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CRM Portals:

Open your doors to your Customers, Partners and Employees

Abstract

This white paper provides a basic definition of an Internet portal, and then describes a CRM Portal, a portal that is a component of a CRM system. Different kinds of CRM Portals are discussed in terms of who uses these portals and what are they used for. Typical CRM portals are for a company's customer, partners, and employees. Examples are provided of the information that can commonly be entered, updated and accessed from each of these CRM portals.

What is a Portal?

An Internet portal is an access point, a web site featuring a suite of services. Internet portals often include a search engine or directory, news, email, stock quotes, maps, forums, chat, shopping, and options for configuration. Large portals may include dozens or hundreds of bundled services.

CRM Portals

What is different about CRM Portals?

A CRM portal is an extension to a CRM system. A CRM portal is a way to open up the CRM system to people who are not CRM system users. This allows them to work with and get information from the company in an efficient way, regardless of the time of the day.

CRM portals usually ask the user to log in. When this is done, they are connected to the CRM system, and have access to those items that the portal is set to allow.

In CRM, it is important to record information about each 'touch' that your company has with its prospects and customers. The CRM portal makes this possible for each portal interaction. You are able to track who enters the portal, as well as the information and actions they initiate. This helps enrich the data collected about each person.

A CRM portal usually has two basic functions. One is the ability to create and update records (which usually, but not necessarily, are records in the CRM system). The other function is to provide access points for a variety of information that is relevant to the person logging in. This access is controlled based on who the user is, what their relationship with your company is, and the settings of the CRM Portal.

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Using the Portal

The CRM portal will ask the user to log in, and based on CRM system data, provide the access that is authorized and relevant to that user.

A Customer Portal may allow "Self-Support." A customer with a problem can search the company's knowledge base to see if they can find a solution. If an answer is not found, they would be allowed to create a new Customer Support Ticket. They also might be allowed to enter new information about an existing ticket and see status and resolution of Support Tickets that were previously entered.

In addition to items such as Customer Support Tickets, data from other sources, like accounting or order entry, can be made available. Usually access to other materials are provided, such as Frequently asked questions or FAQs, literature, downloads, and company news.

The idea is to provide a means for those constituencies outside the CRM system to interact with your company and to get the materials that they need, without involving a customer support agent or a sales person.

Soffront's CRM Portals

Soffront offers a Customer Portal, a Partner Portal, and an Employee Portal.

Customer Portal

A Customer Portal is often the most important and usually the first one to be implemented. The most common function of a Customer Portal is to allow "Customer Self-Support."

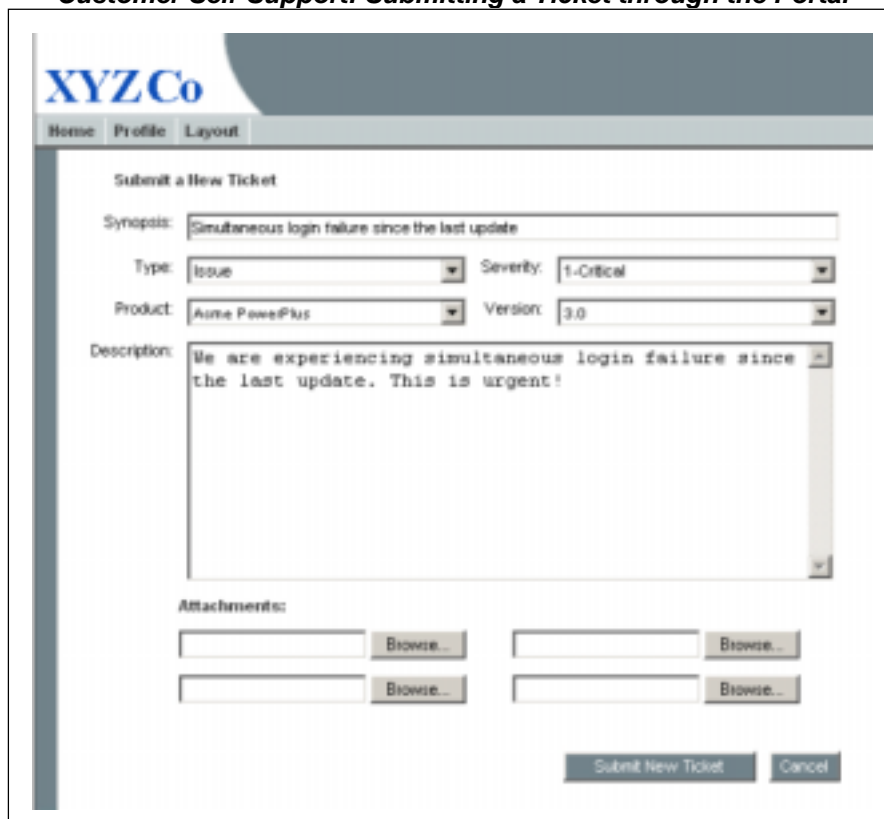
Customer Portal



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Customer Self-Support can lower the cost of providing customer support, while at the same time improving your customer's sense of being provided with quality support when it is needed.

Customer Self-Support: Submitting a Ticket through the Portal



The screenshot shows a web portal for XYZ Co. with a navigation bar containing 'Home', 'Profile', and 'Layout'. The main content area is titled 'Submit a New Ticket' and contains the following form elements:

- Synopsis:** A text input field containing 'Simultaneous login failure since the last update'.
- Type:** A dropdown menu set to 'Issue'.
- Severity:** A dropdown menu set to '1-Critical'.
- Product:** A dropdown menu set to 'Asme PowerPlus'.
- Version:** A dropdown menu set to '3.0'.
- Description:** A large text area containing 'We are experiencing simultaneous login failure since the last update. This is urgent!'.
- Attachments:** Four input fields, each with a 'Browse...' button.
- Buttons:** 'Submit New Ticket' and 'Cancel' buttons at the bottom right.

To submit a Ticket for Self-Support, the customer enters information about the problem, sets the Severity, selects a Product and Version from those that the customer has purchased, and enters detailed notes. The customer can also attach files, such as log files that might provide additional information on the problem. Once the Submit button is clicked, the Ticket is entered into the CRM system and routed to the appropriate Support Agent for resolution.

The Customer can track the progress of the Ticket from the Portal, using the "My Tickets" view.

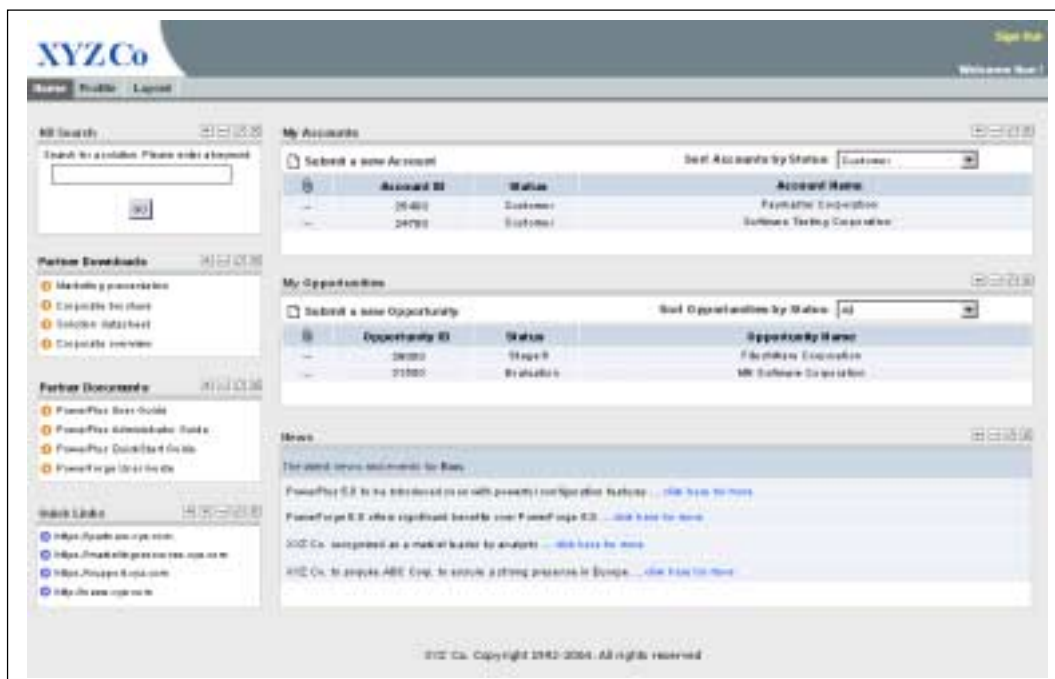
The company's customers can log into the portal and access such things as:

- Obtain Self-Support by searching a Knowledge Management System for a solution to their problems, or referring to a FAQ document.
- Enter Support Tickets and check status.
- Enter Returned Material Authorizations (RMA) and check status.
- See order status from the Order system.
- See invoice status from the Accounting system.
- Read or download Product literature and company news.
- Download software updates.
- Read and Print CRM reports, such as Service history report.

Partner Portal

A Partner Portal provides a means of distributing and managing Partner Leads and opportunities, as well as providing the partner with the information they need to be effective. For a typical sales prospect, when the lead is assigned to the partner, the partner immediately gets an email notification of the new lead, and the lead information is available on the portal. The partner is able to update lead status, add opportunity information, generate a quote, and request support from the company.

Partner Portal

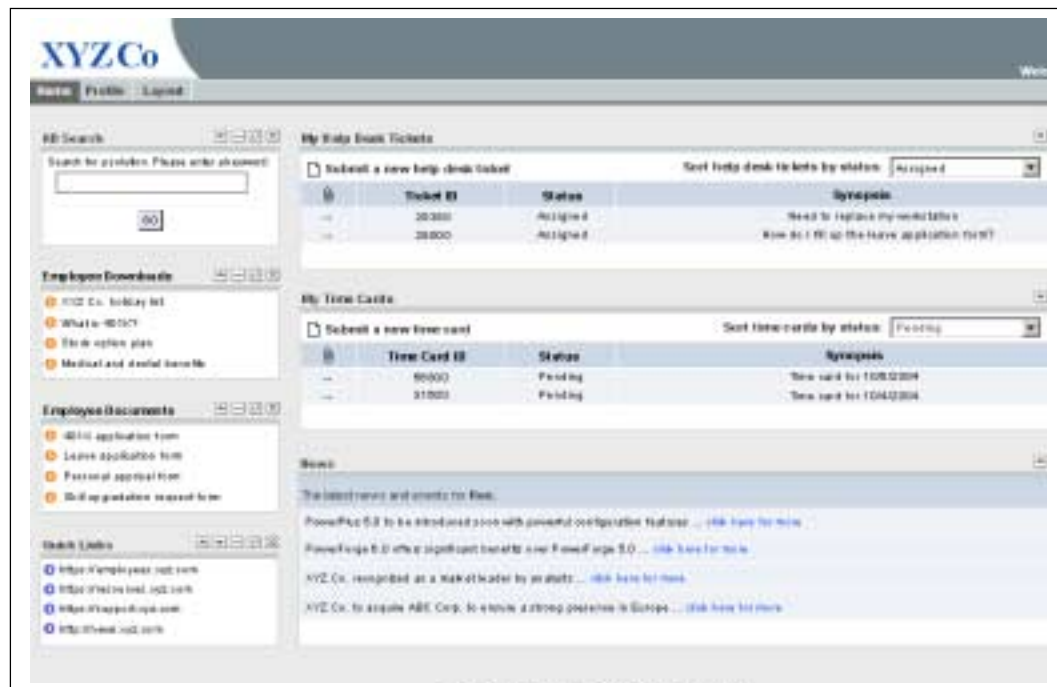


The company's partners can log into the portal and access such things as:

- Access and review new leads provided by the company.
- Update lead status and opportunity information.
- Generate a quotation.
- Enter a new lead generated by the partner.
- Review order status reports for partner's customers.
- Review support tickets and status for partner's customers.
- Enter support tickets for partner's customers.
- Enter RMAs for partner's customer.
- Read or download product literature and company news.
- Download software updates.

Employee Portal

An Employee Portal lets the employee enter help desk support requests, and provides a place where the employee can obtain information and forms that are needed. Some companies even use their Employee Portal to enter time-card information. Employee portals are often configured so that the employee can update their own information, such as address and phone numbers, etc. This saves time for the HR department. Employee Asset information can also be maintained through the portal.



The company's employees and contractors can log into the portal and access what has been configured for their use. This can include such things as:

- Enter a Help Desk Ticket.
- Review status of Help Desk Tickets previously entered.
- Search the Knowledge base for a solution for a problem.
- Update employee address and contact information.
- Access company employee and procedure manuals.
- Download employee forms, such as W9 and insurance forms.
- Complete and submit employee or contractor's Time Cards.
- See company news, links, product information, available downloads, etc.

Employee Self-Support: Updating Personal Information via Portal



Soffront Software – Mid market CRM Experience, Technology and Focus

Soffront Software Inc., a pioneer in the CRM market since 1992, offers end-to-end, fully integrated CRM solutions consisting of sales force automation, marketing automation, customer and employee help desk, asset management, contact center, self-service knowledge management and defect tracking. One main differentiator of the Soffront CRM Suite is its capability to auto-generate code based on a user's business specifications—a feature that is unique in the industry. With more than 500 CRM installations worldwide, Soffront's installed base includes Fortune 500 companies, mid-sized businesses, federal agencies and local/state governments. Soffront is privately held with no debt and has been profitable since 1995.

Soffront offers a CRM system with a set of integrated modules that span all customer-facing functions. Soffront is "built to adapt," and is easily customized to fit even the most demanding CRM need.



Conclusion

Portals are an important element of a CRM system. They expand the reach of the CRM system beyond the company employees who use the CRM system, to the community in which the company operates. This community includes the company's customers, partners and employees.

Portals make the company easier to work with and provide access to the information needed by those who log in. This improves the company's ability to form and keep beneficial relationships with its customer, partners, and employees.

The improvements made possible through the use of CRM portals increase the productivity and effectiveness of the company and its community of customers, partners, and employees.