

## Powertrak™ Customer Portal

Improve business potential, add value to your customers, reduce costs and enhance productivity by providing user-specific access to information, applications, and business processes from a single, web-based portal.

Finally, CRM interaction for everyone inside and outside your company, without the complex training that drives CRM implementation costs up and ROI down. The Powertrak Customer Portal offers a cost-effective, web-based solution to provide your customers with the information that they need. A complete interaction system to communicate with your company!

Powertrak Customer Portal provides a completely configurable way for everyone to work with Powertrak, ERP, and virtually any other information they need to provide the ultimate self-service experience. Add Knowledge Management to extend rich, web document content to the Portal.

### Product Summary

#### Accelerate Productivity

Focus your employee teams to the most critical customer requests first.

#### Reduce Costs and Increase the Speed of Customer Service

Information your customers need is available 24/7 in a format that encourages self-service.

#### Streamline Services Processes

Eliminate hassles associated with routine tasks such as lead registration, pipeline management, and tracking customer account information.

#### Expand Visibility and Versatility

Provide access to other systems and web-based applications to your customers directly from within the Customer Portal.

### Key Features

- Account and Contact Phone Book
- Customer Incident Registration
- Customer Case History and Status
- Product/Pricing Information
- Customer Order/Shipping Status
- Customer Asset tracking information
- Company News

### Product Details

#### Focus to the Critical Customer Needs

- Extends Case Management to your customers.
- Provides incident registration and tracking to your customers over the web with no training required.
- One place to deliver all information to your customers.
- Works with the Powertrak Workflow engine to allocate incidents and provide alerts instantly.
- Powertrak Customer Portal comes built-in with secure access to so that each customer sees just the information that belong to them.

#### Complete Self-Service Web

- Provides instant information and saves phone calls.
- Separate website running 24/7 so customers can work with critical information such as cases, company news and account status when it fits their schedule.
- Direct access is the proven way to save hundreds or thousands of phone calls and emails, and keep your call center costs down.
- Provides a rich user experience, with graphics, data and scripted communications with no training.

## **Product Details**

### **Custom Configuration View**

- “My Portal” configuration gives each user just what they need.
- Users can select just the functions that they need for tailored one-to-one interactions with your organization.
- On-the-fly choices include colors, screen view and access to all “nuggets” of information that you authorize.
- Each nugget shows “what’s new” at a glance so that users can go right to the hot items.

### **Interact with ERP and other systems**

- Interact with Powertrak, ERP and other data sources.
- Customer Portal can provide interaction with anything in the Powertrak CRM system.
- Use the Portal to expose other data sources outside of Powertrak such as ERP, supply-chain, and more with no coding.
- Optional Powertrak XML Data Exchange, you can further extend the Portal across multiple architectures.

### **Configure with No Coding**

- The Customer Portal provides a separately installed website that can be moved inside or outside firewalls for full compliance with your corporate security policies.
- All standard functions are built within the modifiable Powertrak Portal Toolkit and can be changed on-the-fly.
- Build an unlimited number of portal “nuggets” right inside the Powertrak administration module.
- Set up sorting, presentation, table selections, column layout, colors and more for each nugget right from an easy to use toolkit and administration panel.

### **Link to Knowledge Management Systems**

- Optional link to Microsoft SharePoint and other Knowledge Management (KM) systems.
- Extend the web portal through links to your KM solution to provide access to all the unstructured documents that your customers need.
- Simple HTML links can be set to provide full text and advanced web searching.
- Modify the HTML Portal web to seamlessly integrate with your other websites.

### **Optional Add-ons Include**

- Knowledge Manager
- Powertrak XML data pump.
- Event Management and Registration
- Certification