



Dynamics CRM Self Service Portal

Key Features:

1. Secured Access. Different levels of security access to the Portal.
2. Ability to view/update tickets
3. Ability to register new tickets.
4. Ability to control the activities that get displayed on the portal.
5. Access to Knowledge Base. Ability to control the articles that are put on public domain.
6. Ability to administer the account.
7. Ability to change the look and feel of the portal to make it an integral part of your existing website.

Ability to setup individual logins for each account:

To provide access to customers you need to give them access by setting the Self-Service credentials in the newly added Self – Service Tab in the Account form.

The screenshot shows a Microsoft Internet Explorer browser window titled "Contact: Adrian Dumitrasue - Microsoft Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays the Dynamics CRM interface for the contact "Adrian Dumitrasue". The "Information" tab is selected, and the "Self Service" sub-tab is active. The "Self Service" section contains the following fields:

Self Service	<input checked="" type="checkbox"/>	Is Master	<input checked="" type="checkbox"/>
Login Id	<input type="text" value="adrian"/>	Password	<input type="text" value="adrian"/>

The left sidebar shows various navigation options under "Details:", "Sales:", "Service:", and "Marketing:". The "Status" is shown as "Active". The browser's status bar at the bottom indicates "Done" and "Local intranet".

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Secured Login:



Login Id:

Password:

[New User? Register Now](#)

[Forgot Password?](#)

Enter a valid userid and password for successful logon.

Upon logon the user will be shown a list of all his Active cases registered with you.

Friday, September 12, 2008 11:16 AM

Good Morning! Adel

Cases

My Open Cases

Enter case number to search:

Title	Case Number	Status	Priority	Created On	Modified On
Case No: 04	CAS-1033-2S2LR4	Active	High	3/26/2008 9:33 PM	3/26/2008 9:33 PM
Case No: 03	CAS-1032-92DSQT	Active	Normal	3/26/2008 6:46 PM	3/26/2008 6:46 PM
Case No:01	CAS-1030-SRK0FH	Active	Normal	3/25/2008 7:54 PM	3/25/2008 7:54 PM

Done Contact: Adel Wood - Microsoft Internet Explorer

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Only 10 cases will be shown in each page. Click on the > and < buttons at the bottom of the table to navigate to next and previous list of cases respectively.

How to check details of a particular case?

The title column in the above table is a hyperlink column. Clicking on the link will take you to the selected case details.

The screenshot displays the Dynamics CRM Self Service Portal interface. The browser window is titled "CasesDetail - Microsoft Internet Explorer". The address bar shows the URL: <http://localhost/TKSelfServicePortal/Forms/CaseDetails.aspx?id=0ea5ce3c-4efb-dc11-ac4c-000c29aa1b13&type=1>. The page features a navigation pane on the left with links for "Cases", "My Open Cases", "My Closed Cases", "All Open Cases", "All Closed Cases", "Knowledge Base", and "Administration". The main content area has tabs for "Details", "Notes", "Activities", and "History". The "Details" tab is active, showing a "Resolve" button and an "Overview" section. The case information includes: Case No: 04 / CAS-1033-252LR4, Title: Case No: 04, Customer: Adel Wood, Subject: Default Subject, Case Type: Question, Case Origin: Web, Satisfaction: Very Satisfied, Owner: Sam IKL, Status Reason: On Hold, Priority: High, Contract, Contract Line, Service Level: Gold, Product, and Serial Number: 123544. Date information shows Created On: 3/26/2008 9:33 PM and Modified On: 3/26/2008 9:33 PM.

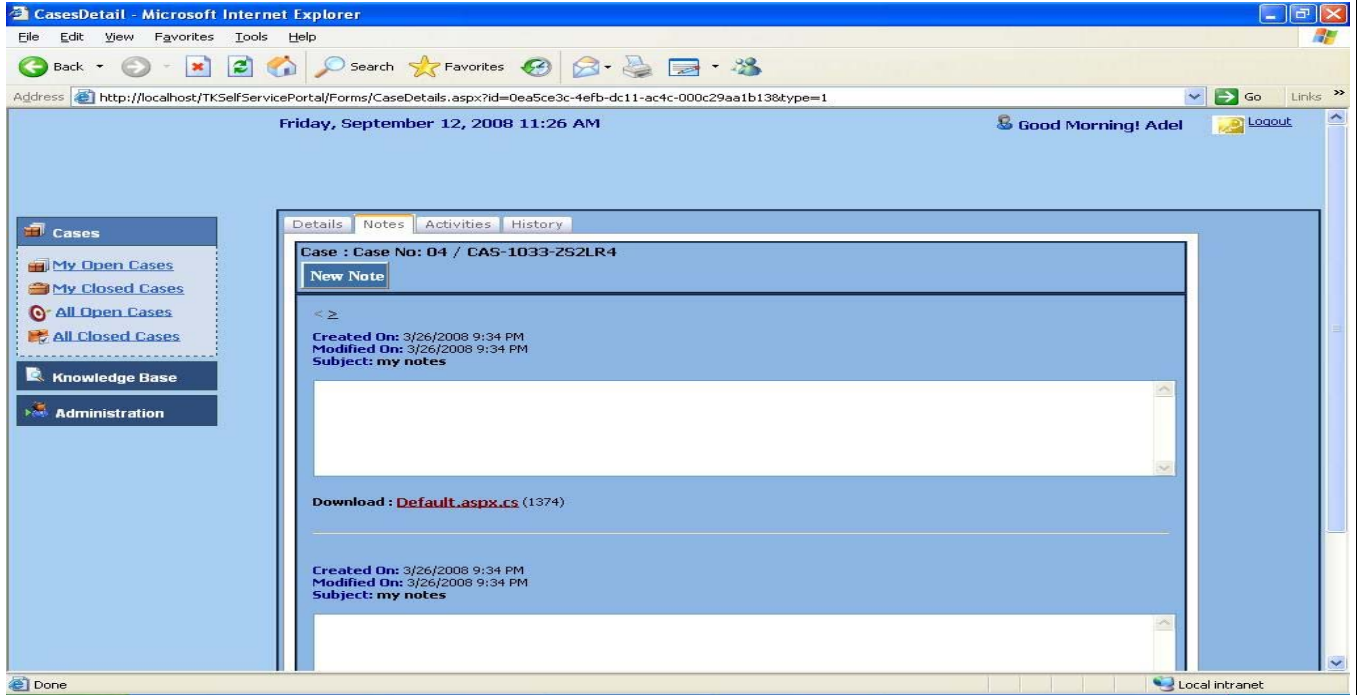
How to Navigate within a Case?

Use the Navigation pane to the left in the Case Details page to check out the open Activities, History or to add a note to the selected case.

How to send comments for a case?

Click on the Notes option in the navigation pane to go to the Notes page which will allow you to send comments for the selected case.

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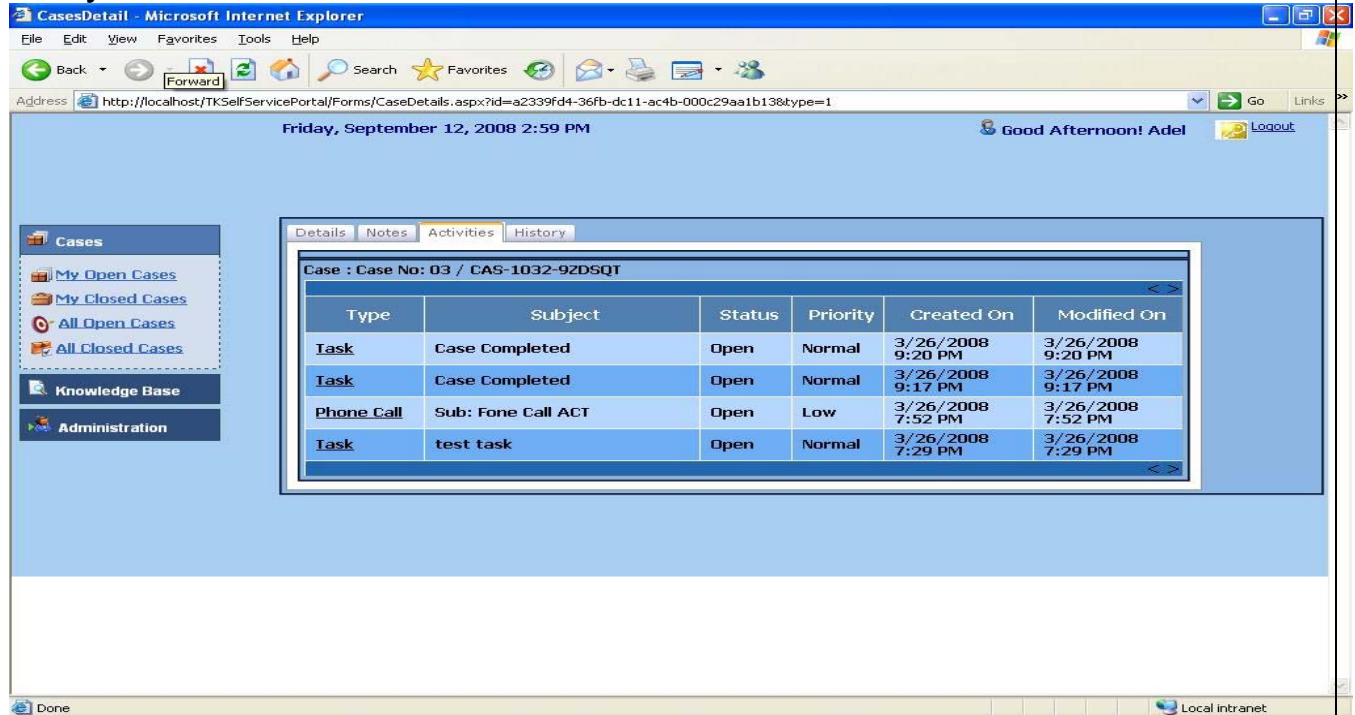


The notes added from here will automatically be reflected in the notes tab of the selected case in MSCRM.

Ability to Resolve or Re-open the case can be provided to the user.

Also as requested, a mail will automatically be sent to the User account specified in the Web.config file.

History/Activities for a Case:



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Details of the Activity:

The screenshot shows a web browser window titled "Activity Details - Microsoft Internet Explorer". The address bar shows the URL: <http://localhost/TKSelfServicePortal/Forms/ActivityDetails.aspx?id=92716eea-1ff0-dc11-b468-000c29aa1b13&activitytype=appointment&type=1>. The page header displays "Friday, September 12, 2008 4:39 PM" and "Good Afternoon! Adel" with a "Logout" link. A left-hand navigation menu includes "Cases" (with sub-links for "My Open Cases", "My Closed Cases", "All Open Cases", and "All Closed Cases"), "Knowledge Base", and "Administration". The main content area shows "Case : Case No: 03 / CAS-1032-9ZDSQT". Below this, there are input fields for "Subject" (containing "test appt"), "Required" (containing "Adel Wood"), "Location", "Start Time" (3/12/2008 4:30 PM), and "End Time" (3/12/2008 5:00 PM). A large empty text area is positioned below these fields.

Knowledge Base:

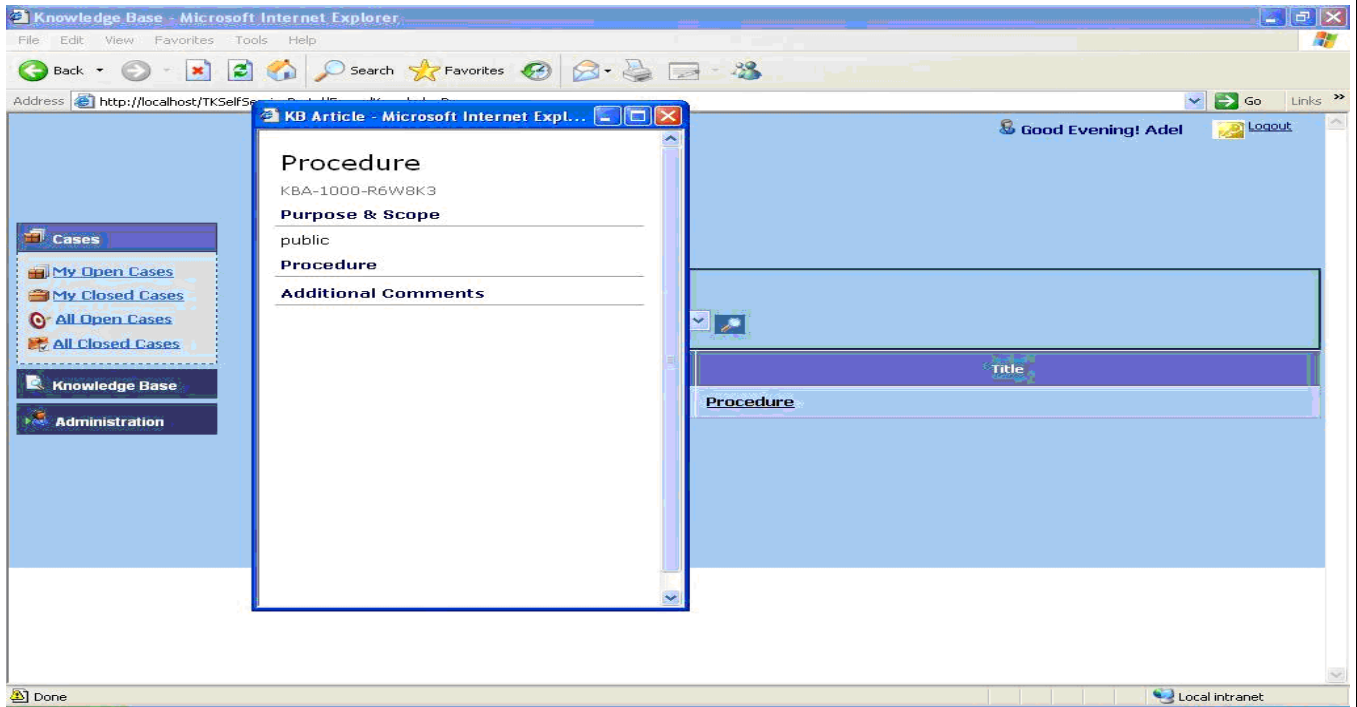
Make your Knowledge Base section in CRM available to your customers through the Portal.

The screenshot shows a web browser window titled "Knowledge Base - Microsoft Internet Explorer". The address bar shows the URL: <http://localhost/TKSelfServicePortal/Forms/KnowledgeBase.aspx>. The page header displays "Friday, September 12, 2008 5:08 PM" and "Good Evening! Adel" with a "Logout" link. A message states "You are not logged in." The left-hand navigation menu is identical to the previous screenshot. The main content area features a "Knowledge Base" heading with a search icon. Below this, there is a "Search Criteria" dropdown menu set to "Article Number Search" and an "Article #" input field. A table with three columns is displayed below the search area:

Number	Subject	Title
KBA-1000-R6W8K3	Default Subject	<u>Procedure</u>

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Viewing a KB Article:

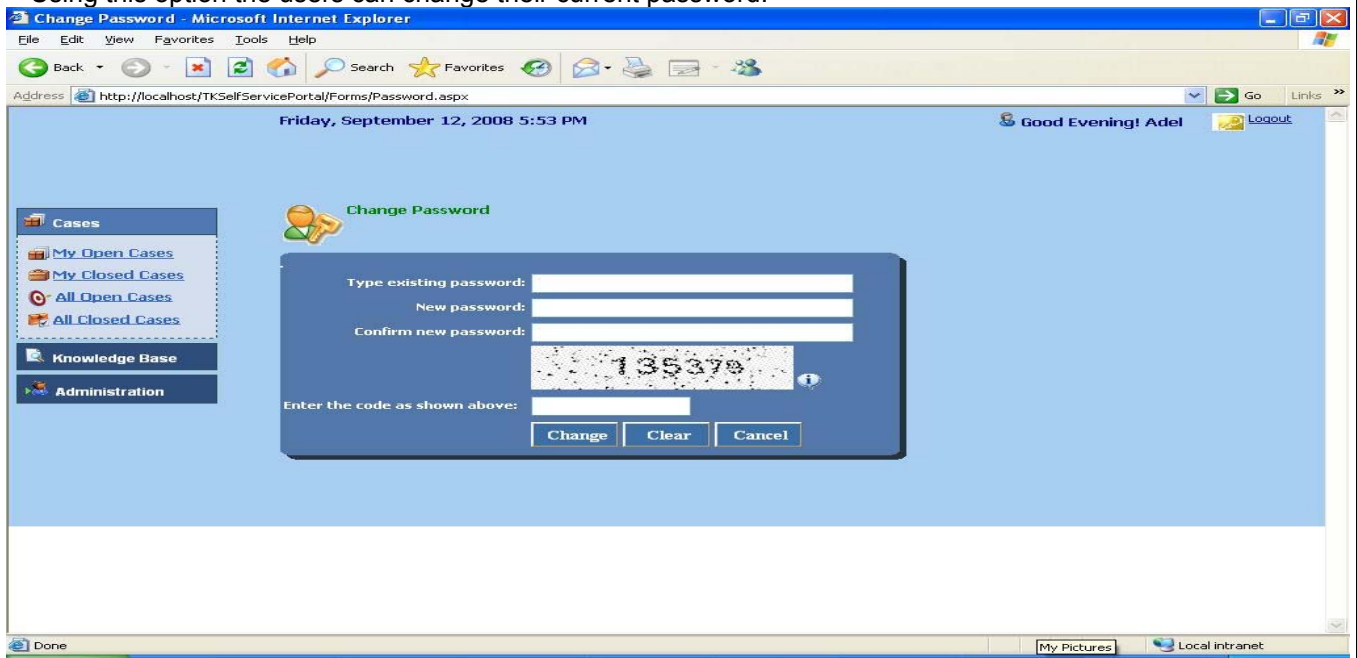


Administration Section:

Allow users to change their password. Administrative users can control the access to the portal of other contacts in their organization.

Change Password:

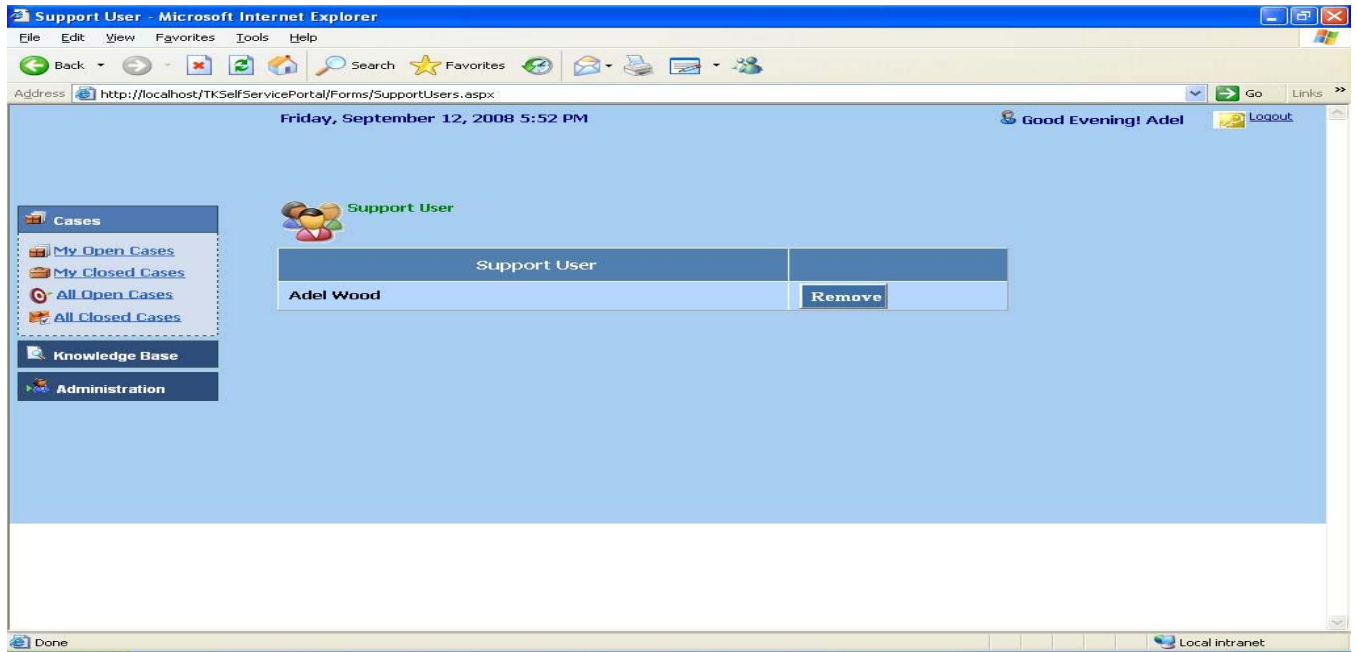
Using this option the users can change their current password.



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Control Access/ Support Users:

From here the master user can check the list of all contacts that have been registered as support users for their company. They can also remove a particular user as support user.



India (Corporate Headquarters)

Mumbai - New Bombay

305,Devarata,
Sec-17, Next to HDFC Bank
Vashi, Navi Mumbai-400705

UK - London

102, Butlers and Colonial wharf,
Shad Thames,
London, SE1 2PY

US - New Jersey

14 Benedek Rd,
Princeton,
NJ 08540

Via email

CRM: crm@inogic.com