



## c360 Customer Portal for Microsoft Dynamics 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 Country/Region.
- 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.
  - Total Attachment(s) size (max 4 MB allowed):** A field with a 'Browse...' button.
  - Case History:** A section titled 'reinstall' with a description 'I am attaching screenshot.' and a 'New Text Document.txt' attachment.
- KB Articles:** A sidebar 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 image displays five overlapping screenshots of the c360 web application interface, demonstrating its configuration capabilities:

- Portal Settings:** A central hub for configuring the portal user interface, including general settings, case-specific settings, security settings, and knowledge base settings.
- Case View:** A configuration screen for how cases are visible to portal users, allowing selection of case fields and sort orders.
- Activity Settings:** A screen for selecting activity settings to be applied on the portal UI, including general settings and activity types.
- Invitation Related Settings:** A screen for configuring invitation email templates, including fields for From Email Address, Email Subject, and Invitation URL.
- Knowledge Base Publishing Criteria:** A screen for setting criteria for publishing articles, including selective publishing options and keywords.
- Manage Profile Settings:** A screen for managing profile settings, including adding and deleting sections and managing fields.

*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 3<sup>rd</sup> 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](mailto: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.

### **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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