

# >< connect

The Digital Platform for  
your **Sales Force**

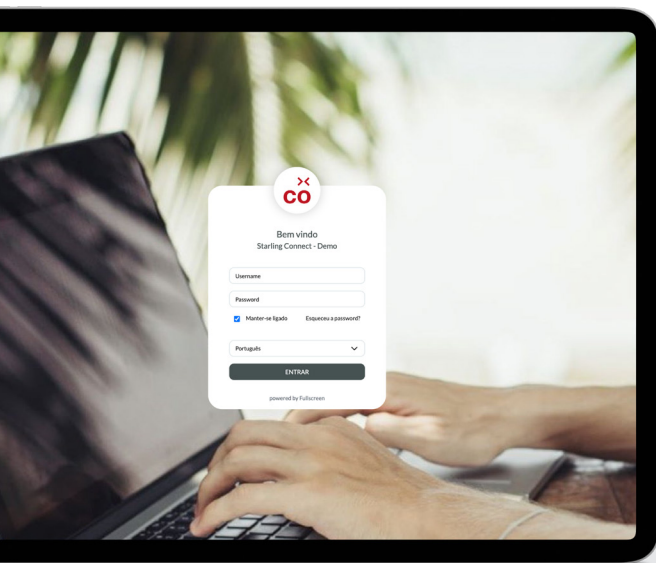
The natural extension of your ERP.  
Integrated, Intuitive and Ready to Use



# What is Connect?

a CRM framework that  
powers your business

**Connect** is not just a software solution, it is a CRM framework that integrates your private area directly with the company's ERP. Our goal is to **centralize the sales force** in a simple digital tool, supporting the entire commercial process — from planning to field execution.



## Connect Essentials

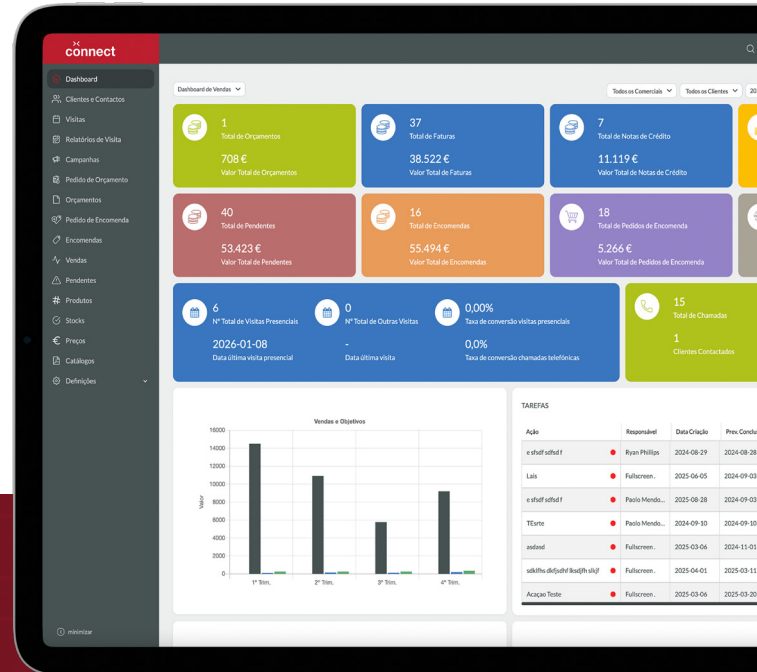
The platform comes equipped by default with the “Essentials” package: a set of features designed based on the most common needs of sales teams. This ensures a fast implementation and a solid foundation from day one.

## Custom Tailoring

We know every company is unique. That's why Connect was designed to evolve: fully adaptable to your business's specific processes, without the need to start from scratch.

# 360° view and sales management

Control, analyze and decide with confidence through real-time monitoring tools.



## Dashboards and Statistics

Track sales performance by salesperson, customer, and product. View objectives and KPIs on a single screen.



## 360° Customer View

A complete database of prospects and customers, centralizing all business activity and relationship history.



## Visits and Reports

Optimize your team's time with visit planning and scheduling. Record and access on-site meeting reports, eliminating post-sales administrative work.

# your portfolio always at hand

Turn your product presentation into a digital and interactive experience.



## Smart Quotes

Create proposals based on your ERP pricing and discount rules. Convert quotes into orders with a single click.



## Orders and Logistics


Order creation with automatic validation of commercial rules. Track order status and shipping note information.



## Financial Control

Instant access to Sales, Pending items, and customer-specific pricing. A vital tool for managing collections and account receivables.

Código	Descrição-Produto	Família	Sub-Família	Marca	Stock	Preço de Venda	Ações
00000000000070	UPS APC BACK-UPS 1200VA	Outros Produtos	Sem informação	Marca A	0	2,50 €	
00000000000000	90 Rede fibra de vídeo 2ma 50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000000	90 Rede fibra de vídeo 20cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000012	90 Rede fibra de vídeo 32,3cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000020	90 Rede fibra de vídeo 20cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000023	90 Rede fibra de vídeo 25cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000033	90 Rede fibra de vídeo 35cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000040	90 Rede fibra de vídeo 40cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000050	90 Rede fibra de vídeo 50cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000050	90 Rede fibra de vídeo 5ma 50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000013	90 Rede fibra de vídeo 32,3cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000030	90 Rede fibra de vídeo 20cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000025	90 Rede fibra de vídeo 25cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000033	90 Rede fibra de vídeo 35cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	
00000000000040	90 Rede fibra de vídeo 40cmx50ml	Redes em Fibra de Vidro PA	Sem informação	Marca A	0	1,39 €	

Dados Gerais		Outras Informações	
	Código 00000000000070	Descrição UPS APC BACK-UPS 1200VA	
	Unidade Sem informação	IVA 23%	
	Família Sem informação	Sub-Família Sem informação	
	Marca Marca A	Preço de Venda 2,50 €	
	Stock 0		

# commercial agility and deal closing

Respond to business requirements quickly and with zero integration errors.



## Product Database

Access detailed technical sheets, high-quality images, and purchase history per product.



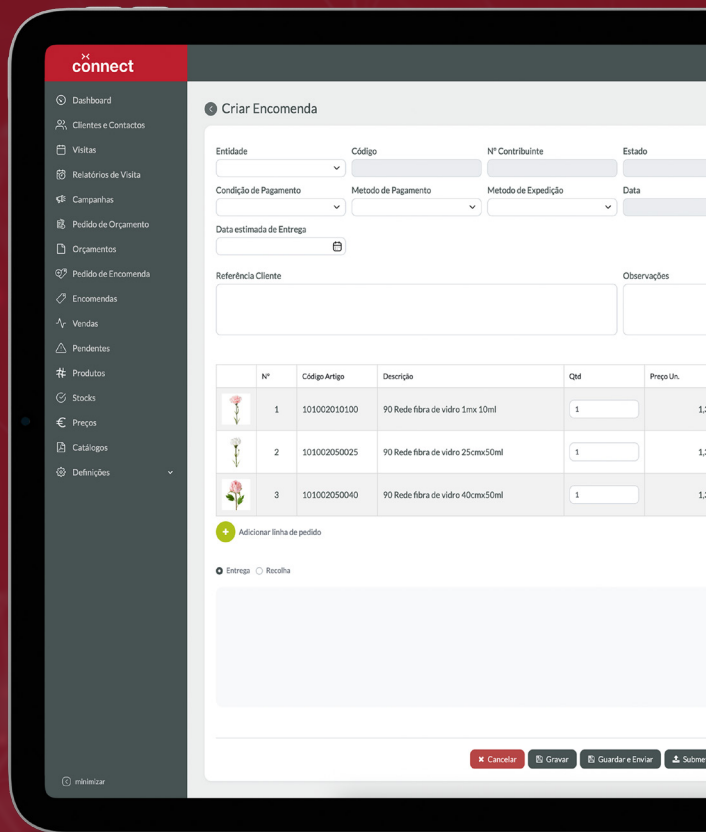
## Real-time stock availability

Check item availability by warehouse at the time of sale, avoiding unmet expectations.



## Digital Library

Have all your catalogs, brochures, and technical datasheets accessible on the platform.



# the features of **Connect**

the complete ecosystem for your sales management.

All the tools your team needs, in one place.



## Management and Analytics

**Sales Dashboard:** Instant view of sales performance by salesperson, customer, and product.

**Goals and Statistics:** Intuitive charts for tracking targets and business growth.

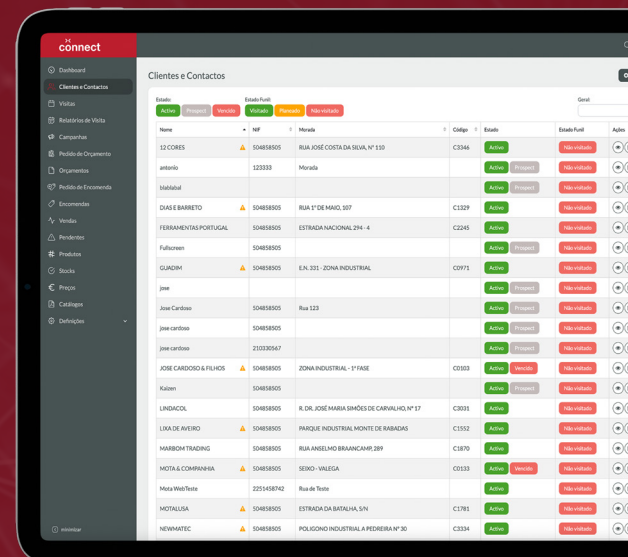


## CRM and Activity

**Customers and Contacts:** Complete database with a 360° view of all customer activity and history.

**Visit Management:** Route planning, meeting scheduling, and shared calendar.

**Visit Reports:** Simple recording of feedback and meeting conclusions directly in the app.





## Sales Cycle

**Quotations:** Proposal creation based on ERP pricing rules. History tracking and conversion into orders.

**Orders:** Creation of purchase orders with discount validation and approval statuses.

**Sales and Outstanding:** View invoices, customer account balance, and pending amounts for settlement.



## Product and Logistics

**Product Database:** Technical sheets, images, prices, and commercial details.

**Real-Time Stock Availability:** Warehouse-level product availability lookup..

**Catalogs:** Quick access to updated brochures and technical documentation.



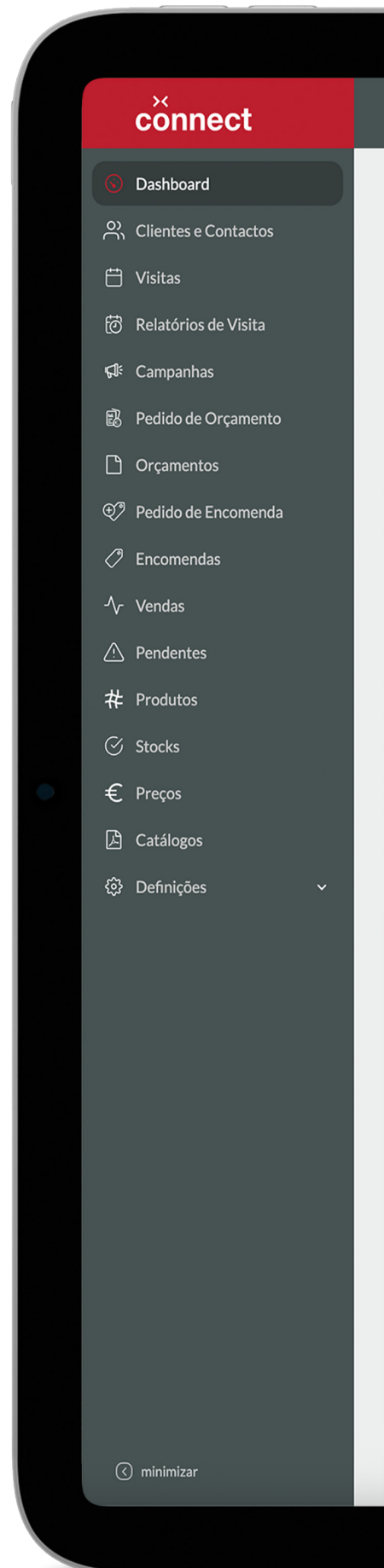
## Settings and System

**Users and Profiles:** Centralized account management with detailed permission assignment by profile (e.g., Salesperson, Sales Manager, Administrator).

**Sales Objectives:** Flexible configuration of sales targets (individual or team) to feed dashboard KPIs.

**Translations:** Language management tool that allows you to customize or translate platform terms for adaptation to new markets.

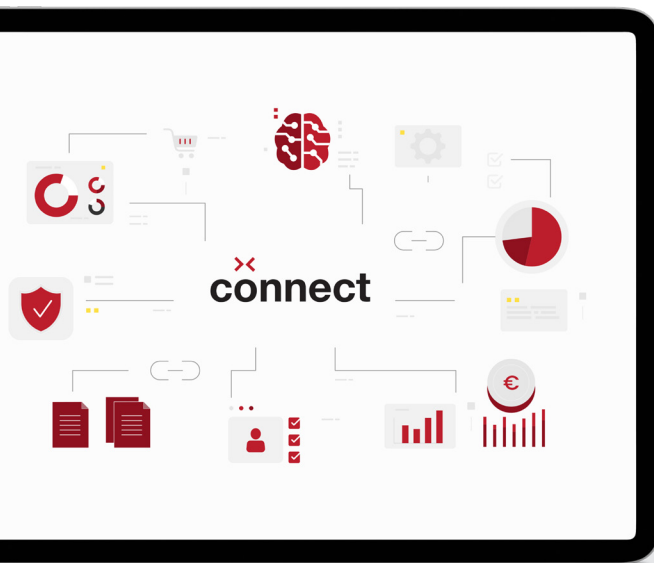
**Maintenance:** Technical utilities for data integrity checks and synchronization monitoring.



# the center of your digital ecosystem

full integration with ERPs,  
logistics, and payments

Integrating **Connect** with your company's management software is the key step toward automating all commercial processes.



## integration

By eliminating manual data entry, your sales team gains time for what truly matters: managing commercial interactions efficiently and transparently.

### **The result?**

A faster service and an immediate increase in customer satisfaction.

## What do we connect?

### ERPs and Management

We ensure a bidirectional and automatic synchronization with your ERP. Products, customers, stock, and orders flow seamlessly between the office and the field.

### Carriers and Logistics

Connection to carrier services for automated shipping and order tracking, ensuring customers always know where their goods are.  
Brokers de Pagamento Online

### Online Payment Gateways

Streamline payments by integrating digital payment gateways (MB References, MBWay, Credit Card) directly into the order process.

### Custom APIs and Webservices

Does your company have specific needs? Connect is ready to communicate via webservice or API with other digital solutions within your business ecosystem.

## Native and Custom Compatibility

 **invoicexpress**

 Microsoft Dynamics 365  
Business Central

 **moloni**

**Sage**

 **SAP**

**cegid PHC**

**cegid Eticadata**

**cegid Primavera**

## Other integrations

 **twilio**

**VOISO**

 **e-goi**

 **INTUIT  
mailchimp**

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## Contact us

Take your **sales force** to the next level.  
Contact us for a Connect demo.

## Fullscreen Porto

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Advanced web solutions:  
website, portals, eCommerce, b2c,  
b2b, b2b2c, marketplace, RM,  
integration, SEO, digital marketing



Schedule demo