CRM Interfaces

While FinancePlus accounting software takes care of your accounting, management and inventory needs, a contact management or Customer Relationship Managment (CRM) system is extremely useful in managing the day-to-day relationships between your organisation and your clients, suppliers and prospects.

FinancePlus offers interactivity with two third-party contact management systems. Interaction with Goldmine V5 is available through an optional interface module while Legrand CRM integration is available as a standard feature.

Legrand CRM Interface

Legrand CRM is a Customer Relationship Management (CRM) system designed for small to medium sized businesses. The software allows you to manage your contacts, sales, marketing, calendar and tasks list all in the one package.

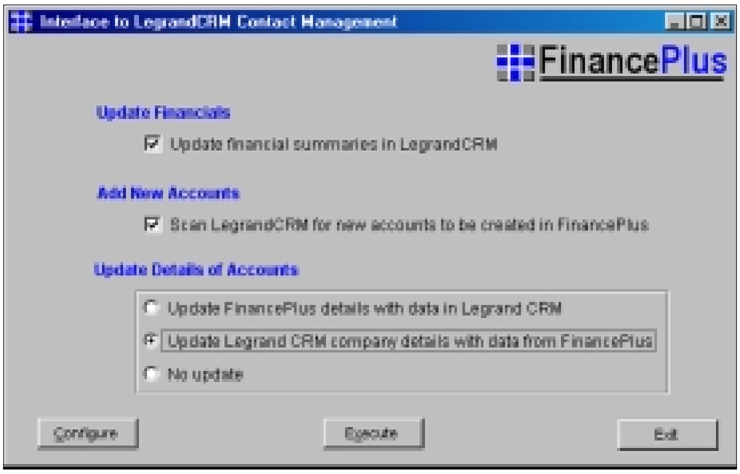
To extend the power of the software, FinancePlus has developed an interface for Legrand CRM which allows FinancePlus users to transfer data quickly and easily between the accounting database and Legrand CRM.

For every Customer or Supplier the following information can be transferred from FinancePlus to Legrand CRM:-

- Current outstanding balances, aged.
- Sales totals for last month, this financial year, and last financial year.
- Account Credit Limit

In addition to the financial summaries that are transferred to Legrand CRM, you can determine which system, FinancePlus or Legrand CRM, is the master database for address and contact information.

The Legrand CRM interface is accessed and controlled from within FinancePlus. There is no need to run a separate program to translate data between the two systems.

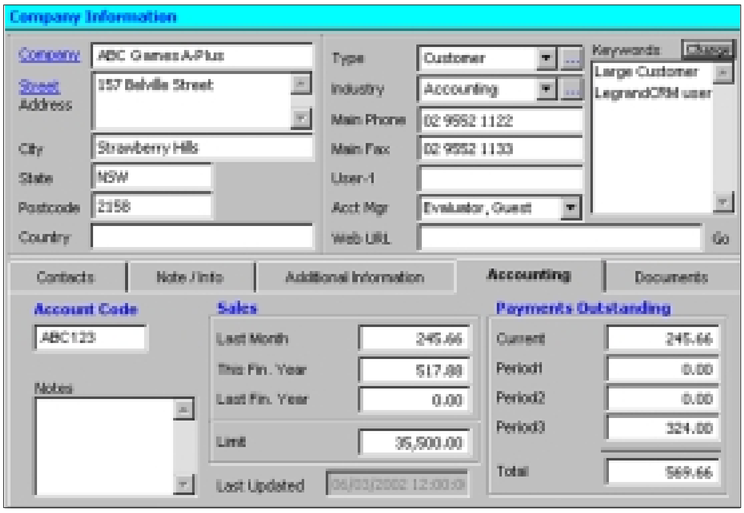


Above: The Legrand CRM interface gives you full control over the transfer of information to and from FinancePlus.

When the Legrand CRM interface is opened, you decide what kind of action to take. (See picture below).

You can choose to:-

- update financial summaries in Legrand CRM
- scan for new accounts in Legrand CRM that need to be created in FinancePlus
- scan for new accounts in FinancePlus that need to be created in Legrand CRM
- update address information (Legrand CRM to FinancePlus or FinancePlus to Legrand CRM).



Above: FinancePlus works tightly with Legrand CRM software to provide sales and customer service staff customer information such as aged outstanding balances, last sale value, sales value for the year to date and for the last financial year.

Legrand CRM Interface Features

- Sales and Marketing staff have access to client data without direct access to accounting data.
- seamless interaction.
- update financial summaries: aged current outstanding balances and credit limit.
- Current month, current year and last year's transaction totals.
- Scan for new accounts in Legrand and FinancePlus and update the other database.

FinancePlus
Accounting software designed to manage your business

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Goldmine Contact Management Interface

Like the Legrand CRM interface, the GoldMine Interface module from FinancePlus provides seamless interaction between your FinancePlus accounting database and your Goldmine V5 contact management database.

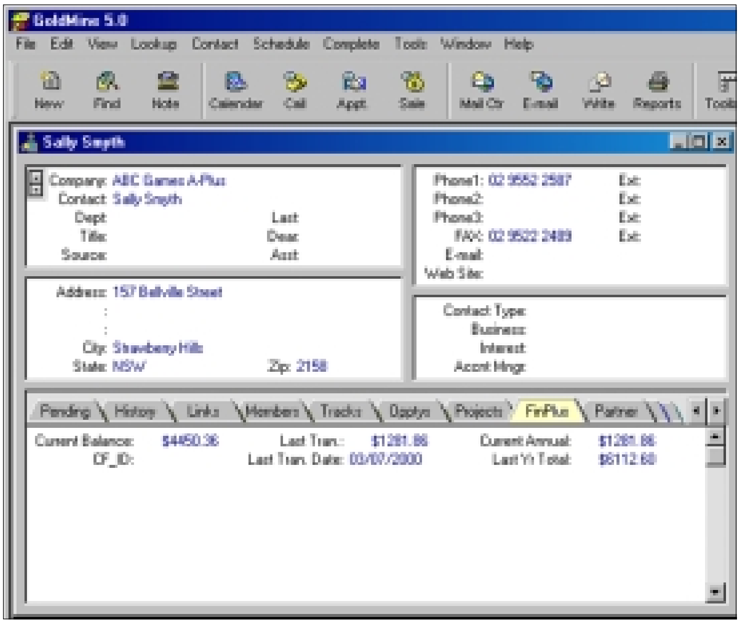
The Goldmine Interface provides much of the functionality of the Legrand CRM interface. FinancePlus can transfer to GoldMine the following customer and/or supplier information:-

- Current outstanding balance
- Last transaction date and transaction amount
- Current year and last year's transaction totals

The Goldmine Interface, like the Legrand CRM interface, additionally allows you to determine which system, FinancePlus or GoldMine, is the master database for address and contact information. The Goldmine interface module is also accessible from within FinancePlus. Again, there is no need to run a separate program to translate data between the two systems.

When the GoldMine interface is called up, you decide what kind of action to take. You can choose to:-

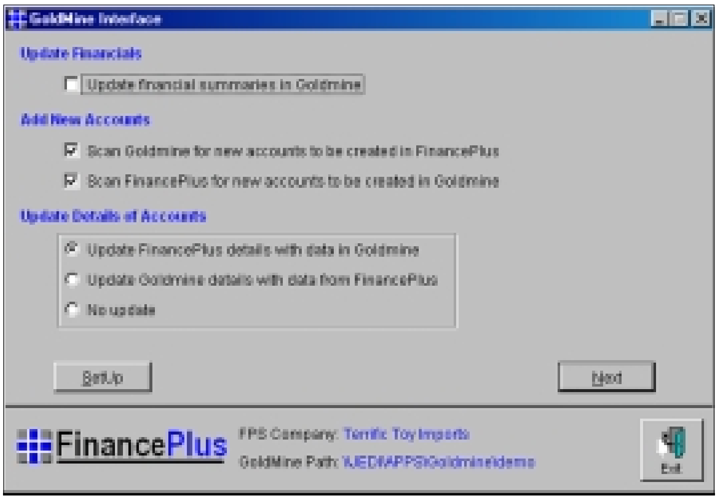
- update financial summaries in Goldmine
- scan for new accounts in Goldmine that need to be created in FinancePlus
- scan for new accounts in FinancePlus that need to be created in Goldmine
- update address information (Goldmine to FinancePlus or FinancePlus to Goldmine).



Above: Within Goldmine accounting information such as Last transaction date, Last transaction value and YTD sales figures can be viewed without logging into FinancePlus.

Goldmine Interface Features

- Sales staff have access to client data without direct access to accounting data.
- seamless interaction.
- update financial summaries, current outstanding balance, last transaction date and amount, current year transaction totals and last year's transaction totals.
- Scan for new accounts in Goldmine and FinancePlus and update the other database.



Above: The Goldmine interface lets you control which system is the master for Address and Contact information.

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