

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.

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

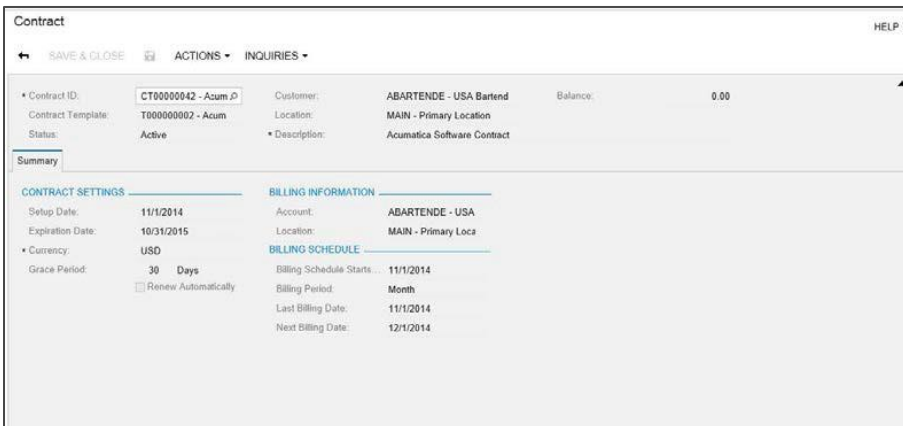
- Provide a secure location to share marketing material, educational material, company policies, and FAQs with customers

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



The screenshot displays a web interface for viewing contract information. At the top, there are navigation options: 'SAVE & CLOSE', 'ACTIONS', and 'INQUIRIES'. Below this, a summary section shows 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

Below the summary, there are three main sections:

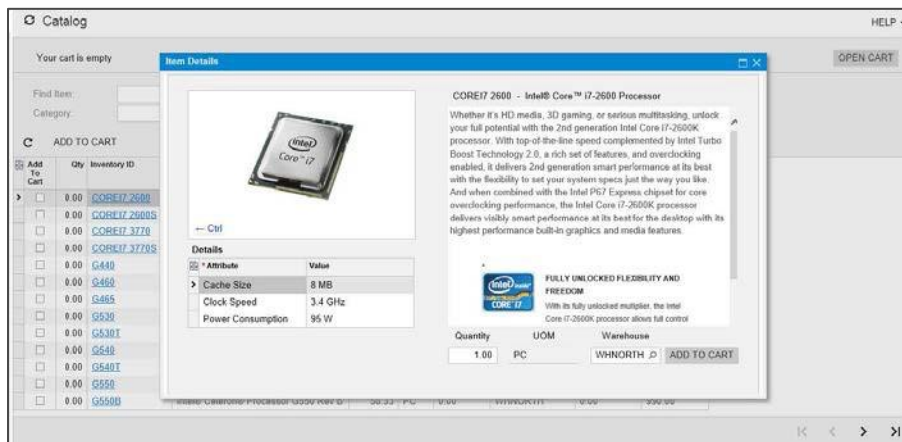
- CONTRACT SETTINGS:**
 - Setup Date: 11/1/2014
 - Expiration Date: 10/31/2015
 - Currency: USD
 - Grace Period: 30 Days
 - Renew Automatically
- BILLING INFORMATION:**
 - Account: ABARTENDE - USA
 - Location: MAIN - Primary Loca
- BILLING SCHEDULE:**
 - Billing Schedule Starts: 11/1/2014
 - Billing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

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	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 ERP. View submitted cases, track each case's status, provide additional information when required, and reopen closed cases.
Knowledge Base	Search for answers to questions. 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 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, and invoices.
Online Catalogue	Give 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.
Personalized Portal	Include user-defined fields to customize the portal interface and keep relevant information accessible.



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

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Learn how Acumatica can work in your business by visiting us online at <https://platformtechnologyadvisors.com> or by calling (805) 569-9487.