SOLUTION FACTSHEET

SYSPRO Customer Portal
Elevate the Customer Experience

Communicate with your customers through the SYSPRO Customer Portal — a secure channel destination for collaboration that empowers customers with real-time access to information via web browser.

The SYSPRO Customer Portal provides a web presence to your customers enabling your business to communicate with them any day, anytime, anywhere. Whether your customers are placing orders online, reviewing account history, checking pricing, or reviewing inventory, the SYSPRO Customer Portal seamlessly and securely integrates with your SYSPRO ERP solution, saving both time and resources.

Key Benefits to Boost your Business

- **Improved Customer Service -** Assist customers with a knowledge base and ability to see their transaction history in real-time.

- **Increased Customer Engagement -** Empower customers to interact with your organization when and where it's most convenient for them.

- **Reduced Customer Service Costs -** Free up your customer service center by providing a self-service alternative.

- **Streamlined Customer Service Processes -** Customers can view shipping statuses, track account information, query inventory, check pricing, or access important documents on their own.

- **Supported Sales Staff -** Self-service special quote request, ordering and purchasing empowers your customers and sales with another mechanism to do business.

Key Portal Functionality

Sales Order – When an order is placed through the portal, the corresponding Sales Order is created within SYSPRO ERP and follows the normal workflow, updating the portal in real-time as the orders are processed.

Sales Order Query – The portal can display purchase and sales order history and status for individual customers.

Accounts Receivable – View customer information, view open invoices, and reprint archived invoices.

Credit Card Interface (Optional) – Allow transactions to be pre-authorized at the time of sales order, or make payments on invoices when using gateway Authorize.net.

SYSPRO Payment Gateway – Portal currently supports SYSPRO Payment gateway or Payment Solutions for SYSPRO and Authorize.net users.

Security – Utilize SYSPRO security to configure what data can be displayed and who can enter transactions. Additional portal users can be created with self-previsioning functionality provided through the portal to a customer super user.

Notifications – Multiple email templates can be configured and triggered through pre-defined workflow to quickly send notifications such as a special quote or order confirmations. Additionally, email notifications are sent when a new user is registered on the site.

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Key Features

- Provides a one-stop knowledge base for your customers

- Exhibits a real-time view of customer's information, sales history, invoices, payments, special requests, and inventory. Customer access to these objects can be controlled through the portal manager down to the field level.

- Easy online order placement for customers

- Divides administrative options between user levels and also allows customization of the user interface

- Real-time access to data via sales order query or invoice query

- Allows administrators to set up security by managing customer profiles, roles, and permission rights

- Empowers customers to update their profile, and manage their user or contact information at their convenience

- Improves the sales team's efficiency by enabling remote sales order entry and access to customer and inventory information

- Provides a secure and efficient way to find all the information in one place, potentially decreasing operating costs

- Supports branding options such as customizing your organization's logo and user theme

Portal Browser Compatibility

The following browsers have been tested:

- Internet Explorer 11, or higher
- Firefox
- Safari
- Google Chrome
- Microsoft Edge

For more information, contact us at:
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