



Business
Software

GetSMART cobra to ELO

Keep an overview of your customer data – with GetSMART cobra to ELO

One crucial factor for the success of a company is to retain existing customers for the long term and to win new customers. To ensure good customer service, it is essential that all relevant information is available holistically and across processes, such as emails, customer information, contracts, and order documents. The prerequisite for this is a perfect interplay between the CRM system and the ECM system so that mutually required information is always available and accessible.

Do you want to keep an overview of your customer data? GetSMART for cobra to ELO supports you in doing so:

- GetSMART automatically connects cobra CRM data to ELO DMS
- The integration of a dedicated ELO client directly into the cobra CRM system ensures seamless processes
- The advantage of this integration is that the leading cobra CRM system can be easily extended with the most important ECM functions, such as document storage and display, powerful search, and much more. No additional ELO modules are required*
- Essential data and interactions are thus available across systems, from basic data to contracts and invoices, and even documented contact information from individual employees in service and sales.
- You don't even have to leave your usual work environment for this. This way, you work optimally integrated and benefit from seamless processes - across system boundaries.
- Simple user management by using a common login for both systems. With an authorization concept, authorized persons can be defined and data access can be controlled.

* ELO full user or index server and index user license required

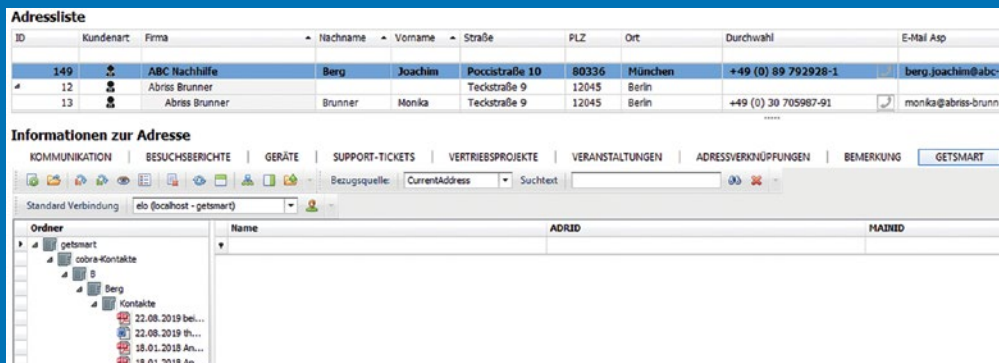


Fig. 1: Integrated view of the GetSMART interface in cobra

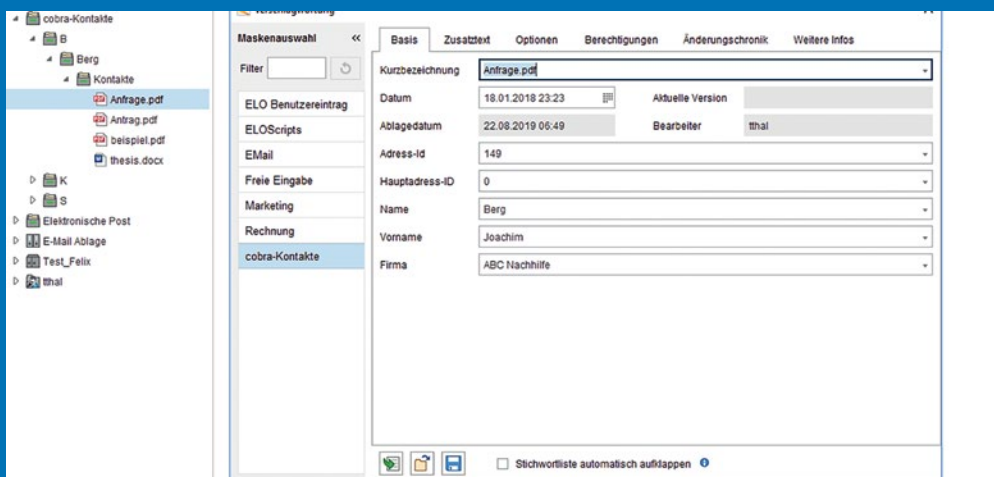


Fig.2: Contact documents taken over from cobra with automatic indexing in ELO

Document management functions in cobra:

- Archiving, displaying, and editing of documents
- Changes to a document are fully logged and remain traceable by means of check-in and checkout functionality and versioning of documents
- Familiar document view and structure as in ELO
- Capturing of keywords and metadata in documents
- Use of folder structures and indexing masks independently of their configuration based on cobra DMS keywords
- ELO views and input masks are freely configurable
- Synchronization of CRM data with ELO business solutions
- Scanning of documents from ELO DMS to cobra CRM
- Direct search of ELO documents in the cobra CRM system
- Transfer of data from the cobra address line to the filing system

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