

# Customer Portal Web For Microsoft Dynamics CRM System



Customer Web Portal System melds the Microsoft Dynamics CRM enterprise

solution for sales, marketing, and customer service to your website properties to extend control of customer information, order management, and detailed project and support interaction live-status directly out to the customer 24/7 online . . . while completely enveloped by your articulated marketing message with product and service e-commerce offerings.



**Customer Login**

User Name:

**Do you have customer portal password?**

No, I am a new customer  
 Yes, I have password

Password:

After associating your Microsoft Live ID from in the portal you can login directly from CRM Online or any Microsoft Live ID account simply by clicking here:

## CRM Web Portal System is:

- CRM Product to Web Integration
- CRM Multi-Site Product and Relationship Management
- Website Shopping Cart on CRM Products
- Payment Card Industry (PCI) Security Compliance
- Website Individual and Company Visit Tracking
- Website Agent/Partner and End-User Tracking
- Multi-channel or Partner/End-User Operation
- CRM-to-Customer-Web Order Management
- Customer-Web-to-CRM Order Management
- Online Proposal Approval and Charge Payment
- Customer Online Statement Generation and History
- CRM Project Management Customer Web Visibility
- Time and Billing Customer Web Visibility
- Customer Satisfaction Rating System
- CRM-Based Website Content Management
- Single Sign-in Microsoft Live ID Option

## Web Portal System Adds Seamlessly to CRM & Web...

Customer Web Portal System is an ingenious set of high-value, fully-integrated, individual mix-and-match products, of combined Dynamics CR "Solutions" and .Net web code you build-upon the Customer Support Portal Accelerator core solution provided by Microsoft. Available are, an ever growing list of easy-to-add CRM and Website components, as well as the world-renowned MTC on-demand custom development services for CRM and website customization to assure your CRM Web Portal development is built to your exact business process and website image.

Add the CRM Web Portal to your Microsoft CRM and existing website to supercharge your web strategy and investment. Enhance as much as you need when you need it to fit your Marketing and IT budget plans over several quarters while testing new customer online interactions against your business strategy.



Gain more business and higher customer satisfaction rates by allowing your customers to "Login" and access control over their interaction with business or organization. Today "Online" 24/7 access is the business norm. Just offering anytime online access to your business raises your profile!



Multi-level, or Company to Partner-channel to End-user online interaction 24/7 is an absolute requirement in the 24/7 global business world today. CRM Web Portal supports the spectrum of contractor or channel models to suit any business-relationship structure.



Call 323-851-5008 8:00 AM to 5:00 PM  
323-853-0076 5:00 AM to 8:00 AM  
323-853-0076 5:00 AM to 8:00 AM

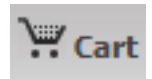


## Your CRM Functionality Is Now Self-Service Online . . .

- Account
- Contacts
- Proposals
- Orders
- Projects
- Products
- Statements
- Invoices
- Cases

CRM Web Portal System extends the actual CRM SQL database and all the processes and records from the Outlook or CRM web client internal use to a custom End-User perspective in the look and feel of your website.

### Manage Your Customers 24/7 Online CRM Information Self-Service to:



- Edit their Company account and Individual contact information
- Add new contacts and control access rights and communication preferences
- Order products to a simple order or build complex proposals from your website – Seen in CRM
- Approve and modify orders and complex proposals on your website - Created in CRM
- Pay for products on a secure charge card platform with critical data stored outside your CRM
- Review historical Quotes, Orders, and Invoices to duplicate, return, or check status
- Real-time status on the incident “Case” information and provide updates
- Access your knowledgebase for self-support

### Allow Your Channel Partners or Outsource Venders 24/7 Online Access to:

- Access to their regional account and individual contact information
- Update end-user service or product delivery
- Update customer service satisfaction and



### With the ConsultPro Professional Services Solutions Manage Your Customers Projects and Processes Workflow Interactively Online 24/7:



- Review the Visual Project Schedule and live status of their projects
- Review current account billing status and historical statements
- Review schedules of resources assigned to their projects
- Rate and review service satisfaction at all levels of delivery
  - Schedule any CRM Activity, Stage of Activities or sophisticated Projects
  - Manage client Self Service billing management
- Experience advanced client project team interaction
- Manage resources anywhere on the globe simultaneously



*Partner NFR program, OEM, and custom development available to support unique needs*

## Operate State-of-the-Art Multi-site/Social-Media E-Commerce on Your CRM Enterprise Integrated Marketing and Sales Processes with Popular Features:

Services: Low-Cost Hourly Download Engagement and Pricing Guide

Fixed Rate | Monthly Managed | CRM Upgrade Services

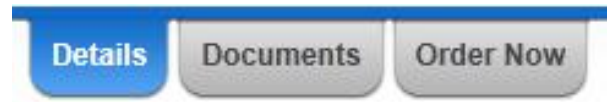
Descriptions: Expand All Collapse All Order

		Qty
1	MTCRET Business Process - Technical Services Retainer	\$0.00 <input type="text" value="0"/>
2	500561 Custom Functionality Form Customization - Hourly Service	\$29.00 <input type="text" value="0"/>
3	500564 Data Migration Services - Hourly Service	\$39.00 <input type="text" value="0"/>
4	500556 Workflow Development and Implementation - Hourly Service	\$39.00 <input type="text" value="0"/>
5	500558 Custom SRS Report Development and Deployment - Hourly Service	\$39.00 <input type="text" value="0"/>

- Track all website visitors' web visits and page tracking real-time to CRM
- Shop anonymously to build confidence before to before entering their personal data



- Shop for products Online across lists or landing pages live from CRM Product records
- Manage multiple websites from CRM product and Contact relationships



## Unique System Features Build Business Advantage:



- Offer single-sign-in Microsoft Live ID for all Xbox, Office 365, Win Phone or CRM Online users
- Upgrade your website to a CRM controlled CMS – Content Management System

## What are the CRM Web Portal Options . . .



### CRM Driven Web-based Customer Satisfaction Survey

3<sup>rd</sup> leg, Activity completion triggering automatic template e-mail-to-web-survey system for customer satisfaction management and closed-loop continuous business improvement.

### Multi-level Partner Management

Extend CRM's multi-relational capability eloquently to bring your current multi-level channel management system or build a new one to suit your businesses future. Ideal for contractors, aggregators, outsourcers, anyone sharing or controlling external resources.

### Multi-site Controls

Bring control of multiple websites on the CRM database and unified Account and Contact management for cross market, e-commerce and social and foreign market targeted sites. Use your CRM to manage Opportunities across several wesite. Cross selling!

### Option Selection for Flexible, Powerful, and Easy e-Commerce Product and Service Sales

Full credit and debit bank card integration, Shopping cart, Product display CMS, Visitor product interest tracking.

### CRM Web Custom Customer Capture

Bring control of multiple websites on the CRM database and unified Account and Contact management for cross market, e-comm and social and foreign market targeted sites.

### Visual Project Schedule – Live Status

Add MTC's ConsultPro Visual Scheduling used by your scheduled process or project management made visible to web visitors. Includes Top View with remarkable information delivery of volumes of projects or Activities for an end-user direct or partner.

## How to Engage Your CRM Web Portal Project . . .

Get an evaluation of your plans. That is, tell us what you want and we'll tell you and show you what we can do. Email [Portal@MTCCRM.com](mailto:Portal@MTCCRM.com) with any reference to your needs, ideas, plans. Or call **323-851-5008 PST** and ask about CRM Portal.

## CRM Web Portal Enterprise Solution Value . . .

Visual Project Scheduling and its expanding functional options are products integrated to a family of enterprise Microsoft CRM solution building blocks under the “SMB Custom Enterprise” (SMB) banner. SMB Custom is just that – All the building blocks to configure a complete enterprise solution fit to your business, scalable for growth. The entire solution family can be seen in the “ConsultPro” professional services practice management solution. The SMB and ConsultPro are solutions of MTC. MTC is the leader in efficient global CRM engineering for low-cost, fixed-rate Online and 24/5 live product support. MTC can configure product components, customize product functionality. Have MTC add workflow and scripting automation for you. We provide data migration, and configuration services.



Portal Pricing:	Description and Included Functionality	Premise Purchase *Per User	Online Monthly *Per User
<b>CRM Web Portal Core</b>	All standard dynamics CRM functionality integrated to your Web Portal. Delivered with both CRM Solution and .Net Web functionality. Customer web capture. Includes Microsoft's CRM Customer Support Accelerator.	<b>49.00</b>	<b>2.50</b>
<b>CRM e-Order Services</b>	Adds integration to payments gateways and certified off-site secure customer credit-card information. Integrates to CRM Order management. Authorize.Net	<b>19.00</b>	<b>1.00</b>
<b>CRM Product Web CMS</b>	Adds Multi-format line-item selling website display of your CRM Product records Easy CMS layout for landing pages to lists. Product Visitor tracking to CRM.	<b>9.00</b>	<b>.50</b>
<b>CRM Web Shopping Cart</b>	This is a unique short-cut to CRM's Order management process that allows anonymous visitors to build Carts without sign-in but still capturing order.	<b>499.Flat</b>	<b>NA</b>
<b>Visual Live Status</b>	This option adds ConsultPro Visual Scheduling Gantt to user project and order live status, Includes unique Top View for partners displaying multiple projects	<b>19.00</b>	<b>1.00</b>
<b>Partner Portal</b>	This is the Multi-level CRM Relationship management built for Seller-Partner-customer contractor, aggregator, or outsourcer, offers 2 <sup>nd</sup> level User security.	<b>29.00</b>	<b>2.00</b>
<b>Live ID Single Sign-in</b>	This is a convenience option for CRM Online users or any Microsoft Live ID Sign-on service that allows instant access. Includes CRM button to your site.	<b>299.Flat</b>	<b>NA</b>
<b>Multi-Site Central CRM</b>	Adds a CRM Solution for multi-site central Account and Contact relationship and visit tracking management. Manage CRM selling cycles across multiple sites.	<b>15.00</b>	<b>1.00</b>
<b>Initial Services Bundle</b>	This is bulk rate, initial-order 40 hour - 50% discount to MTC's web design and dev. services rates. RE-build solution or CMS integration Sitefinity, Do Net Nuke.	<b>999.Flat</b>	<b>NA</b>
<b>Your Forms Package</b>	There are a standard set of 5 or 12 deluxe design order management and project forms personalized for your business. Chose from 10 designs.	<b>5-199.Flat</b> <b>12-349.Flat</b>	<b>NA</b>

\*All prices are in US Dollars. Prices are per user unless otherwise specified and are matched by the solution to the number of Microsoft Dynamics CRM users. Web Portals require the additional one-time purchase of the Microsoft Dynamics CRM External Connector License.

### Volume discounts are available at the time of initial purchase in accordance to the following schedule:

50 to 99 users provides a 5% per user price discount	100 to 249 users provides a 10% per user price discount
250 to 499 users provides a 20% per user price discount	500 to 999 users provides a 30% per user price discount
1000 + users provides a 40% per user price discount	Volume discounting does not apply to "Flat" pricing items.

Maintenance and Support: 12 Months unlimited technical support and ongoing upgrades and solution enhancements are included with initial purchase. Annual maintenance and support thereafter is 15%. Any required installation, configuration, or training in conjunction with a CRM version upgrade is not included in maintenance and the support agreement.

Available at [www.DynamicsExchange.com/Portal.aspx](http://www.DynamicsExchange.com/Portal.aspx) [www.MTCCRM.com/Portal.aapx](http://www.MTCCRM.com/Portal.aapx)