

Cobweb Hosted CRM - Service Description

The Cobweb Hosted CRM service provides you with the flexibility to integrate sales, customer services and marketing processes to provide an exceptional customer experience and maximise your business potential.

1. Why choose Cobweb CRM?

The Cobweb Hosted CRM service is a fully flexible solution that is easy to deploy and is intuitive to use. Get up and running fast by using one of our pre-defined service options, our QuickStart program or, work with our Professional Services team to build a bespoke solution to your exact requirements.

We will help you every step of the way making sure your solution is quick and easy to set-up and administer. Our service support offers you 24/7 telephone support, managed data migrations, and bespoke user training*.

The Cobweb Hosted CRM service seamlessly integrates with Microsoft Office programs, including Microsoft Office Outlook, Microsoft Office Word, Microsoft Office Excel, and powerful data sharing tools such as Microsoft SharePoint and Microsoft SQL Server Reporting Services. *Chargeable service

Enhanced Productivity	Streamline Processes	Simplify Reporting
<ul style="list-style-type: none"> • Full Outlook integration • Secure anywhere access • Role based user access and security • Single password when used with Cobweb Hosted Exchange 2007 • Mail Merge with Word • Custom views based on user role 	<ul style="list-style-type: none"> • Easy to use Workflows • Built in processes to speed up simple tasks • Single view of Customer • User based activity reporting • Use Microsoft CRM accelerators 	<ul style="list-style-type: none"> • Powerful reporting wizard • Useful in-built reports • Easy to export data • Dynamic data linking to excel • Create live dashboards using Cobweb's SharePoint 3 service

2. Service options

Cobweb provides 4 service options for Cobweb Hosted CRM, plus a QuickStart and bespoke solution to meet the needs and requirements of any size of business.

2.1 Cobweb Contact Plus

Advanced contact and customer management. Single customer view across your users - customers, contacts

- Track all customer conversations and interactions
- Access anywhere using Microsoft Outlook and Web Browser
- Account summary and contact reporting
- 1GB storage space
- Minimum of 3 users

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2.2 Cobweb Sales Accelerator

Easy Sales Force Automation for small and medium businesses.

As *Contact Plus*, plus:

- Sales pipeline management - leads and opportunities
- Easy, real-time pipeline and sales reporting
- Fully configurable and customisable
- 2GB storage space
- Minimum of 3 users

2.3 Cobweb Hosted CRM Small Business

Marketing and Sales Automation with Customer Management As *Cobweb Sales Accelerator*, plus:

- Marketing Automation - marketing lists and mail merge campaigns
- Fully configurable and customisable
- 5GB storage space
- Minimum of 3 users

2.4 Cobweb Hosted CRM Enterprise

Full customer lifecycle management for any business

As *Cobweb Hosted CRM Small Business*, plus:

- Customer Service - case/incident management, contract management, resource scheduling, knowledgebase
- Fully configurable and customisable
- Unlimited storage space
- Minimum 3 users.

Service Options	1	2	3	4
Manage Contacts & Accounts	√	√	√	√
Track customer communication	√	√	√	√
Access to 24/7 Support	√	√	√	√
Advanced Find (Smart Search)	√	√	√	√
Backups for DR	√	√	√	√
Data Import	√	√	√	√
Localised	√	√	√	√
Mail Merge	√	√	√	√
Quick Campaigns	√	√	√	√
Single Password	√	√	√	√
View Reports	√	√	√	√
Web Access	√	√	√	√
Manage Sales Pipeline		√	√	√
Create and Manage Marketing Campaigns			√	√
Manage customer support incidents				√
Web Portal Access			√	√
Utilise CRM Add ons & Accelerators				√
Add roles				√
Add users				√
Campaigns			√	√
Change Roles				√

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Create Reports		√	√	√
Create Workflows			√	√
Customisation		√	√	√
Offline Access				√

3. Support model included and chargeable

Support for the service, 24 hours a day, 365 days a year for two registered administrative users.

3.1 Online Support

- Cobweb Knowledgebase provides FAQ's, Recorded Demo's and how to documents
- The CRM Resource Centre is a web-based community portal for sharing CRM best-practice and feature information, and is accessible from within the CRM client interfaces.

3.2 Phone Support

- 24*7 phone support for all system break fix incidents, for instance error pages and system access
- Provide trouble shooting assistance and help identify problems
- Paid support is available for configuration support, customisations and system development.

3.3 Support Escalations

- Access to a technical expert as required during normal working hours
- Paid support available for system development, customisation and other system integrations such as accountancy programs
- Onsite consultancy, training and design available as a Professional Service.

4. Service Level Agreement

All service level guarantees are based on service monitoring data collected over whole calendar months*.

Cobweb shall use reasonable care and skill when providing Services but does not guarantee that the Services shall be continually available to the Customer.

There may be occasions when Services are disrupted through an error or act of the Customer or another third party or, circumstances outside the reasonable control of Cobweb ("Service Disruption").

In the event of unavailability of Services to the Customer, other than in the case of Service Disruption, Cobweb shall reimburse the Customer ("Service Credit") as follows:

Service Credit (% of monthly charge)	Service Availability
25%	99.0% to 99.5% inclusive
50%	95.0% to 98.9% inclusive
100%	Less than 95%

You also receive:

- The service availability calculation excludes standard scheduled maintenance
- Access to online self-help via the Cobweb Knowledgebase and e-learning self-paced training modules.

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5. Back-up and Restore

The data within the Cobweb Hosted CRM is backed up for the purpose of service restoration in the event of disaster recovery. Backup tapes are rotated on a “Grandfather, Father, Son” basis with one weekly tape every four weeks kept for 12 months and one in every 12 monthly tapes kept for a seven year period.

The tapes are stored in a highly secure environment, off-site. A full database restore service is available to you should you need it for business continuity, it will be subject to a Professional Services charge.

6. Data Management and Migration

6.1 Data management

At all times the data stored within the Cobweb Hosted CRM service is 100% the property of the customer. You also own your customizations, workflow, and any application development you add to the Cobweb Hosted CRM server.

In the case of service termination, data can be provided to the customer on DVD or other Portable Digital Media subject to a Chargeable Support Service fee. Specific limited and unlimited document and data storage is included in the various service options and is subject to the fair use policy.

6.2 Data Migration

Whether you are currently using a collection of spreadsheets, Outlook contacts folders, or you have an existing contact management or CRM system, we can help you migrate your data into Cobweb Hosted CRM Solution. As part of the Cobweb Hosted CRM service you will be provided with a data template that will make the data migration seamless.

Manage Data Intelligently:

- The Data Import Wizard provides capabilities for end-users to quickly and simply import and validate data into the CRM system. Built-in import mapping features are available for common file formats and custom field mappings can be saved for reuse later saving time on repetitive work
- Duplicate detection ensures data integrity across the CRM system when importing or inputting new data records with the option to merge or remove duplicate records as necessary

7. Control Panel

Our Cobweb Control Panel allows you to complete the following:

- Manage access modes – what permissions each user has over Cobweb Hosted CRM itself i.e. Full Access, Admin Access, Read only
- Manage security roles of the user i.e. “Who is the marketing manager” etc
- Configure emails to track and link with CRM records using any email address
- Basic User management features i.e. user creation, password management
- Access your current and historical billing information
- Choose other services at your convenience to compliment your Cobweb Hosted CRM Solution.

8. Provisioning

The Cobweb Hosted CRM service provides you with a choice on how you have your service provisioned:

8.1 Service Provision only

The service is made available for you to configure and upload data as per your requirements

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8.2 Manage Setup:

Includes initial site configurations and basic migration support. You will receive an Excel template to populate with your existing data and our provisioning team will migrate the data into your Cobweb Hosted CRM system for you

8.3 Quick Start:

The quick start is a Professional Services package that enables you to work with a CRM expert to:

- Complete discovery, analysis and design process
- Cleanse and/or migrate your data
- Provide admin and user training
- Create custom reports, template changes and work flows.

9. Billing

Cobweb operates on a monthly billing cycle on a per-user-per month charge model. You can have peace of mind rest that your billing is transparent and predictable with no hidden extras and the Cobweb Control Panel allows you to check your monthly bills when and where you want, making it easy for you.

10. Customer Obligations (Technical Requirements)

To run Cobweb Hosted CRM Solution you will need the following specifications on your computer:

- Windows XP SP2 or above, including Vista (32/64 bit supported)
- Internet Explorer 6 SP1 Browser or above only
- If you choose not to use the Email Router and install the CRM Plug-in for Outlook, then they will need Outlook 2003 SP2 or above.

11. Technical Features

For performance scalability and high-availability, the CRM system is build upon a load-balanced and cluster solution for all system components – Microsoft SQL Server, Windows Web services & Microsoft Exchange Server.

12. Platform Features

- Support for a broad-range of email systems is available for integration with the Cobweb Hosted CRM service.
- Native support for Microsoft Hosted Exchange is included and makes full use of the email integration features within CRM.
- Support for other POP3 and outbound SMTP mail systems is available for integration with existing on-premises mail services
- The Cobweb Hosted CRM service supports the following European language locales – English, German, Dutch, French, Spanish, Danish, Italian, Brazilian-Portuguese, Finnish, Norwegian, Swedish, Iberian-Portuguese, Russian, Turkish, Czech, Hungarian, Polish, and Greek
- International currency support and exchange rate locking is available to support transactions in a local currency
- Microsoft Dynamics CRM 4.0 has been optimized for best-performance over the Internet to provide a productive and responsive end-user experience.

13. Security

- The delivery of the Cobweb Hosted CRM Service is regulated by our accredited & audited ISO27001 Information Security Management policies and procedures
- The multi-tenanted architecture, built into Microsoft Dynamics CRM 4.0, allows the hosting of multiple distinct CRM instances on a common infrastructure platform.

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- The security model of Microsoft Active Directory and Microsoft SQL Server ensure absolute data segregation across customers.
- No other customer has permissions to see or access any data other than their own. Each customer instance has a dedicated Microsoft SQL Server database for all CRM documents and data
- Our network security within our state-of-the-art data centre is fronted by multiple resilient firewalls with constant monitoring of network traffic, router load and application behaviour
- The data centres are managed on a 24*7 basis by the Cobweb Network Operations team to ensure maximum reliability, system redundancy and high fault tolerance
- Each user has a unique login, allowing them to set preferences and access only those documents/areas to which they have been authorised.
- Authorisation works through an administrator setting preferences to specific information and parts of the site, and can be controlled by role level
- Strong password policies are set by the web-based Cobweb Control Panel – a self-service administration portal.
- All client access, both web and Outlook Client is secured with 128- bit SSL encryption.
- All data resides in the UK and is subject to UK data protection laws.