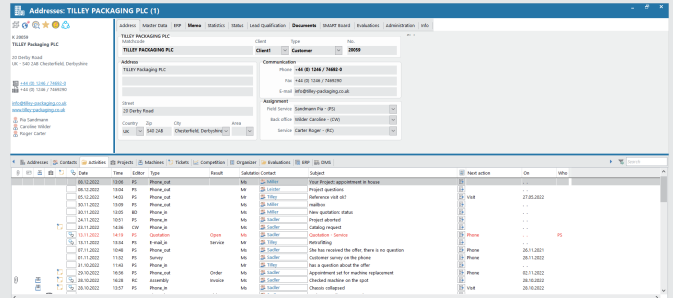


Structured: all information centrally available in the electronic file

For each address, there is a file which bundles all the relevant information such as location, contacts, responsibilities, as well as activities and makes them available for the whole company. This way, you are not only informed about your business partner but also have the complete history at a glance.

- Management of addresses and contacts
- Categorization, classification and evaluation
- Account manager assignment, e.g., depending on the zip code, field service/back office
- Duplicate check
- Data quality check and optimization
- Warnings such as delivery block, extra discount

- Visualization multilevel company's hierarchy or relationships
- Documentation of all activities with various formatting options and spell checking
- Assignment to conversations
- Address or contact mass processing



Organized: all documents company-wide available

Easily store in the system the complete correspondence including all document related to the address or project.

- Storage of different file format

- Uniform document templates according to your CI
- Document version control
- Document preview

Thanks to the integration of Microsoft Office, you can also create new Word or Excel documents directly from SMART-CRM and then store them in the CRM system.



Uncomplicated: Convenient address acquisition

Read in imprints or e-mail signatures into the CRM system in no time or import the vcf contacts per drag & drop.

- Automatic assignment to corresponding fields
- Duplicate check
- Predefined values

The key to success

SMARTCRM can tell you: what, when, with whom and with what result – centrally available in the CRM system for all employees and traceable even years after.



Documented: your e-mail communication centrally available in the CRM system

Thanks to the integration of Microsoft Outlook, e-mails can be directly sent from the CRM system. Incoming e-mails can be conveniently filed in SMARTCRM and assigned to a relevant project if applicable.

- Connection to Microsoft Outlook
- E-mail dispatch from SMARTCRM
- Import of incoming e-mails
- Link to address, contact and if applicable project, machine etc.



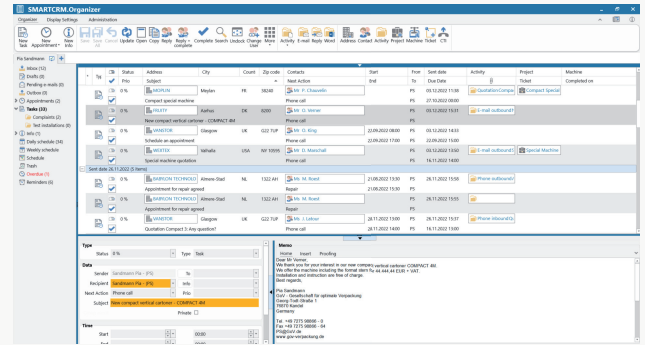
Thanks to the CTI integration, SMARTCRM not only displays the name and the company of the caller but allows you to jump into his activity history.



Coordinated: all tasks and appointments at a glance

The Organizer is your personal scheduler and task manager in SMARTCRM but also the company-wide communication medium.

- Dispatch of internal information
- Task and follow-up management
- Task deadline monitoring
- Scheduler with reminder
- Resource planning
- Substitution management
- Link to address, contact and activity

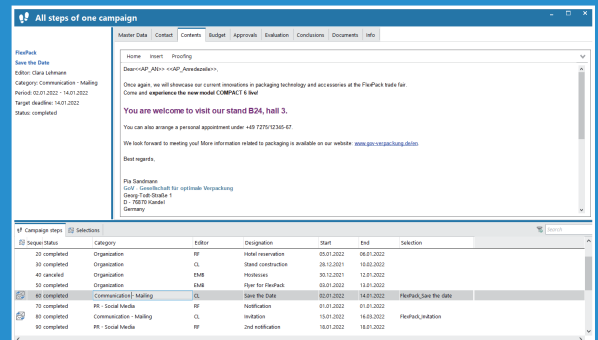


Focused: extensive campaign management

With SMARTCRM, all steps of marketing and sales campaigns can be planned, documented and evaluated. Using selection tools, you can precisely define your target group and minimize unnecessary wastage.

- Documentation of campaigns and any number of campaign steps
- Documentation of participants
- Approval processes
- Design of mailing lists
- Recording of selection conditions in user-specific profiles
- Dispatch of personalized serial e-mails (with a time delay if required) or mailings

- Duplicate check
- Processing of the information for further use by third-party systems, such as Inxmail Professional



Detailed rights management

- Comprehensive rights management
- Assignments of rights, e.g., for departments, employees



GDPR compliant data privacy tool

- Functions for the documentation, blocking and deleting of personal data as well as for the fulfillment of the obligation to provide information



Online media monitoring

- Optional: interface connection to the online media monitoring tool Dealfront Connect
- Transfer of an address from SMARTCRM to Dealfront per click

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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