

xRM Solution: Contract and Document Management

AXIOMA
UNTERNEHMENSBERATUNG



Extension of Microsoft Dynamics CRM 2011: xRM Modul Contract and Document Management When finding is nicer than searching!

Manage all documents completely in your Business and have them available anytime!

Processes become faster and more complex in today's business life. Information to be available and complete is playing an increasingly important role for optimal customer service.

Either the latest issue of the contract contents or the request for documents re-sending, customers expect quick and professional answers to all their questions and enquiries.

The advantage is, who can react quickly and flexibly here?.

Employees also require all relevant documents, for example, to create a solid base of information on new offers or to extend existing contracts.

Our xRM module Contract and Document Management offers a structured document assignment per customer / company directly in the CRM system.

Documents are saved directly to the customer profile and include an overview of all relevant information such as categorizations, responsible employee or runtime. Of course, the documents can be stored directly in the data set as an original.

Comprehensive input options, such as key-words, allow a meaningful search across all documents.

On the other hand, it is also possible, for example, to find all the companies that have the same type of contract, to make them additional offers.

On request, we also offer structured document storage according to your criteria. We design your storage structures transparent and uniformly.

This means that all documents that are created from CRM are automatically stored in addition to their direct storage in the CRM system. Thus, for example, quotations, orders, invoices, delivery notes or purchase orders are stored by customers and / or projects in structured form.

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

If you wish to have additional information, we gladly offer you a personal appointment.

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