

Your Complete Guide to Choosing a CRM/365 Portal Solution



Investigating any technology solution for your business can be overwhelming. How do you know if you are asking the right questions and getting the best solution available?

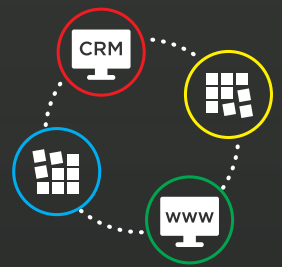
We have compiled a comprehensive list of questions for you to ask yourself and your potential vendors when considering a Dynamics CRM/365 Portal Solution for your business.

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Things to Ask when considering a web portal

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We have compiled a comprehensive list of questions for you to ask yourself and your potential vendors when considering a Portal Solution for your business.

Organization Questions to ask yourself when considering a portal.

What are the top three business objectives for our portal? (ie improved customer support, improved data accuracy, reduced task load)

1. _____
2. _____
3. _____

What are the key business functions of the portal? (ie case mgmt., event registration, customer profile mgmt., order mgmt.)

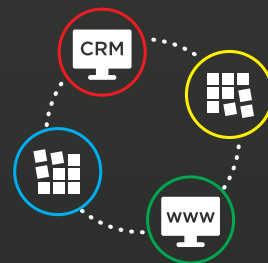
What is the allotted budget for a portal? (including software licensing, services, hardware, etc)

Do we plan on building the portal or outsourcing development?

- ☐ Build our own portal ☐ Outsource portal development

Do we want to host our portal onsite, in the cloud or with a third a party?

- ☐ Host portal onsite ☐ host portal in the cloud ☐ use a third party hosting provider



What version of Dynamics CRM are we currently running?

☐ CRM 4 ☐ CRM 2011 ☐ CRM 2013 ☐ CRM 2015 ☐ CRM 2016 ☐ CRM Online ☐ 365

Is there a timeline or deadline to get a portal in place?

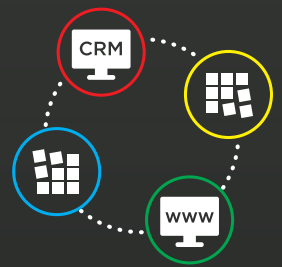
Have we identified the key internal stakeholders?

☐ yes ☐ no

Vendor Checklist

If you are considering a comprehensive portal solution, then The Portal Connector and Microsoft Portals are the two main options you will look at. We are providing a list of questions to help you thoroughly investigate and compare the two solutions. We have also taken the liberty to complete the answers for The Portal Connector option.

	The Portal Connector for Dynamics CRM/365	Dynamics 365 Portals
What versions of CRM does your current solution support?	<input checked="" type="checkbox"/> CRM 2011 <input checked="" type="checkbox"/> CRM 2016 <input checked="" type="checkbox"/> CRM 2013 <input checked="" type="checkbox"/> CRM Online <input checked="" type="checkbox"/> CRM 2015 <input checked="" type="checkbox"/> 365	<input type="checkbox"/> CRM 2011 <input type="checkbox"/> CRM 2016 <input type="checkbox"/> CRM 2013 <input type="checkbox"/> CRM Online <input type="checkbox"/> CRM 2015 <input type="checkbox"/> 365
Does your solution work with custom entities?	Yes, any data or entity in CRM/365 can be used	
Does your license include unlimited portal users?	Yes	
How many feature releases do you have per year?	3-4 releases that include new and enhanced features.	
How detailed is your security model?	<input checked="" type="checkbox"/> User and role based security <input checked="" type="checkbox"/> Granular security for individual elements on a page	<input type="checkbox"/> User and role based security <input type="checkbox"/> Granular security for individual elements on a page
Do you offer a trial or demo version of your solution?	Yes, with free one-on-one training	
Where can my portal be hosted?	Anywhere a website can be hosted—hosted onsite, hosted in the cloud or a third party hosting provider.	



Skill Sets Required for your solution

The Portal Connector and Microsoft Portals have approached portal development from different perspectives. Your choice may depend on the skill sets required to set up, use and modify your solution. The Portal Connector skill sets are indicated below.

What Skill Sets are required for each of these tasks?	Microsoft Office User	Dynamics CRM User	Basic HTML	HTML Developer	.NET Developer
Build new website templates					
Define and Assign security rights					
Create a form based on multiple entities					
Change an existing form					
Create new web pages					
Add text and images to a webpage					
Add a grid of CRM data to a webpage					
Add a chart or graph to a webpage					
Add blogs, forums, news to a webpage					
Create an eCommerce website					
Configure credit card / payment processing					
Configure SharePoint document and list integration					

Please note that if you have development staff available in your organization, the complete API for The Portal Connector is opened up to allow for custom development.

Design Considerations for the portal solution

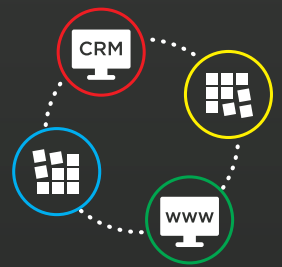
	The Portal Connector	Dynamics 365 Portals
How does your solution support the display of data on cell phones and tablets?	With built in responsive design capabilities, your portal will display on any device with no coding required.	
Does your solution support all of the new web frameworks (for example bootstrap, JQuery, MVC and more)?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
How does your solution support moving between development, testing, UAT to production?	Using our import/export tool or the site sync feature, either option allows seamless movement through the process.	

Budget Requirements for the portal solution

	The Portal Connector	Dynamics 365 Portals
What is your standard license fee?	\$15,000, one time cost	
Is the license perpetual?	Yes	
Do you have a SaaS or subscription option?	Yes, we offer flexible licensing options that include SaaS and Subscription options.	
What is the annual maintenance fee?	20% of the portal license, included in the first year.	
What is the license cost for development, testing and UAT environments?	No cost	
How is the solution licensed?	By domain	

How Flexible and Adaptable is the portal solution?

	The Portal Connector	Dynamics 365 Portals
How does your solution reduce the time it takes to execute my portal?	The drag and drop tools and pre-built templates / solutions reduce portal development to hours and days. With TPC's extensive javascript API it makes complex UI tasks trivial.	
Does your solution allow me to customize aspects of my portal easily and without a developer?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
How does your solution handle my custom business requirements?	We provide a series of widgets that define business rules and data validations.	
How can I adapt the portal solution to handle future business needs?	The Portal Connector works with any CRM data and structure you have today or tomorrow, by using CRM's API and development best practices it inherently supports the current and future ecosystems that Microsoft promotes.	
If I have developers on staff, how do they customize the solution?	We have an open API that allows developers to customize every aspect of the solution.	
Does your solution support open authentication?	<input checked="" type="checkbox"/> Facebook <input checked="" type="checkbox"/> Twitter <input checked="" type="checkbox"/> LinkedIn <input checked="" type="checkbox"/> Custom	<input type="checkbox"/> Facebook <input type="checkbox"/> Twitter <input type="checkbox"/> LinkedIn <input type="checkbox"/> Custom
Can your solution be customized with C# code in Visual Studio?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does your portal support Right to Left Languages?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No



How is the portal solution supported?

	The Portal Connector	Dynamics 365 Portals
Is one-on-one training included with your license fee?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
How many support tickets to I get with a license?	3	
What does it cost for additional support tickets?	\$250.00	
How do I access a live support person on the phone?	We offer daily live Q&A sessions that customers can attend. During this time you get a live person on the phone that you can engage with.	
Do you have a community support forum?	Yes, available on our website.	
Do you have published technical and configuration documents?	Yes, available on our website.	

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