



Contracts & Documents

Because finding is much more beautiful than searching!

Manage documents throughout the business process and anytime on the go!

Processes are getting faster and more complicated in today's business world. Quickly available and complete information plays an increasingly important role in optimizing customer care.

Whether it's asking for the most recent contract content or requesting resubmission of documents, customers expect quick and qualified answers to all their questions and problems.

The advantage is who can react quickly and flexibly here.

Employees also need all relevant documents in order, for example, to create new offers on a solid basis of information or to renew existing contracts.

Our xRM module Contracts & Documents offers you a structured document allocation per customer/company directly in the CRM system.

Documents are stored directly at the customer and already contained in the overview of all relevant information such as categorization, responsible employees or term. Of course, the documents can be saved directly in the record as an original.

Comprehensive input options, eg. Keywords allow a meaningful search across all documents.

Conversely, it is also possible, for example, to find all companies that have the same type of contract to submit additional offers.

On request, we also offer you structured document storage according to your criteria. The contracts & documents can be left in the CRM system, in a Sharepoint system or using our LinkConverter a linking of the record in the database CRM.

This means that all documents created from CRM are automatically stored in the CRM system in addition to their storage. For example, offers, orders, invoices, delivery notes or orders can be stored structured according to customers and/or projects.

If you are interested in this module or other solutions, we will gladly send you an overview of our CRM system.

You will always receive further information in a personal conversation.