



c360 Solutions Customer Portal for Microsoft CRM 3.0

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 screenshot displays the Adventure Works Customer Portal interface. The top navigation bar includes 'Manage Profile', 'Service Case', 'KB Articles', and 'Custom Tab'. The user is logged in as 'Raman, Arvind'. The main content area is divided into several sections:

- General Profile:** Fields for First Name (Arvind), Last Name (Raman), Home Phone, and E-mail (arvind10@yahoo.com).
- Address:** Fields for Street 1 (One Dunwoody Park), Street 2 (Suite 230), ZIP/Postal Code (30330), State/Province (GA), and City.
- Service Cases:** A section titled 'Problem with brake pads' containing:
 - Case Details:** Case No. (CAS-01065), Title (Problem with brake pads), Description (Brake pads on my latest shipment is very squeaky. It was oiled and reinstalled.), Status (Active), Case Origin (Web), and Created On (05/20/2005 - 2:10 PM).
 - Update Case:** A form with a 'Subject' field and a 'Description' text area.
 - Attachments:** A section for 'Total Attachment(s) size (max 4 MB allowed)' with a 'Browse...' button.
 - Case History:** A list of actions, including 'reinstall' with a description 'I am attaching screenshot.' and a timestamp 'Created on 05/20/2005 - 2:11 PM by Raman, Arvind'.
- KB Articles:** A section with a search bar and a list of articles under 'Most Popular Articles...' and 'Latest Additions...'. The articles list various technical issues and their last modified dates (01/25/2005).

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



The screenshot displays several configuration windows from the c360 Customer Portal. The windows shown are:

- Portal Settings:** A main configuration page with a sidebar menu and four main sections: General Portal Settings, Case Specific Settings, Security Settings, and Knowledge Base Settings.
- Case View:** A window for configuring case visibility, including options for 'Unselected Case fields' and 'Selected Case fields', and a 'Sort By' dropdown set to 'Created On'.
- Activity Settings:** A window for selecting activity settings, including checkboxes for 'Populate Activity Sub-Category field' and 'Send Activity Email to Account Owner', and a list of 'Selected Activities' like E-Mail, Phone Call, and Task.
- Invitation Related Settings:** A window for configuring invitation email templates, showing fields for 'From Email Address' and 'Email Subject', and a section for 'Parameter' and 'Email Body'.
- Knowledge Base Publishing Criteria:** A window for setting criteria for publishing articles, with options for 'All Knowledge Base Articles' and 'Articles with the following keyword'.
- Manage Profile Settings:** A window for managing user profile sections, showing a table of sections and their fields.

Section Name	Name	Required
General	First Name	<input type="checkbox"/>
	Last Name	<input checked="" type="checkbox"/>
Address	Home Phone	<input type="checkbox"/>
	E-mail	<input type="checkbox"/>

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:

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

Pricing

The cost of Customer Portal is \$250 per assigned Microsoft license. A 10-license minimum purchase is required. See section titled 'Installation, Training and Technical Support' for additional fees that may applied.

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)
- *Portal Administrative Training Webinar:* \$395 (one time fee for a single scheduled administrative training webinar 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. The Customer Portal does not create additional entries/users in Active Directory. It is our understanding that Microsoft plans to introduce an External Connector License that will be required for Microsoft compliance for any application accessing Microsoft CRM data over an internet connection without a CRM Client Access License. This External Connector license is not technically required for the c360 Customer Portal to function but will be required by Microsoft for CRM access compliance. At this time, the External Connector license is not available from Microsoft. **Customers purchasing the c360 Customer Portal should plan to purchase the Microsoft External Connector License when it is released.** c360 cannot provide additional information on its cost or availability.

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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