

Portal Features

If you already have customer information in your Dynamics CRM - you can quickly and securely provide your customers with access through a web portal.

Instead of having customers call or email for updates on a specific matter, enable your customers to create an online account and update Support Ticket or Case Information themselves, update billing or contact information immediately, or see the real-time status of a warranty claim.

Absolutely anything you've created in Dynamics CRM (on-premise or in the cloud) including any custom entities can now be securely offered to your customers for real-time communications and updates.

Online Forms

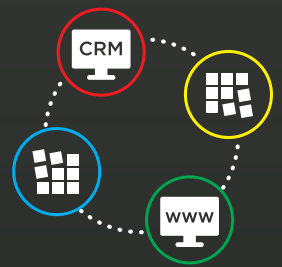
- Easy to use system that guides you through building online forms.
- Build simple, detailed or complex forms.
- Any field in CRM can be added to a Portal form.
- Individual fields can be secured as locked, visible or editable.
- Incorporate your existing website branding and design into your Forms.
- Extensive flexibility to change the layout of forms and pages on the Portal.
- Form fields can be defined as required or optional for data entry.
- The forms and data collection will continue to function even if your Dynamics CRM system is temporarily unavailable.

Data Management

- Display small or large amounts of Dynamics CRM data on a single Portal page.
- Manage the data with an intuitive easy to use Excel-like grid.
- Sort, filter and export the data from within the Portal.
- Adaptable security to control who can add, edit and delete data.
- Able to display multiple layers of data within a single portal page.

Ecommerce Integration

- A complete set of Ecommerce tools allowing you to be up and running in minutes.
- Synchronizes Dynamics CRM Products and price lists with your online store.
- Real-time creation of Orders and Invoices in Dynamics CRM.



Business Processes

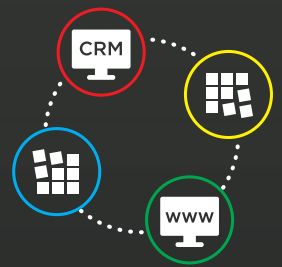
- Business rules and processes in CRM will be respected in the Portal.
- Submitted data can trigger more complex business processes and workflows, even integrate with other business systems.
- You control the level of access and approval processes for adding new Portal users.
- Auditing allows you to see who changed what data, when.
- Data flows between the Portal and Dynamics CRM in real time or in batches depending on your preference.

Configuration Options

- The Portal will work with and connect to all forms of Dynamics CRM installations.
- Even if your Dynamics CRM system is not accessible to the Internet, our technology will allow the Portal to interact securely.
- It takes only one check box in Dynamics CRM to add a new user to the Portal.
- You have the ability to allow new users to register for your portal and automatically be granted access.
- You control which elements of Dynamics CRM are accessible in the Portal, even custom elements.

The following extensive list of features and capabilities include both The Portal Connector for Dynamics CRM and Dynamics 365, and Sitefinity CMS Standard.

System Management	The Portal Connector + Sitefinity
Web Servers	2 Servers
Concurrent Sitefinity CMS Users	2
Concurrent Portal Users	Unlimited
Domains	1
Sitemap Pages	Unlimited
Content Items	Unlimited
Dynamics CRM Org Connections	1
Dynamics CRM Entities	Unlimited
Dynamics CRM Custom Entities	Unlimited
SharePoint Integration	On Premise & Online
Ecommerce Integration	Requires Portal Connector Enterprise

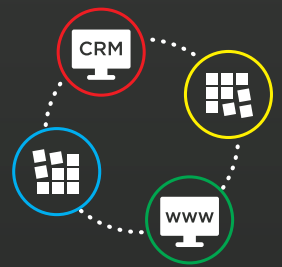


Page Management

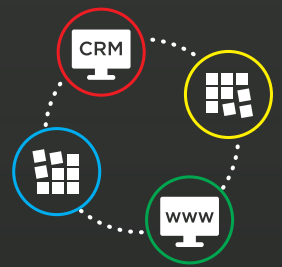
Multiple Forms per Page	✓
Read Only Form Toggle	✓
Grid View Widget	✓
Grid - Filter	✓
Grid - Export to Excel	✓
Grid - Delete Record	✓
Grid - Add Record	✓
Grid - Auto Build Fetch XML	✓
Grid - Fetch XML Editor	✓
Chart Widget	✓
Data Map Overlay	✓
Filtered Form View	✓

Content Management

Multilingual Content	✓
Accelerator Importing and Exporting	✓
Word-like HTML Editor	✓
Clean Paste from Microsoft® Word	✓
Multilingual Spell Check	✓
Image Editor	✓
Template Builder	✓
Drag & Drop Page Modeling	✓
In-line Editing	✓
Content Sharing	✓
Manage Flash and Windows Media Files	✓
Dropbox Synchronization	✓
File Manager	✓
Right-to-Left Language Support	✓
Multilevel Undo/Redo to Revert to Old Versions of the Content	✓
Versioning Side-by-Side Version Comparisons	✓
A/B and Multivariate Testing	✓
Scheduled Publishing	✓
Dynamic Sitemap Navigation	✓
Advanced Publishing & Syndication System	✓
Search Engine (incl. Search in Documents)	✓
Event Calendars	✓
Document Management	✓
Custom Attributes	✓
Dynamic Administration Dashboard	✓



Content Types	
Create Custom Content Types	✓
Forms	✓
Blogs	✓
Forums	✓
News	✓
Images	✓
Videos	✓
Documents	✓
Generic Content	✓
Events	✓
Lists	✓
Content Organization	
Tags (Horizontal Classification)	✓
Categories (Vertical Classification)	✓
Custom Taxonomies & Filters	✓
Facet Taxonomy	✓
Network Taxonomy	✓
Hierarchical Libraries	✓
Site Control	
Granular Permissions	✓
Configuration Policy Administration Site Administrators, Editors, Designers	✓
Windows Authentication	✓
Single Sign-on	✓
Content Roll Back	✓
Browser-Based Administration	✓
Interface Localization and Customization	✓
Personalized Work Area	✓
Section 508 Compliance	✓
XHTML and WAI Compliance	✓
Design	
Drag & Drop Layouts	✓
Templates	✓
Themes for Style Management	✓



SEO and Web Analytics

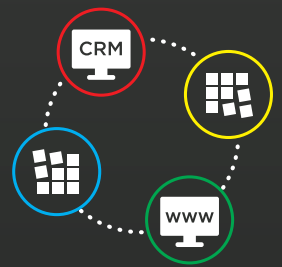
Built-in Web Analytics	✓
Contextual Analytics	✓
Metadata (Title, Description, Keywords)	✓
SEO Friendly, Extensionless, Localizable, Custom and Absolute URLs	✓
Canonical URLs	✓
SEO Filtering Tools	✓
Mobile Apps Builder	✓
Responsive Web Design	✓
Device-Based Page Redirection	✓
Mobile Navigation	✓
Built-In Device Emulator	✓
Sitfinity Box	✓

Social Media

Content Mashup Content Sources: Sitfinity Content, External RSS, Twitter, Email	✓
Twitter Connector	✓
Twitter URL Shortening Service	✓
Twitter Widgets Profile, Search, Favorites and List	✓
Facebook Pages Management	✓
RSS and Atom Syndication	✓
Social Sharing Buttons	✓
Blogs	✓
Forums	✓
Comments	✓

Ecommerce

End to End Shopping Cart Functionality	✓
CRM Products Available for Purchase Online	✓
Multiple Pricelist	✓
Default Pricelists	✓
Multi-Currency	✓
Shopping Cart Wish-list	✓
Multiple Payment Providers	✓
CRM Order or Invoice Creation on Checkout	✓
CRM Form Management	✓
Standard and Custom CRM Entities	✓
Parent / Child Forms	✓



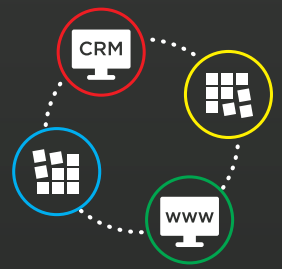
Sub-Grid Data	✓
Supports All Fields Types	✓
Supports Notes	✓
Single File Upload Widget	✓
SharePoint Document List Widget	✓
Rules Manager Widget	✓
Knowledge Base Articles with Subject Tree	✓
Standard and Custom Input Masks	✓
Field Level Read Only	✓
Make Field Required	✓
Empty and Required Message	✓
Filtered Lookups	✓
Lookup Add/Edit In-line	✓
Supports Query String Values	✓
Restrict by User or IP	✓
Submission Notification by Email	✓
CRM User Invite Process	✓
Form Decoration by Form or Site	✓

Email Campaigns and Newsletters (Inside Sitefinity)

Number of Subscribers	10,000
Personalization	✓
Mailing Lists Management	✓
Drag & Drop Email Template Modeling	✓
Dynamic Lists	✓
Advanced Reporting and Statistics	✓
Scheduling	✓
Content Reuse	✓

Digital Asset Management

Sitefinity Desktop Application	✓
Drag & Drop Digital Libraries	✓
Desktop Image Editor	✓
Live Document Editing	✓
Thumbnail Generator	✓
Preview Video & Audio Files	✓
Publish Word Docs as PDF Files	✓
Replace Images with One Click	✓

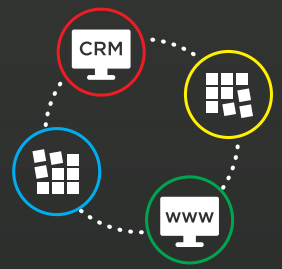


Performance	
Support for Load-Balanced and Webfarm Environments	Requires Portal Connector Enterprise
Client-Side Data Binding	✓
Caching	✓
Security	
Granular Permissions	✓
User and Role Management	✓
Audit Trail	✓
Spam Protection (CAPTCHA)	✓
Support for Full Trust Environment	✓
SSL Compatibility	✓
Pluggable Authentication	✓
NTLM and LDAP	✓
Authentication, Windows Authentication	✓
Extensibility and Customization	
Native Support for ASP.NET MVC and Razor	✓
Module Builder	✓
Fluent API	✓
Fully Exposed Native APIs	✓
RESTful Web Services APIs	✓
Geolocation API	✓
Security Framework	✓
Support for Multiple Membership Providers (LDAP support)	✓
Plug-in Framework for Modules and Widgets	✓
Search Service	✓
Notification Service	✓
Localization Service	✓
RSS Service	✓
Custom Fields	✓
Custom Content Type Builder	✓
Widget Configuration Editor	✓
Visual Studio Templates for Rapid Development	✓
Sitefinity Thunder - Visual Studio Plug-in	✓
Telerik Products Included	
ASP.NET AJAX Controls	✓
Silverlight Controls	✓
OpenAccess ORM	✓
Kendo UI	✓



THE PORTAL CONNECTOR

for Dynamics CRM/365



Native .NET Application

Native Support for Microsoft® Visual Studio 2010	✓
Support for Windows Azure	✓
Templates Based on Standard Master Pages	✓
Themes	✓
Support for CSS	✓
Custom and User Controls	✓
Provider Model	✓
Personalization Framework	✓
N-tier Application Development	✓

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