

Summary of Legrand CRM Accounting Link for ABM

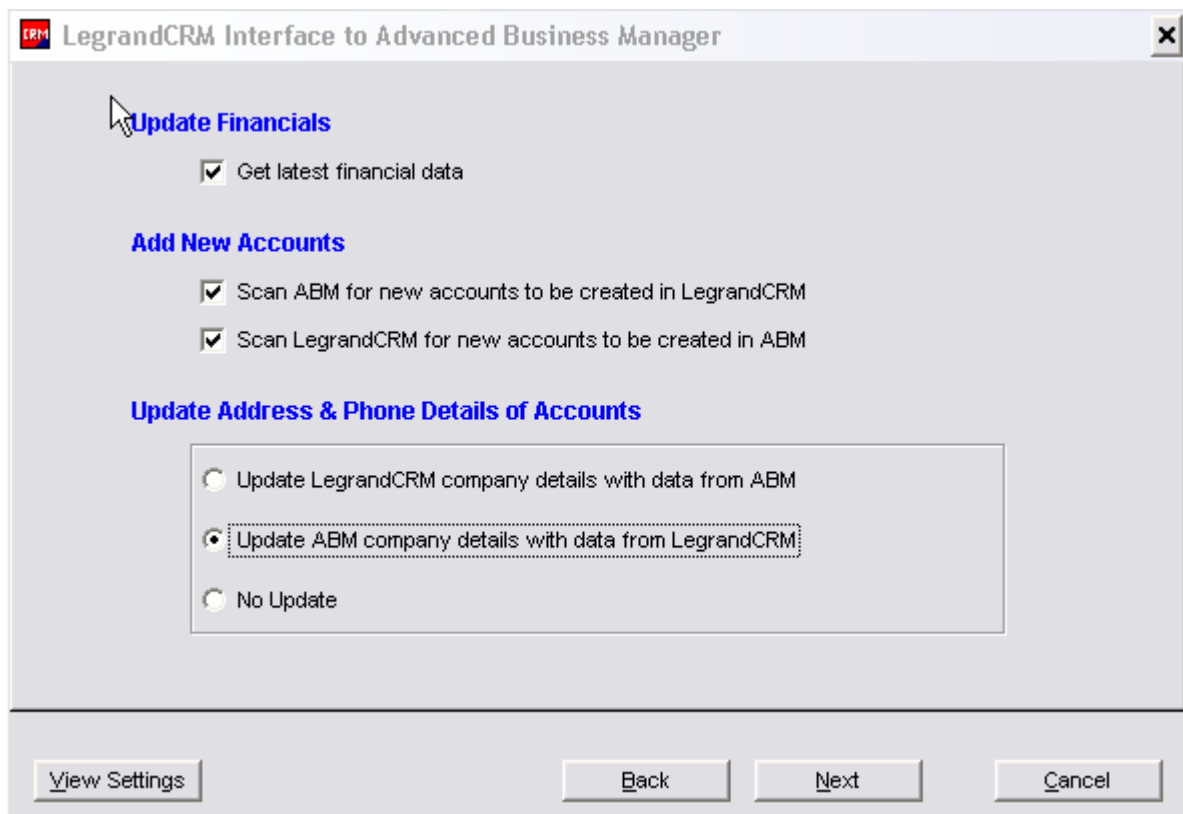
Overview - Why you should link ABM Accounting into Legrand CRM

Legrand CRM Accounting Link provides a simple, yet effective way to link Legrand CRM data to your ABM accounting data.

Once ABM accounting data become part of Legrand CRM, you'll be able to:

- Get a full "360 Degree" view of your customers and suppliers that includes the most important part of the business relationship: the current financial status between the two companies.
- Identify the best sales prospects from among your customers based on financial histories.
- Quickly target wayward customers before they drift away forever.

Transfer and update of Customer/Supplier information between Legrand CRM and ABM



The Legrand CRM Accounting Link enables the transfer of customer and supplier details, along with account balances to and from Legrand CRM from ABM.

Depending on the options selected, running this link:

- Creates or updates in Legrand CRM any customers/suppliers created or updated in ABM.

- Creates or updates in ABM any customers/suppliers created or updated in Legrand.
- Updates the ABM customer/supplier balances in Legrand CRM.

This is NOT a real time link. Data in the Legrand CRM and ABM will be updated when the link is run. How often you need to run the update will vary from business to business.

Regardless of whether they have the Legrand CRM Accounting Link installed on their PC or not, Customer and Supplier information will be available to all Legrand users under the Accounting Tab. Users do not need to have ABM installed in their PC to view this information.

Contacts	Comment	Info1	Info2	Accounting	Documents	Group Members	Audit
Accounting Menu							
Code	L004			Sales	Customer	Payments Outstanding	
ID	CL004XXXXXX			Last Month		Current	0.00
Remarks	Potential Legrand Customer			This F. Y.	2,851.78	Period1	3,136.96
				Last F. Y.	3,244.59	Period2	0.00
				Credit Limit	0.00	Period3	3,569.05
				Updated on	5/09/2006 2:46:48 PM	Total	6,706.01

This information is stored in the Legrand CRM database after the Accounting Link is run.

You can search on any information in these fields by right clicking and then clicking on “QuickSearch”. These searches can be used to produce targeted sales and marketing campaigns based on sales histories.

Sales and Purchase History

Legrand CRM users who need to look at customer/supplier sales and purchase histories must have Legrand CRM Accounting Link installed and configured on their PC as well as a copy of ABM.

Calendar Events	Activity Notes	Tasks	Opportunities	Cust. Services	Item Tracking	Accounting
Refresh Sales History Transactions for period: ALL						
Date	Transaction#	Amount	Type	Description		
22/06/2006	5100324	\$3,136.96	Cust. Invoice	Invoice		
31/01/2006	4564	\$-22,676.74	Cust. Receipt	Receipt		
14/12/2005	5100276	\$1,769.60	Cust. Invoice	Invoice		
12/11/2005	123123	\$-12,500.00	Cust. Receipt	Receipt		
12/06/2005	5100262	\$1,663.75	Cust. Invoice	Invoice		
23/04/2005	5100248	\$135.70	Cust. Invoice	Invoice		
7/12/2004	5100231	\$26,136.00	Cust. Invoice	Invoice		
7/12/2004	5100228	\$1,451.21	Cust. Invoice	Invoice		
31/08/2004	44	\$-2,062.50	Cust. Receipt	Receipt		
31/08/2004	5100180	\$7,529.50	Cust. Invoice	Invoice		
31/08/2004	5100181	\$60.03	Cust. Invoice	Invoice		
23/07/2004	5100153	\$2,035.00	Cust. Invoice	Invoice		
30/06/2004	5100167	\$27.50	Cust. Invoice	Invoice		
20/06/2004	3454	\$-10,702.75	Cust. Receipt	Receipt		

Double clicking on any item will bring up details of the transaction in ABM which can then be printed.

Please note that these transactions are NOT stored in the CRM database and Legrand CRM cannot produce reports from these figures. All financial reports must be run from ABM. Their primary purpose is to get a snapshot view of recent transactions.

How many copies do I need?

For customer/supplier information and balances to be transferred between Legrand CRM and ABM, at least ONE PC must have Legrand CRM Accounting Link installed and configured. This PC also needs to have ABM installed as well.

Once this is done and the Link run, all Legrand CRM users will have access to this information.

Each user who needs to see sales and purchase histories must have Legrand CRM Accounting Link and ABM installed and configured.

Example:

Fripps and Co - Purveyors of Fine Ferret Wax have 10 staff.

All staff have Legrand CRM installed on their PCs and all staff need to view client account balances.

Two accounts staff need to view account histories in Legrand CRM and enter transactions in ABM.

Three sales staff need to view client account histories.

Q. How many licenses of Legrand CRM, how many Legrand Accounting Link and ABM does Fripps and Co. need?

A. They need:

10 Licenses of Legrand CRM – one for each user.

5 Licenses of Legrand Accounting Link – three for sales, two for accounts.

5 Licenses of ABM for accounts staff - three for sales, two for accounts.

ABM requirements

- ABM Accounting software installed on the computer that will run Legrand CRM Accounting Link
- Although not strictly speaking a requirement, please note that Accounting Link will operate faster if ABM is running on your computer when you execute Accounting Link.

Legrand CRM requirements

- Accounting Link licence for PRO and CORP editions of Legrand CRM.
- Accounting link is licensed per Legrand CRM serial number and requires purchase of an activation key to operate.