XACT SOFTWARE SOLUTIONS LTD

Comparing CRM integrations for the MYOB EXO Accounting Package

Act! vs. Legrand vs. MYOB EXO CRM

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Choosing to integrate CRM with accounting is an important step for organisations wishing to streamline their internal processes. However, there are important considerations to make when deciding which integration product is right for the business. This whitepaper compares four of the competing CRM integration solutions for the MYOB EXO Business accounting package.

Contents

Introduction

This document compares MYOB EXO CRM, Legrand CRM, Web Ninja and ACT! integrations with MYOB EXO Business accounting.

Choosing to integrate CRM with Accounting

Before reading further it is important to outline some of the key reasons why an organisation might wish to integrate CRM with accounting.

When done well, integrating front-office systems (CRM) with back-office systems (accounting) creates a logical office workflow that is capable of supporting both sales and accounting requirements. As each facet of the business operates differently, providing a solution that enhances the business processes for each department requires a deep understanding of "how things should work" and should be both well featured and customisable.

Front-line staff need a system that is simple and easy to use; capable of storing large volumes of customer data, yet providing simple but powerful lookup and sales analysis tools. They need to view the status of a customer's account (i.e. what have they purchased recently and do they have any outstanding invoices?) and be able to create sales documents readily. Too often sales staff juggle multiple applications to perform what should be within the capability of well-integrated office software.

Back office staff on the other hand, are reluctant to give front-line staff direct access to accounting - their focus is on security. This can result in situations where front-office staff cannot readily access account information or create sales documents directly into the accounting system, and accounting staff must interpret quotes compiled in MS Word or Excel to create a customer's invoice.

So what are the features that an integrated CRM/Accounting solution needs to offer?

- **Reduce double entry of data:** Information should only need to be entered once, in any program, and should then be accessible to those who need it.
- **Eliminate redundant tasks:** Integrated systems should be intuitive and should operate seamlessly together. The fewer steps it takes for users to perform a task and the fewer programs they have to open, the more efficient they will be.
- **Real-time workflow:** Preferably integration solutions should be working with real-time data so that information is consistently accurate. The process should be sufficiently automated so there is no responsibility on users to manually refresh data. What is displayed should be the true situation at all times.
- **Organisation-wide visibility of data**: Integrated solutions should give all users complete visibility of contact data including phone/email communication history, activities/tasks, customer account information and sales history. In doing so, the CRM should also respect the security level applicable to the logged on user.

It is for these benefits that organisations should be motivated to integrate CRM and Accounting; as such they will set the scope for the following analysis.

Set-Up and Pricing

Legrand[1]

Legrand is a desktop product designed for organisations with three or more users. For larger organisations Legrand offers a team-based data access filter as an optional extra. Legrand also has an optional addon solution that enables a limited web-interface, however not all of the features in the desktop version are available on the web version including the integration with MYOB EXO.

The Accounting Module which enables MYOB EXO integration is offered as a separate addon, as is the Quotes Module.

Legrand uses a synchronisation solution for its MYOB EXO integration. The setup of this link means that accounting data will only update for the particular contact record that a user is viewing – which means that the accounting information for all the other accounts will be aging data. To ensure that the data is up-to-date in all of the account records, users must be conscious of running the “Get lasts financial data” process before performing searches or reports that contain accounting fields – by not doing so, users may get ‘unexpected results’.

Pricing Option #1: Classic

Module	Initial Cost	Ongoing Fees[2]	10 users / 5 years
CRM[3]	$1,710	$205	**$30,733**
Accounting Link (site licence)	$625	$112	
Quotations	$641	-	
Team Based Access	$427	-	**$4,270**

Pricing Option #2: Subscription

Module	Initial Cost	Ongoing Fees	10 users / 5 years
CRM	-	$570	**$39,200**
Accounting Link	$625	$112	
Quotations	-	$214	
Team Based Access	$427	-	**$4,270**

1 Pricing for this solution is provided by Reboot Ltd, the New Zealand providers of Legrand. Loyalty discounts have not been applied.

2 Ongoing fees for the CRM (Classic Pricing only) include 2 years software assurance.

3 Minimum purchase of 3 licences required

Web Ninja

Web Ninja is a cloud-based CRM suitable for all sized SME's and comes with the ability to divide users into teams and assign different profile types and user permissions.

Web Ninja enables users to set up synchronisation between the CRM and MYOB EXO to occur at a specified time interval, or manually. Despite this more streamlined process the implications are the same as Legrand in that the data will be out of date until the next sync runs.

Furthermore setting up the accounting integration can be a daunting task as users must first create the accounting fields they wish to see in the CRM, and then imbed the given code into the synchronisation scripts. For those who are not technically minded, assistance from IT or Web Ninja may be required to get the integration working.

There are also additional costs for document storage – any additional storage over 500MB incurs a cost of AUD$10 per 100MB per month, this can significantly increase the cost to the business particularly if users are importing emails into the CRM that contain attachments and images. Compared to other cloud storage providers this is very expensive, for example Dropbox offers the first 2BG of data storage for free and charges $10 per month for up to 50GB of storage.

Users may also wish to enquire about whether the entire database can be exported in a useable format, and the cost to do so, just in case the business wishes to move to a different CRM program in the future.

Pricing

Module	Initial Cost	Ongoing Fees	10 users / 5 years
CRM[4]	$1194(5 users)	$1080(5 users)	**$11,028**
Additional storage[5]	-	$2160	**$10,800**

Act!

ACT! comes in two versions; Pro, and Premium (which includes a web component called Premium for Web, at no additional cost). The Pro version is desktop based and is suited for up to 10 users, whereas the Premium version is designed for 10 or more users. ACT! Premium also provides users with added security features and the ability to divide your workforce into teams; it also comes with a free addon product called ACT! Premium Mobile which provides users with live web and mobile access to the contacts and calendar modules.

The integration of MYOB EXO with ACT! comes as a separate addon which is developed and sold by Xact Software Solutions Ltd. Xact Software is a 3rd party developer and is independent of Sage. The MYOB EXO link can only be installed on desktop versions of ACT!.

4 *Accounting integration is included in the CRM*

5 *Additional storage is based on a 2GB database where the first 500MB is free.*

The MYOB EXO Link for ACT! works differently to Legrand and Web Ninja - it is based on a live connection as opposed to a synchronisation (import/export) process. This means that the data users see in ACT! is the same as an accountant will see in MYOB EXO – so if data is changed in ACT!, MYOB EXO will be updated immediately.

Pricing Option #1: Pro

Module	Initial Cost	Ongoing Fees	10 users / 5 years
CRM	$349	$58	**$10,710**
Accounting Link	$294	$49	

Pricing Option #2: Premium[6]

Module	Initial Cost	Ongoing Fees	10 users / 5 years
CRM	$592	$99	**$14,780**
Accounting Link	$294	$49	

MYOB EXO CRM

MYOB EXO CRM is an additional module, produced by MYOB, to work with the EXO Business accounting package; it replaces MYOB Client Connect Pro. MYOB EXO CRM is the only CRM in this analysis that uses concurrent licencing, which means a business that needs 10 people to access the data may only require 8 licences – this will depend on the needs of the users and the general set up of both MYOB EXO Business (accounting system) and the CRM module.

There are two ways that users can be set-up. First, users can have access to both MYOB EXO business and the CRM module; this will consume one licence of each system when they log in and may increase the overall licencing costs to the business. The other option is to provide users with access to the CRM module– this option will only consume a CRM module licence but users will not be able to modify account data or create transactions. Furthermore, if CRM only users need one-off access to MYOB EXO Business they will need to log into the accounting product separately and flick between both systems (i.e. they will not be fully integrated).

Like the ACT! solution, MYOB EXO CRM operates using a live connection. Users are also able to search and report on the accounting data from within the CRM.

Pricing[7]

Module	Initial Cost	Ongoing Fees	10 users / 5 years
CRM	$850	$185	**$15,900**

6 Pricing for this solution is based on the price break which applies for 6-10 users.
7 Pricing for this solution is based on the price break which applies for 10-14 users.

Notes/Assumptions

- Prices are accurate as at 16/04/2012
- Prices are subject to change and are included in this analysis to be used as a guide only.
- Prices for “10 users over 5 years” assumes that all 10 users require accounting integration and any other components included in the analysis.
- All prices are in NZD and are exclusive of GST. When applicable prices have been rounded to the nearest dollar and/or converted from AUD to NZD using a conversion rate of 1.2.
- Unless otherwise stated, all prices are based on a per user basis.
- Ongoing fees are the annual costs applied to the software.
- The first year of ongoing fees is included in the initial cost, where an initial cost is provided.

Creating workflow in the Sales Process

One of the key motivators for integrating Sales and Accounting Processes is to create efficient office connectivity that eliminates duplication of data, and reduces redundant tasks. This section of the document focuses on comparing how well each of the CRM Systems achieves this workflow through a typical sales process. First however, it is important to describe each of the CRM Systems' approach to CRM/Accounting integration.

Legrand

Legrand from the CRM perspective is a sales driven program which strongly supports the generic lead-to-customer conversion process. Overall whilst the CRM streamlines processes out-of-the-box it is significantly limited in terms of customisation and flexibility. This "one size fits all" approach tends to constrain businesses that have unique requirements; this limitation may not be realised initially, but will become apparent as the organisation grows and future needs are realised.

In addition organisations will quickly find that they will need to invest in additional modules such as the Accounting Link Module and the Quotes module, to get the full benefit of accounting/CRM integration. Whilst these are marketed as optional modules, for most businesses they will be mandatory in order to establish front-to-back office workflow.

Web Ninja

Web Ninja's integration with MYOB EXO is designed to support accountings need for security; salespeople will soon discover that they have limited information and capabilities to support sales related functions. This is visible in two key ways:

First, Web Ninja provides limited access to MYOB EXO sales documents. Whilst users are able to view transactions (Sales Orders/Invoices) in read-only mode they cannot create sales documents from within the CRM. Furthermore, the CRM will only display header information of a Quote, such as sales total and due date – this means users cannot see which items are included unless they have direct access to MYOB EXO. From a customer service perspective, this offers sales staff a limited view of the customer and will often result in unnecessary communication between sales and accounts.

Second, if organisations are using MYOB EXO to create quotes then an account must have a status of "Customer" in order for Quote details to appear in the CRM. This does not support the typical sales process, as contacts should still be prospects until the quote has been converted into a sales order or invoice. Therefore assigning a prospect with a type of Customer can be confusing and result in inaccurate segmentation and skewed reporting.

Overall, whilst this integration provides some front-to-back office connectivity, in order for a business to achieve greater efficiency each salesperson would require access to MYOB EXO. Not only would this result in significant increases in MYOB EXO Business licences it still will not achieve true workflow as staff will have to flick between the two systems.

ACT!

Out-of-the-box ACT! is designed very much from a sales perspective where the focus is on capturing, organising and sharing data. Through ACT!'s design, many 3rd party developers have also been able to build addon products which increase the functionality of the CRM. As such, the accounting integration approach is based from the developer of the MYOB EXO Link – Xact Software.

The approach taken by both the ACT!/Xact Solution and MOB EXO CRM is live connectivity to the EXO accounting data file. This is contrast to the Legrand and Web Ninja approach which relies on running an import/export process to update data. While on the surface they both achieve the same objectives, users must remain aware that the data is only as current as the last synchronisation. The implications of this become more significant as organisations grow, and the number of users and volume of data increases.

The Xact MYOB EXO Link also has a stronger focus on accurately connecting the sales process with accounting and providing complete account visibility for sales staff. As part of the live integration design the Xact MYOB EXO Link uses a live product list which enables the link to work with the MYOB EXO Price Rules. This means when a user is selecting items to be added to a quote the sell price displayed is based on the accounts price level – and if an item quantity is changed the price will update to reflect any pricing rules. The Price Rules are also listed in the Accounts Tab for users' reference.

The products list is also integrated with the ACT! Opportunities module which enables users to assign products to an opportunity without the need to create a quote. This is useful for opportunities that are very early in the sales process where a quote is not yet required and means that users can accurately state the estimated value. Later in the sales process opportunities can then be converted to a MYOB EXO quote.

MYOB EXO CRM

MYBO EXO CRM's approach is influenced by an accounting perspective. The result is that whilst the integration of the CRM with MYOB EXO (i.e. Creating/Viewing Accounts and Sales Documents and Stock Availability, and Reporting on Sales Data) is excellent, support for day-to-day CRM tasks is not as strong.

Areas in the CRM which do not promote workflow within the business includes email integration, limited number and placement options for custom fields and a calendar that is not shared with other users. Furthermore, users can only edit data that relates specifically to the CRM (i.e. Contacts and Non-Accounts) and no transactions can be generated from the CRM unless they also have access to MYOB EXO Business.

Example: A Typical Sales Process

You are the sales person in a local furniture manufacturing company. You use Outlook as your main email program and create quotes using MYOB EXO Business.[8]

Step 1: Opportunity from a new contact

01/03/2012: You receive an email from a potential customer, Jill, who asks you to send her some information about fitting out an office with desks and chair sets for approximately 15 people.

LEGRAND	WEB NINJA	ACT!	MYOB EXO CRM
⇨ ***Outlook*** Click on the email and select the option to create a new contact. As you have never dealt with Jill's company before you will also need to create a new company record. Once you have created the contact and attached the email select the "Create Opportunity" option and fill in the relevant details. Send Jill an email with the relevant product information then select your reply and export it to the CRM.	⇨ ***Leads Module*** Create a new lead in the Leads Module. ⇨ ***Outlook*** Navigate to Outlook and send Jill and email with the relevant product information, then select your reply and export it to the CRM.	⇨ ***Outlook*** Click on the email and select the option to create a new contact then send Jill an email with the relevant product information[9]. ⇨ ***Contact Module*** Find Jill's record in ACT! then click on "New Opportunity" to be taken to the Opportunities Module. Create the opportunity and include the products Jill enquired about.	⇨ ***Company Module*** Create a new company and contact record for Jill. While in the contact record create a new opportunity quote and fill in the relevant details including the products Jill enquired about. ⇨ ***Outlook*** Send Jill an email with the relevant product information then select your reply then click and drag the email to the history notes tab in the opportunity module.

8 The example process described here will differ if using an alternative email program and/or quoting system.
9 This email will be automatically attached to Jill's contact record in ACT!

Step 2: Opportunity to quote

13/03/2012: You phone Jill to follow up on her earlier enquiry. She is very busy and quickly asks you to produce and email a quote based on the information she gave you in her first email.

LEGRAND	WEB NINJA	ACT!	MYOB EXO CRM
⇨ ***Company Module*** Click on the "Accounting" tab in the Company module and choose either "Create new customer account during next batch update" or "Create new customer account now" to convert the Legrand contact into a MYOB EXO account. ⇨ ***Quotes OR Opportunities Module*** Go direct to the Quotes Module, click on the "Create New Quote" option and assign the quote to the opportunity, OR go to the relevant opportunity, click on the Quotes tab and choose create new quote.[10] Create the quote and email it to Jill.	⇨ ***Leads Module*** Go to the Leads Module, find Jill's record, and click on the option to convert the lead to an account. ⇨ ***MYOB EXO Business*** Jill's record will appear in MYOB EXO after the next sync session. Find Jill's account record in MYOB EXO then create the quote and email it to her.[10] [11] After another sync session, the quote will be imported back into Web Ninja. ⇨ ***Outlook*** If you want to record the communication history, go to Outlook and export the email to Web Ninja.	⇨ ***Contacts Module*** In the MYOB EXO tab, click on the "link to account" button to automatically create a new MYOB EXO account and link it to Jill. Then, create a new quote from the existing opportunity. If you want to you can then convert the opportunity to closed-won. While the quote is still open click on the option to email it to the contact as a pdf.[9]	⇨ ***Contacts Module OR Opportunities Module*** Search for the contact and click the shortcut link to the opportunity, or search for the opportunity directly. Once in the opportunity go to the quotes tab and select the option to email the opportunity quote to Jill.[11]

10 You may have to refer back to the initial email to remember which products to add in the quote.

11 You will have to ensure that the CRM is set up to email sales documents. Typically in order to email a sales document a user will select the option to print (which will generate a print preview) then, after printing or if the print preview is closed, the user will be given the option to send the document in an email.

Step 3: Quote to Sales Order

28/03/2012: Jill signs off the quote and it can now be converted to a sales order.

LEGRAND	WEB NINJA	ACT!	MYOB EXO CRM
⇨ ***Opportunities Module*** Search for the opportunity then close it and choose the winning quote. ⇨ ***Companies Module*** Once the opportunity has been closed navigate to the relevant company record, find the closed quote and convert it to a Sales Order.	⇨ ***MYOB EXO Business*** Search for the quote in MYOB EXO and convert to a Sales Order.	At this stage users cannot convert Quotes to Sales Orders. However, this feature will be available in future development. When the feature is available, the process will be as follows: ⇨ ***Contacts Module*** Search for the contact, then in the MYOB EXO tab, click on create new transaction and select the quote to convert.	⇨ ***MYOB EXO Business*** Search for the contact and click the shortcut link to the opportunity, or search for the opportunity directly. Once in the opportunity click on the option to convert the quote to a Sales Order Quote. When this is done a debtor account for Jill will be created in MYOB EXO.

Total steps required for each CRM:

LEGRAND = 5	WEB NINJA = 6	ACT! = 4	MYOB EXO CRM = 4

Other Sales-Related Functions

Web Capture

The ability for organisations to be able to import data captured from web forms is crucial to achieving workflow as it can significantly reduce data entry time. Both Legrand and Web Ninja include web forms in their CRM which enable users to capture data on their websites then import it using field mapping. In Web Ninja imported contacts are automatically entered into the database whereas in Legrand users can choose which records to import to the database, and can also add activity notes, create tasks and send email reply's to selected records.

ACT! and MYOB EXO out-of-the-box do not enable users to import data direct from web forms, however both CRM's enable users to import data from CSV files. However, there are a number of addons for ACT! that provide this feature.

Segmentation/Groups

Organising and segmenting contacts into groups is an efficient way to identify niche markets and schedule targeted marketing campaigns. The way that contacts and companies can be segmented in each of the CRM's in this analysis differs widely.

ACT! is the only CRM in this analysis that has a separate groups module. It is also the only CRM that enables users to add contacts to groups both manually, or using set criteria (also referred to as dynamic membership). The ACT! Groups Module also enables users to organise groups into a hierarchical structure, display custom information and collaborate all of a group members' communication history, notes, activities and opportunities.

In contrast, both Legrand and MYOB EXO CRM use keywords to segment contacts. One of the key limitations of this manual membership structure is that lists can often be difficult to maintain, keywords provide little information regarding what the list is for, and users must continually search to identify contacts that must be added/removed from a list.

Web Ninja on the other hand operates more like the dynamic membership in ACT! whereby users can set up pre-determined filters then quickly pull up the related contacts by searching using the filter name. Dynamic membership is a more efficient way of managing groups however like Legrand and MYOB EXO, users can only use keywords to identify what the group represents.

Marketing

The objective of most marketing campaigns is to ultimately generate sales. Therefore having marketing processes such as email integrated into CRM systems is important to track the effectiveness of your marketing strategies.

Legrand and Web Ninja both have a dedicated campaigns module where users can set up marketing campaigns, list the relevant respondents and design emails in an html editor. Legrand's campaign management module is more extensive with users being able to create and view activities related to the campaign and create opportunities based on campaign responses.

Whilst ACT! does not have a dedicated campaigns module, users can achieve the same results as in Legrand using the groups module and ACT!'s mail merge feature. If users wish to utilise more sophisticated e-marketing features there are also a number of 3rd party integrations available.

MYOB EXO is the least featured with regards to marketing processes; users can use marketing keywords to segment their market and use simple mail merge tools to send bulk-emails. As mentioned earlier, one of the key limitations of this keyword membership structure is that lists can often be difficult and time intensive to maintain.

Email Integration

Integrating Email with CRM is important for enabling users to keep track of all the communication history between the company and a contact. The success of email integration with regards to promoting workflow can be evaluated based on the number of relevant tasks users can perform in the email program.

With Outlook email integration, users in all of the CRM's can selectively choose which inbound emails they want to attach to the corresponding records. In both Legrand and ACT! users can also create new contacts and new opportunities from within Outlook. ACT! users can create ACT! activities from Outlook.

The way that outbound emails are treated differs widely in each of the CRM's. In Legrand and Web Ninja, if users send emails via the in-built HTML editor the email will automatically attach to the CRM however if an email is sent via Outlook users will have to manually export the email to the CRM. Similarly in MYOB EXO CRM users will be prompted to auto-attach outbound emails to the Documents Tab, or they can manually drag-and-drop emails from Outlook into the CRM.

ACT! on the other hand, provides the most streamlined approach as it will automatically attach outbound emails to the relevant contact record when sending from both the inbuilt Mail Merge tool and Outlook– even if the CRM isn't open. ACT! is also the only CRM in this analysis that integrates with Gmail, Google Contacts and the Google Calendar.

Calendaring/Scheduling

The ability for organisations to be able to share their calendar and task list is important for streamlining the workforce by enabling users to view others' schedules, schedule activities on behalf of others and link users' activities with relevant contacts in the database.

The calendar and task lists are much the same in ACT!, Legrand and Web Ninja. All of these CRM's provide a calendar view and users can also select to view activities/tasks by day, week or year. They also all have the ability for users to set priorities, schedule activities/tasks for other users, and view available resources. In addition, ACT! gives users the added functionality to create recurring activities, send invitation emails to all the related contacts, and Web Ninja enables users to add actions related to an activity.

MYOB EXO's calendar is designed in a very similar way to Outlook, and like Outlook, the calendar is not shared amongst other CRM users and therefore creates multiple silos of information throughout the business. This design can have significant negative implications on workflow as it prevents staff and departments from being connected, and can result in inefficient customer service and unnecessary internal communication.

Reporting/Analytics

Whilst reporting/analytics do not necessarily influence workflow, they are equally important so users and top level managers can see, at a glance, how the organisation is performing.

Out-of-the-box Legrand provides the least sophisticated reporting. With the exception of basic summary statistics shown in the Snapshot Module users can only analyse opportunities, and run "Lapsed Customer" Reports, "Activity" Reports and Sales History Reports. If users wish to create more advanced reports they will need to purchase the Legrand Report Writer which refers to the 3rd party addon called Stonefield Query.

Web Ninja offers slightly more functionality than Legrand; as well as providing summary statistics on its Home Page, Web Ninja also offers a number of pre-built reports and the ability for users to create their own.

ACT! comes with over 80 pre-built reports and 5 pre-built dashboards all of which can be customised, plus users can easily create their own reports and dashboards. ACT!'s Dashboard Module is also the most visually appealing as users can display results in a variety of ways including bar charts, pie charts, tables and gauge charts. Whilst ACT! does not offer a Snapshot or Home Page, users can easily configure the program to open on the Dashboard Module and can create a custom dashboard which displays the summary statistics they want to see. If users want even more functionality there are a variety of addon products to choose from, including an addon for Stonefield Query.

Like ACT!, MYOB EXO CRM has very extensive list of built-in reports – most of which focus around quantitative data concerning contacts, sales, stock, opportunities and activities. There is also an advanced budgeting tool where users can set and monitor budgets per item, customer and item/customer, and an in-built report writer where users can generate custom reports using SQL then display the results in a grid, pivot table or URL and display the results in a dashboard.

Customisation

No two businesses are the same and therefore customisation is an important feature for any CRM.

Legrand is quite rigid in design and offers little flexibility for users to customise the database; users are provided with a range of pre-defined field type in pre-defined tabs where only the title can be modified, and there is no customisation ability for the accounting integration. MYOB EXO has similar limitations to Legrand as users are only able to create and display up to 25 custom fields per table and can only decide its placement by assigning it a number.

In contrast, Web Ninja is more customisable enabling organisations to store large amounts of data that is unique to the business. This high level of customisation is also extended to the accounting integration where users can display a large number of MYOB EXO field/s in the CRM. However, users should be aware that including the fields in the synchronisation scripts so that data can be imported/exported between the CRM and MYOB EXO can be complex for those who are not technically minded. Furthermore, like Legrand and MYOB EXO CRM the placement of fields is limited; users must create fields in the order they wish to appear.

Overall, ACT! is the most customisable solution, and is the only CRM that offers a true layout designer. In ACT! users can create any type of custom field, modify the layout, create multiple layouts and store fields in additional tabs. For businesses running ACT! Premium, any changes to the layout will be reflected directly in ACT! Premium for Web. The Xact Link for ACT! is also customisable as users can choose a variety of MYOB EXO fields to be displayed in ACT!. For more advanced customisation, organisations can also enlist the skills of ACT! Developers.

Conclusion

Every business is different and the appropriateness of each of the solutions reviewed will depend on the CRM needs of the business; no one solution is best for all situations. The decision making process in choosing a CRM should concentrate on finding a solution that fits the prime business requirements, rather than design business processes to fit around CRM. In short, focus on the business process rather than software product.

To conclude, whilst Legrand is relatively well featured there are a number of key components missing from the CRM. In particular is the lack of customisation which is apparent in both the CRM and accounting integration; this one-size-fits-all approach can be extremely limiting for businesses as it may not support important business processes. Many of the other missing CRM components are available through the purchase of addon Modules and programs such as the Quoting Module and Legrand Report Writer, however this adds to the overall cost of the CRM – making it the most expensive in this analysis.

Web Ninja is the only CRM that offers a web solution that integrates with accounting; it also provides users with a significant amount of customisation, however as there are no addon products available users are restricted to the features offered out-of-the-box. Furthermore, Web Ninja's accounting integration was also the most limited and does not seem to support a logical sales process as some prospects are likely to be assigned a type of customer. In addition users can only view the header information of a quote, and sales documents can only be viewed individually in read-only mode; this limited perspective makes it difficult for sales staff to operate without also having direct access to MYOB EXO.

Whilst from the outset Web Ninja seems to be the most cost effective once the cost for additional data storage is included, which will be true for most businesses, this CRM is no longer the cheapest option (based on a 2GB database).

In addition to the above, both Legrand and Web Ninja have processes which do not facilitate continuous workflow throughout the organisation; particularly through the synchronisation set-up of the accounting integration and the tedious export process to attach outbound emails from Outlook to the CRM.

If this analysis was to evaluate CRM's purely based on their ability to integrate with MYOB EXO then MYOB EXO CRM would be the clear winner – although this is to be expected having been developed by the same company. However, this analysis also focused on the CRM that offered the most streamlined solution and whilst MYOB EXO CRM excelled in the accounting integration and reporting areas, it has significant design and process limitations – the most notable revolving around Outlook integration and the Calendar design. Furthermore it appears that in order to get the most out of the CRM users require knowledge of SQL to perform advanced searches and reporting, access to MYOB EXO Business in order to maximise workflow, which will incur additional licence costs.

In terms of offering the most cost-effective, streamlined solution ACT! plus the Xact Link for ACT! and MYOB EXO is the clear winner. Like MYOB EXO CRM it offers a live connection between the CRM and MYOB EXO contacts and products, and integrates with MYOB EXO price rules. This solution best supports web/mobile access, marketing segmentation, email integration and database customisation, and is strongly featured in all other areas that were covered in this analysis. It also offers users the largest range of addon products which means businesses can be confident that the database can meet most, if not all of their feature requirements.

Regardless of which CRM you choose, this analysis highlights the importance of understanding the detail and the best process to reach your business objectives, hence the need to thoroughly research the alternatives.