

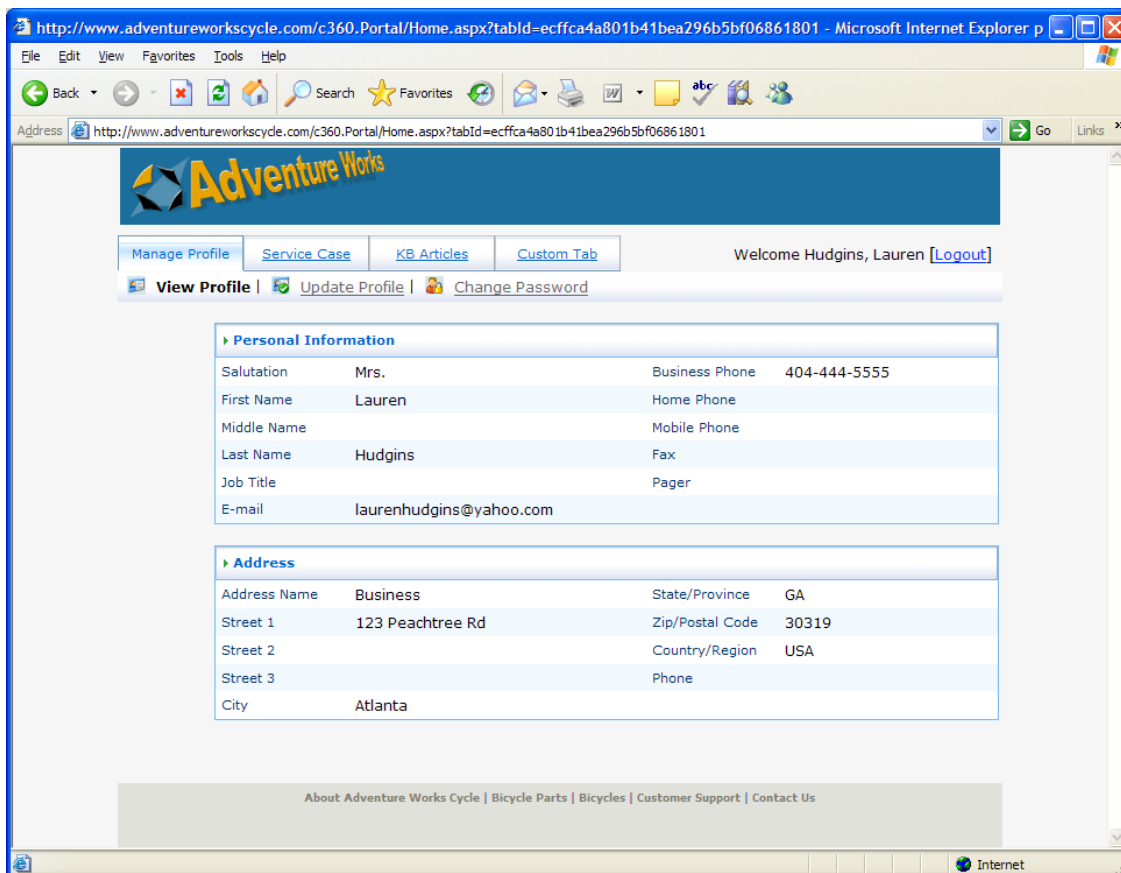


c360 Customer Portal for Microsoft Dynamics CRM 4.0

Overview

The c360 Customer Portal allows organizations using Microsoft CRM to extend their customer service and support functions to the web to achieve more efficient support and service as well as higher customer satisfaction and self sufficiency. The c360 Customer Portal will allow organizations to quickly and easily create a web self service presence that is fully integrated into their Microsoft CRM solution. Using the c360 Customer Portal, an organization's customers will be able to:

- Authenticate and become authorized to perform specific actions including:
 - o Create new Customer Service Cases
 - o View and update existing Service Cases
 - o View Service Case Activity History
 - o Attach documents when working with Service Cases
 - o Update Contact record details to keep personal data up to date
 - o Search and view selectively published CRM knowledge base articles
 - o Access additional modules developed either by the customer or their implementation partner



The Customer Portal allows organizations to quickly create a web-based Customer Service presence enabling users to self service themselves.


Microsoft Dynamics CRM LitwareInc Administrator
Microsoft CRM

New Activity - New Record - Go To - Tools - ISV - c360 Tools - Test - Web Only - Both - Advanced Find - Help


Settings c360 Settings

Administration
Business Management
Customization
Templates
Product Catalog
Workflows
Data Management
System Jobs
c360 Settings


Click on the feature you want to work with




General Portal Settings
Configure the portal user interface and set general configurations like session time-out.



Case Specific Settings
Define a way in which the cases will be visible to a portal user.



Security Settings
Manage the settings (roles, password, access level, etc) for a portal user.



Knowledge Base Settings
This will allow you to publish knowledgebase to the portal.

Invitation Related Settings - Webpage Dialog

Configure your invitation

General Access Defaults Invitation Notification Reinvitation Notification Resend Password Notification

Set your invitation email template

From' Email Address

Email Subject

Select a parameter

Parameter

Email Body

To become a portal user, please click on the link below:
@@INVITATIONURL@@

Case View - Webpage Dialog

Configure how cases should be visible to a portal user

General Case List Case Details

Select case fields that should be shown to a portal user

Unselected Case fields

- Severity
- Status Reason
- Status
- Subject

Selected Case fields

- Case Number
- Title

Move Up Move Down

Select the sort by and sort order according to which cases should be ordered in the portal UI

Sort By

Sort Order

Activity Settings and Attachments - Webpage Dialog

Select settings that should be applied on the portal UI

Activity Attachments

Select general settings

Populate Activity Sub-Category field with name of the CRM Contact creating the Activity

Send Activity Email to Account Owner When an Activity is Created (By Default the Email will be Sent to Case Owner)

Select which entities to publish

Notes

Activities

If activities are to be published select activity type

Unselected Activities

- Resolution

Selected Activities

- E-Mail
- Fax
- Letter
- Phone Call

Select Activity type to be created when a Case is updated through the Portal

Task

Knowledge Base general settings - Webpage Dialog

Select different knowledge base settings that you want to customize

You must select knowledge base settings

Knowledge Base articles are accessible only for logged in users

No. of Knowledge Base articles per page

No. of Latest Knowledge Base articles to be published

No. of most popular Knowledge Base articles to be published

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Manage Profile Settings

Add Section Delete Section Save Settings Manage Fields

Section Name	Name	Required
General	Salutation	<input checked="" type="checkbox"/>
	Business Phone	<input checked="" type="checkbox"/>
	First Name	<input checked="" type="checkbox"/>
	Home Phone	<input checked="" type="checkbox"/>
	Middle Name	<input checked="" type="checkbox"/>
Address		



The Customer Portal provides significant flexibility and configuration.

The c360 Customer Portal is fully and easily configurable to suit your business needs.

By using the Customer Portal, an organization will be able to:

- Selectively publish CRM Knowledge base articles based on keywords and subject items
- Configure the Portal screens in terms of which fields to display, the display order and so forth
- Selectively publish the activity types that gets displayed to the Portal user
- Configure the Service Case entry form as well as the Case View and Details screen
- Create personalized email templates for customer communication and setup automated notifications
- Allow different users access to different parts of the Customer Portal based on their security level
- Access data from a 3rd party system to display in the Portal by developing custom modules
- Provide world class customer service over the web

The Customer Portal now allows the portal user to **create and manage cases for multiple accounts**. Organizations can specify which accounts the portal user can access. This now opens up the possibility to use the Customer Portal in different ways where a user may need access to different accounts to service. An example of this may be when *'an implementation consultant needs ability to create and manage cases for different clients'*.

These options are highly flexible and can include complex scenarios such as *'Allow user to create cases for Accounts A and B but view cases for Accounts B and C'*.

Pricing

The cost of Customer Portal is \$200 per assigned Microsoft license. A 10-license minimum purchase is required. See section titled 'Installation, Training and Technical Support' for additional fees that may apply.

Installation, Training and Technical Support

The cost of the Portal includes new releases for a period of one year from initial purchase date. In addition, the cost of the Portal includes direct technical assistance with any product defects. **The cost of the Portal does not cover installation related questions or administrative and user training.** These services can be provided by c360 at an additional fee (see <http://store.yahoo.com/c360/customerportal.html> to purchase) or can be provided by a c360 Portal Certified Partner. **c360 strongly encourages the use of a c360 Portal Certified Partner to implement the Customer Portal.** Contact Sales@c360.com to be referred to a c360 Portal Certified Partner if you are not already working with one. Fees for c360-provided installation assistance and training webinars are listed below:

- *Remote Installation Assistance:* \$995 (one time fee for scheduled remote one-on-one assistance by a c360 technician)



Languages

All c360 products are available in multiple languages and can be easily translated into additional languages by simply making changes to the label and caption values found in a separate XML document. Each product's Installation and Configuration guide provides detail on making language modifications. All product downloads include language files for multiple languages.

Licensing

There is a 10 license minimum purchase for Customer Portal. The number of Customer Portal licenses must equal or exceed the number of assigned Microsoft CRM licenses. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Customer Portal licenses. Customer Portal pricing is based on the number of active Microsoft CRM licenses regardless of how many customers will be accessing the Customer Portal. Customer Portal requires a single Microsoft CRM license so that the Customer Portal can access Microsoft CRM.

Support and New Releases

Customers that purchase a c360 product are entitled to support and new releases of the purchased product for one year from the time of purchase of the first product licenses. Subsequent purchases of additional licenses of the same product fall under the terms of the initial purchase. For more information please refer to the c360 Software License Agreement at <http://www.c360.com/Download/c360SolutionsSoftwareLicenseAgreement.pdf>.

c360 Partner Program

Authorized Microsoft CRM partners may inquire about the c360 partner program by visiting <http://www.c360.com/PartnerProgram.aspx>.

Information

For more information on Customer Portal, contact c360 Solutions at:

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