Feature and Datasheet - The CloudFronts Service QuickStart for Dynamics CRM and Office 365

This Feature Guide provides details of each of the features offered as part of our Service QuickStart solution along with system and licensing requirements for Office 365.

Key Features –

1. **Office 365 E3, CRM Online, Users and Domain Setup –** On Project Kick off, we will setup a new Office 365 system for your organization along with your users who will need access to Email and your CRM system. In addition, we will also help in setting up your domain on Office 365 along with your Logo. We will setup your environment as a 30-day Free trial, after which you will need to continue your subscription by paying for the CRM and Office 365 licenses. License costs are not part of our implementation and you will be directly paying for them to Microsoft. License Costs are mentioned below –
    a. Office 365 E3 License - $20/User/Month OR Office 365 E1 License - $8/User/Month.
    b. CRM Online Licensing - $50/User/Month with E3 License (minimum 5 users required) OR $65/User/Month with E1 License (minimum 5 users required)
    c. One CRM user should be dedicated for admin functions and will consume a full CRM license. Ideally this user is setup as CRMAdmin@yourdomain.com
    d. A Support user will be setup in CRM to send the automated workflow notifications.

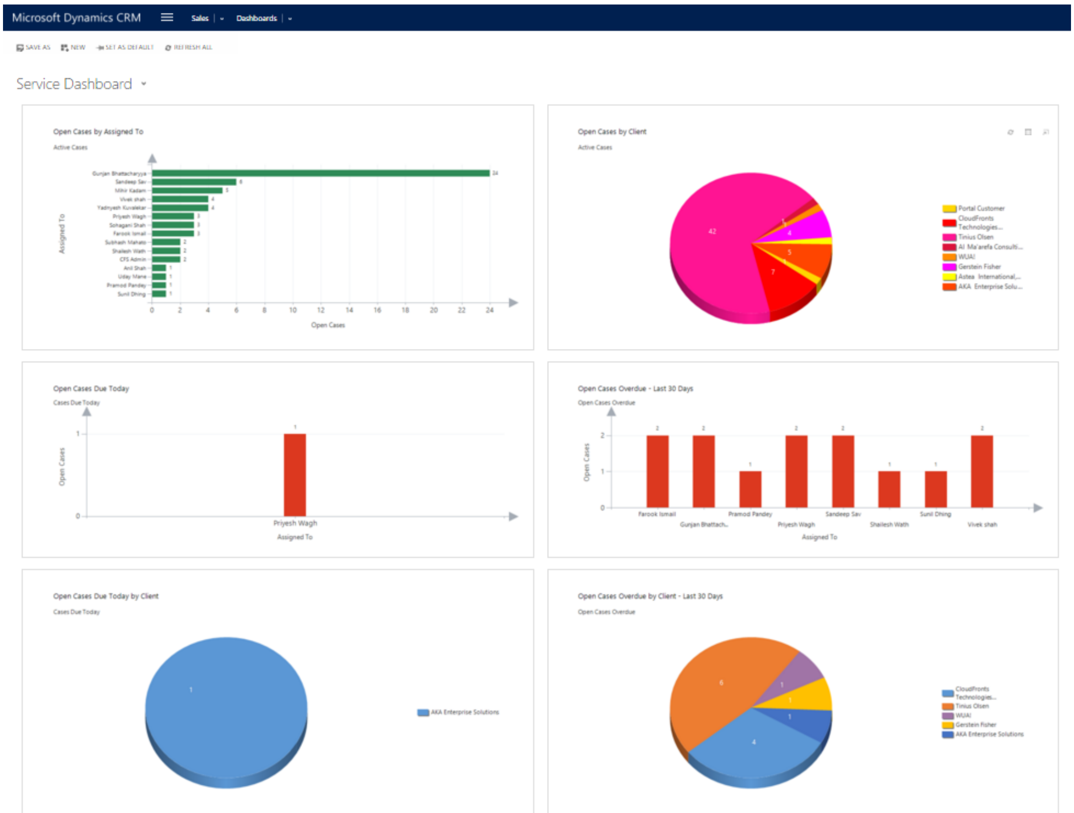
2. **Server Side Synchronization Email to Queue Setup –** Once we have your Office 365 Email and Dynamics CRM, we will also setup Server Side Synchronization to ensure we are able to move Email messages from your Support Email into the Support Queue in CRM. The Support Queue is visible to all your Support team members and they will convert the items in the queue into Cases and assign to respective team members or themselves.

3. **Automated Workflow Notifications including Notes Updates –** Workflows in CRM allow us to automate many routine tasks like sending email updates or following up on open items. We are using the powerful Workflow engine in CRM and taking it a step further for this QuickStart. We are providing our solution with a few out of the box workflows that we developed for our own support team. These workflows notify the client on Case creation, assignment and resolution! In addition, we developed a customization that allows us to trigger notifications to clients when a Case 'Note' is added. A note in CRM is a simple description of a discussion or issue and every time a note is added to the Case by your Support team, our custom workflow will send an email to the client with the Case Notes history!

4. **Case Auto Number Feature –** Dynamics CRM ships with a Case Auto Number feature that is really not very useful. It basically consists of a prefix and an incremental number along with a randomization number at the end. It looks something like this when you create a case and the Case ID is assigned **- CAS-00033-AS7FX3.** Our Support team wanted a more useful case ID which could provide some information about the Case or Customer. So we came up with an ID that basically captures the Customer Number and assigns an incremental number to each case for that customer. This way a case number becomes very useful and provides us with information on which Customer and the number of cases for that customer! So for Customer with Number 3, when we open the second case, the Case ID would be 3- 002. We have included this wonderful

feature with our Service QuickStart! Read more about it at our blog on the Dynamics CRM Community - https://community.dynamics.com/crm/b/microsoftdynamicscrmsolutions/archive/2015/12/01/custom-generation-of-case-number

5. **QuickStart Dashboard –** We developed a very useful Dashboard for our team and we have included the same Service Dashboard inside of the QuickStart solution. It includes metrics like Open Cases by Assigned To, Open Cases by Client, Cases Due Today and Overdue Cases. This allows the Service Manager to get a quick view into his Service operations. A sample screen capture is below –



6. **User Training –** Our user training is conducted by our Customer Support team who use the same solution on a daily basis. This ensures they can answer any question and provide best practices from their learning as well!

7. **Go Live –** When you Go Live, our support team is available through a quick email for any critical issues. You can contact them 24 hours a day M-F through our support email – support@cloudfronts.com.

For any queries or questions on our QuickStart offering please contact us at info@cloudfronts.com.