



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 c360 Customer Portal interface. The top navigation bar includes 'Adventure Works' and 'Welcome Raman, Arvind [Logout]'. 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 220), ZIP/Postal Code (30330), State/Province (GA), City, and Country/Region.
- Service Cases:** A section titled 'Problem with brake pads' showing details for Case No. CAS-01005, 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:** Fields for Subject and Description.
- Knowledge Base:** A section titled 'Most Popular Articles...' listing various technical issues and their last modified dates (01/25/2005).
- Case History:** A section titled 'reinstall' showing a case created on 05/20/2005 - 2:11 PM by Raman, Arvind, with an attached document 'New Test Document.txt'.

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



The screenshot displays five overlapping windows from the c360 application, demonstrating its configuration capabilities:

- Portal Settings:** A central hub for configuring the portal user interface, including General Portal Settings, Security Settings, Case Specific Settings, and Knowledge Base Settings.
- Case View:** Allows administrators to define which case fields are visible to portal users and how they are sorted (e.g., by Created On).
- Activity Settings:** Configures activity settings, including which activities are published and which activity types are created when a case is updated.
- Invitation Related Settings:** Manages invitation email templates, including setting the From email address, subject, and body content.
- Knowledge Base Publishing Criteria:** Sets criteria for publishing articles, such as selective publishing based on keywords.
- Manage Profile Settings:** Defines the fields required for user profiles, such as First Name, Last Name, Home Phone, and E-mail.

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'*.

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>.

More Information

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