

## Compare CCS Customer Service Management (CSM) for SharePoint

FEATURE	SOLUTION OPTIONS	
	CCS CSM	Non-SP Standalone
<b>General</b>		
No additional software or hardware required	X	
Built on standard SharePoint	X	
Supports all versions of SharePoint (2007, 2010)	X	
Run on premise or Hosted SaaS	X	
Support for multiple service desks within organization	X	
Easily integrates with other applications	X	
Requires redundant collaboration functions (tasks, calendar..)	No	Yes
Requires Synchronization with Outlook	Auto	Yes
Requires separate DB, Security, maintenance etc.	No	Yes
Multi-Language support instant translation to audience	X	
<b>Customization</b>		
100% Customizable without code	X	
Create/cross reference additional data/lists	X	
Add/Edit/Delete List columns (fields)	X	
Create/Edit/Delete List Views (ticket list views)	X	
Create/Edit/Delete Workspaces (role based pages)	X	
Create/Edit/Delete Dashboards (charts, tables)	X	
Change Look and Feel (Your logo, Theme, Master page)	X	
Custom design form layouts	X	
Column/field level permissions for forms	X	
Cross reference Accounts, Contacts, Tickets, docs, tasks, etc.	X	
Turn on or off features and functions to fit your specific needs	X	
<b>Account, Contact and Opportunity Management</b>		
Track Incoming leads	X	
Capture Incoming leads from email and web forms	X	
Convert qualified leads to Opportunities	X	
Convert qualified leads to Accounts	X	
Convert qualified leads to Contacts	X	
Cross reference Opportunities, Accounts, Contacts, and all activities	X	
Quick search across Accounts, Contacts, Leads, Equipment etc.	X	
Link email collaboration with Accounts, Contacts and Opportunities	X	
Link customer service tickets to Accounts, Contacts and Opportunities	X	
Setup your specific lead process / status	X	
Setup your specific opportunity stages / status	X	
Account Overview - view all activities, documents, appointments, tasks	X	
Contact Overview - view all activities, documents, appointments, tasks	X	
Opportunity roll-up for sales reporting, forecasting	X	
Company / Product Announcements Management	X	
<b>Notifications / Alerts</b>		

**FEATURE**

**SOLUTION OPTIONS**

General	CCS CSM	Non-SP Standalone
New lead, opportunity etc. notification/alerts by email or SMS	X	
Automatic notification of new opportunity to sales rep or group	X	
Automatic notification of overdue lead follow-up	X	
Automatic Notification of Opportunity status change	X	
Custom notification templates with fields and link	X	
Alerts for Overdue Account actions or other conditions	X	
Notification at the Category/Type level	X	
<b>Document Management</b>		
Sales Material document library (proposals, contracts etc.)	X	
Marketing / Product Materials library	X	
Account Documents Library (link to Accounts/Equipment)	X	
Equipment Manuals / Warranties Library (linked to Equipment)	X	
Full check-in check out control	X	
Approval workflows for document changes	X	
<b>Email and Voice Collaboration</b>		
Send email from within a Contact	X	
Forward and link emails to Accounts, Contacts	X	
Drag and drop Outlook emails and link to tickets	option	
View email collaboration from Account, Contact view	X	
Call Contact from ticket info via Skype or Live	X	
Support Chat/messaging	option	
Phone call log linked to Contact, Account	X	
Send email to selected list	X	
<b>Sales Team Collaboration Support</b>		
Link Team discussion by Account / Opportunity	X	
Link to sales team calendar for appointments	X	
Link Accounts, Opportunities to staff/team tasks	X	
Create team resource Links for external sales resources	X	
<b>Customer Service Module</b>		
<b>Issue/Service Request Capture</b>		
Capture from any email and convert to ticket	X	
Capture all types of attachments and link to ticket	X	
Drag and drop email from Outlook and convert	option	
Capture from external web page form	X	
Capture from SharePoint form (end-user specific)	X	
Quick add for Phone calls coming in	X	
IVR Link	option	
Capture from mobile/smart phone entry	option	
<b>Customer/Contact Interface</b>		
Client/Customer Workspace for ticket/request tracking	X	
Customer facing and Internal Knowledgebase	X	

**FEATURE**

**SOLUTION OPTIONS**

General	CCS CSM	Non-SP Standalone
Auto fill in of Agent info from AD or SP user info	X	
Customer can create/view tickets for multiple service desks	X	
<b>Notifications / Alerts</b>		
Notification/alerts by email or SMS	X	
Automatic notification of new ticket to person or group	X	
Automatic notification of ticket assignment	X	
Automatic Notification of ticket completion	X	
Custom notification templates with fields and link	X	
Alerts for Overdue tickets or other conditions	X	
Notification at the Category/Type level	X	
<b>Ticket Processing/Management</b>		
Assign one or many staff or groups	X	
Automatic assignment to staff or group by category	X	
Work log for tracking activities with date/time stamp	X	
Link Tickets to Knowledgebase articles	X	
Full escalation/SLA alerts and reminders	option	
Track personnel time and cost per ticket	X	
Set billing levels for chargeback	X	
Record Elapsed time with start and stop clock	X	
Approval workflow by Category/Issue type	X	
Staff assignment from SP groups	X	
Advanced Ticket Search with unlimit conditions	X	
Print Work Orders	X	
<b>Email and Voice Collaboration</b>		
Send email from within ticket	X	
Forward and link emails to tickets	X	
Drag and drop Outlook emails and link to tickets	option	
View email collaboration from ticket view	X	
Call Contact from ticket info via Skype or Live	X	
Support Chat/messaging	option	
<b>Knowledgebase and Satisfaction Surveys</b>		
Full knowledgebase for each service department	X	
Search Knowledgebase from ticket	X	
Create Knowledgebase article from ticket	X	
Full customer satisfaction survey support	X	
Link to survey on ticket completion	X	
<b>Team Collaboration Support</b>		
Link tickets to Team discussion by request/issue category	X	
Link tickets to support calendar for service appointments	X	
Link tickets to staff/team tasks	X	
Link tickets to service documents	X	

**FEATURE**

**SOLUTION OPTIONS**

General	CCS CSM	Non-SP Standalone
<b>Service Management and Measurement</b>		
Service Staff workspace/views (my tickets)	X	
Management workspace/views	X	
Over a dozen pre-defined Ticket list views	X	
Filter, sort, summarize ticket information	X	
Search across all fields for ticket info	X	
Dashboard for real-time measurement	X	
Supports real-time definable charts	X	
Supports real-time definable tables	X	
Export any ticket data (by view) to Excel or Access	X	
Excel based reporting application with pre-defined reports	option	
Define and schedule periodic reports	option	
Email reports in PDF format	option	
<b>Security</b>		
Control access at the site, workspace, list and field level	X	
Separate service desk permissions by department or region	X	
Requires additional log in for end users	No	
<b>Equipment Tracking</b>	Option	
Upload/Import existing Equipment information	X	
Assign Equipment to Accounts and Locations	X	
Link Issues/tickets to Equipment	X	
View all incidents/repairs/maintenance per Equipment	X	
Equipment Maintenance Calendar		
Track vendors and Equipments from vendors	X	
Track Service Contracts and link to Equipment	X	
Create warranty expiration alerts	X	
Link manuals/documents to Equipments	X	
Create hyperlink to vendor support sites for Equipment	X	
Link to Network Inventory for IT Equipment autodiscovery	X	
Track Equipment and Parts	X	
Product Catalog	X	
Create Recurring maintenance tickets	X	
View all Equipment installed in an Account	X	