Acumatica
The Cloud ERP

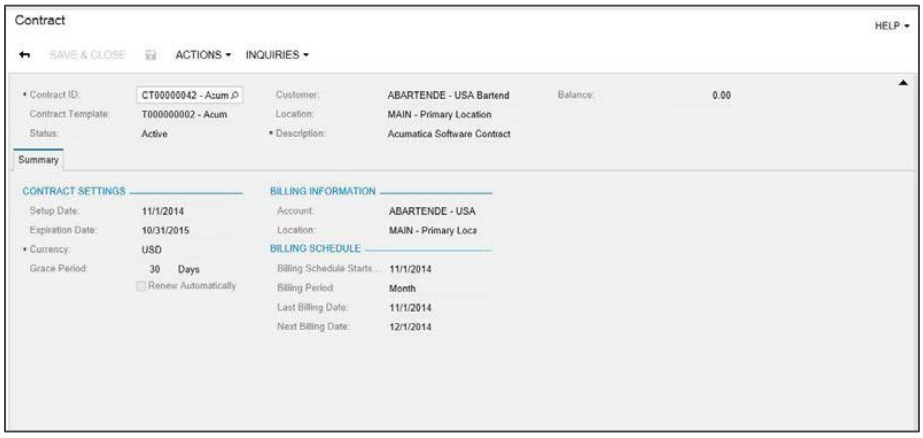
Customer Self-Service Portal

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.



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 critical 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

ONLINE ORDERING

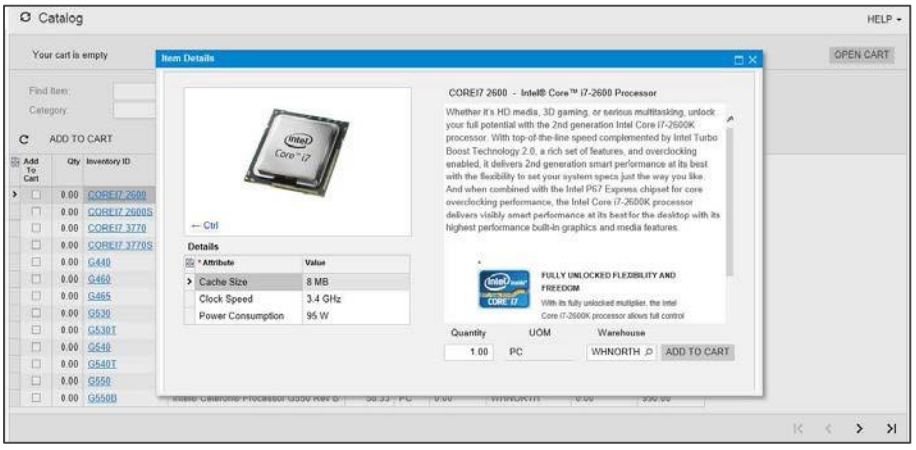
- Business partners and resellers can view inventory and place orders themselves—speeding up the ordering process and freeing your sales team

Acumatica
The Cloud ERP

Customer Self-Service Portal

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. Customers can view cases they submitted, track each case's status, 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 online 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.



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

For more information please contact,

Mary Jo O'Neill
Marketing & Administration | Parallel Solutions
maryjo@erpsolutions4u.com
5380 Naiman Pkwy., Suite B, Solon, OH 44139

parallelsolutions