



Customer Portal Overview

SAP® Business One Web Solutions
April 28. 2009

Self-Service Customer Portal

Self-service customer portals are fast becoming a competitive advantage in today's global economy. Whether the intention is to get paid faster, or simply "go green", the Customer Portal offers excellent customer service for your valuable customers.

The Customer Portal is a secure, dependable way to improve customer service and the bottom line.

Customer Portal Benefits

Get paid faster – Customers can view their invoices online, drill down into the details, and quickly pay their bill.

Customer retention – Providing customers with the ease of paying online for products and services can be a great benefit to your valued customers.

Better customer service – The Customer Portal provides complete customer history, sales, quoting history, invoice history as well as current activity. Customers can get the information they need, when they need it, without having to pick up a telephone. Knowledgebase, customer service and more.

New marketing and selling opportunities – The Customer Portal has dedicated sections to promote products and services.

Reduce administration costs – The Customer Portal enables companies to move in a paperless direction, reducing time and material related to accounting and service.

Security and Technology

B1WebAPI Framework - Framework for building custom web applications that integrate seamlessly with Business One. Supports SOAP based web services or more simplified XML.

Advanced Plumbing - To move data between Business One and a web application.

Flexible, Configurable Interface - Flexible, configurable and resilient to changes in functionality. User driven through queries in Business One.

Low Cost of Ownership - Does not require a B1 license to run functionality.

No Synchronization - Real time access to data via queries.

Data Integrity - Uses Business One standard APIs to ensure all business logic is followed.

Deployment Options - Web applications can be hosted externally or internally.

Secure Customer Login

oec computers
Customer Portal

Login

Your user name (email)
nakensly@earthshaker.net

Your password
.....

Login

What is the OEC Computers Customer Portal

It's just one more way that we offer the best possible customer service. From this web site you can do things like view your current statement, see outstanding invoices, make payments, see open orders and get delivery information. If you're an existing customer look for more information on your monthly statement. If you're interested in becoming a customer, give us a call at 555-555-5555 or visit our website at www.oec.com.

What's New at OEC

This month we have the new line of HP Laser Printers available. Check them out on our [website](#) and place your order. We have limited quantities so order soon.

2009 Year End Specials

We have large quantities of Canon printers and supplies available that we are offering at greatly discounted prices. Check out these and other great bargains at our [OEC Overstock page](#).

Once logged in, your customers are taken to their own personal window displaying just their information. The Customer Portal delivers a secure, flexible, personalized web self-service gateway through which your customers can retrieve information using a standard web browser. This online customer service portal delivers to your customers the personal information they want, the way they want to see it, and when they want to see it. Your customers can view sales history, current sales, account balance, statements, deliveries, quotes as well as customer service incidents.

Providing secure communications and personalized information allows customers to quickly get the information they need, and to develop the sense that they are participating in an active user communication.

Customer Home Page

The screenshot shows the OEC Computers Customer Portal home page. At the top, the logo 'oec computers' is displayed in green and blue, with 'Customer Portal' underneath. The page is divided into several sections:

- My account:** Includes links for 'My profile' and 'Set password'.
- Billing:** Includes links for 'Statement' and 'Pay Online'.
- Orders:** Includes links for 'Your Orders' and 'Your Quotes'.
- Quick Search:** A search box with 'Our Reference #' and 'Your Reference #' fields and a 'Search' button.
- Welcome Bob McKensly:** A central message area with a welcome message and contact information.
- At a Glance:** A summary of account details: Balance: \$17132.51, Open Orders: 6, Open Quotes: 11. Includes a 'Pay Online' button.
- What's New at OEC:** A section for news and updates, including '2009 Year End Specials'.

At the bottom left, there is a 'Logout' link.

The customer's home page is divided into several sections. These sections enable your customers to update their profile, drill down into customer specific accounting details, sales details, delivery details and service details. Additionally, customers can easily pay their invoices online.

- **My Account Section** – Customers can manage their own profile including their Customer Portal Password.
- **Billing** – Customers can instantly view a real-time statement with the ability to pay their bill on-line.
- **Quick Search** – Quickly locate specific document based on several criteria's of information.
- **Customizable Welcome Message** – Creative and informative welcome messages can be displayed, updated and maintained.
- **At a Glance** – Customers can instantly drill down into the details of their account balance, open sales orders and open sales quotations.
- **What's New** – Keep your customers informed with customizable news and information.
- **Specials** – Place specific "customer type" products and service specials helping to increase sales while providing better customer service.

Real Time Drill Downs



My account

Welcome Bob McKensly

At a Glance

My profile

Set password

We here at OEC Computers are always looking for ways to improve the service we provide to our customers. This Customer Portal is just one more way we make ourselves accessible to you. From here you can view and print your current statement, make credit card payments,

Balance: \$17132.51
 Open Orders: 6
 Open Quotes: 11

Bill

Order

Quote

Quote

Quote

Quote

Quote

Quote

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ACCOUNT NUMBER	PAYMENT TERMS	STATEMENT DATE
C40000	2P10Net30	4/30/2009

Type	Date	Doc #	Reference	Due Date	Amount	Balance
Invoice	4/14/2009	88		5/14/2009	\$4223.21	\$141.58
Invoice	4/23/2009	89		5/25/2009	\$4223.21	\$4223.21
Invoice	4/23/2009	90		5/25/2009	\$12669.62	\$12669.62
Invoice	4/23/2009	91		5/25/2009	\$98.10	\$98.10

0-30 DAYS	3
\$17132.51	

Pay Online

Search

Logout

Delivery Details

DOC #	YOUR REF #	DOC DATE	STATUS
84		04/23/09	Closed

BILL TO:	SHIP TO:
Bill To 208 Hollywood Ave Los Gatos CA 95030 USA	Ship To 208 Hollywood Ave Los Gatos CA 95030 USA

Line Items

PRODUCT	DESCRIPTION	QTY	UOM	PRICE	TOTAL
10021009	Crit-Line III TQA	1	ea	\$3874.50	\$3874.50

NOTES	SUMMARY										
Based On Sales Orders 84.	<table border="1"> <tr> <td>Sub-Total</td> <td>\$4223.21</td> </tr> <tr> <td>Discount</td> <td>\$0.00</td> </tr> <tr> <td>Freight</td> <td>\$0.00</td> </tr> <tr> <td>Tax</td> <td>\$348.71</td> </tr> <tr> <td>Total</td> <td>\$4223.21</td> </tr> </table>	Sub-Total	\$4223.21	Discount	\$0.00	Freight	\$0.00	Tax	\$348.71	Total	\$4223.21
Sub-Total	\$4223.21										
Discount	\$0.00										
Freight	\$0.00										
Tax	\$348.71										
Total	\$4223.21										

Related Documents

Type	Date	Doc #	Your Ref #	Total
Invoice	4/23/2009	89		\$4223.21
Order	4/16/2009	84		\$4223.21

The data populated through the customer portal drill down is real-time information, therefore providing your customer with the latest and most accurate view of their data.

Customers with appropriate portal access can drill down from the "Customer Balance" right into the invoice. From the invoice, customers can drill down into the sales order. From the sales order, customers can drill down into the delivery. With just a few clicks of the mouse!

Collect Customers Payment Online

Type	Date	Doc #	Reference	Due Date	Pay	Amount	Balance
Invoice	4/14/2009	88		5/14/2009	<input checked="" type="checkbox"/>	\$4223.21	\$141.58
Invoice	4/23/2009	89		5/25/2009	<input checked="" type="checkbox"/>	\$4223.21	\$4223.21
Invoice	4/23/2009	90		5/25/2009	<input type="checkbox"/>	\$12669.62	\$12669.62
Invoice	4/23/2009	91		5/25/2009	<input type="checkbox"/>	\$98.10	\$98.10

Enter on account payment here:

Pay the following amount of \$

Confirm your Payment

Documents Selected					
Date	Type	Doc #	Reference	Due Date	Amount
4/14/2009	Invoice	88		5/14/2009	\$141.58
4/23/2009	Invoice	89		5/25/2009	\$4223.21
					\$4364.79

Enter credit card information below:

Name on card:

Card Type:

Card Number:
Ex: 1111222233334444

Expiry:

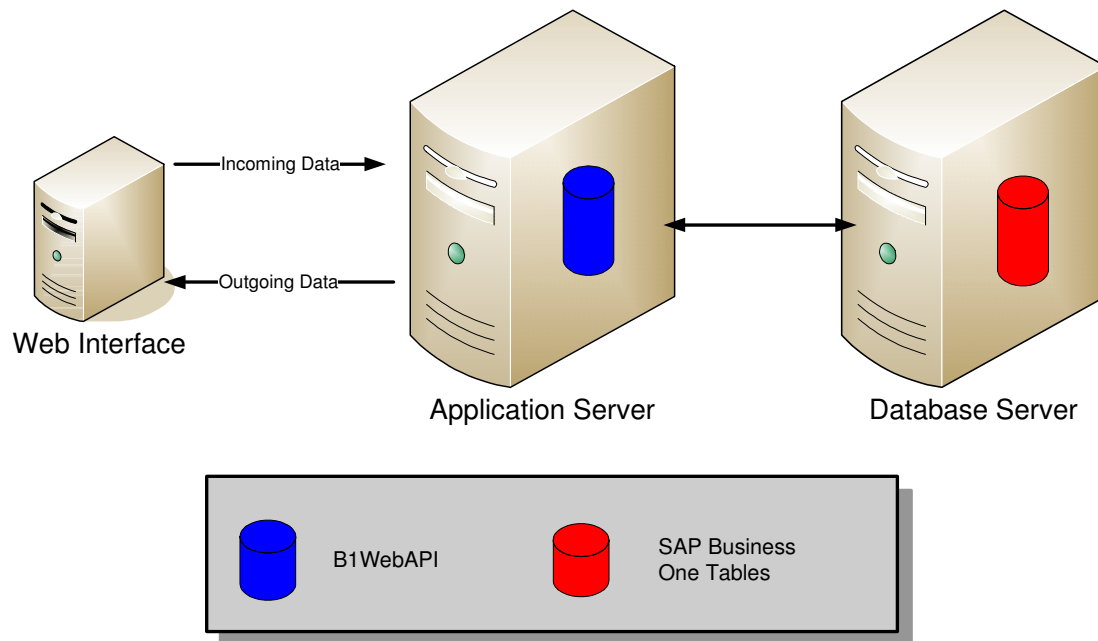
Amount to Pay: \$4364.79

Notes (200 chars):

Collecting payment from your customers online can improve your cash flow. Credit card payments and bank transfers traditionally clear much faster than Checks.

Most gateways are supported, enabling customer to pay their bills via credit card and debit card. Additional functionality can be added supporting electronic funds transfer.

Scalable Functionality and Technology



The **Web Interface** can be an Internet Explorer, Firefox explorer or just about any internet enabled device.

The **Application Server** can be hosted in-house, or professionally hosted. Running on the application server is B1WebAPI. B1WebAPI provides a foundation for extensive scalability and growth.

The **Database Server** is the SAP Business One server.

Summary of B1WebAPI Features

- Framework for Development
- Flexible to change
- Developer/Consultant work as team.
- 1 License (No B1 licenses required for smaller pieces of functionality)
- Customer specific functionality.
- No Synchronization of data required between systems.
Real time access to data via queries.

Summary

The benefits of self-service are--as the name implies--that customer service personnel do not have to be involved, resulting in a 97% savings per customer interaction, according to a widely cited Forrester report. Convenience and additional choices are also important benefits, resulting in a complete win-win for the company and its customers.

The B1WebAPI foundation enables companies to grow their internet presence incorporating various aspects of the supply chain. This is a competitive must-have in today's global economy, reducing costs while streamlining operations.

For additional information or to schedule a demonstration of the Customer Portal / B1WebAPI tools, please contact your local SAP Business One reseller.