FEATURES & ENTERPRISE MODULES

GALEFORCE CRM FOR FINANCIAL SERVICES V3.1

The following features and enterprise modules are available only in GaleForce CRM for Financial Services. For information about Microsoft Dynamics CRM base features and functionality, a feature sheet is available upon request. Enhanced features are indicated by √√√.

Application Features

FEATURE	DESCRIPTION	MS CRM	GF CRM
Account & Holding Portfolio Management	Tracks asset, liability and investment products in multiple currencies. Balances, terms, interest rates, payment amounts and payment frequency are displayed for various types of accounts. Also shows all holdings associated with an investment account, their cost and market values.		√
Account Transactions	Access to recent financial transactions for a customer, account, or specific holding. Transaction data is recorded in an account transaction "chapter" that stores transaction type, symbol, date and value in chronological order. The data can be entered manually, pulled in real-time from a back-office system, or imported nightly.		√
Activity/Task Management	Provides financial services-specific schema & form extensions, custom field additions, and ability to relate custom entities to system entity, including Microsoft Outlook generated action items.	√	√√√
Agreement Management	An accepted quote that describes the nature and terms of the product(s) and/or service(s) offered. Drives future document creation and allows users to track a client's signed documents.		√
Alerts: Scheduled & Real-Time	Notifies users of records requiring urgent attention, and records with important notes attached. Alerts can be generated by external systems, internal custom processes, or manually by users. Users can create notification and record alerts that are flagged and displayed as alerts.		√
Call List Management	Allows users to define criteria for the types of calls to be made regularly as a reactive measure to account or client performance, and for complete call lists to be updated and generated on a systemic basis.		√
Call Planning	Allows users to proactively plan, schedule and track interactions with a client over a period of time. Also provides management visibility into account or client follow-up, and that critical customer touch points are planned and acted upon.		√
Case Management	Financial services-specific schema & form extensions	√	√√√
Company Management	Redirected form, allowing full use of all GaleForce Framework features Relate custom entity to system entity. Financial services-specific schema & form extensions.	√	√√√
Contact Management	Redirected form, allowing full use of all GaleForce Framework features Relate custom entity to system entity. Financial services-specific schema & form extensions.	√	√√√
Customer Field	Tracks which customer a record belongs to, and supports the creation of parented custom entities. Allows IT and Business Analysts to create custom entities that can have a parent/child relationship to either a contact or a company.		√
Deal Management	Facilitates the capture of interest in financings during early deal marketing efforts. Based on automatically matching the investment characteristics of the deal and expressed investment preferences of the investors, marketing professionals can identify potential investors and invite them to upcoming events or roadshows.		√

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Employee & Team Roles	Enable users in different departments, roles and teams to see forms and views that have been customized to contain only the information each user needs, or has been given access to.	√	√√√
Entity Customization	The ability to create and customize entities, entity fields, and message strings using the UI entity tools.		√
External Data Entities	Pulls data from external systems on request in real-time, and displays it within the CRM interface, without bringing the actual data into the CRM system. Achieved via integration using BizTalk or a custom .NET assembly.		√
Household Management	Provides an expansive client relationship view by means of grouping multiple clients or contacts into one Household. Accounts, holdings, agreements, client interactions and notes associated with all Household members can be viewed, as well as their relationships. A Household can also be associated with other Households, for an even broader view of a customer's interactions. New functionality includes the ability to associate companies within households and create roll-up households.		√
Joined Views	Allows for the presentation of columns of data side by side that may exist in separate but related tables. It may be important to list a company tax ID number beside the contact data for a contact associated with that company to facilitate fast access to information.		√
Lead Management	Financial services-specific schema & form extensions	√	√√√
Multi-currency Support	Allows tracking of accounts in multiple currencies, and supports viewing of overall customer value in any user-selected currency.		√
Notes and Attachments	Documents are merged in a single source by Microsoft Sharepoint.	√	√√√
Opportunity Management	Modified form to make use of GaleForce CRM system enhancements, and integrated with Sales Process Management	√	√√√
Outlook Desktop Client	Unlike the Microsoft SDK, the GaleForce Platform is compatible with both the web and Outlook desktop clients.	√	√√√
Quote Management	Relate custom entity to system entity. Financial Services specific schema & form extensions	√	√√√
Relationship Tree	An intuitive tree-based structure that provides users with a complete view of the customer's relationship with the financial institution, including their household, contacts, accounts, opportunities, activities, circle of influence and more. Custom relationships can also be mapped between contacts, companies and users, to show any relationships that exist between them.		√
Reports	Provides the ability to create line-of-business specific reports, using Microsoft SQL Server Reporting Services.	√	√√√
Rules-Based Forms and Views	Enable users in different departments, roles and teams to see forms and views that have been customized to contain only the information each user needs, or has been given access to.		√
Sales Process Management	Financial services-specific schema & form extensions	√	√√√
Template Editor	Build customized templates for critical business processes including Goal Plans, Call Plans and Call Lists. Users can work from standard templates, or create personal templates.		√

Enterprise Modules

MODULE	DESCRIPTION	MS CRM	GF CRM
Analytics Dashboard	The Dashboard uses Microsoft Scorecard Manager to define, display and track an overview of the user's most important information, including critical tasks, quotas, sales force management, and key performance indicators (KPIs). Provides quick access to commonly used functions, records and documents. Web parts can be added to the dashboard to show critical CRM data and analytics.		√
Auditing	Captures data changes at the record and field level, including the author and date/time of change. Can be configured to specify which data actions should be audited for each type of record (i.e. Create, Update, Delete). The "View Audit Log" permission permits only authorized users to see and search audit records. Installation of this functionality is optional at time of deployment or at a later date.		√
BizTalk Adaptor	Provides automated bi-directional integration between MS CRM and other enterprise systems. The adaptor allows BizTalk Server to send and receive data from MS CRM through the logical business layers, preserving the security, updatability and integrity of system data and workflow. Leveraging this best-in-class integration technology, the GaleForce BizTalk Server Adapter for MS CRM enables consistent, powerful and scalable integration with hundreds of backend systems. This facilitates quick integration with various back-office systems, without needing to develop separate integrations for each system.		√
Field Level Security	Compliance and security requirements may dictate that only certain users can view or edit certain fields belonging to a specific record (such as a Contact or Company). In MS CRM, permissions for view/read/write and security are by default implemented at the Record level – users can see all fields for a record, or none. GaleForce CRM delivers the ability to define field level security for any entity, and restrict permissions by role to each field. Permission values include "None", "Read only", or "Read/Write." Field level security cannot increase the user's permissions over what their established role has already granted them for a particular record, but can impose additional restrictions on sensitive field level data.		√
MobileAccess	Provides online/offline access to Microsoft CRM data for Blackberry users, including contacts, companies, opportunities, leads and activities, with an easy-to-use, multi-tasking user interface.		√

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