

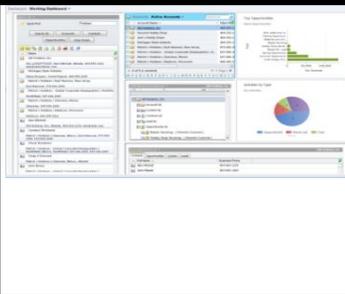
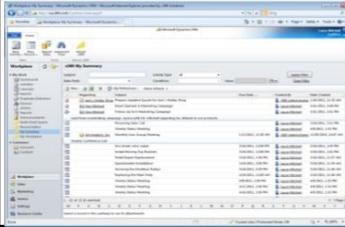
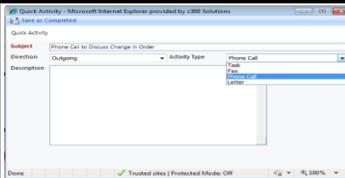
# c360 Add-On Solutions



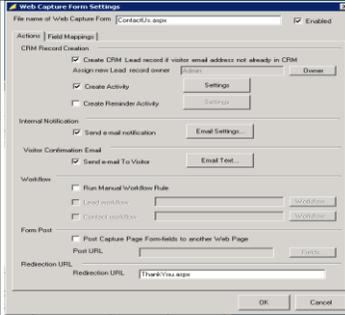
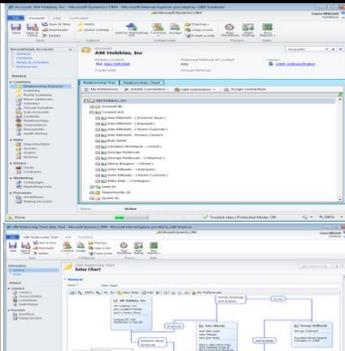
Functionality	Dynamics CRM 2011	c360
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## c360 Core Productivity Pack

Record Editor			
<i>"Does your team resist using CRM because updating data is too time consuming?"</i>			
	Inline Grid Editor - Edit any list of records (i.e. system or advanced find views) in a grid format.	X	✓
	Update data without having to wait for a Form to open.	X	✓
	Designed to work with Systems Views as well as user Personal Views	X	✓
	Redesigned for CRM 2011 to work with new form Subgrids functionality.	X	✓
Relationship Explorer			
<i>"Is it difficult to grasp and comprehend customer relationships captured in CRM?"</i>			
	Visualize complex customer relationships	X	✓
	Utilize an intuitive tree-based structure to navigate and display all types of relationships that exist between entities within Microsoft CRM 2011	X	✓
	Navigate and display new CRM 2011 "Connections" information that exists between entities.	X	✓
	Use charting functionality to display MS CRM 2011 entity relationship information in a graphical format	X	✓
	Charting functionality can also display entity connection information in a graphical format	X	✓
	See a complete view of any CRM record's relationship hierarchy in a single place	X	✓
Multi-Field Search			
<i>"Can your team find the data they need in CRM?"</i>			
	Display search results along with preview data from different entity types in the same grid	X	✓
	Perform searches across multiple entities	X	✓
	Configure and personalize search criteria for each user through user preferences	X	✓
Alerts			
<i>"Do people need to be notified regarding special handling instructions for specific customers?"</i>			
	Provide immediate notification of important issues when a record is accessed	X	✓
	Add multiple alerts to CRM records	X	✓
	Set expiration dates for time sensitive alerts so records do not become cluttered with stale information	X	✓
	View past issues and activate/deactivate those alerts at any time	X	✓
Console			
<i>"Does your team have to navigate through several screens to view critical customer information?"</i>			

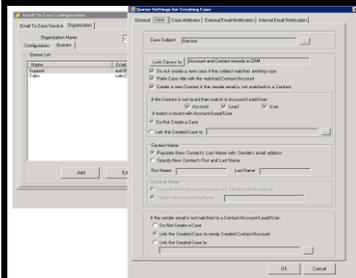
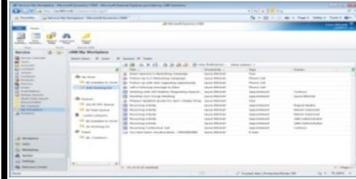
	Search for specific records (i.e. Joe's Plumbing, Bill Daniels, etc.) and view/update detailed record information directly from Dashboard main screen.	X	✓
	See an individual record's activity Summary data directly in a dashboard cell.	X	✓
	View / Update a selected record's data in a rendering of the entity's form displayed in a Dashboard Cell.	X	✓
	Visualize selected record relationships utilizing Relationship Explorer in a Dashboard Cell.	X	✓
<b>Summary / My Summary</b> <i>"Is finding and summarizing customer notes, activities and attachments difficult?"</i>			
	Chronologically roll-up all open and closed Activities, Notes and CRM records	X	✓
	Auto-Preview Panes (configurable to each user's needs) provide snapshot summaries of data.	X	✓
	Immediately see which Email Activities and Notes have attached documents (paperclip icon appears) and immediately see the names of the documents	X	✓
<b>Quick Activity</b> <i>"Are employees neglecting to capture customer interactions because it is too time consuming?"</i>			
	Automatically log an activity as "Complete" when saved	X	✓
	Embed Activity Form into MS Dynamics CRM Dashboards to further reduce clicks and save time when capturing customer interactions.	X	✓

### c360 Sales Productivity Pack

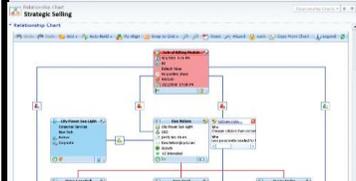
<b>Web Connect</b> <i>"Do you want to quickly create leads in CRM from web site visitors?"</i>			
	Integrate your web site to Microsoft CRM through configuration(i.e. no custom coding) for lead and web visitor activity capture.	X	✓
	Through configuration, link multiple web site forms to CRM to create Lead and Activity records.	X	✓
	Match by email address and create new Lead or Activity depending on whether email address was matched to an existing Lead or Contact	X	✓
	Send a configurable confirmation email to visitor	X	✓
<b>Relationship Explorer</b> <i>"Is it difficult to grasp and comprehend customer relationships captured in CRM"</i>			
	Visualize complex customer relationships	X	✓
	Utilize an intuitive tree-based structure to navigate and display all types of relationships that exist between entities within Microsoft CRM 2011	X	✓
	Navigate and display new CRM 2011 "Connections" information that exists between entities.	X	✓
	Use charting functionality to display MS CRM 2011 entity relationship information in a graphical format	X	✓
	Charting functionality can also display entity connection information in a graphical format	X	✓

	See a complete view of any CRM record's relationship hierarchy in a single place	X	✓
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## c360 Service Productivity Pack

Email To Case		<i>"Are customer emails for help sent to your Support Team being neglected or not tracked as cases?"</i>	
	Automatically convert incoming Emails to Cases	X	✓
	Monitor an unlimited number of Microsoft CRMEmailEnabled queues creating Case records and link the email activities to those Case records.	X	✓
	Configure cases to be linked to either the email senders Contact or Account record based.	X	✓
	Cases based on emails from unresolved senders can be linked to a default Contact or Account	X	✓
	Assign new Cases to a queue to be worked	X	✓
	Notify customers by email that a new Case has been created	X	✓
	Notify CRM Users that a new Case has been created. This email notification includes a link to directly open the newly created Case	X	✓
My Workplace		<i>"Is Queue Management and balancing team workloads challenging in CRM?"</i>	
	Each user can personalize their view to see their items as well as other user and team queues (where security permissions allow)	X	✓
	Immediately see a count of items in each queue without clicking on the queue	X	✓
	Toggle between user, team and queue views with a single click	X	✓
	Combine user, teams and queues to display together in the same view	X	✓
	Personally select which columns (activity and/or case fields) they would like to see in the Queue grid and configure default sort order	X	✓
	Specify a default start up view, selecting between user, teams and queues	X	✓

## New c360 Solutions

Relationship Charts		<i>"Automatically generate relationship charts which can be used to see, modify and build relationships and connections and save them back in CRM"</i>	
	See any logical relationships between any entities	X	✓
	Build any relationships and connections on the chart by drag and drop	X	✓
	Explore relationships in CRM between different entities	X	✓



Navigate EASILY between logically connected CRM entities	X	✓
Create activities directly from the chart	X	✓

**Record Editor - CRM 2011 On-Line** *CRM On-Line Users - Does your team resist using CRM because updating data is too time consuming?*



Our popular Record Editor Functionality is now available for MS CRM 2011 On-Line	X	✓
Inline Grid Editor - Edit any list of records (i.e. system or advanced find views) in a grid format.	X	✓
Update data without having to wait for a Form to open.	X	✓
Designed to work with Systems Views as well as user Personal Views	X	✓
Redesigned for CRM 2011 to work with new form Subgrids functionality.	X	✓

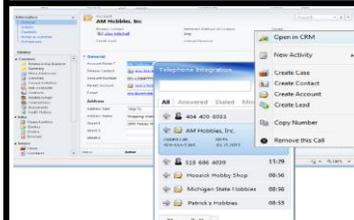
**Individual c360 Solutions**

**Customer Portal** *"Do your customers expect On-Line Access (create and review their cases, update their profile, search your knowledgebase, etc.)?"*



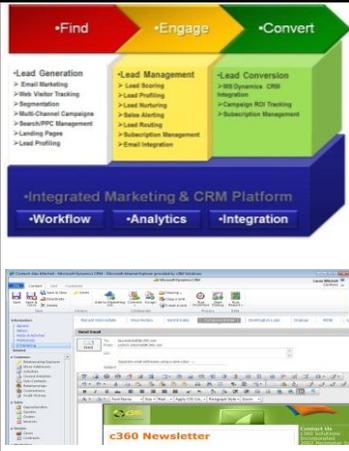
A fully supported and easily configurable portal solution , which includes the ability to:	X	✓
*Selectively publish CRM Knowledge base articles based on k	X	✓
*Allow users to self register themselves to become authentic	X	✓
*Configure the portal screens in terms of which fields to display, the display order, and so forth	X	✓
*Selectively publish the activity types that get displayed to the Portal user	X	✓
*Configure the Service Case entry form as well as the Case view and details screen	X	✓
*Configure the Order view and Product details screen	X	✓
*Create personalized email templates for customer communication and setup automated notifications	X	✓
*Allow different users access to different parts of the Customer Portal based on their security level	X	✓
*Configure portal to allow specified portal users to create and manage cases for multiple accounts.	X	✓

**CTI** *"Display a contact's profile before you pick up a phone call"*

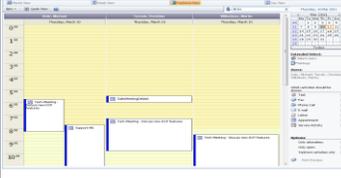


Provides integration between telephone systems (TAPI Interface, OCS, Lync, Skype) and Microsoft Dynamics CRM.	X	✓
Automatically detects incoming phone calls,	X	✓
"Pop Up" Displays callers name/number	X	✓

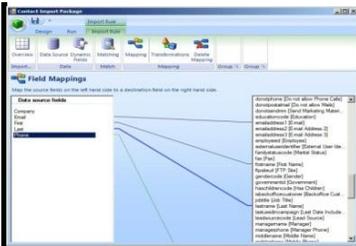
	Opens a contact or an account on lifting the earphone	X	✓
	Creates activities for incoming and outgoing calls	X	✓

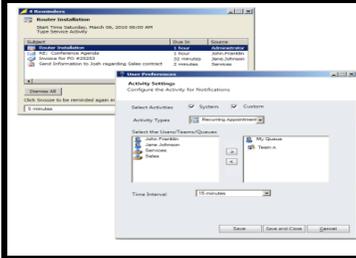
<b>E-Marketing</b>			
<i>"Does marketing demand the ability to send professional looking email templates and receive response statistics (i.e. email delivered, opened, clicked on, etc.)?"</i>			
	Email Campaign Statistics - Verify and track who has received, opened, clicked on and/or requested "unsubscribe" for each email campaign sent.	X	✓
	Integrated Email Marketing - 1,000+ email templates to help you easily design your email marketing, nurture and drip campaigns.	X	✓
	Web Analytics and Activity Tracking - Identify high value prospects by tracking web behavior in real time.	X	✓
	Online Advertising and Social Media Tracking - Create great looking landing pages for PPC and SEM through configuration. In addition, you can direct social media traffic to branded pages that get a targeted message across.	X	✓
	Lead Management - Intelligent lead scoring and routing based on email responses and submitted eDialog landing pages.	X	✓

<b>Documents Core Pack</b>			
<i>"Do you need Word templates that can display data stored in MS CRM?"</i>			
	Supports all MS Dynamics CRM entities (CRM mail merge is limited to 5 entities -accounts, contacts, leads, opportunities, quotes and custom entities)	X	✓
	Capable of resolving any kind of relationship between custom and delivered MS CRM entities.	X	✓

<b>Group Calendar</b>			
<i>"Does your organization require a comprehensive scheduling calendar showing availability of all designated people, teams and resources?"</i>			
	View the Calendar of multiple CRM users, user groups and/or Service Resources.	X	✓
	Show activities of one or more users at the same time	X	✓
	Control scheduling conflicts by having a uniform and simple overview with multiple users, teams and resources	X	✓
	User specific preferences to define user groups, groups and resource calendar views	X	✓
	Reschedule user, team and service activities using easy drag and drop functionality	X	✓

<b>Import Manager</b>	<i>"Is your IT Team struggling migrating and/or updating data into MS CRM?"</i>		
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	Works with all entities - custom and delivered.	X	✓
	Easily configure relationships from Contacts to Accounts as well as other relationships between all entities.	X	✓
	Perform duplicate checking prior to inserting records	X	✓
	Update existing records with new information	X	✓
	Schedule data imports	X	✓
	Features Excel plug-in, ODBC plug-in and the ability to develop Custom plug-ins.	X	✓

<b>Reminder</b> <i>"Are employees missing critical activity due dates?"</i>			
	Actively notify users when scheduled CRM activities are due with "pop-up" reminders.	X	✓
	Monitor any combination of users and/or queues and activity types.	X	✓
	Monitor all standard and custom activities or a just subset of activities	X	✓
	Configure how frequently reminders appear	X	✓