

CRM to CSR Feature Comparison Matrix

(The CSR portal is included in base nubill services, CRM support is a value add option.
This matrix only highlights customer care related features.)

Features	CSR	CRM
Web Portals	○	○
Smart Client Portals	⊘	○
Account Notes and Histories†	○	○
Basic Knowledgebase Support	○	○
Advanced Knowledgebase Support	⊘	○
CSR Alerts & Reporting	○	○
CRM Alerts & Reporting	⊘	○
Trouble Ticket/Work Order (“Issues”) Support	⊙	○
Customer Issues Correspondence Tracking	⊙	○
Customer Satisfaction Tracking	⊙	○
Workflow and Workload Management	⊙	○
Sales Opportunities	⊘	○
Inventory Management Integration	⊙	⊙
Provisioning Integration	⊙	⊙
Taxation Integration	⊙	⊙

Matrix Legend

- Supported
- ⊙ Supported with Add-on Service
- ⊘ Not Supported

†Issues related notes and histories only available with CRM or the Issue Management Add-on Service.