

# Copy of Customer365 (Self-service) cheat sheet (External)

## Self-Service Comparison

- The portal site that Sage CRM provide is limited and provided as a framework only so while we may say No to items they could be implemented but are not out of the box

Feature	Sage CRM Out-of-the-box	Customer 365
<b>Users</b>		
Password Recovery	Yes	Yes
Self-registration	No	Yes
Password Reset/Change	Yes	Yes
User Management	Yes - via Sage CRM	Yes - via Sage CRM
<b>Case Management</b>		
Case Search	No	Yes
Case List	Yes	Yes
Case List filter	No	Yes
Create Case	Yes	Yes
View Case	Yes	Yes
Edit Case	Yes	No *We advise against this
Create Tracking note	No	Yes
View Communications	No	Yes
Attach file	No	Yes
<b>Quotes/Orders</b>		
View Quotes/Orders	No	Yes
Print	No	Yes
<b>Knowledge base</b>		
Solutions	No	Yes
<b>General</b>		
Company Info (logged on user)	No	Yes
Contact us Page	No *Request product info which creates a LEAD record	Yes
File Resources/Downloads	No	Yes
Smartphone/Tablet Support	No	Yes - Responsive site
Theme	No	Yes
Pricing		
License Type	Server-	Server
Cost	Free - comes with Sage CRM but development costs	Price on application

CRM integrations	Sage CRM	Sage CRM
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