



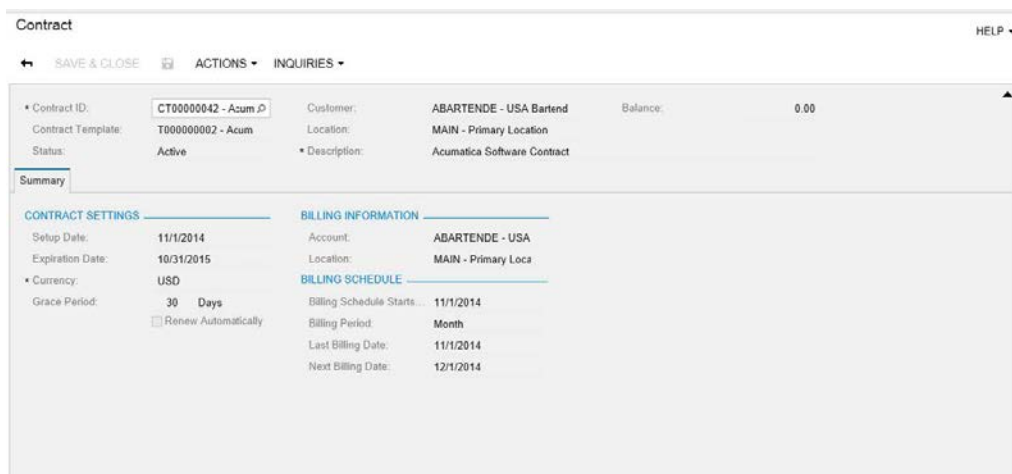
# CUSTOMER SELF-SERVICE PORTAL

## GIVE CUSTOMERS 24/7 SELF-SERVICE ACCESS

Acumatica Customer Portals, part of the Customer Management Suite, enable you to create a customer portal experience to help you work and communicate with customers more efficiently.

## REDUCE STAFF WORKLOADS, INCREASE CUSTOMER SATISFACTION

- **Empower your partners and customers.** Helpful tools enable customers to see all the relevant information about their interaction with your organization and perform account-related activities online. You can also reduce customer support questions by providing anytime access to your knowledge base and document sharing.
- **Leverage your Acumatica investment.** Acumatica Portals use the same database and interface as your own Acumatica instance, so you can efficiently create online experiences including B2B ordering\* and self-service access customer portals.



The screenshot displays a 'Contract' page with the following details:

- Contract ID:** CT00000042 - Acum
- Contract Template:** T000000002 - Acum
- Status:** Active
- Customer:** ABARTENDE - USA Bartend
- Location:** MAIN - Primary Location
- Description:** Acumatica Software Contract
- Balance:** 0.00

The 'Summary' section is expanded, showing:

- CONTRACT SETTINGS:** Setup Date: 11/1/2014, Expiration Date: 10/31/2015, Currency: USD, Grace Period: 30 Days,  Renew Automatically
- BILLING INFORMATION:** Account: ABARTENDE - USA, Location: MAIN - Primary Loca
- BILLING SCHEDULE:** Billing Schedule Starts: 11/1/2014, Billing Period: Month, Last Billing Date: 11/1/2014, Next Billing Date: 12/1/2014

*Customers can easily access their contract information, including billing details*

\*The B2B Portal works with and requires Acumatica's Customer Management and Distribution Management Suites.

## KEY BENEFITS

### "ALWAYS ON"

- Grant customers access to account information 24 hours a day, 7 days a week, without picking up the phone or sending an email

### CLIENT SELF-SERVICE

- Offer customers the ability to perform activities and answer their own questions by providing access to the information they need most

### EXTEND THE VALUE OF ACUMATICA

- Leverage your existing Acumatica solution to deliver even greater value to those you serve by offering new ways for them to access information and perform key activities

### DOCUMENT SHARING

- Provide a secure location to share marketing material, educational material, company policies, and FAQs with customers

### REDUCE SALES TEAM WORKLOADS

- Enable your sales team to focus on more strategic activities by reducing the number of sales and support related inquiries they receive

### ON-LINE ORDERING

- Business partners and resellers can view inventory and place orders themselves—speeding up the ordering process and freeing your sales team



### CUSTOMER SELF-SERVICE PORTAL FEATURES AND CAPABILITIES

#### Customer Self-Service Capability

Grant customers 24/7 access to their account information, create and manage support cases, and create and track online orders—all without picking up the phone or sending an email.

#### Financial Overview

Give customers access to all historical documents, contracts, balances, due dates, payments received, and amount due.

#### Up-to-date Pricing and Inventory Details

Ensure accurate inventory and pricing is always displayed because it is connected to the same database as your Acumatica Distribution Management applications.

#### Case Management

Allow customers to submit new cases, which seamlessly flow into Acumatica ERP. The customers can view the cases they submitted, track the status of each case, provide additional information when required, and reopen closed cases.

#### Knowledge Base

Allow customers to search for answers to their questions, allowing more customer self-service and generating fewer support calls.

#### Document Sharing

Provide a secure location to share documents with customers, such as marketing material, educational material, company policies, and FAQs, without building a separate web page.

#### Online Ordering

Let your business partners browse inventory and place orders on-line 24 hours a day, 7 days a week. The customer can track the status of the order, shipments, invoices.

#### Online Catalogue

Give your customers access to the products you sell with their descriptions and images. You control which products are visible to each user and which warehouses goods can be shipped from.

### THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

#### STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

#### ADAPTABLE SOLUTION

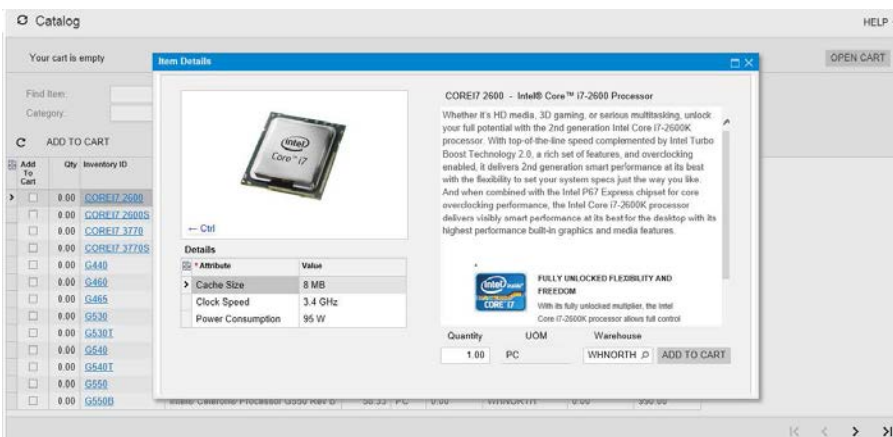
Add and extend:

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

#### YOUR BUSINESS ACCELERATED

Get a single version of the truth:

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows



Create detailed product listings with photos in your B2B Portal ordering catalog