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*NOTE: This document is optimised for printing.*
*Graphics will look better when printed.*

# 1 System Requirements

## Common requirements

- Supported operating systems for the desktop or laptop computer are Windows 2000 and Windows XP.
- Win95, Win98 and Win ME are not supported.
- Legrand CRM requires Microsoft Office (Word and Excel) for reporting and mail-merge. If you do not have Word and Excel on your computer you will not be able to produce reports or letters.
- Legrand CRM requires Internet Explorer 5.5 or higher to be installed in order to use HTML email function
- Legrand's CRM databases (Microsoft Visual FoxPro and Microsoft SQL2000) are fully ODBC compliant. You can use any ODBC-compliant report writer (e.g. Crystal Reports, Microsoft Access, Visual Basic) to develop your own customised report

## Specifications for STD and PRO editions

- The database is based on Microsoft FoxPro tables. Sharing a database is simply a matter of locating the CRM data folder as a shared folder on the file server.
- If sharing the database with 5 Users or more the shared folder **must** reside on a file server running Windows 2000 server or Windows 2003 server, with at least 256MB memory.
- If you do not have a file-server and only 5 users or less need to access the Legrand CRM database concurrently, then you can use a workstation running Windows 2000 Professional or Windows XP Professional as the de-facto file-server.
- Linux is not supported, nor is peer-to-peer file sharing.

## Specifications for CORP edition

- The CORP edition is a Client/Server application that uses Microsoft SQL server for its database.
- The Microsoft SQL databases that are supported are SQL2000 and MSDE.
- The SQL server licenses are **not** included with Legrand CRM.

# 2 Legrand CRM product configurations

| | STD | PRO | CORP |
|---|---|---|---|
| Companies/Account management | X | X | X |
| Contact management | X | X | X |
| Keyword Information Tags for mailing lists & groups | X | X | X |
| Marketing Events & Campaigns | X | X | X |
| Sales Opportunities | X | X | X |
| Group Calendar | X | X | X |
| Microsoft Word mailmerge | X | X | X |
| HTML email & email templates | X | X | X |
| Direct access to Outlook folders & bi-directional transfer | X | X | X |
| Optional modules available | | X | X |
| Personalised email (i.e. email mail-merge) | | X | X |
| Duplicate Checking | | X | X |
| Multi-value database Quicksearch | | X | X |
| TAPI support for incoming phone calls | | X | X |
| 'Lapsed Customer" reporting | | X | X |
| User Rights - control the functions a User can access | | X | X |
| Client/Server application | | | X |
| SQL Server scalability & performance | | | X |
| **SYNCHRONIZATION** | | | |
| **Data Synchronization**<br>*Laptop Users can perform a LAN syncrhonisation between their local database and the master database.* | X | X | |
| **Restricted Synchronization**<br>*Control who can synchronise data and control whether laptop Users can receive all the data from the master database or only updates to their own records.* | | X | |
| **SQL Synchronization**<br>*Uses Microsoft SQL Server's native 'Publish & Subscribe" functionality to control User's ability to deliver high performance synchronization over LAN, WAN, VPN.* | | | X |
| **OPTIONAL MODULES** | | | |
| Customer Service Module | | $175 | $175 |
| Item Tracking module | | $175 | $175 |
| Bundle: Customer Service + Item Tracking modules | | $250 | $250 |
| Accounting interface | | $100 | $100 |
| **DATABASE** | | | |
| Database | FoxPro (DBF) | FoxPro (DBF) | SQL |
| **PRICE** | | | |
| Price per computer license **US$** | **$ 225.00** | **$ 350.00** | **$ 450.00** |

# 3 Reviews: Editor's Choice Award!

**Managing Relationships: 6 CRM packages tested**
Technology & Business magazine, January 2004.

**Legrand CRM wins Editor's Choice award, small-to-medium CRM market.**

"*Legrand should definitely be on the evaluation list for any company looking at deploying or changing their CRM application.*"

"*For an out-of-the-box solution, Legrand would be very hard to go past.*"

**Affordable CRM** – Australian Personal Computer magazine, December 2002.

"***Legrand CRM is the Sales Champ***"

"*There's no use having reams of rich data on your customers if you can't get to it quickly and easily. Ideally, you need to know which individuals work for the same company; who said or wrote what to whom and when – and for this single 360 degree view to be a single click away.*

***ACT! falls short here****, because it's more centred on the individual, so there's no organizational view of your contact records..."*

*"**Legrand stands out in management aspects….putting all of the customer data together in a single super-informative view.***"

# 4 Customer Testimonials

*With the development of our sales team it has become important to install a good CRM. I have used a number of products including, Maximizer, Goldmine but have found the Legrand product to be the most ideal for tracking a group of sales people. It's simple integration with Microsoft Office is a fantastic feature.*

***Rohan Brown, City Software, Melbourne, Australia***

*We have been very pleased with the performance of Legrand. The product has excellent functionality for tracking all of our activity. I particularly like your implementation of assigning keywords to companies and contacts.*
*This has improved our productivity dramatically over using Outlook. We have made great use of the sales pipeline and are now able to manage our sales process quite effectively. We had used Goldmine previously and training was a real issue. With Legrand we were able to train ourselves with an average of 30-45 minutes per user; talk about a productivity increase. The integration with Outlook has allowed us to move contacts and email records without having to go through a separate conversion process. All users are able to import Outlook information with out requiring any IT involvement. I have not found other products that gave us this level of functionality for the value offered by Legrand.*

**Jeff Gusdorf, St Louis, MO, USA**

*After evaluating many CRM software packages, I felt that the Legrand software best suited my client management database needs. It is very straightforward and easy to use, with a friendly user interface.*

***James Bramley, Fox Studios, Australia***

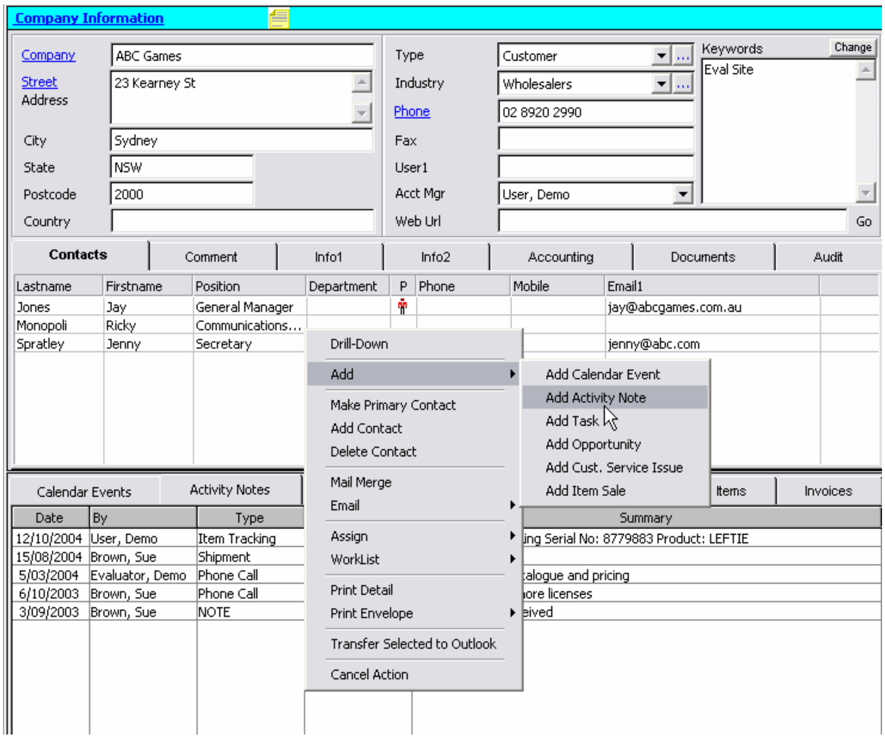
*Just to let you know that I am very happy with your software. It suits our needs like a glove. The installation is so easy that even I (wow) managed to install it on all computers and have the Database shared.!*

***N.Silva, Portugal***

# 5 Distinctive Features – what sets Legrand CRM apart

## 5.1 Business-to-Business View

The Company view provides a quick summary of all the key information about 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.




Please note that any labels that are highlighted in blue underline perform an action when you click on them.

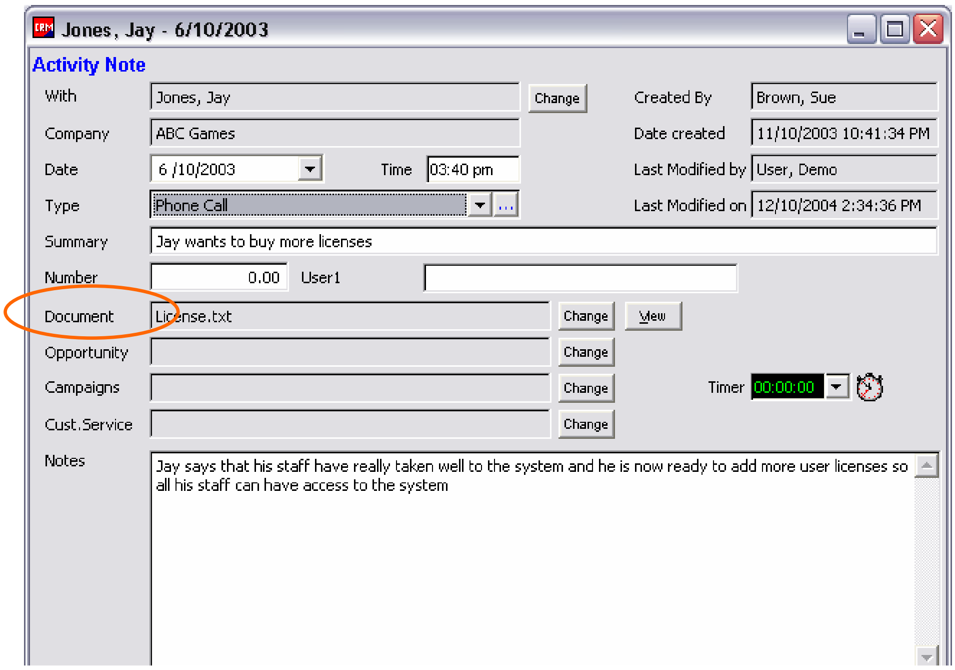
For instance, clicking on the Street label will toggle between Street Address and Mail Address.

**Right-Mouse click** on any list section to bring up a pop-up menu of available commands or **double-click** on any item to drill-down into it.

Note that the Company record has a Documents section where files can be stored and an Accounting section where financial summaries can be imported using the optional AccountingLink interface.

**Please note that the screen can be personalised: all of the field labels can be renamed**. Simply go to the main menu at the top of the screen and select "Administration > System Administration > Screen Labels". You can also redefine the module names; e.g. some people prefer to use "Account" instead of "Company".

Legrand CRM enables you to link an activity note to Sales Opportunities, Marketing Campaign and to attach **any document** type (eg doc, txt, pdf, ppt, xls, etc…) to the activity note.




When linking a document to a Company's main record or to an Activity record, Legrand CRM does not merely record a link to the file on the disk but takes a copy of the document and stores this in a sub-folder of the database folder.

This ensures that whenever the CRM database is backed up that all document attachments are also backed up.

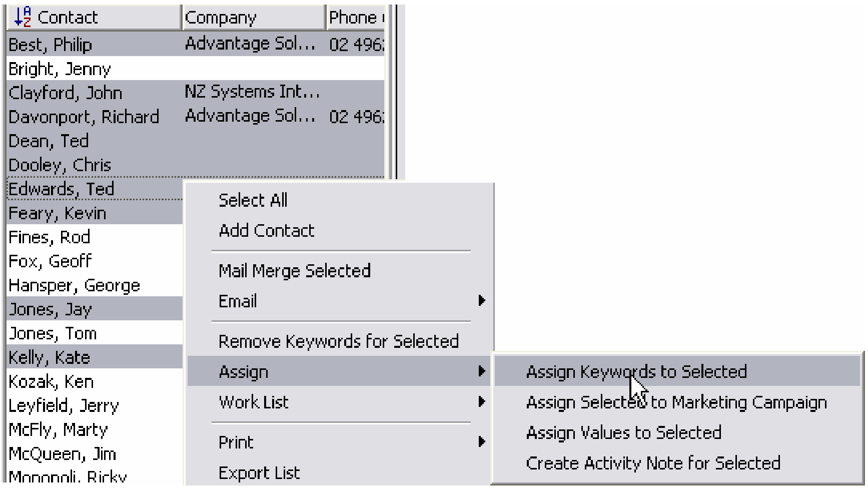
## 5.2 Keyword Information Tags for managing lists & groups

Whenever you have a Contacts database there will be a need to group, classify and generally organise these contacts into various lists. This is one area where Legrand CRM truly shines, thanks to its **Keyword** facility.

A Keyword is an information tag that can be assigned to either a contact or a company. There is no limit to the number of Keywords that can be created, nor is there a limit to how many Keywords can be assigned to a Contact.

The use of keywords is best explained with an example. For instance, say that some Contacts in the database receive a Xmas card while others might be invited to a Xmas luncheon. We'll use two keywords – "Xmas card" and "Xmas luncheon" – to tag the contacts that belong to either group.

Note that you do not have to assign the Keyword to each contact one at a time. Legrand CRM enables you to select a number of Contacts and assign the same Keyword to all the selected Contacts.

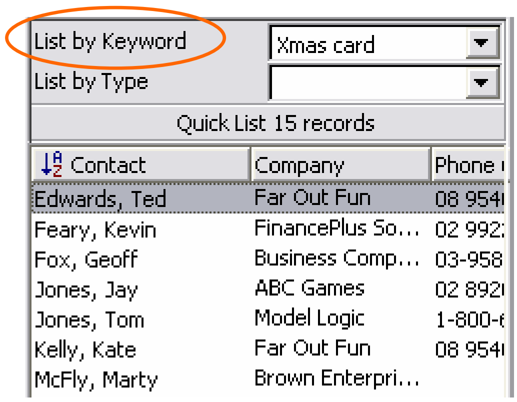



Simply select any number of contacts from the Contact list window by using the standard Windows SHIFT-Left-Mouse click and CTRL-Right-mouse click commands. Then, with your mouse cursor over one of the highlighted contact names perform a right-mouse click and select the command "***Assign > Assign Keywords to Selected***".

Retrieving all contacts that have a certain keyword assigned to them is a one-click operation: simply select the appropriate keyword from the "List by Keyword" dropdown list.

In this case when you select "X-mas Luncheon" you are immediately presented with all the Contacts that are tagged with that keyword.

From there you can then perform any of the many commands available: perform a mail-merge, send an email, print labels, or simply export the list to Excel for use by an external mailing house.



## 5.3 User Rights enhance data integrity

There is a particular issue that we believe is important to any company seeking to implement a contact management system of more than five users – that is to control what a user can do.

All contact management systems include a login account and password to provide basic control over who can access the data.

Pretty much all contact management systems also include an “Administrator” class of user who is authorised to create User accounts and perform major system configuration.

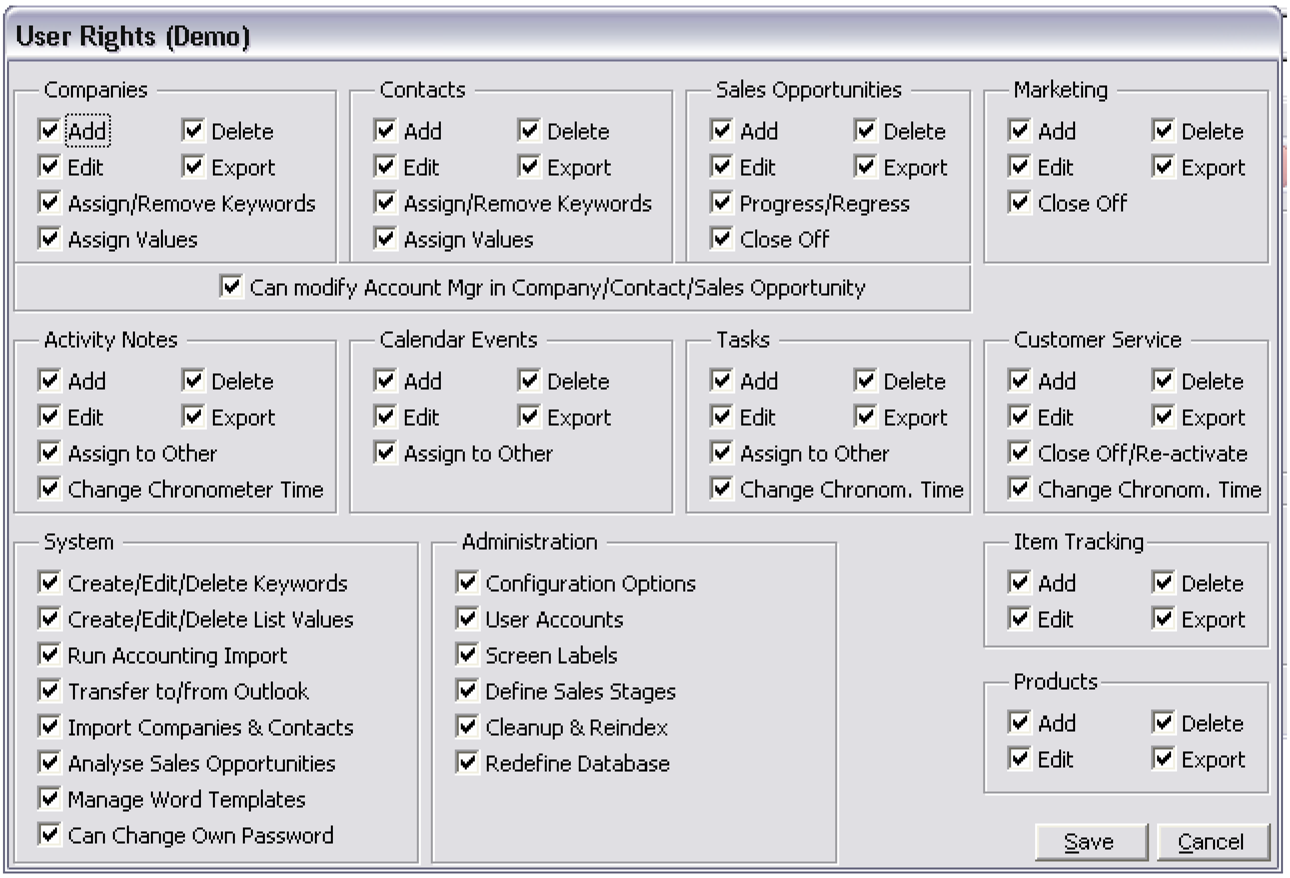
However, hardly any contact management system under $500/user delivers the ability to control what a user can do. In most contact management systems, once you have Edit/Create access to a record you can perform all editing functions to all types of records. This can create problems.

Data integrity is very important in any contact management system – **by this we mean ensuring that data is correct and meaningful, and protecting the data from accidental mistakes**. For instance, what if someone accidentally performs a global replacement of a certain field value, or someone new and with little knowledge of the existing customers overwrites existing data with inappropriate information.

The only way to minimise the likelihood of such accidents happening is to control who can do what on a module per module basis.

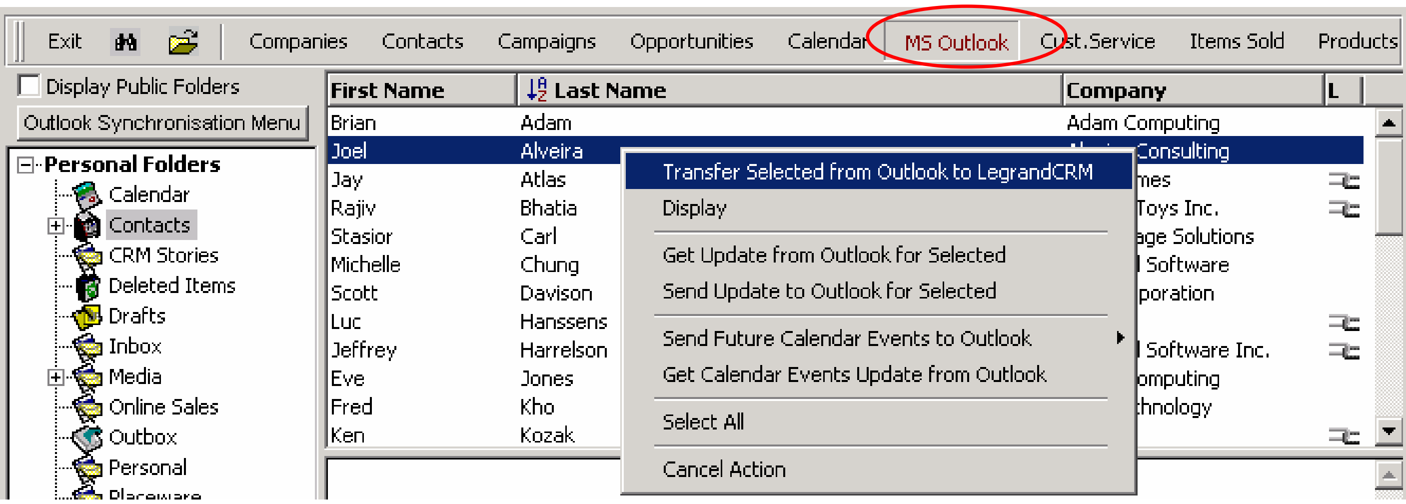
For instance, a new receptionist or a temp staff person may initially only be given rights to create activity notes (eg to record an incoming message) and to create calendar appointments, but may not have the rights to change anything in Company and Contact records and may definitely not be allowed to modify the sales opportunity records.

There is nothing more frustrating for a Sales Manager to find that the field values he has used to classify his customer and prospect lists have been modified by another staff member. Well documented policies and procedures can help, but the CRM software can help too by providing control over what actions a User can perform. Legrand CRM is the only system in its price bracket to deliver such functionality.



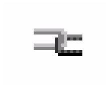
## 5.4 Seamless integration with Outlook

Legrand CRM does not seek to replace Outlook but rather works seamlessly with it. Your Outlook data is directly accessible from within Legrand CRM from the main toolbar.




You can access all your Outlook information from within Legrand CRM. Simply double-click on an item to bring up the Outlook detail window for that item. A right-mouse click brings up a menu of available actions. You can transfer Contacts, Appointments and Tasks back and forth between Outlook and Legrand CRM.

Once an item has been transferred in either direction a link has been created for that item between Legrand CRM and Outlook. This is visually indicated by the presence of a **link icon**.



When an Outlook item – be it a Contact, Appointment or Task – has been linked to Legrand CRM you can make a change in either system and keep the two in sync by performing the 'Send Update' or 'Get Update' actions.

**Note: Outlook security feature**

The new security features in Outlook 2003 and Outlook 2002 are designed to prevent other programs from sending bulk emails. This enhanced security in Outlook causes a warning message to pop-up any time you access Outlook data from Legrand CRM. To avoid these Outlook warning messages you will need to select "Administration > User Options" from the main menu, then click on "Outlook Security" and specify "Extended MAPI" as the interface mechanism.

**Should all incoming emails automatically transfer into the CRM database? No!**

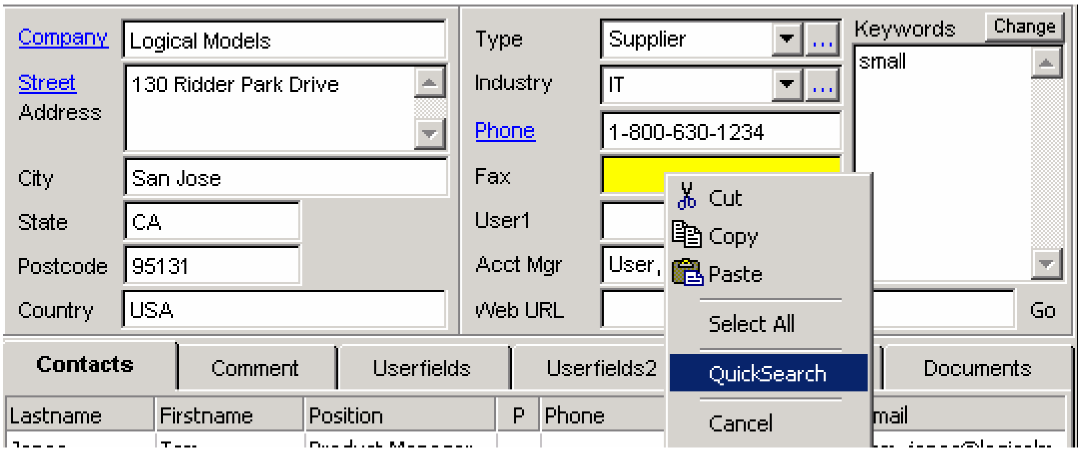
Most people receive a lot of email messages every day. There is usually little point in recording every incoming email in the company's central CRM database. Typically only a small fraction of each day's incoming emails is significant enough that it warrants being stored as a record in the CRM database.

Legrand CRM enables you to selectively transfer important emails from Outlook into Legrand CRM. Simply view your Outlook Inbox from within Legrand CRM and right-mouse click on any email you wish to transfer to the CRM database.

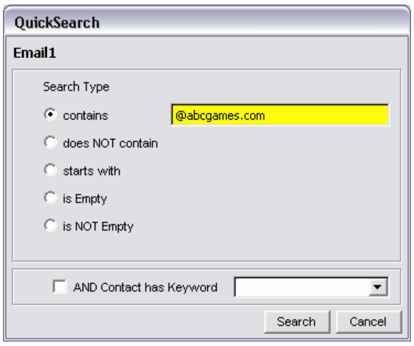
Legrand CRM will scan its Contacts database, searching for a matching email address. If a match is found the email message is automatically copied into the CRM database. If no match is found Legrand CRM will ask you whether to attach the email to an existing Contact or whether you wish to create a new Contact record on-the-fly.

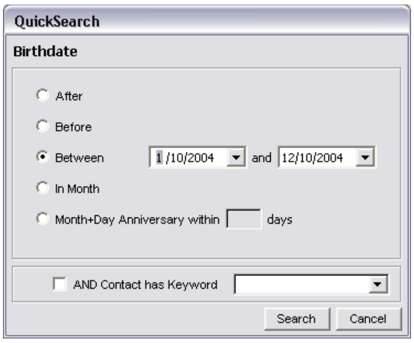
## 5.5 QuickSearch – finding records quickly

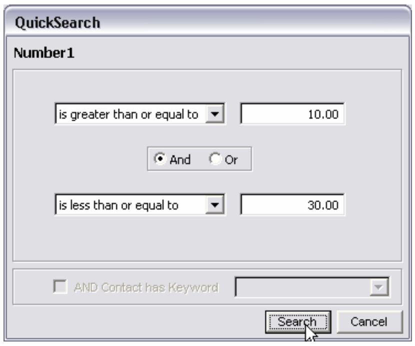
The **QuickSearch** function in Legrand CRM enables you to perform a quick search on **any** of the Company, Contact, Opportunities or Custom Service module fields. The QuickSearch facility is accessed with a simple right-mouse click in the field you want to perform the search on.




The QuickSearch facility enables you to select from a selection of search criteria, such as "Starts with", "contains", etc... The search criteria will of course vary according to the type of data; for instance, when searching on a date field the available search criteria are After, Before, Between, In Month or Anniversary within *nn* days.



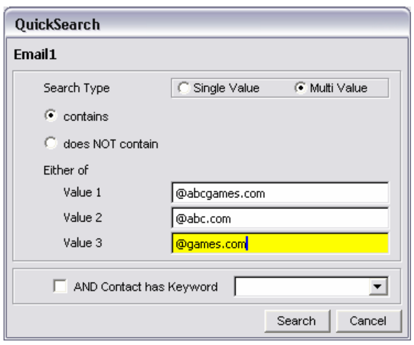




When performing a QuickSearch on a field in the Contacts table you can also combine this search with a Keyword criterion.

For instance, you could do a QuickSearch on Contacts where email "Is Empty" and where Keyword is "e-Newsletter" to quickly identify the Contacts in the e-Newsletter mailing list that do not have an email address.

To bring up a window that enables you to perform a more complex search on any combination of data fields, simply click on the '*Search Criteria*' in the toolbar column on the left of the screen.

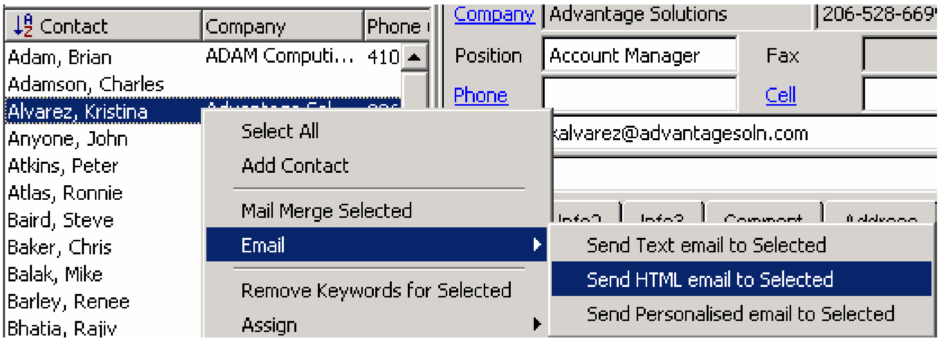
In PRO and CORP versions it is also possible to perform a Mutli Value QuickSearch on text based fields, this allows you to select either the contains or does not contain search criteria.



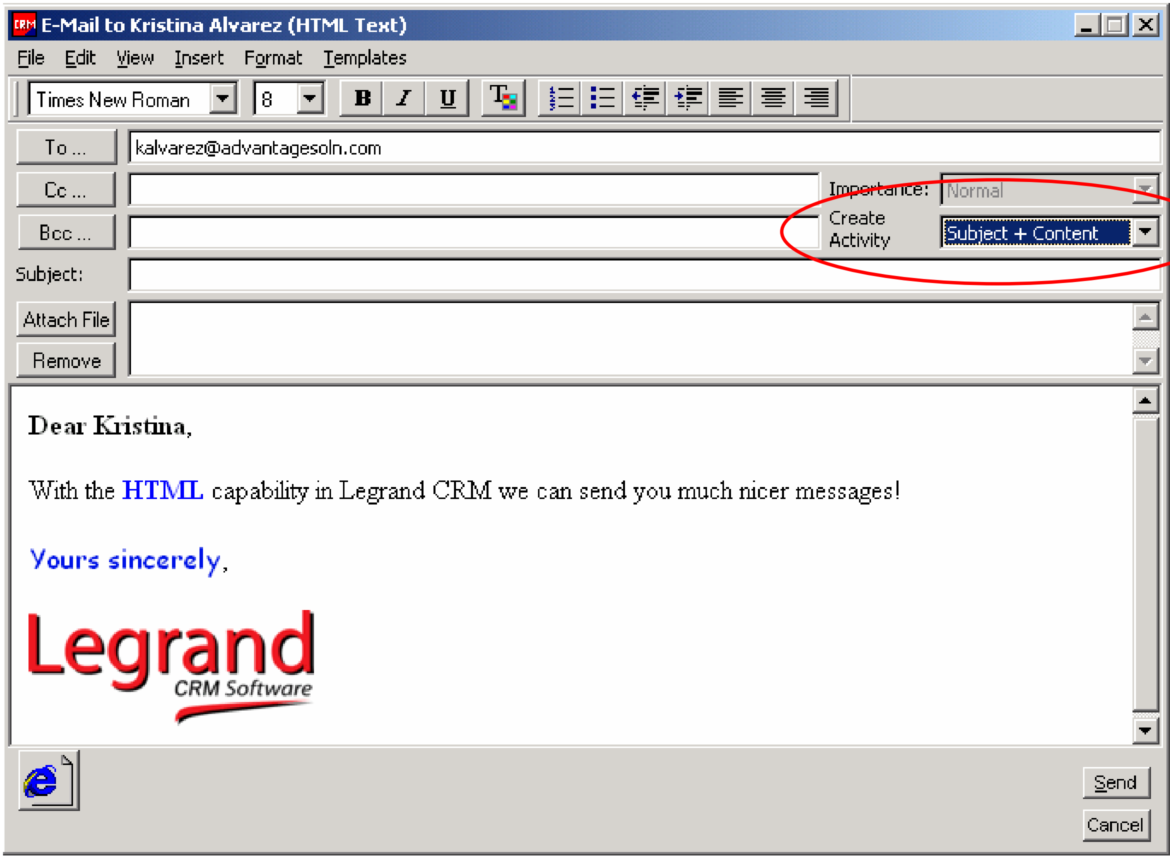
## 5.6 HTML emails & email templates

Legrand CRM includes the ability to send HTML (graphical email). HTML emails can be composed on-the-fly using the built-in editor or can be composed externally using a HTML editor like FrontPage or Word HTML editor.

To send an email to one or multiple contacts, simply right-mouse click on the selected contact and select the appropriate command.

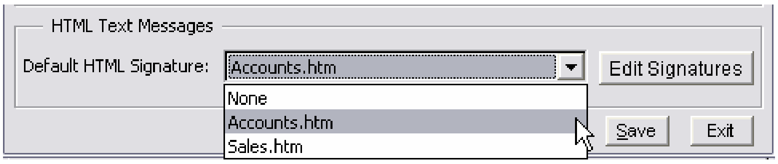



One of the interesting features of the built-in editor is that it allows you to edit either in Graphical mode or in text mode (where you can edit the HTML tags). This will be of interest to HTML experts who like the ability to better control the appearance of the HTML message by directly working with the HTML tags. (It really is only for HTML experts!)




Note that you can select whether the system will create an Activity Note record that contains the entire email or whether simply to record the Subject of the email.

It possible for users to set Mutliple default HTML email templates.




There is also the ability to set a system wide default HTML template. This feature uses command style sheet to ensure that all emails sent from LegrandCRM can be set to have a consistent company wide format.


**Note: Configuring outgoing email**

There are several important email configuration options that must be specified in order for outgoing email to operate correctly. For instance, are you sending out the email via SMTP, via Outlook or using CDO? Some of this will impact how embedded pictures are treated.
From the menu at the top of the screen select "Administration > User Options" and then click on "Email System" to review the available configuration options for outgoing email.

It is important to be aware of the practical limitations of creating a HTML email using the built-in editor (or even using Microsoft Word). The built-in editor is only intended for creating messages with simple effects (bolding, highlighting, logos, etc…).

It is very difficult to obtain exact positioning of graphics and/or achieve fancy effects using anything but a specialised HTML editor. For anything more complex we therefore recommend that a specialised package be used (e.g. FrontPage or Dreamweaver) and that the resulting HTML file be stored as an **eTemplate**.

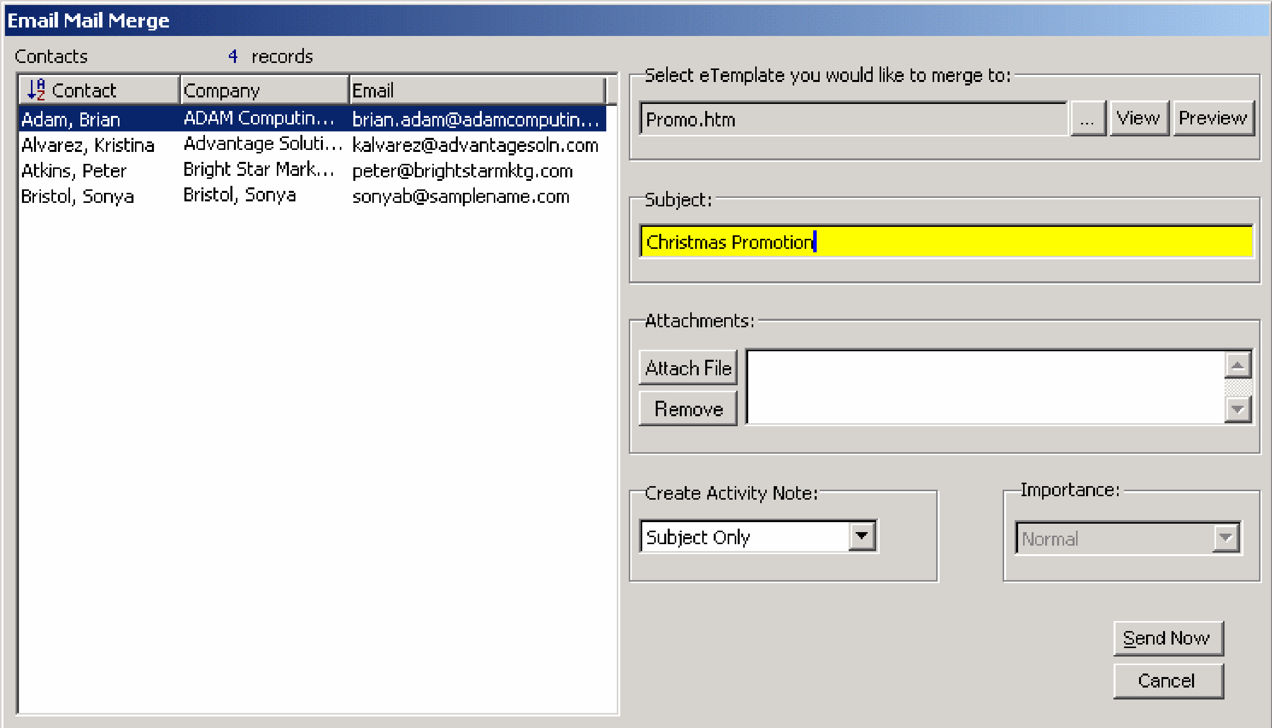
**Please note that Internet Explorer 5.5 (or higher) must be installed on your computer in order to use the HTML email function.**

The eTemplates are stored on the fileserver in a sub-directory of the CRM data folder. You can access the eTemplates from the main menu by selecting "***Administration > eTemplates***".

## 5.7 Personalized Email *(in PRO and CORP editions)*

Using the same mail-merge tags as are used by Legrand CRM in Word document mail-merge, you can easily create personalised email messages.

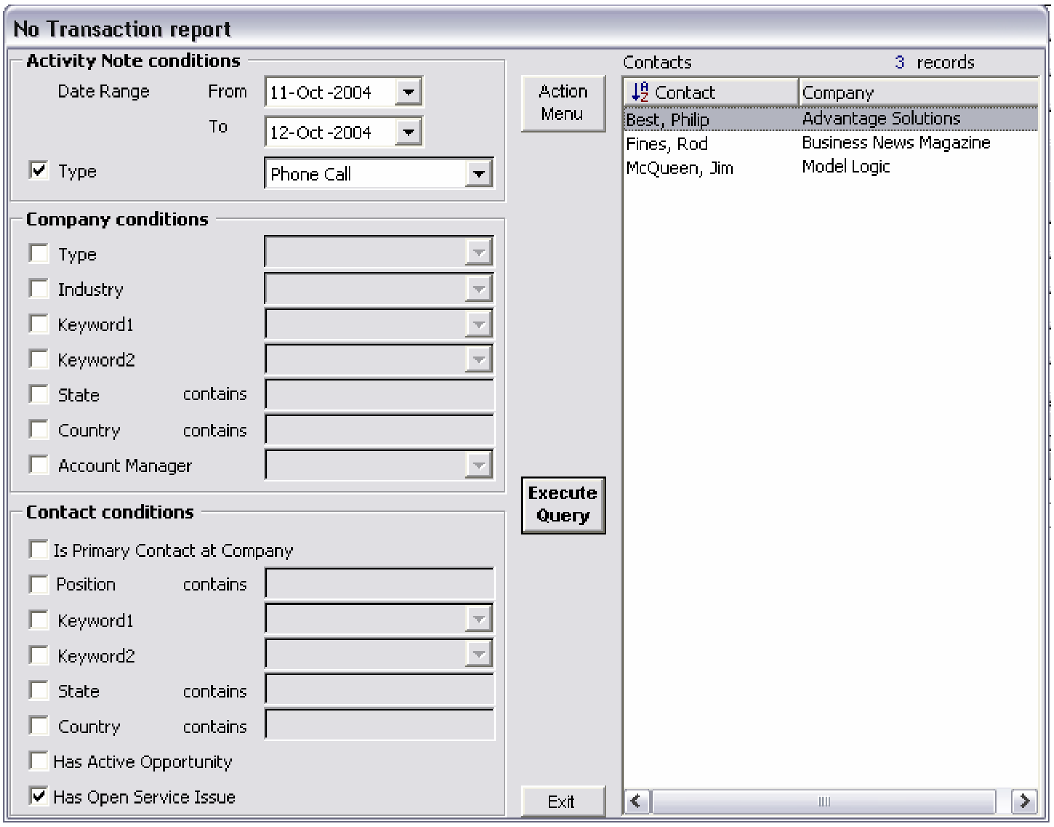
The "Email mail merge" wizard enables you to select the appropriate eTemplate, to preview the personalised email for the currently selected contact, to decide what attachments are to be included with the email, et cetera…




## 5.8 'Lapsed Customer' reporting *(in PRO and CORP editions)*

Keeping track of lapsed customers is vital to any business. An early warning that there's been no interaction with a customer provides the opportunity to re-establish contact and build relationships.

The "No Transaction" report, often called the "Lapsed Customer" report by marketing people, enables you to report on customers where there has been no interaction in a specified period.




It means you can find out which contacts amongst your current sales opportunities have not been contacted recently, or find out which existing customers have not been contacted, say, in the last six months.

You can also specify whether to report on all types of activities, i.e. there's been no interaction with these contacts at all, or whether to report on specific types of activities, e.g. there's been no interaction of type 'Customer Service' with these contacts.

Simply transfer the resulting list of contacts to the 'Worklist' in order to perform an action such as a mail-merge, a personalised email, or simply tagging the contacts for follow-up by the marketing department.

## 5.9 Activity Reporting – Who did What, When and with Whom

After the 'No Transaction' report the next most frequently used report is one that answers the question "What's been happening lately?". Typically this is the question a Sales Manager or General Manager might ask when he/she returns to the office after an absence of a few days.

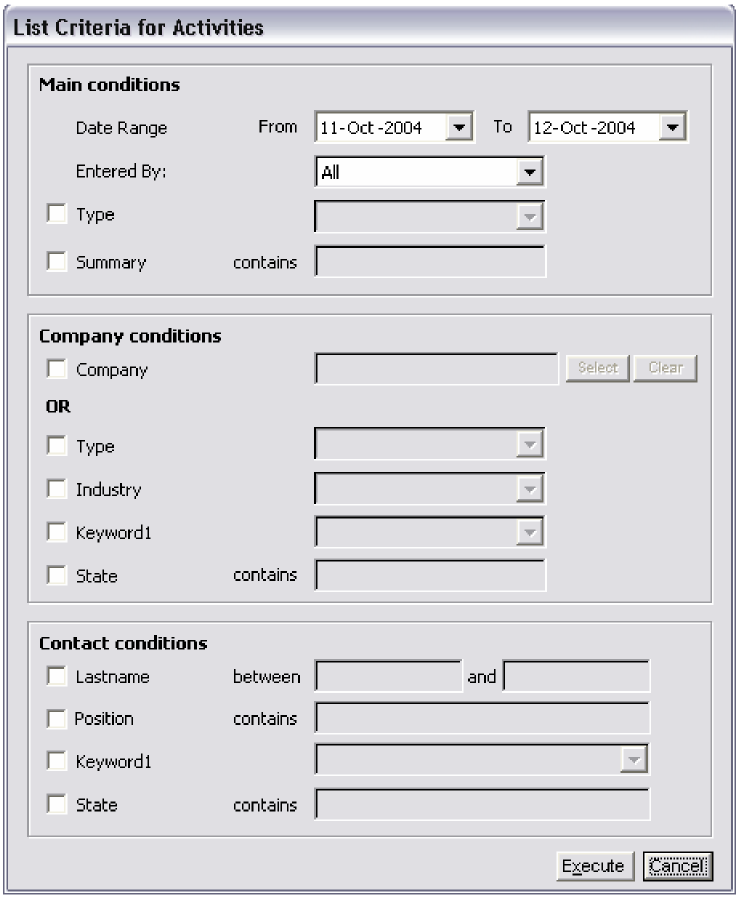
Legrand CRM provides a quick and easy answer to this! Simply access the main menu at the top of the screen and select "Report > Activity Notes".

This will bring up a reporting criteria window that enables you to specify the date range and any other reporting criteria.

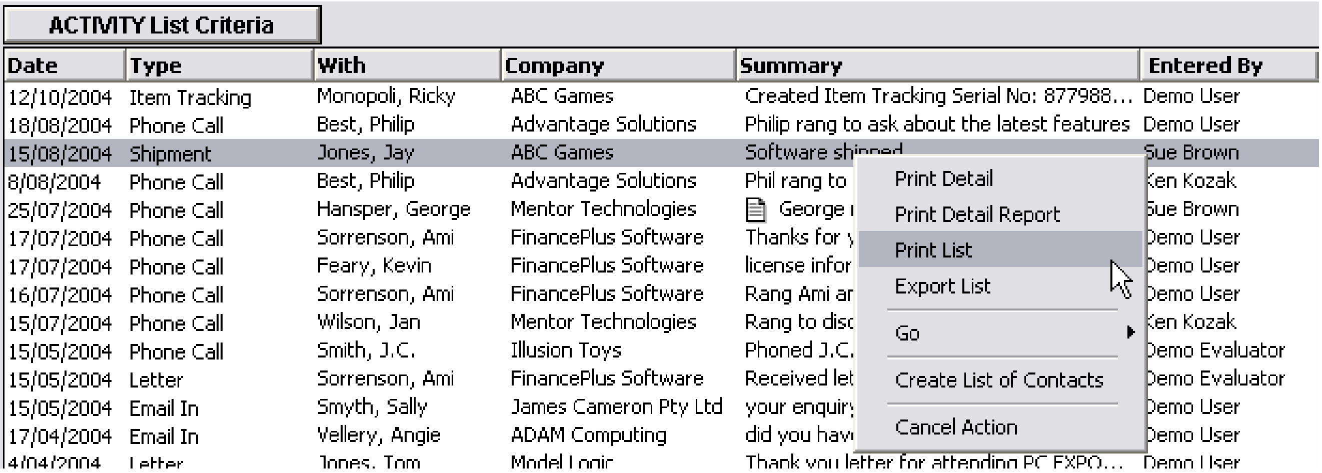
For instance, you may want to see all the activity notes that have been recorded against Customers in the last month.

Another example is where you may have defined an activity type called 'Billable Time' to record the chargeable hours spent by a team of consultants. You can then use the Activity Reporting to quickly and easily report on all Billable Time activities for specific staff members or specific customers.

The possibilities are endless.



The resulting list can then be printed out or even exported to Excel with a simple right-mouse click. Or, you can double-click to drill-down into the activity note and find out the full details about the recorded activity.


ACTIVITY List Criteria

| Date | Type | With | Company | Summary | Entered By |
|---|---|---|---|---|---|
| 12/10/2004 | Item Tracking | Monopoli, Ricky | ABC Games | Created Item Tracking Serial No: 877988... | Demo User |
| 18/08/2004 | Phone Call | Best, Philip | Advantage Solutions | Philip rang to ask about the latest features | Demo User |
| 15/08/2004 | Shipment | Jones, Jay | ABC Games | Software shipped | Sue Brown |
| 8/08/2004 | Phone Call | Best, Philip | Advantage Solutions | Phil rang to | Ken Kozak |
| 25/07/2004 | Phone Call | Hansper, George | Mentor Technologies | George | Sue Brown |
| 17/07/2004 | Phone Call | Sorrenson, Ami | FinancePlus Software | Thanks for y | Demo User |
| 17/07/2004 | Phone Call | Feary, Kevin | FinancePlus Software | license infor | Demo User |
| 16/07/2004 | Phone Call | Sorrenson, Ami | FinancePlus Software | Rang Ami ar | Demo User |
| 15/07/2004 | Phone Call | Wilson, Jan | Mentor Technologies | Rang to disc | Ken Kozak |
| 15/05/2004 | Phone Call | Smith, J.C. | Illusion Toys | Phoned J.C. | Demo Evaluator |
| 15/05/2004 | Letter | Sorrenson, Ami | FinancePlus Software | Received let | Demo Evaluator |
| 15/05/2004 | Email In | Smyth, Sally | James Cameron Pty Ltd | your enquiry | Demo User |
| 17/04/2004 | Email In | Vellery, Angie | ADAM Computing | did you have | Demo User |
| 4/04/2004 | Letter | Jones, Tom | Model Logic | Thank you letter for attending PC EXPO... | Demo User |

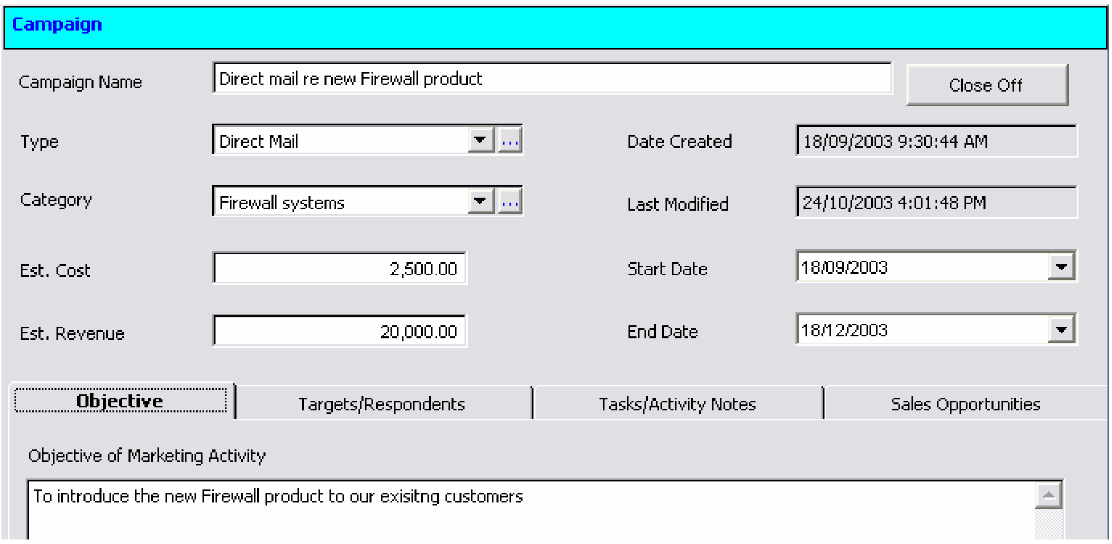


## 5.10 Marketing Campaigns & Events

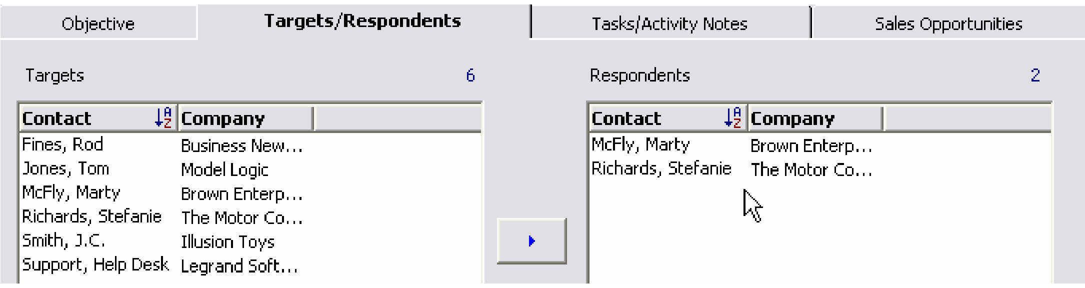
Legrand CRM's Marketing function enables you to create and implement marketing campaigns, and monitor the result of the campaign. With Legrand CRM's marketing module you can:-

- Define your own types of marketing campaigns.
- Record the Start/End dates of the campaign, budgeted cost and estimated revenue.
- Use the two reconfigurable fields ('Type' and 'Category') to classify/segment the marketing activity.
- Manage the implementation of a campaign by linking Tasks and Appointments to the campaign and record notes.
- **Targets** – if the campaign is a direct marketing campaign whereby you target a specific list of contacts with a promotional offer – e.g. an upgrade offer to past customers – you can very easily assign the list of targeted contacts to the marketing campaign.
- **Respondents** – once the campaign is underway Legrand CRM easily allows you to record every person that responds to the campaign; at all times you know exactly how many people have responded.
- Link a Sales Opportunity to the marketing campaign that created it

Over time this detailed information about every marketing campaign becomes a very powerful source of information to measure the effectiveness of these campaigns.



One can go back over a period of, say, 12 months and compare the results of every print advertisement during that period. This enables the company to identify which marketing campaigns consistently deliver good results.




## 5.11 Worklist – a ‘scratchpad’ to which you can add/remove Contact names to build a new list


The Worklist acts like a notepad to which you can add or remove contact names.

The Worklist enables you to compose a new list of contacts that is the result of multiple queries to the database, with each query being either added or subtracted to the Worklist.

This is best explained with an example.

For instance, let’s create a list of Contacts who have a last name that starts with a letter between ‘A’ and ‘L’ and who are not a Primary Contact at a Company where the City contains the letter “b”. These are the steps:-

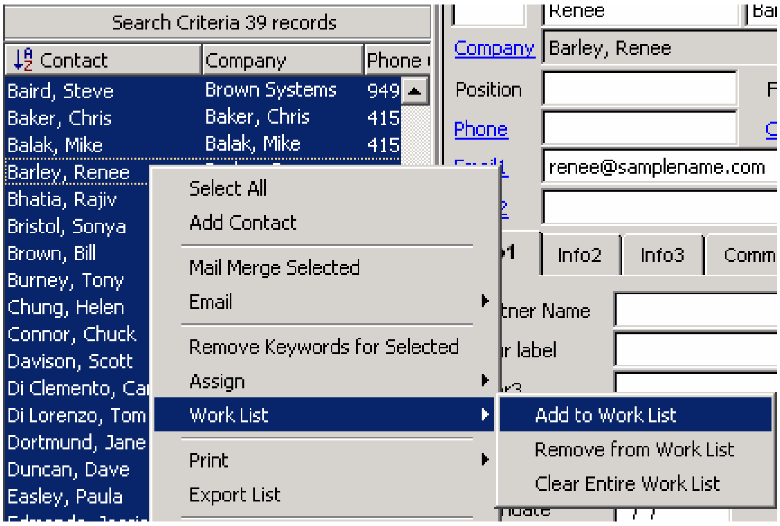
1. Perform a ‘Search Criteria’ and retrieve all the Contacts where the Lastname starts with ‘A’ to ‘L’.
   With the resulting list execute ‘Select All’ (right-mouse click, then select all) and then execute ‘**Worklist > Add to Worklist**’
2. Next perform a new search and retrieve all Contacts that are a ‘Primary Contact’ and where the organization has the letter “b” in its City name.
   With the resulting list execute ‘Select All’ (right-mouse click, then select all) and then execute ‘**Worklist > Remove from Worklist**’

That’s it! The worklist contains the list of names that match your criteria.

**It may look like a strange query but that is exactly the point of this example!** Sometimes it is not straightforward to create a single database query to retrieve the list of Contacts you need. This is where the **Worklist** comes to the rescue.

It is like a notepad of paper to which you Add and Remove list of names obtained from multiple search queries.

Please note that the Worklist is automatically cleared when you log out of Legrand CRM.

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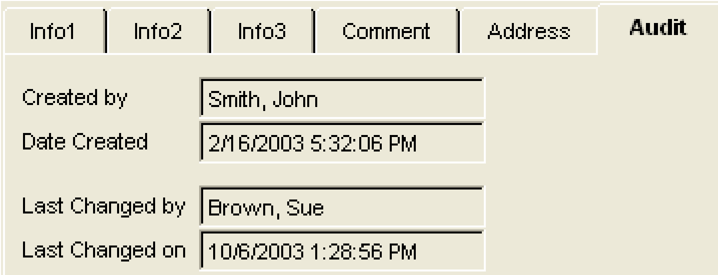
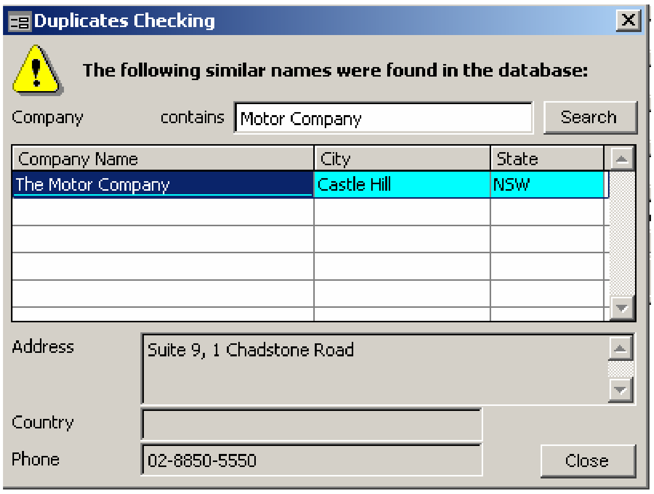
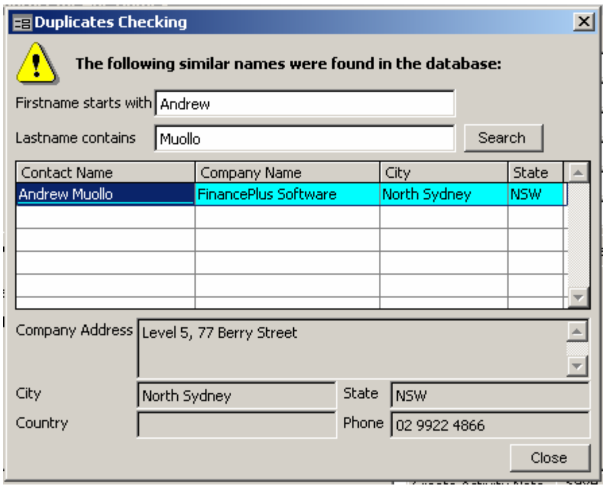
## 5.12 Audit trail

Legrand CRM keeps track of the Creator and creation date of a record, as well as who last modified a record and when. The Search function can be applied to Creator, Creation Date, Modifier and Last Modified Date; this enables you to quickly find which records have been recently changed and identify who performed the change.




## 5.13 Duplicate Record Check *(in PRO and CORP editions)*



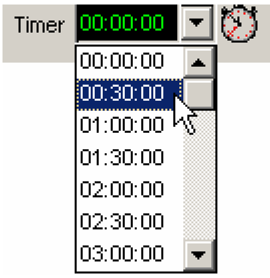

LegrandCRM PRO and CORP editions comes inclusive with a duplicate name check feature when entering company / contact records.

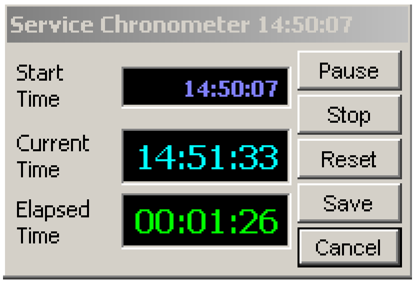
This feature allows control over one of the most annoying aspects of any database application, duplicate records, and is performed as the optimum place, record creation.

## 5.14 Chronometer

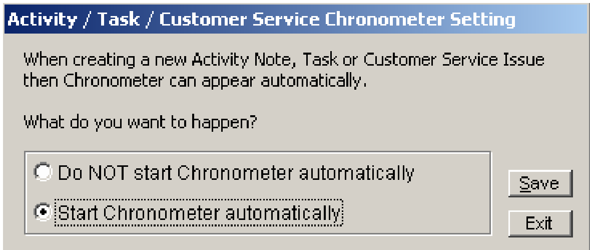
For many companies it is very import to be able to easily record the length of time spend on an activity, task or service issue.

Within Activity Notes, Tasks and the Custom Service module, there is a Duration field which can be populated by either data entry or using the Chronometer screen to time activities length.



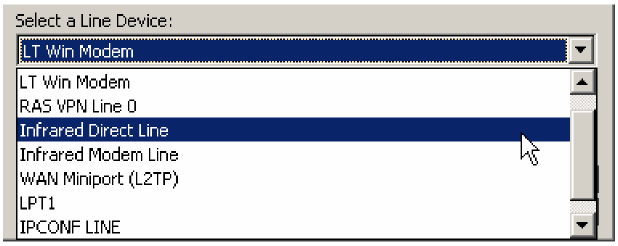




There is also a System Setting to control wether the Chronometer starts automatically when a new Activity, Task or Customer Service issued is opened.

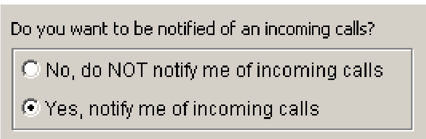



## 5.15 TAPI *(in PRO and CORP editions)*

LegrandCRM allows you to connect your phone system to the database and allows individual users to



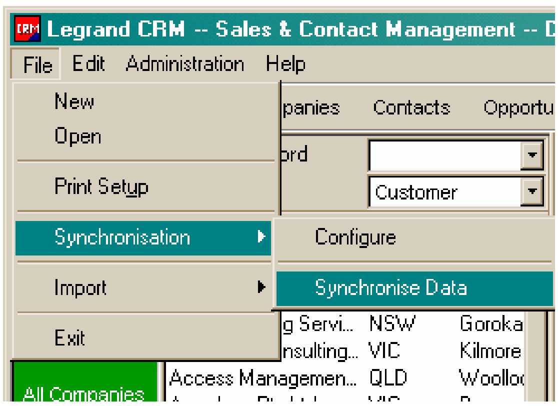

- Select which TAPI service is being used.
- Control when an incoming call is received whether the application automatically displays the matching record details.




## 5.16 Synchronization

As a company with many laptop users who travel frequently, synchronization has always been an extremely important matter at Legrand Software.

The synchronization function in Legrand CRM enables you to synchronize a Master database with any number of laptop or remote users. The synchronization feature in Legrand STD and PRO is ideal for travelling sales people who wish to synchronize their local data upon return to the office. Legrand CORP uses MS SQL replication tools and thus can be set up to be used over a strong VPN connection.




Legrand offers two types of synchronization, full and restricted. Legrand CRM Standard Edition offers only full synchronization; the Pro Edition offers both full and restricted synchronization.

- **Synchronization** is a single-step process and is initiated by the User of the remote database.
- During synchronization any changes made since the last synchronization time to either the Master database or the Remote database are exchanged.
- Synchronization occurs at the record level. If a record has been modified multiple times or has been modified in both the Master and Remote database, the most recent change will prevail.
- Synchronization covers all records of the CRM database, and also includes Letter Templates and document attachments.
- If remote users routinely attach document files (eg Excel, Word, PowerPoint, PDFs) to Activity records in their CRM database then the volume of data being exchanged increases correspondingly.
- Legrand Standard (STD) and Professional (PRO) are file-sharing applications and thus the speed of the synchronization feature is not dependent on the number of changes that have been made, but on the size of the database, it is the local application that has to download all the data from the file server and make the local decision what to update or not to update. Synchronization for these editions is best done via a **LAN connection** (i.e. when the remote user is back in the head office and is connected to the office network).
- Legrand Corporate (CORP) uses MS SQL server and thus is a true client/server database. The local computer sends data request to the SQL Server application and this in turn extracts the data from the database and send the records to the client. Synchronization using Legrand CORP thus needs to transfer far less data than the STD and PRO editions and can be set up to run over a strong VPN connection, as well as a LAN.
- The Standard (STD) edition of Legrand CRM provides **unrestricted synchronization**: i.e. the remote user receives a complete copy of all records in the master database.
- The Professional (PRO) edition of Legrand CRM enables you to also create Remote User Accounts that only have **restricted synchronization** rights. With restricted synchronization a remote user only receives updates to his/her own records, not the full master database. This is particularly useful in situations where an organization has multiple sales people (each maintaining a CRM datafile on their laptop) and it is a security requirement that a salesperson not be able to access/view information about the customers of the other sales people.

### A common problem with synchronization

Data synchronization works very well when all Users synchronise regularly, but it can create a problem when a User hasn't synchronised for a while.

Imagine the situation where User A last performed a sync operation 3 months ago. The Master database has continued to evolve over the last 3 months, with many records added and several changes made. For instance, the current record in the master database for ABC Corporation is the result of several small changes made during the last 3 months.

When User A performs a sync operation, all records that have been modified in the Master and Local database since the last sync operation will be compared. If the same record in both the Master and Local database has changed, the one with the most recent change wins.

So, if User A did not modify the record for ABC Corporation he/she will simply get the latest data for ABC from the server; this data is the result of the cumulative changes of the last 3 months. This is good.

<u>If, however, User A recently made a small change to his record for ABC Corporation this has the potential to wipe out the changes of the last 3 months at the server.</u>

Because User A last performed a sync operation 3 months ago his/her information about ABC is clearly 3 months old. If he/she then makes a small change today (e.g. simply makes a change to one of the user fields) and then synchronises… what then happens is that, **if User's A minor change is the most recent change then User A's record of ABC corporation will prevail and will overwrite the record at the server**. The result: all the changes of the last 3 months to ABC Corporation are lost because User's A record for ABC Corporation consists of 3 months old data, plus the minor change he/she just made.

This is a common situation in record-level synchronization, though one that most people are not aware of.

Synchronization between Outlook and a Palm or PocketPC works like that too: the record with the latest change overwrites the other, unless you have specified that one side always wins.

Whenever someone says that synchronization has caused their data to be 'lost', you can be almost certain that it is due to one user overwriting the server with old data as per the scenario above.

### A Solution to the problem

Legrand Software delivers a solution to this problem in the form of a synchronization configuration setting in the Master database which enables the Administrator to exert control over this aspect of the sync process.

This configuration setting enables the Administrator to define the "***Time Period allowed for updates to the master database***". This will determine what happens in the situation where both the Master and Local record have changed since the last sync operation.

This is how it works:-

- Say that the "*Period allowed for updates to the master data*" is 15 days.
- If the last sync operation was less than 15 days ago there is no impact; all changes are compared and the usual rules apply; i.e. the most recent change wins.
- However, if the last sync operation was more than 15 days ago then the following rules apply:
    - All new additions (new records) in the Local data are uploaded to the Master. *(as before)*
    - All new additions in the Master data are downloaded to the Local. *(as before)*
    - All changes in the Master database to records that have not changed in the Local database are downloaded to the local database. *(as before)*
    - Any changes in the Local database to existing records will only be uploaded to the Master database if the Master record itself has not changed since the last sync operation.
    - **If both records at Master and Local have changed since the last sync operation, then even if the Local database is the one with the most recent change it will still be the Master record that prevails.** This avoids the problem outlined before.

### Synchronization with Legrand CORP edition

Unlike the STD and PRO editions which are desktop applications that use a file-sharing database (Microsoft FoxPro), the CORP edition is a true client/server application that uses Microsoft SQL Server as its database.

Synchronization in the CORP edition is totally different than the process that has been described so far for the STD and PRO editions.

The CORP edition uses SQL Server's native Replication functionality to perform sync operations.

On the plus side this delivers a lot of control to the SQL Database Administrator (DBA), enabling him/her to use the full power of SQL Server to set up very detailed rules that govern Publication and Subscription to the entire SQL database or selected segments of the database.

Synchronization in the CORP Edition is also much faster than with Legrand STD or PRO editions. This is because SQL Server only sends the actual changes down the network connection. Legrand STD and PRO editions are desktop applications that use a file-sharing database (FoxPro), therefore they need to download the database from the fileserver to perform the record comparisons at the local desktop.

The down side of synchronization in Legrand CORP edition is that you do need a very experienced SQL Database Administrator to setup and manage the synchronization process.

# 6 Customer Service Module

The saying is that you can't have a business without having customers; but it is just as true to say that you can't keep a business if you can't keep customers happy.

**Customer Service –** many use the word, but few businesses have in place a system to manage and monitor how well they perform in the area of customer service. Why? Because such systems have traditionally been quite expensive to purchase and implement.

Legrand Software is the first CRM vendor to deliver a practical and inexpensive Customer Service module.

The Customer Service module is available as an optional module to the PRO and CORP editions.

The Customer Service module enables you to track customer service issues, from initial contact all the way through to resolution.

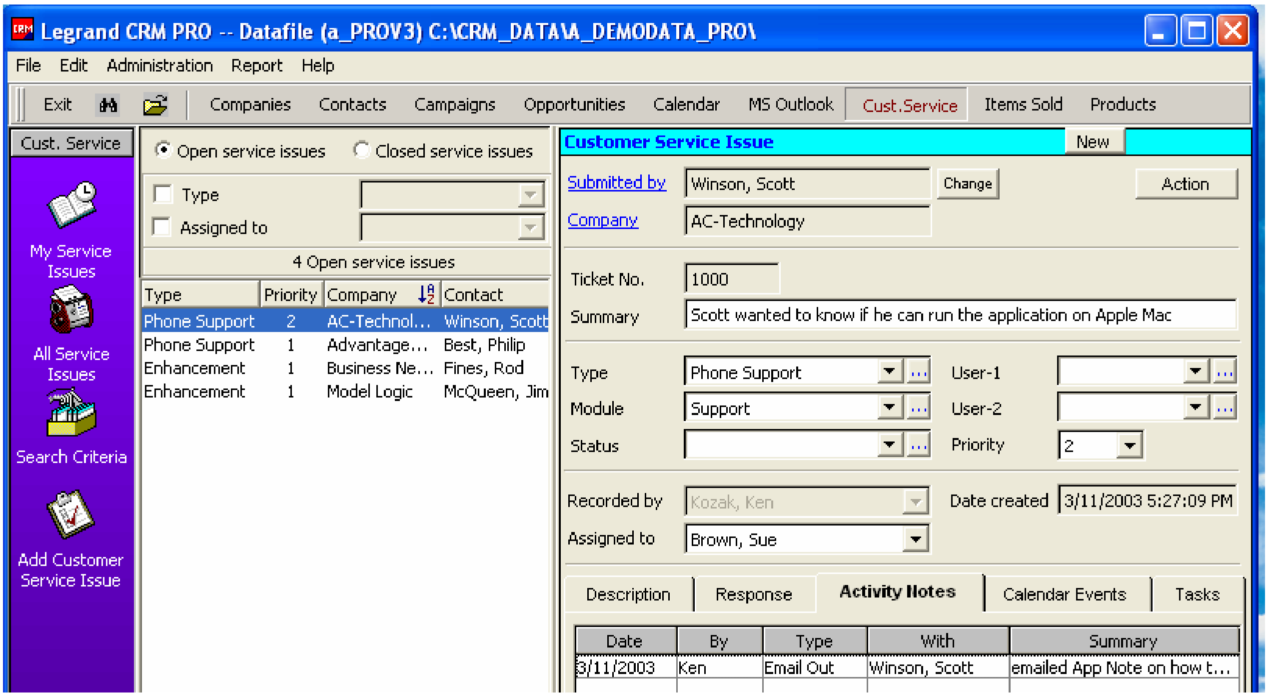
Legrand CRM automatically creates an activity record when a Customer Service issue is opened, closed, re-opened or re-assigned to another member of staff. Re-assigning a service issue to another staff member automatically triggers an email to that staff member to alert them that a service issue has been assigned to them. Tasks and Activity Notes are easily linked to a Customer Service issue.

**What this means is that a detailed audit trail is created of how a particular issue is dealt with.**

In the company view you have an immediate overview of all the Customer Service issues that have been lodged by a particular customer and what the status of every issue is.

Your sales people will no longer run into surprise confrontations when making a sales call to a customer, only to find out that this customer has unresolved complaints.

With Legrand CRM's Customer Service module you can easily track all customer complaints and pro-actively manage these issues to ensure maximum satisfaction of your existing customers.



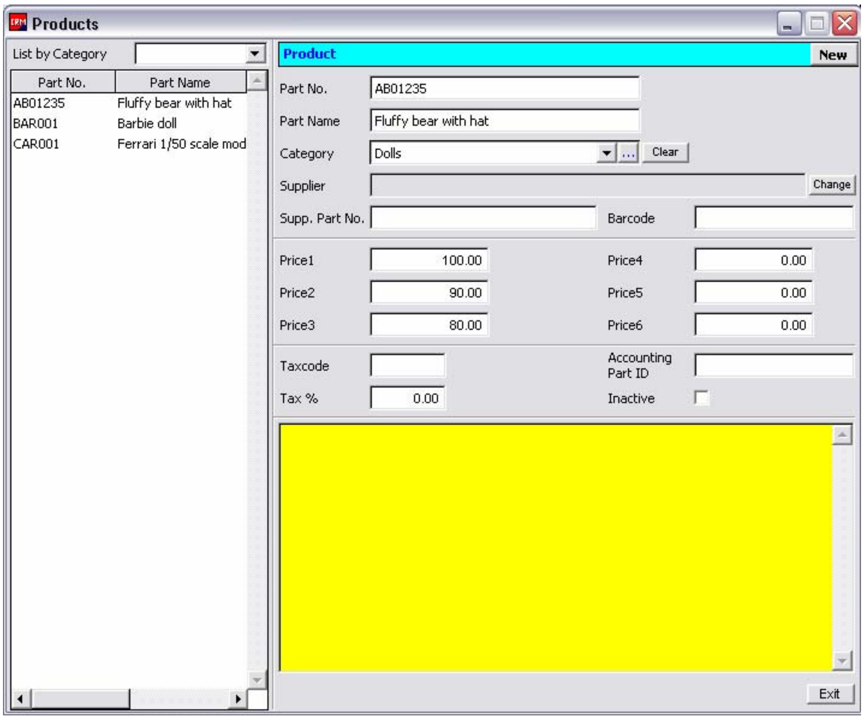
# 7 Item Tracking Option

This optional module delivers the ability to maintain a Products table and keep track of items that have been sold to Customers, including warranty dates, contract expiry dates, etc…

In the products table you can record core product information such as the Part No, Part Name, Product Category, Supplier, Supplier Part No., Barcode and up to 6 prices.

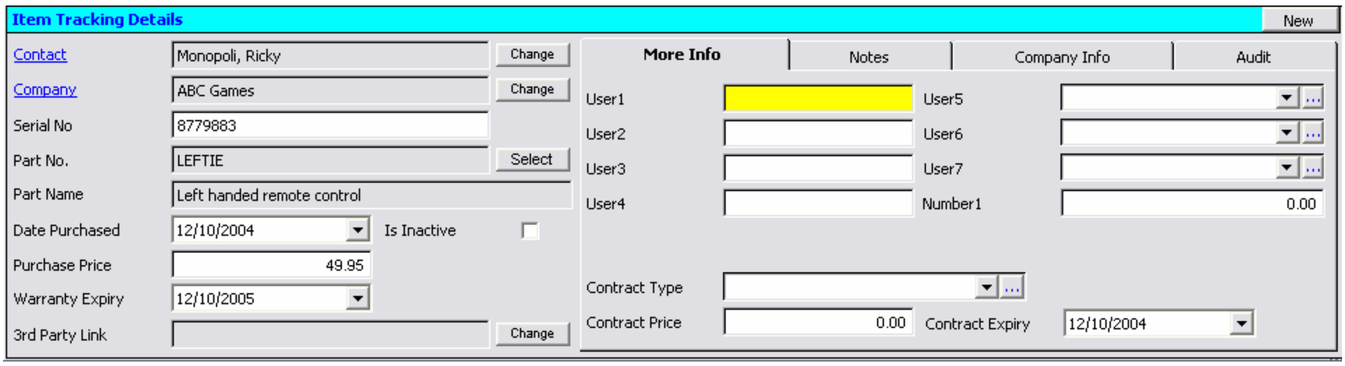
You can also store the accounting system's unique ID for that part, and the tax code and tax percentage that apply, as well as the ability to make the item inactive.

It is worth noting that the products table can be imported via a .csv file, allowing you to keep the products table up-to-date with your either accounting system or any other inventory tracking software you may use.




Once Parts have been defined in the Products table you can create entries in the Items Tracking table to record detailed information about Items that have been sold to Customers.

You can record a **Serial Number**, **purchase date**, **purchase price**, **warranty expiry date**. You then also have a further **eight User fields** to record additional information, plus some fields to record Service information such as **Service Contract Type**, **contract price** and **contract expiry**.




Once again it is worth noting that Items Tracking records can be imported via a .csv file, allowing you to keep the products table up-to-date with your either accounting system or any other inventory tracking software you may use.

Using the either the on screen search functions or the search criteria feature of this module will allow you to be pro-active in converting your database of items sold into new opportunities, i.e. you could create a list of all contacts that have purchased a certain item or from a certain product category and offer a the latest upgrade, or run a search on all support contacts or subscription dates that are about to expire in the next two months and offer renewal contracts.