



## c360 Console for Microsoft CRM 3.0

### Overview

The c360 Console allows Microsoft CRM users to design their CRM workspace in virtually any way they like. Console delivers **critical data** with **less clicks, fewer screens** and allows Microsoft CRM users to see the data that is relevant to them the way they want to see it. The Console allows users to combine CRM views, search cells, custom cells (iFrames), c360 products and CRM record data into a readily configurable interface. The Console also allows organizations to develop their own content cells that can be used to display integrated data from an external system. The c360 Console allows users to mix the following types of content:

- Microsoft CRM Advanced Find queries/views
- c360 Products, if in use by the organization
  - o c360 Summary, My Summary and Quick Activity
  - o c360 Relationship Explorer
- CRM record details (CRM records; tabs, sections and fields)
- Custom Content cells integrated with an external system
- Custom Search cells
- Associated entity lists (displays records linked to the actively selected CRM record)

The screenshot shows the c360 Console interface within a Microsoft Internet Explorer browser window. The browser address bar displays the URL: `http://192.168.66.134:5555 - Microsoft CRM V.Next Beta - Microsoft Internet Explorer provided by c360 Solutions`. The user is identified as "User: Gravely, John".

The interface is divided into several sections:

- Workplace:** A sidebar on the left containing navigation options such as "My Work", "Activities", "Calendar", "Queues", "Articles", "Reports", "Announcements", "Forecast Manager", "Console", "My Summary", "Multi-Field Search", "Customers", "Accounts", and "Contacts".
- Console:** The main workspace area, which is currently displaying a search cell for "October 10 Test Account". It includes a search bar, filters, and a list of results.
- c360 Summary:** A pane showing a summary of activities for the selected account. It includes a table with columns for "Activity Type", "Subject", "Description", "Regarding", and "Date Created".
- c360 Relationship Explorer:** A pane showing a relationship chart for the selected account, with options for "Relationship Explorer", "Relationship Chart", and "Admin".
- Record Details:** A pane showing the details of the selected account, including "Account Information" (Account Name, Account Number, Parent Account, Primary Contact, Relationship Type) and "Address" (Address Name, Street 1, Street 2, Street 3, City, ZIP/Postal Code, Country/Region, Phone, Address Type, Shipping Method).

*Each user can create multiple Consoles with multiple, resizable columns and configurable content cells that interact with each other.*



## **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 Console licenses must equal or exceed the number of assigned user licenses or Console 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 Console licenses.

## **Support, Upgrades and Enhancements**

The list price of Console 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 Console licenses. Please refer to the next section titled Console upgrade for additional information.

## **Information**

For more information on c360 Summary and the Core Productivity Pack, contact your c360 reseller:

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