



c360 Audit for Microsoft Dynamics CRM 3.0

Overview

c360 Audit is a Microsoft CRM enhancement that allows you to **Track** and **Analyze** all changes made to CRM. The components of c360 Audit are

1. **Audit Tracker**
2. **Audit Analyzer**

The **Audit Tracker** component captures all changes made to CRM data including custom entities and custom fields. Using the Audit Tracker, organizations will be able to:

- Track all changes made to CRM data including contact save, lead conversions, quote deletions, updating of account fields
- See the big picture view of the complete audit trail with the ability to drill down and open any CRM record with a single click
- See the before and after picture of every CRM save event
- User customizable view to see only the fields that are most critical
- See HOW an Account got its current status; Your existing CRM system is just a snapshot but using Audit, you can now see HOW
- Increase compliance with legal regulations such as SOX, HIPAA, The Privacy Act, and others by maintaining a verifiable audit trail

Transaction Type	Modified On	Modified By	Category	Account Number	Relationship Type	E-mail	Industry	Account Name	No. of Employees	Originating Lead	Primary Contact	Annual Revenue
Account Updated	6/30/2006 11:04:47 AM	Joseph Administrator	Standard	9Aw2q31	Customer	example10846@contoso.com	Business Services	Active Cycle Mart	152	Acevedo Stephen	Acevedo Stephen	78000000.00
Account Updated	6/30/2006 11:04:17 AM	Joseph Administrator	Standard	9Aw2q31	Customer	example10846@contoso.com	Entertainment Retail	Active Cycle Mart	152	Acevedo Stephen	Acevedo Stephen	78000000.00
Account Audit Begin	8/2/2005 4:07:41 PM	Joseph Administrator	Standard	A0138	Customer	example10846@contoso.com	Entertainment Retail	Active Cycle Mart	152	Acevedo Stephen	Acevedo Stephen	78000000.00

c360 Audit allows you to Track all changes made to CRM data



The **Audit Analyzer** component is a power **Business Intelligence** system that lets you analyze historical CRM information to gain a better understanding of your customers. Using the Audit Analyzer, Microsoft CRM users will be able to:

- Get critical insight to your historical CRM data by creating specialized queries like '**negative queries**', '**OR queries**' using special operators such as 'increased', 'not changed' etc
- Sales can now more easily identify 'stuck opportunities' in the funnel by creating the negative query "Show me all hot opportunities where status code has not changed in the last month"
- Create complicated 'OR queries' such as "All opportunities where the Estimated Amount has changed OR the Account Type has changed"

The screenshot displays the Audit Analyzer interface. At the top, it shows filters for 'Account Changes', 'Active Accounts', and 'In The Last 7 Days'. Below this, a table lists accounts with columns for Account Name, Primary Contact, Address, Owner, Account Number, Main Phone, and Address City. Two records are shown: 'Active Cycle Mart' in Hartford, CT, and 'Active Cycling' in Atlanta, GA.

Below the account table, there is a section for 'Account Opportunity' with a table of transaction types. The columns include Modified On, Modified By, Actual Close Date, Actual Revenue, Probability, Est. Close Date, Est. Revenue, Topic, Originating Lead, Price List, and Step Name. Four 'Opportunity Audit Begin' records are listed, all with an estimated revenue of approximately 3,200 and a probability of 0.

Account Name	Primary Contact	Address 1: State/Province	Owner	Account Number	Main Phone	Address 1: City
Active Cycle Mart	Acevedo Stephen	CT	Jule Jones	9Aw2q31	404-222-1110	Hartford
Active Cycling	Adrian Dumitrascu	GA	Alan Jackson	PCA2345	555-555-0135	Atlanta

Transaction Type	Modified On	Modified By	Actual Close Date	Actual Revenue	Probability	Est. Close Date	Est. Revenue	Topic	Originating Lead	Price List	Step Name
Opportunity Audit Begin	3/28/2006 2:18:57 PM	Joseph Administrator	03/22/2006	0.00	0	03/28/2006	32924.50	Interested		Wholesale	
Opportunity Audit Begin	3/28/2006 2:18:46 PM	Joseph Administrator	03/22/2006	0.00	0	03/28/2006	125394.62	Interested		Wholesale	
Opportunity Audit Begin	3/28/2006 2:18:35 PM	Joseph Administrator	03/22/2006	0.00	0	03/28/2006	123262.08	Interested		Wholesale	
Opportunity Audit Begin	3/28/2006 2:18:26 PM	Joseph Administrator	03/22/2006	0.00	0	03/28/2006	145654.32	Interested		Wholesale	

c360 Audit Analyzer allows you to query and analyzer historical CRM information

Languages

All c360 products are available in multiple languages and can be easily translated into additional languages by simply making changes to the label and caption values found in a separate .XML document. Each product's Installation and Configuration guide provides



detail on making language modifications. All product downloads include language files for multiple languages.

Licensing

The number of Audit licenses must equal or exceed the number of assigned user licenses or Core Productivity Pack will not function for any user. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Audit licenses.

Support, Upgrades and Enhancements

The list price of Audit includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchased for 20% of the total cost of all Core Productivity Pack licenses.

Information

For more information on c360 Audit, contact your c360 reseller:

CABC Ltd
11-13 The Broadway
Newbury
Berks
RG14 1AS
<http://www.msCRM-cabc.co.uk>
email: sales@cabc.co.uk
Tel 01635 570970
