New in Legrand CRM v6

Legrand CRM version 6 introduces a number of significant enhancements and new modules. With v6 we deliver more customisation, an enhanced email marketing solution, an expanded Products module, a new optional quotation module, plus a host of smaller enhancements and fixes.

1. Configurable screens

Version 6.0 brings significant enhancement to the configurability of Legrand CRM. You can:-

- change the sequence and position of user fields
- change the width of captions and input controls
- determine how many field groups to use in a panel – one, two or three

2. Configurable Field properties

In addition to controlling the position and size of user fields you now also have control over the appearance of user fields. You can:-

- specify whether a user field uses a text box or a drop-down list for its input
- hide unused fields
- set read-only fields (useful when you have integration with 3rd party applications which imports and displays data into Legrand CRM)

3. Additional fields in Companies and Contacts modules

Companies

- 3 additional checkbox fields
- Additional fields for use with quotation module: Currency, Price Level, Sales Agent, default tax code, default quotation print template, default warehouse, 'Watch Out' notes

Contacts

- 3 additional checkbox fields
- InActive field

4. New functionality

- the contact list in the Companies module will automatically resize when there are more than 7 contacts at the currently selected company
- Street and Mailing address can be renamed; e.g. Billing and Shipping address
- **Opt-Out list** – the Opt-Out list contains the list of contacts who have unsubscribed via Constant Contact from any further email campaigns. The list is based on Contact name and email address. Any email address that is in the Opt-Out list cannot be used in any emails
- **Inactive contacts**!
- Activity Note lists in companies and contacts module can be filtered by activity type
- Activity Note lists now show date + time of the activity
- The marketing campaign list in Companies and Contacts module can now be filtered by campaign type and displays the detailed result of email campaign: Open (Yes/No), Bounced, Unsubscribe, Forwarded
- Calendar events can be 'tagged' with keywords.

5. Integration with Constant Contact email marketing delivery and tracking service

In v6 we introduce tight integration with Constant Contact, one of the global leaders in email marketing services. You can still continue to send out email campaigns using your own email server, but if you want fast delivery and detailed tracking of campaign results then our integration with Constant Contact provides the solution you need.

The integration includes the following functionality:-

- Upload Legrand CRM keyword mailing lists to Constant Contact
- Download Opt-Outs from Constant Contact to Legrand CRM
- Download campaign results to Legrand CRM, both the campaign summary and the details per contact

This integration delivers the best of both worlds: Legrand CRM excels at list management and campaign management, whereas Constant Contact excels at email delivery and recording the success rate. For more information please email a request for the detailed application note or attend one of the monthly webinars.

6. Expanded Products module

The products module has expanded significantly. Many additional fields have been added to enable tight interaction with product inventory data that is found in accounting systems:-

- 2nd Category field
- Product type (Part, Kit/Assembly, Service, Text)
- 9 price fields
- description field (in addition to Part Name)
- 2 images: thumbnail image and full size image
- Specification field
- isDiscountable, cost, unit measure, supplier name, supplier part no, unit weight, unit volume

The products module has a new interface and now includes a range of new reports: a product datasheet and a product list report. You can define multiple templates for each of these report types, and the can include images in the reports.

7. NEW: Quotation module

Version 6 sees the introduction of an optional Quotation module.

Quotations can be linked to a Sales Opportunity or can be used stand-alone linked directly to a company and contact. Key features of the quotation module are:-

- Unlimited revision tracking: every time you make a change to an existing quote the system automatically increments the revision number while retaining the quote number.
- Easily use an existing quote as a starting template for a new quote
- Product part number, description, prices, categories, cost and stock availability are imported from supported accounting systems
- You can also import Products via CSV file
- The quotation screen supports:
    - Optional line items
    - Sub-totals
    - Header lines

    - ‘*exclude from printing*’ & ‘*hide price*’ properties
    - Stock location, weight, volume
- Subject to User Permissions you can view cost and margin per line item, as well as total margin for the quote
- User-configurable grids allow you to specify which columns to display
- Maintain multiple print templates for product data sheets, product lists with images and quotations (incl. images)
- stock availability can be viewed ‘live’ or batch imported (*depending on the accounting system*)
- When a quote has been accepted convert it automatically to a sales order in the accounting system (*only for supported accounting systems*)

Some of the benefits that the quotation module provides:-

- Sales people do not need access to the accounting system in order to create a quotation. There is no need for sales people to use an accounting license; no risk of sales people accessing sensitive financial data.
- You don’t need to create a Customer account in the accounting system every time you deal with a new Prospect
- Use traditional CRM functions to email quotes, record sales activities (meetings, phone calls, etc…) and track what is in your sales pipeline
- Detailed visibility to the Sales Manager :
    - See quotes and their revision history
    - See which quotes are outstanding
    - View profitability (i.e. quote margins)
    - Create custom reports to analyse profitability, quote acceptance ratios, which products are being quoted most frequently, etc…

8. NEW: Web Portal

Version 6 sees the introduction of a brand new product: the Legrand CRM Web Portal.

The Web Portal is a web version of Legrand CRM but it is not a hosted cloud solution; the Web Portal application runs on your IT infrastructure, on your web server.

Clearly the main benefit of the Legrand CRM Web Portal is that your mobile sales team has anywhere, anytime access to your corporate CRM data using a web browser on their laptop, iPad or Android tablet.

Your mobile team has access to the same CRM information as the people in the head office. Mobile sales agents can add/update client records, record meeting notes, update sales opportunities, set follow-up action items for team members, etc… And, of course, the benefit to management is immediate visibility to what is happening in the field.

The Legrand CRM Web Portal is ideally suited for mid-sized small businesses who have multiple mobile workers and who already have the IT infrastructure in place to run a web server application.

For more information on Legrand CRM v6 please contact your Legrand CRM Solution Partner or visit our web site to sign up for one of the monthly webinars.