

Document Management in Legrand CRM

Documents can be stored in two areas in the Legrand CRM, the documents tab to activity notes. 'Documents' can be any windows supported file type i.e. .doc, .pdf, .xls or .wav files.

Documents Tab

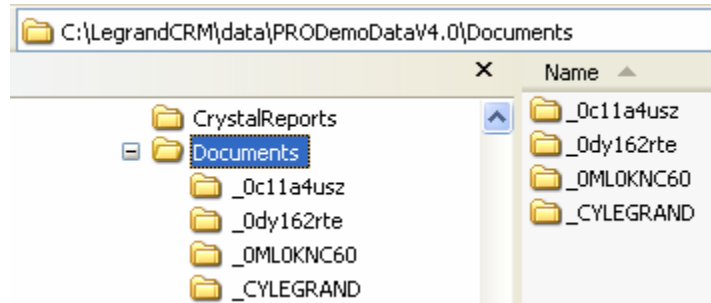
The screenshot shows the 'Company Information' section of the Legrand CRM. A paperclip icon is circled in red at the top of this section. Below it, there are several tabs: 'Contacts', 'Comment', 'Info1', 'Info2', 'Accounting', 'Documents', 'Group Members', and 'Audit'. The 'Documents' tab is selected, showing a table with two columns: 'Document description' and 'File'. The table contains one entry: 'something' in the description column and 'Using HTML template example.htm' in the file column. To the left of the table are buttons for 'Open', 'Add', 'Rename', and 'Delete'. The company information fields include: Company (American General Insurance), Street Address (23 Kearney St), City (Bankstown), State (PE), Postcode (09898), Country (USA), Type (Customer), Industry (Wholesalers), Phone (892 828 9283), Fax, User1, Acct Mgr (Muollo, Andrew), and Web Url.

Note. The paperclip at the top of the company information is a visual reference that a document is attached.

Documents attached to the Legrand database are stored within the Legrand database folders or Legrand common folder for the CORP edition, they are not linked to the original file residing on the users C drive.

This allows for all documents to be backed up and provides users with access to the file regardless of which client PC is online.

The files attached are stored in the 'documents' folder under the database or common folder as described above. Each company has its own subfolder (this is the database unique id character code for that record).



Activity notes

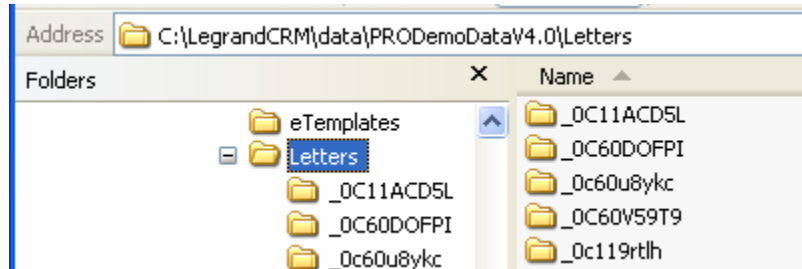
An attachment can also be stored against an activity note.

Note. If importing emails from outlook the .msg file will be saved as an attachment against the activity note, allowing you to open the outlook email and see all attachments that were attached to the email.


As with Documents above, files attached to the Legrand database via activity notes are stored within the Legrand database folders or Legrand common folder for the CORP edition, they are not linked to the original file residing on the users C drive.

This allows for all documents to be backed up and provides users with access to the file regardless of which client PC is online.

The files attached are stored in the 'letters' folder under the database or common folder as described above. Each contact has its own subfolder (this is the database unique id character code for that record).



When viewing the activity note list, records with attachments are highlighted with document icon.

Calendar Events		Activity Notes	Tasks	Opportunities	Cust. Services	Item Tracking	Accounting
Date	By	Type	With	Summary			
11/13/2006	Andrew Muollo	Quote	Jones, Jay		Send quote for 60-User CRM CORP as requested.		
11/10/2006	Demo User	Opportunity	Jones, Jay	Opened new Opportunity: new one			
3/8/2006	Demo User	Cust.Service	Spratley, Jenny	Closed Off Cust. Service no. 1001			

Physical Files

User wishing to track the folder location of the companies physical file can use the Legrand user files to record information such as cabinet and folder numbers.

Company	American General Insurance	Type	Customer
Street	23 Kearney St	Industry	Wholesalers
Address		Phone	892 828 9283
City	Bankstown	Fax	
State	PE	Physical Folder	CA14 - FL87
Postcode	09898	Acct Mgr	Muollo, Andrew