Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

TECHNOLOGY

Legrand CRM for You and Your Clients

Once in a while, I find a QuickBooks add-on product that just hits the mark right in the center of the bullseye. And when I do, I like to tell the world about it. Legrand Software is a company that has done just that.

Oct. 01, 2006

Legrand CRM For You And Your Clients

By Doug Sleeter

From the Oct. 2006 Issue

Once in a while, I find a QuickBooks add-on product that just hits the mark right in the center of the bullseye. And when I do, I like to tell the world about it.

Legrand Software is a company that has done just that. They've created the Legrand CRM system, which integrates with QuickBooks (QuickBooks Pro, Premier
or Enterprise Edition – 2003 or higher) using the Legrand Accounting Link. This link manages a bi-directional transfer of information between the databases, eliminates double-entry, ensures the consistency of contact information, and provides live access to sales histories. Most importantly, this occurs without providing non-authorized users direct access to sensitive accounting information.

Before I go into the solution here, you might want a little background on the term CRM. CRM is another one of those acronyms that computer geeks like me use to keep the rest of the world from knowing what we're talking about. CRM stands for Customer Relationship Management.

What is CRM? Well, no matter what business you're in, most likely you and your office colleagues are constantly in touch with prospects, customers, vendors and partners. And if you're smart, you keep a database of some type in which you track all of your contacts.

The problem is — with most small businesses anyway — that it stops right there. Just a database of contacts (address, phone, e-mail, etc.) stored in MS Outlook or something similar. And usually, each employee keeps their own contact list, with no sharing of data between employee contact manager databases. So a common question any employee might have is: "When was the last time anyone in our company dealt with this customer, and what was it about?" And, of course, that's hard to answer because each employee has their own notes in their own database.

In addition to these basic contact questions, the sales force needs access to historic sales data and other financial information (balance owed, etc.), which is usually only available in the accounting system. For example, maybe you want to do a mailing to all customers who have not purchased in the last 90 days, or perhaps you want to create a list of names and phone numbers for everyone who is more than 30 days past due on their account. Additionally, you may want to know which products were sold to a given customer so your sales or support staff can instantly look up what and when the customer purchased and maybe even when the service contract expires.

The technology solution for tracking all this information, centralizing it and controlling access so sensitive data is protected, is called CRM. With CRM, you have a complete, corporate-wide solution for tracking customer information in a centralized, secure and controlled way.

Most CRM software companies target their solutions at the fortune 500 companies since the needs in those companies are so clearly evident. However, even very small businesses can benefit greatly by implementing a CRM system.

LEGRAND'S QUICKBOOKS ACCOUNTING LINK

The Legrand CRM Accounting Link synchronizes customer information between QuickBooks and Legrand. This allows employees throughout the company (even those who cannot directly access QuickBooks) to view critical sales information from within CRM software. For example, a sales or support representative could view customer balances, products or services purchased, credit limit status, and other accounting notes, even though he or she does not have direct access to QuickBooks.

The link performs two-way synchronization with QuickBooks data, which means information can be passed from Legrand to QuickBooks and from QuickBooks to Legrand. This eliminates redundant data entry and ensures that customer information is consistent between the databases. It also means that you can create new customer records either directly in QuickBooks or in Legrand CRM. Each time you synchronize the databases, the link imports customer records from QuickBooks into Legrand CRM, and vice versa. Furthermore, the interface ensures that updated customer addresses and contact details are synchronized between the CRM and QuickBooks databases.

The Accounting Link interface to QuickBooks can be executed in batch mode or it can be used to exchange data for one particular customer. Batch updates perform the following functions:

1. Import the latest address, contact detail, sales transactions, and financial data from QuickBooks into Legrand CRM for customers that have already been linked, and optionally update QuickBooks if the CRM data is more current.
2. Scan both QuickBooks and Legrand CRM databases for customer records that do not exist in the other database, allowing the user to select which ones to transfer.

COMPANY/ACCOUNT MANAGEMENT
Within Legrand, the “Company” view provides a quick summary of all the key information concerning a customer: address details, list of contacts at that customer, list of recent activities, appointments and tasks related to any of the contacts at that company, as well as any centrally stored documents.

NAVIGATION
Although the screens are somewhat cluttered, Legrand has done a good job of presenting an easy-to-use, intuitive interface with clearly labeled fields, colorized text, hypertext links to detail screens, and tabs to indicate related

information for each record. Users can also customize the database by renaming any of the field labels.

ACTIVITY NOTES

Activity notes are generally used to record information about each conversation or contact with a customer. E-mails, phone calls, information gathered from meetings and other documents (files) can be attached to activities notes. These activity notes can also be linked to other records. For example, a single activity note can be linked to a customer, a marketing campaign, a sales opportunity, and a customer service issue.

KEYWORD INFORMATION

Legrand CRM allows you to assign "keywords" to companies or contacts in the database. This feature provides a great way of categorizing or grouping records so that you can quickly look up records that are related by some user-defined keyword. For example, if you have a large database of all contacts, but some of those contacts are your clients, you could define a keyword "client" and then assign that keyword to all clients within your contact database. You would then be able to quickly find all clients by searching the contact list for the keyword "client."

SECURITY AND USER RIGHTS

Legrand CRM provides advanced User Rights management. In addition to providing username and password access to the database, the appointed Legrand Administrator
is able to set the rights (or privileges) for each
individual user. The User Rights specification covers most sections of the database, allowing the administrator to control most functions, such as adding records, deleting records, editing records, exporting data, assigning keywords, etc.

OPTIONAL ITEM TRACKING MODULE

Item Tracking, especially when used in conjunction with the QuickBooks Accounting Link, is awesome. This module makes it possible to track "Items" that have been sold to customers. Items can be a product or service item, depending on the relevance to each client situation. Item records have many fields to store information about the product or service purchased, such as serial numbers, purchase date, purchase price, warranty expiration date, etc. Eight user fields can be customized to your needs. With item tracking, you get much more than just balance information; you also see exactly which product(s) or service(s) each customer purchased, when it was purchased and even when it expires (if relevant).

OPTIONAL
CUSTOMER SERVICE MODULE
Available as an optional module to the Pro and Corp editions, the Customer Service module enables the tracking of customer service issues, from initial contact through resolution. A ticket number is automatically assigned when a new customer service issue is created.

Information carried within customer service tickets includes summary information, description and response fields. Again, depending on the relevance for each user, five additional modifiable data fields are available. Legrand CRM automatically creates an activity record when a Customer Service issue is opened, closed, re-opened or re-assigned to another staff member. Re-assigning a service issue to another staff member automatically triggers an e-mail to that staff member to alert them that a service issue has been assigned to them. Tasks, calendar events and activity notes are easily cross-linked to a Customer Service issue.

PRODUCT EVALUATION & PRICING
Legrand Software offers demonstration evaluation copies of Legrand CRM to potential
customers. You can download an evaluation copy from its website at www.legrandcrm.com,
or you can request a disk to be mailed to you. Three editions are available (Standard, Pro and Corp), and pricing ranges from $225 to $450 per user, plus optional modules.

CONCLUSION
Like most available CRM packages, Legrand does all the basics and it does them well. Where Legrand excels is in the bonus features such as the Accounting Link. The Accounting Link not only provides critical accounting summaries to sales staff, it also allows for reporting on customer purchasing history, even at the item level if you add the Item Tracking module. Overall, I'm very impressed with this product. If you or your QuickBooks clients aren't getting what you need out of your homegrown (or non-existent) CRM system, I highly recommend Legrand CRM. ▯

———————————————————-

Mr. Sleeter is the founder of The Sleeter Group, a national provider of expert-level QuickBooks seminars for accountants. He is the author of several books including McGraw Hill's college textbook series, "Introduction to QuickBooks Pro." For more information, call 888-484-5484 or visit www.sleeter.com.

Intuit, Inc. • Technology • Article

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved