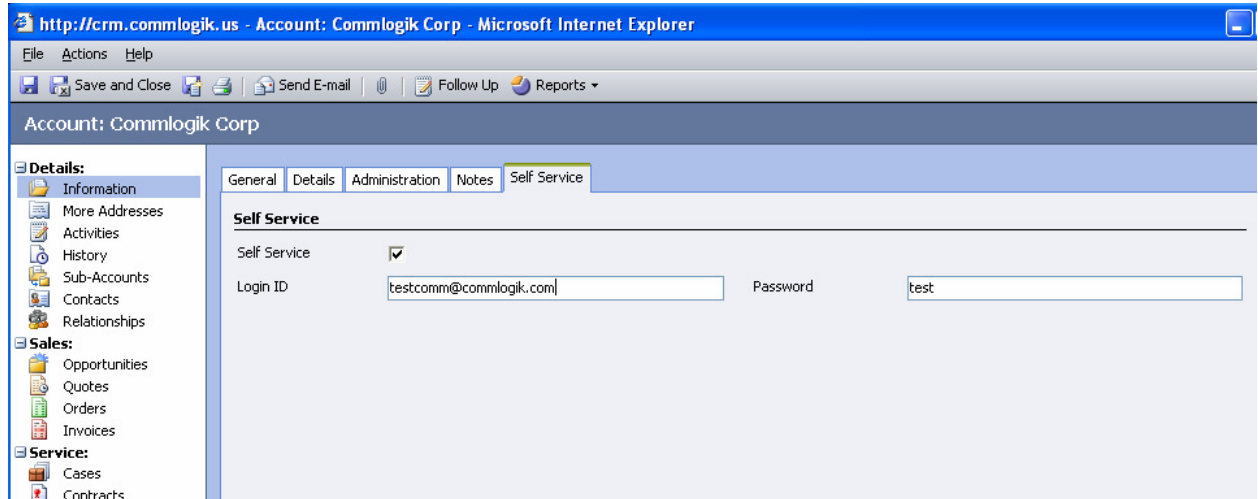




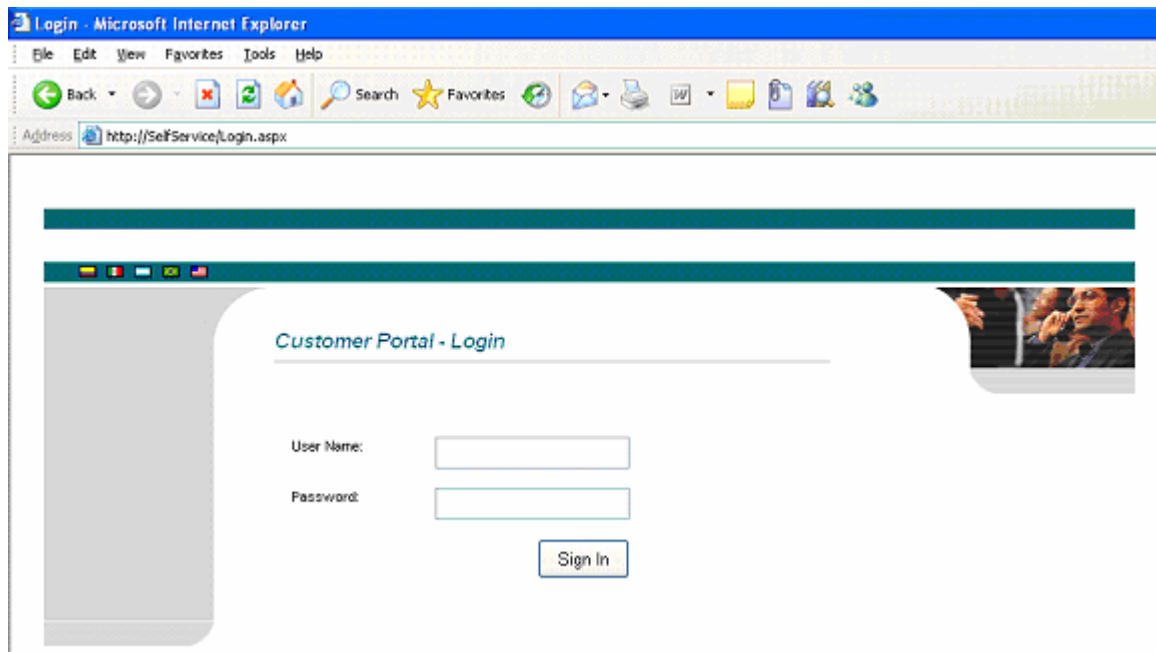
Dynamics CRM Self Service Portal

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.



Secured Login:



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.

Dynamics CRM Self Service Portal

Title	Case Number	Priority	Created On
How to configure the Lucent Partner PBX to integrate with Microsoft Exchange 2007 UM	CAS-01965-TRL810	Normal	01/11/2007
Support provided to Coassist	CAS-01960-EK0KSD	Normal	01/08/2007
Fredson support services	CAS-01959-SHCDES	Normal	01/08/2007
Portal for CRM	CAS-01916-4MFB3E	Normal	12/19/2006
demos TTS Loquendo	CAS-01720-W79RXO	Normal	10/18/2006

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.

Case Details: CAS-01965-TRL810

Overview

Title:

Customer:

Subject: Case Type:

Case Origin: Satisfaction:

Assignment Information

Owner: Status Reason:

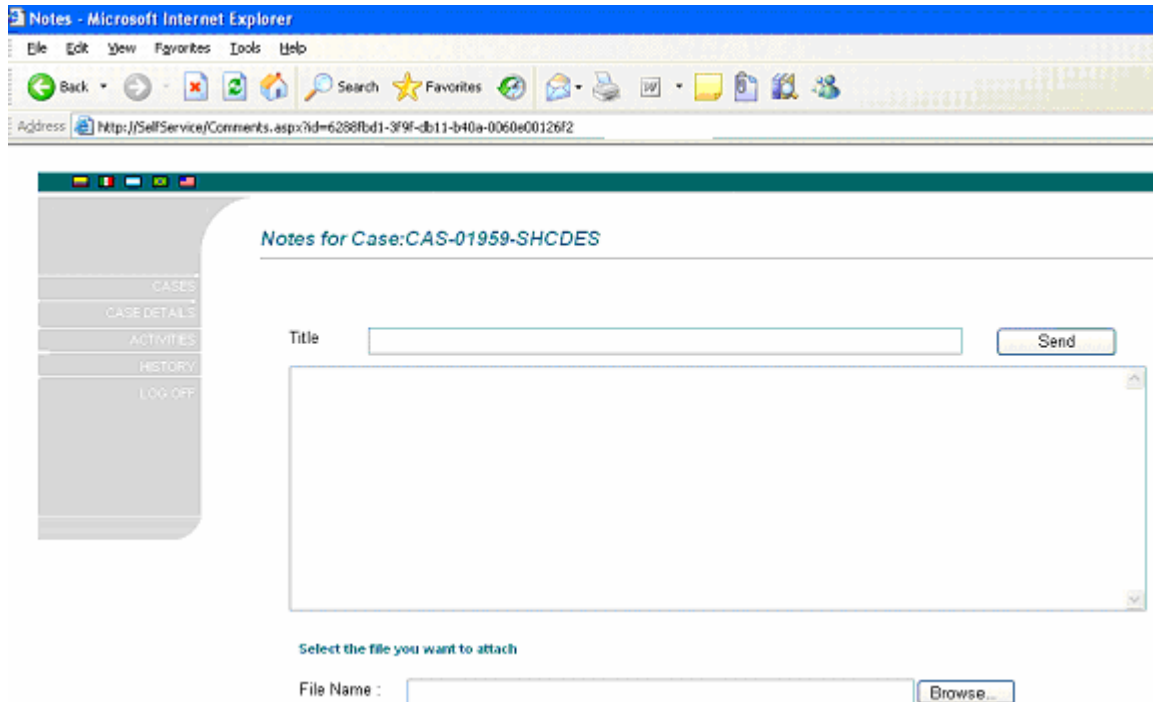
Dynamics CRM Self Service Portal

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.



The screenshot shows a Microsoft Internet Explorer browser window displaying the Dynamics CRM Self Service Portal. The address bar shows the URL: <http://SelfService/Comments.aspx?id=6288fbd1-3f9f-d611-b40a-0060+00126f2>. The page title is "Notes for Case: CAS-01959-SHCDES". On the left side, there is a navigation pane with the following options: CASES, CASE DETAILS, ACTIVITIES, HISTORY, and LOG OFF. The main content area contains a "Title" input field, a "Send" button, a large text area for entering the note, and a "Select the file you want to attach" section with a "File Name" input field and a "Browse..." button.

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

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

Dynamics CRM Self Service Portal

History for a Case:

Active Cycling

History for Case: CAS-01002-DWKEEO

Activity Type	Subject	Activity Status	Priority	Due Date	Created By	Show Details
email	new email with huge content CRM.00010012	Canceled	Normal		Sam L	Details

Details of the Activity:

Active Cycling

Activity Details for Case: CAS-01002-DWKEEO

From: Date:

Subject:

New email activity sent...

This is html content

And if it is a lengthy mail... the text box will expand automatically

Dynamics CRM Self Service Portal

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