

What's new in Legrand CRM v5.3

Enhancements & Additions

- **New documents folder** for Opportunities - in System Preferences you can specify a shared folder location and a sub-folder naming convention (e.g. OppRef #, or company name + Oppref) where documents relating to the opportunity are stored. The opportunity screen then provides a view into that folder
- More filtering options when viewing the list Opportunities in the Company screen – the opportunities list in the Company screen now gives you selection options for Active/Closed/Both and also allows you to list those opportunities that are linked to the current company via either the '*Companylink*' field or the '*Participants*' list
- New: (for Administrators) if the 'Common Folder' cannot be found upon login you can specify a Common Folder location for that database
- New: '*Status*' and '*Outcome*' columns have been added to the Activity list in calendar view
- The Activity Note, Task and Calendar screens now include a '*Save & create new...*' function which enables you to save the transaction and immediately record another transaction, including Opportunity and Customer Service transactions
- When creating a new Contact you can use the '*Save & Create new..*' function to immediately follow the creation of the Contact record with another transaction, including opportunity and customer service transactions
- The Opportunity, Customer Service and Marketing links that exist in Activity Notes, Tasks and Calendar Event forms are now hyperlinked so you can quickly navigate to that record. E.g. if you open a Task record you can click on the Opportunity link to navigate to that Opportunity.
- The 'Custom Menu' function has been added to the Opportunities module and the Customer Service module
- The list display limit in CORP edition has been increased to 50,000
- New: when deleting a recurring calendar event you now have the choice of (1) deleting only the selected event, (2) deleting the all future events, (3) deleting all events, past and future.
- When transferring calendar events from Legrand CRM to Outlook the contact name and company name are now included in the 'subject' field of the Outlook appointment
- **Legrand Report Writer v4.1**, includes bug fixes, enhancements and 25 additional reports (see separate listing)
- Legrand Reports - a new User Setting now exists to specify the location of the Legrand Reports folder
- Legrand Reports - the reports list is loaded only once, making it much quicker to select subsequent reports
- When exporting an appointment from Legrand CRM to Outlook the Contact details are now also added to the appointment's "subject" in Outlook.
- **Outlook AddIn v4** for Outlook 2010 and Outlook 2007. Provides improvements in handling Exchange emails and email messages with empty TO, CC and Subject fields. The 'Team' filters are applied when performing a search for a company/contact. Also, when searching for a Contact you can perform an 'AND' search – useful when your database has 100,000's of records.
- Item tracking list in companies and contacts modules now has an 'Include Inactive' checkbox
- When marking a Task as completed the reminder is automatically removed
- When editing the Due Date of an existing Task the start date is updated accordingly; i.e. if the existing Task has a difference of 3 days between Due Date and Start Date then as you change the Due Date the Start Date is updated to retain that original 3 day difference. Changing the Start Date, however, does not cause any update to the Due Date

- The merge function now automatically removes blank lines in multi-line addresses
- The digital signature of LegrandV5.DOT Word template has been updated
- Changed the Save/Update routine so that table extensions (i.e. additional columns) are not touched in Companies, Contacts, Customer service and Item tracking tables
- You can now specify a default TimeZone setting per user (useful to avoid TZ question when remote users login via Terminal Server)
- Checkbox fields (the 'Yes/No' fields) in companies & contacts can now be imported
- In accounting transactions, when activating the 'Accounting info' tab the 'Transactions' tab is no longer automatically activated

Fixes & Changes

- DYMO label printing has been updated for Dymo software v8.3 on Windows 7
- When resuming computer from Sleep or Standby mode the connection to the SQL database was lost
- Marketing respondents list - sometimes not all respondents were shown in the list
- In the list sections in the calendar module (i.e. activity list, task list and calendar list) you can now generate the contact list for just the selected records in the list rather than the entire list
- Fixed problem in SQL2008 R2 when using column 'MSREPL_TRAN_VERSION' for replication
- If you specified the Account Manager as a condition in the 'No Transaction' report then any other condition was being ignored.
- The Word report of an Activity Note would only print the first 255 characters of the 'notes' field
- Fixed error in telephony integration (wouldn't shut off)
- When performing a 'File > Open' or CTRL+O to open a new database the application would sometimes crash
- A Legrand who User does not have the permission to Edit a calendar event was still able to move (i.e. drag and drop) an existing appointment in the calendar
- Print Task detail report (task merge codes were not being handled)
- Deleting a custom menu did not work
- Merge error when invoking email function from Opportunity module
- New: Opportunity Influencers
 - when in Contact view you can now list all the opportunities to which this person is linked as an Influencer/Participant
 - when in Company view you can now list all the opportunities to which any contacts at this company are linked as Influencer/Participant
- Change: access to the Outlook import screen is now via the main menu : 'File > Outlook Import'

Enhancements to accounting interfaces

- **Sage Line 50** accounting (UK)
 - Sage Line 50 version 2011 is now fully supported
 - Fix: computation of Year-to-date sales takes into account today's date and 'current' accounting period
- **QuickBooks** accounting (USA, CA, UK, AUS, NZ)
 - New: added QuickBooks 'Create Estimate' function
 - New: 'Create Vendor' record from Legrand CRM
 - New: QuickBooks, when linking an existing CRM record to an existing QB record you are presented with the list of QB accounts that do not yet exist in LCRM
 - New: the default currency of a Customer account is now displayed in the 'Notes' section
 - Fix: when creating a new Customer account the Name field is now populated
 - Fix: invoice drill-down did not always function

- **Sybiz** accounting (AUS, NZ, UK)
 - New: improved address mapping for NZ customers
 - Fix: fixed date display formatting issue in accounting transactions list
 - Fix: 'Sales Last year' figure is now correctly computed irrespective of whether you have 12 or 13 accounting periods

- **MYOB EXO** accounting (AUS & NZ)
 - The list of accounts to be imported from EXO can now be sorted by AccountNo, Account Code and Name
 - Fix: the synchronisation of contact information between Legrand CRM and MYOB EXO has undergone some significant changes. We are now storing the EXO 'Contact_Seqno' in the Legrand CRM contacts table to enable faster and correct synchronisation from Legrand CRM to MYOB EXO

- **MYOB Accountright** (USA, AUS, NZ, UK)
 - New: when linking an existing CRM record to an existing MYOB record you are presented with the list of MYOB accounts that do not yet exist in LCRM
 - New: Supplier transactions are now available in the 'Transactions' tab
 - Fix: error when 'sending address updates' to MYOB
 - Fix: could not create record in MYOB if Legrand company record had empty address or empty notes.
 - Fix: when performing a Get Financial Updates function the MYOB account code would be lost

- All accounting systems
 - fix error when executing command 'Create Supplier Account Now'

Continue reading following pages for more details on some of the enhancements...

More details on key changes

Sales Opportunities

New documents folder for Opportunities - in System Preferences you can specify a shared folder location and a sub-folder naming convention (e.g. OppRef #, or company name + Oppref) where documents relating to the opportunity are stored.

Opportunity documents folders

Legrand CRM can create a Windows folder for every opportunity where you can store documents related to that opportunity.

Reference # e.g. "1028"
 Reference # - Company Name e.g. "1028 - XYZ Corporation"
 Company name - reference # e.g. "XYZ Corporation - 1028"

Please note: if a company's name is changed you will need to manually edit/update any existing opportunity document folders for that company.

The root location of all the opportunity document folders is, by default, a folder called 'OppDocuments' inside the Common Folder location of this Legrand CRM database. You can specify a different root location on your network.

Root location of all the Opportunity document folders.

Please note: if the root location is changed you will need to manually move all existing folders to the new root location

The opportunity screen then provides a view into that folder

Opportunity Detail

[Contact](#) Citizen, Joe 415 123 5600 Sales Process Implementation
[Company](#) 123 CORP 234567890 Stage Site review
 Reference # 1021 Manager User, Demo
 Summary 200 left-handed widgets Estimated Close 5/07/2011
 Estimated Value 12,000.00 Stage Probability Probability 10
 Forecast Upside YesNo-1
 Territory YesNo-2
 Category YesNo-3
 User-1 3rd Party Link
 User-2 Campaign

Description Notes for Current Stage Notes for Previous Stages Data-1 Data-2 Participants Documents
 Root location for Opportunity document folders C:\LegrandCommon\QB-CRM-Demo\OppDocs
 Documents folder for this opportunity C:\LegrandCommon\QB-CRM-Demo\OppDocs\1021 - 123 CORP

Name	Size	Date modified
ESTIMATE1-2011-05-04.XLSX	8 KB	4/05/2011 6:04:02
ESTIMATE2-2011-05-17.XLSX	9 KB	17/05/2011 6:04:24
QUOTE TO CLIENT 2011-05-26.DOCX	14 KB	26/05/2011 6:04:44
SUBCONTRACTOR PROPOSAL.DOCX	14 KB	4/05/2011 6:03:40

Please note that Legrand CRM does not store the documents in the SQL database. The documents remain in the shared network folder, Legrand CRM simply presents a view into that folder and the ability to open documents via a double-click.

More filtering options when viewing the list Opportunities in the Company screen

You now have more options for the opportunity list in the Company and Contact screens. You can select whether to list Active or Closed opportunities, or both, and you can also select whether to list based on the type of association:-

- (1) **Opportunities** – these are the Opportunities that are directly with that Company (or Contact)

Calendar Events	Activity Notes	Tasks	Opportunities	Campaigns	Cust. Services	Item Tracking	Transactions
<input checked="" type="radio"/> Opportunities - 1 <input type="radio"/> Opportunities where Participant - 0 <input type="radio"/> Opportunities where a Reseller - 0 <input checked="" type="radio"/> Active <input type="radio"/> Closed <input type="radio"/> Both							
Ref #	Active/Closed	Stage/Outcome	Value	Summary			
1006	Active	Quotation	\$15,000.00	needs a new server with MS SQL and 15-user Legrand CRM			

- (2) **Opportunities where Participant** – these are the Opportunities to which one or more contacts at this company are associated with as a participant. The list shows the opportunity reference #, the company with whom the opportunity is, the contact at this company who is involved with the opportunity and their role.

Calendar Events	Activity Notes	Tasks	Opportunities	Campaigns	Cust. Services	Item Tracking	Transactions
<input type="radio"/> Opportunities - 1 <input checked="" type="radio"/> Opportunities where Participant - 2 <input type="radio"/> Opportunities where a Reseller - 0 <input checked="" type="radio"/> Active <input type="radio"/> Closed <input type="radio"/> Both							
Ref #	Company	Status	Value	Influencer	Role	Description	
1006	Bruno Corporation	Active	\$15,000.00	Hansen, Paul	IT Supplier	needs a new server with MS SQL and 15-user ...	
1010	Toys-for-YOU Inc.	Active	\$9,350.00	Hansen, Paul	Implementation Consultant	1,000 widgets	

- (3) **Opportunities where '3rd Party Link'** – these are the Opportunities to which this company is linked via the '3rd party link' field. In our example the '3rd party link' field was renamed 'Reseller' and hence in the screenshot below we see the selection being named 'Opportunities where a Reseller'

Calendar Events	Activity Notes	Tasks	Opportunities	Campaigns	Cust. Services	Item Tracking	Transactions
<input type="radio"/> Opportunities - 0 <input type="radio"/> Opportunities where Participant - 4 <input checked="" type="radio"/> Opportunities where a Reseller - 3 <input type="radio"/> Active <input type="radio"/> Closed <input checked="" type="radio"/> Both							
Ref #	Active/Closed	Stage/Outcome	Company	Value	Summary		
1006	Active	Quotation	Bruno Corporation	\$15,000.00	needs a new server with MS SQL and 15-user Legrand CRM		
1007	Closed	NO SALE	GB Enterprises		4 new departmental printers		
1010	Active	Site review	Toys-for-YOU Inc.	\$9,350.00	1,000 widgets		

Opportunity Detail

Sales Process: MegaSale
 Company: 650 340 7000 Stage: two
 Reference # Manager: User, Demo
 Summary Date: 12/03/2009
 Estimated Value Stage Probability: 10
 Forecasted YesNo-1: 12/12/2008 10:39
 YesNo-2
 YesNo-3
 Contractor: JI Construction 87697009
 Campaign

Description Notes for Current Stage Notes for Previous Stages Data-1 Data-2 Contacts Documents

Contacts Add Delete

Contact	Company	Role
Carnivallo, Jean	Acqua Blue	
Gonzalez, Julia	Fenestras IT	External Consultant
Morrison, David	JI Construction	Competitor
Murphy, Sean	Murphy Indus...	Board Member

Gonzalez, Julia
 Role: External Consultant
 Has been hired by the MD to write an independent report. She will have a big influence on the eventual decision

The Activity Note, Task and Calendar screens now include a 'Save & create new...' function

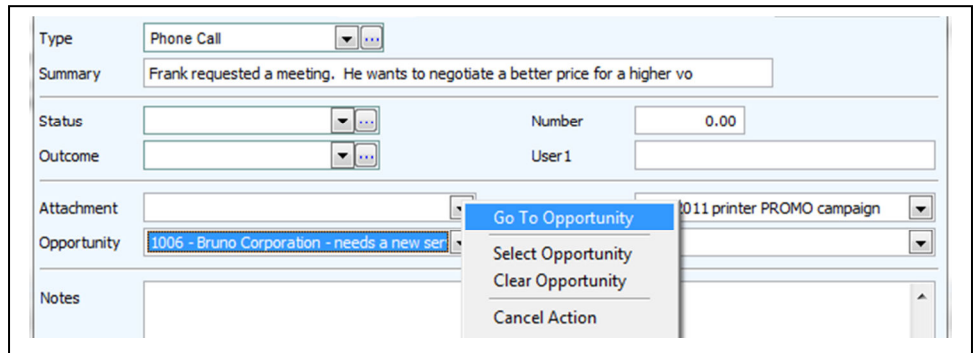
This enables you to save the transaction and immediately record another transaction, including Opportunity and Customer Service transactions.



The Opportunity, Customer Service and Marketing links are now hyperlinked

As you know an Activity Note, Task or Calendar Event record can be linked to an Opportunity, Marketing or Customer Service record.

In v5.3 we have added a "Go To..." menu so that you can immediately navigate from the Activity Record, Task or Calendar

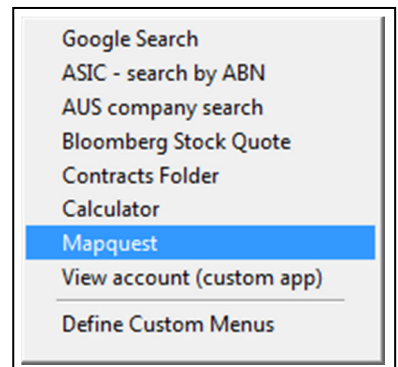


Event to the linked Opportunity, Marketing Campaign or Customer Service record

The 'Custom Menu' function has been added to the Opportunities and Customer Service modules

In Legrand CRM CORP edition the Custom Menu function enables you to add menu entries in Legrand CRM.

This functionality has been available in the Companies & Contacts module since v5.0. As of v5.3 we have now extended this to the Opportunities and Customer Service modules.



A custom menu can be used to invoke a URL (intranet or internet), invoke an external program, or open a file or folder in your network.

Up to 5 parameters can be passed to the custom menu command.

