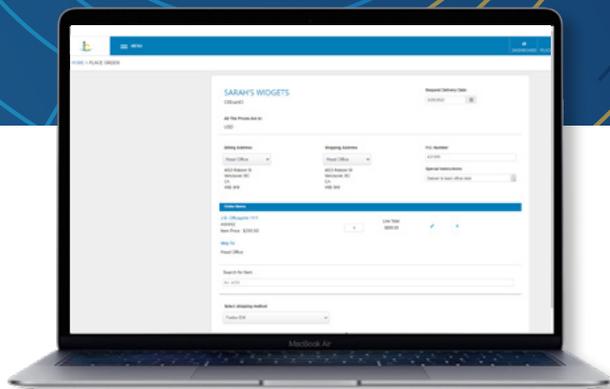# Customer Portal

An interactive, self-service B2B hub for your customers.

> *According to Microsoft, 90% of consumers expect an online portal for self-service."*

In a highly competitive, global economy, savvy buyers gravitate toward customer-centric companies that are differentiated, responsive, and easy to do business with. It is vitally important, therefore, to deliver an exceptional customer experience.

So, where should you start?

Introducing Customer Portal for SAP Business One

Customer Portal by Vision33 empowers companies of any size to build interactive, self-service B2B portals for their customers.

It is a modern alternative to email, phone, and chat, and gives your customers the ability to transact business when it's most convenient for them. It also streamlines operations, reduces administrative efforts, and frees up staff to tackle more strategic initiatives.

The secure, flexible, browser-based solution enables two primary functions for your B2B customers:

- Perform common business transactions such as placing orders, making payments, and tracking shipments.

- Access account-related details via a private, secure dashboard.

Build a differentiated, self-service experience for your customers.

Vision33's Customer Portal is an add-on solution for SAP Business One. That means each Portal is configured within Business One, enabling you to seamlessly deliver a rich, valuable, and unique experience to each client. Customer Portal is mobile-friendly and accessible via a standard web browser. Each Portal displays account-specific data retrieved directly from SAP Business One in real-time reports. Frequently performed business transactions, like placing an order or paying an invoice, are readily accessible via the menu.

Customer Portal will help you:

Boost operational efficiency

Self-service portals reduce inbound customer inquiries and administrative tasks, freeing up support functions like sales, customer support, and accounts payable to focus on more important things.

Improve order accuracy

Manual order entry by internal staff is time-consuming and error-prone.

Increase cash flow

Integrated order and payment functionality accelerates buying cycles and increases cash flow.

Improve customer experience, satisfaction, and retention

People prefer to work with companies that are convenient and easy to do business with. Customer Portal puts B2B account management at your customers' fingertips.

With Customer Portal, you can:

Deliver 24/7 self-service access to real-time account details

Empower your customers to access reports and perform business transactions anywhere, anytime. Real-time integration with SAP Business One ensures your customers have access to their latest account details.

Take and manage orders online

Stop fielding order inquiries. With Order Pad, your customers can:

- Place new orders and quotes
- Add items to an existing order
- Quickly re-order items
- View order status

Accept online payments

Streamline and accelerate customer payments with online bill pay capabilities. Customers can pay with ACH (US only) or credit card.

Build bespoke dashboards and reports for each customer

Put critical account information at your customers' fingertips with custom dashboards and reports. Reports can be shared via email, downloaded, or printed, and can be formatted as pivot tables, charts, and grids.

Manage service calls

Enable users to submit service calls via Customer Portal's web interface. New service call submissions appear in the SAP Business One service module and email notifications alert your service desk that a new call has been created.

Conduct business in multiple languages

Serving non-English speaking markets? The Portal's interface can display any left-to-right (LTR) language.

Currency and date formats are displayed in the user's locale.

Extend your brand

Add your brand colors and logo to Customer Portal to expand brand visibility and give your customers a seamless experience.

Control user access and security settings

Configure each user's login settings to control which portals and role-based views they can access.

Streamline user access via integration with OKTA for single-sign-on (SSO) capabilities.

Advanced security settings such as password rules, expiration, lock out, and re-use restrictions keep account information safe.

Secure and reliable performance

Customer Portal is hosted on Amazon Web Services (AWS), ensuring reliable performance and the ability to scale as your business needs change.

Customer Portal runs on SAP Business One versions 9.3 and 10.0 (SQL and HANA).

Build your own customer portal today.

> "*Customer portals should be part of every customer service strategy. According to Bain & Company, great customer service can lead to higher customer retention rates and increased profits ranging from 25% to 95%.*"

Boost customer satisfaction and reduce administrative efforts with an interactive self-service hub for your customers.

Contact us or learn more at **vision33.com/products/customer-portal.**

A Trusted Partner

Vision33 solves customer business challenges through the promise of technology and the value it delivers. We partner with organizations in the public and private sectors to understand their vision and help them attain it with the right blend of strategy, consulting, and technology. Vision33 is consistently recognized by the industry for its notable growth and dedication to helping customers achieve success.

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