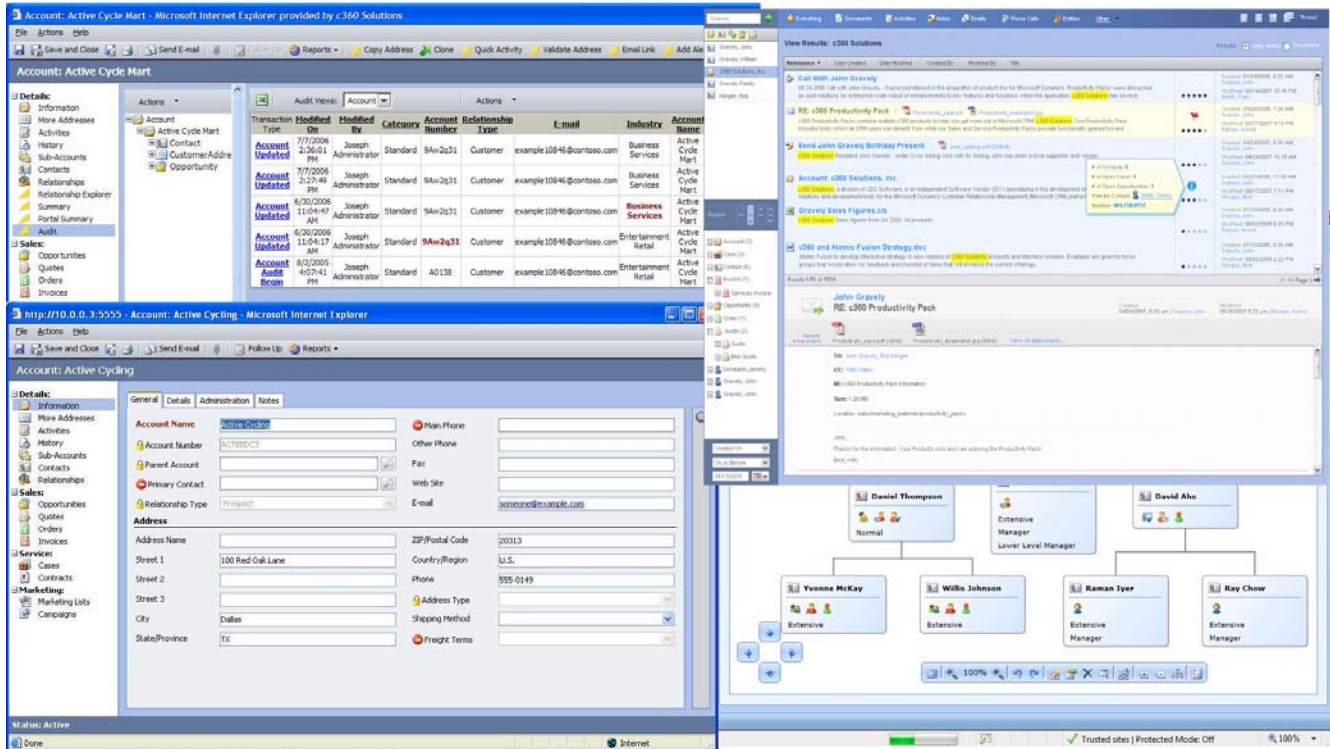




# c360 Financial Services Pack for Microsoft Dynamics CRM

## Overview

c360 Financial Services Pack for Microsoft Dynamics CRM is an industry solution set on top of Dynamics CRM suitable for the Financial Services Industry. The Financial Services Pack combines multiple c360 products ideal for Financial Services organizations.



The c360 Financial Services Pack products are utilized by different financial services companies including organizations in the Banking, Wealth Management, Investment Banking and Capital Markets segment. c360 Financial Services Pack allows Financial organizations using Microsoft CRM to be more productive and compliant.

c360 Financial Services Pack is comprised of the following c360 Solutions components:

- **c360 Core Productivity Pack** – Includes c360 Core Productivity Pack Includes c360 Explorer (CRM Search Engine), Relationship Explorer/Charts, and Record Editor, CRM/SharePoint
- **c360 Audit**: Tracks and Analyzes all changes made to CRM
- **c360 Field Level Security** restricts access to CRM data on a field level basis

With the c360 Financial Services Pack, companies are able to:

- **Track and Analyze** all changes made to CRM
- **Restrict access** to CRM data on a field level basis
- **Instant search** of all CRM data by constantly **indexing** all CRM records and attachments and leveraging **Microsoft Search** to search the indexed information



- Edit/Modify multiple CRM records within a single screen regardless of where it has been entered in CRM
- Create visual, **graphical relationship charts** which can display formal and informal relationships using the '*picture paints one thousand*' words philosophy
- Quickly see **chronological** management summaries of all records in their CRM system
- Allows Microsoft CRM users to design their **CRM workspace** in virtually any way they like
- Build role-specific Dashboard views to streamline CRM views and processes
- Add critical data to CRM records so other users will immediately be made aware of it upon opening the record

### **Pricing**

c360 Financial Services Pack is \$3500 server fee\* + \$275 per active Microsoft CRM user.

\*Includes installation of the financial services pack products in on up to two environments

### **More Information**

For more information on the c360 Financial Services Pack, please contact c360 Solutions at:

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