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Legrand CRM For You And Your Clients

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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

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

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

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

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.

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Mr. Sleeter is the founder of The Sleeter Group, a national provider of expert-level
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Technology

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