

Legrand CRM Accounting Link by Legrand Software Inc.

Overall Rating **9.36**

Product Name

Legrand CRM
Accounting Link by
Legrand Software Inc.

Reviewed By

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Summary

Legrand CRM Accounting link provides an end-use customer utilizing Legrand Software for customer management, and QuickBooks Pro, Premier or Enterprise Edition - 2003 or higher with the ability to exchange and view key customer information. This link allows an organization to provide its sales staff or account managers with customer information including outstanding balances, contact information, credit limit status and accounting notes from within Legrand CRM without providing direct access to sensitive accounting information ---- all from within Legrand CRM's consolidated information center.

Legrand CRM Accounting link seamlessly updates customer information between QuickBooks and Legrand and the interface will provide various views of accounting transactions depending upon a users access rights. The customer information is stored both in QuickBooks and in the Legrand CRM database so that all Legrand CRM users can view this information, not just those who have the optional Account Link module. The only difference will be those that have the optional Accounting Link will be able to view accounting information in "Real Time" vs. through the last update.

Strengths

Legrand CRM possesses so many incredible features that will not be explored in detail during this review as this review is primarily focused on the product as it integrates with QuickBooks. However, I would be remiss in not stating that this is probably one of the most dynamic CRM applications on the market. This application should be seriously evaluated and considered by small to mid-sized organizations that require a CRM that is designed to manage multiple aspects of your business relationships as well as your customer information and interactions including the ability to manage customer accounts, contacts, sales opportunities, customer service issues and marketing campaigns.

Legrand CRM has excellent reporting capabilities, mail merge, direct export to Excel and Office, works with WinFax Pro as well as integrates with Outlook. This functionality was reviewed and performed at exceptionally high levels and was extremely intuitive to use.

Legrand will provide you with free evaluation copy of the software that can be downloaded from the Internet, set up and installed on your system in minutes. The instructions are clear and even with limited product knowledge, the end user can be up and running and begin playing with the software and accounting integration/functionality in under an hour.

Legrand Accounting Link exchanges customer data with QuickBooks eliminating redundant data entry and ensuring customer information is in sync. Legrand exchanged 1500 customer contact records from QuickBooks to Legrand in less than 50 seconds. The end user can easily create a new record in QuickBooks from Legrand CRM, import Customer records from QuickBooks into Legrand CRM, ensure customer addresses and contact details are consistent between the CRM and accounting databases by exchanging address updates, and have “Live” access to invoices.

The Account Link interface to QuickBooks accounting can be executed in batch mode or be used to exchange data for one particular customer. Batch updates will allow for three operations to be performed:

- Import the latest financial data from QuickBooks into Legrand CRM for customer accounts that have already been linked.
- Scan either QuickBooks or Legrand CRM for accounts that have not yet been created in
and select which ones to transfer.
- Send/Receive address and contact details for accounts that have already been linked.

Limitations

Legrand does not currently exchange vendor information with QuickBooks. However, contact information for vendors can be exported into either an excel or csv format and can be imported into Legrand. It would be important for the end user to determine the system of record that should contain the vendor contact information so that periodic updates can be performed to keep the contact information in sync.

Wish List

The wish list is for the functionality as described in the Limitations section. The company has stated that this functionality is being addressed and will be available in future versions of the software.



Product Ratings	Rating
<p>Setup and Installation: Set up and installation was simple - no issues associated with installation of product.</p>	9.5
<p>Interface: The interface is excellent. The end-user can customize the labels within the application so that they are meaningful to their business. There is minimal training required in learning how to make these changes.</p>	9.2
<p>Features: There are too many great features to list. The company sells three different versions of their software not unlike the QuickBooks products. These include the Standard Edition, Pro Edition and the Corporate Edition, and use will vary based on customer need. The following link will provide the reader with a comparison chart listing the features of the various products. This review examined the full product offering.</p> <p>http://www.legrandsoftware.com.au/overview.html</p>	9.5
<p>Follow-through on Claims The product follows through with its claims. Product claims made on the QuickBooks Solutions website were verifiable.</p>	9.5
<p>Ease of Use/Service and Support The product is easy to use and is intuitive. Customer support was excellent, and documentation was clear and easy to follow.</p>	9.5
<p>Data Security Data Security is excellent. For an off the shelf package, the level of security is so detailed that I was actually shocked. The system administrator will set the access levels as defined by the company hierarchy. Security can be as detailed as the end user desires.</p>	9.5
<p>Privacy The company has a well documented privacy policy which is available on their website. Access to the privacy policy is available under the About Us" menu at the top right of their website.</p>	9.0
<p>Integration with QuickBooks The product integrates seamlessly with QuickBooks.</p>	9.2

Ratings Definitions**10.0 (Perfect):**

This is a very rare score is reserved for a product that is as perfect as it could be.

9.0 to 9.9 (Spectacular):

A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no major drawbacks.

8.0 to 8.9 (Excellent):

A product that receives a rating in this range is superior in so many ways that its few drawbacks do not have much negative impact.

7.0 to 7.9 (Very good):

While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that users should be aware of.

6.0 to 6.9 (Good):

This range represents a product that is above average. Its strengths outweigh its weaknesses, making it good for most uses but not a standout.

5.0 to 5.9 (Average):

A product that scores in this range is functional but unremarkable.

4.0 to 4.9 (Mediocre):

Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.

3.0 to 3.9 (Poor):

A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.