

Contact Merge Tool for Legrand Software

Middleware for accounting and CRM

Situation

- **Have you accidentally created duplicate contacts in your Legrand CRM data base?**
- **Are not sure of the magnitude of the problem?**
- **Are you looking for an easy way to clean it up without spending hours moving activity notes, item tracking records, etc then deleting the duplicates?**

Solution

Our contact merge tool quickly provides a list of all the duplicates by e-mail address, phone number or name. Highlight those to be merged together and click on merge. You will be presented with a list of all the information contained with each record and a radial button indicates which information will be used for the result. Click on merge and you are done.

“ We ended up with 350+ duplicates based on importing information from our previous CRM, QuickBooks, and item tracking records.

To do the merge manually we estimate the process would have taken 100+ hours. With the merge tool, it took less than 8 hours plus we had an up-to-date list to know exactly what needed merged without the need to create a SQL query as we were going through the process.

Our data base is so much cleaner and easier to work with now that we don't have to always be concerned that critical details may be overlooked because they are included on different contact records. Based on our success we cannot wait to tell all our clients who are also using Legrand CRM.”

~**Bonnie Nagayama**
Moraga, CA
www.4luvofbiz.com

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Installation and Integration

The Contact Merge tool by PASH works with CORP versions of Legrand with plans to include STD and PRO, in the near future. No limited-trial period, the application is free to download, install, and view duplicate records.

- 1 Connection information for the Legrand database
- 2 Search for duplicates by email, phone, name, or fuzzy logic
- 3 View the duplicates found
- 4 Select the desired duplicates to merge
- 5 Click on Merge button to merge selected duplicates

Contact Merge tool for Legrand Software

Duplicate	Position	First	Last	E-mail	Phone
jivey@msn.com		Mrs Jane	Ivey	jivey@msn.com	205-555-0001
		Jane	Ivey	jivey@msn.com	205-555-0001
joedavis001@aol.com		Joe	Davis	joedavis001@aol.com	205-555-0001
		Joesph	Davsi	joedavis001@aol.com	
lsmith@egsolutions.net	Mrs	Leslie	Smith	lsmith@egsolutions.net	205-444-0001
	Mrs	Leslie	Smith	lsmith@egsolutions.net	205-444-0001
eli.james@eliworks.com	President	Mr	Elijah	James	eli.james@eliworks.com
		Mr	Eli	James	eli.james@eliworks.com
		Mr	Elijah	James	eli.james@eliworks.com
	President	Mr	Elijah	James	eli.james@eliworks.com
		Mr	Elijah	James	235-766-5555
cterry@pipesystems....	CFO		Cason	Terry	cterry@pipesystems.c...

About PASH

PASH is dedicated to providing software solutions to the accounting and CRM user.

Additional Software by PASH

PASH also provides SalesTax-Pro software which integrates with QuickBooks and imports QuickBooks data into the California BOE-401-A2, Deductions/Exemptions, and Schedule A. For more information on SalesTax-Pro visit <http://www.salestax-pro.com/index.html>.

