

Customer Portal UX for Aptean Pivotal CRM

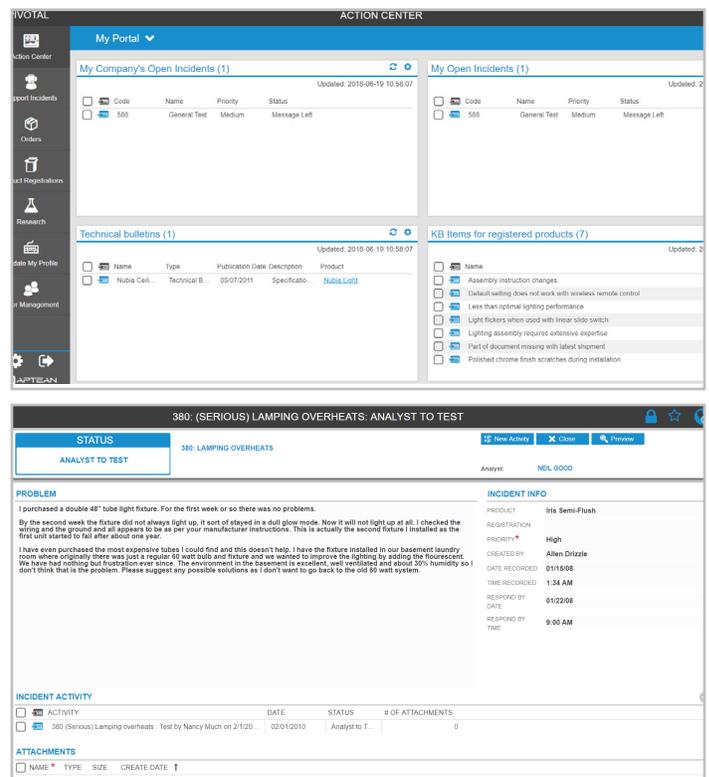
Intuitive Self-Service for Your Organization

When customers self-serve, support costs go down, customer satisfaction goes up, and everyone wins. The Customer Portal enables your organization to deliver web-based, self-service tools to your customers. By delivering enhanced usability and a broad array of features, Customer Portal simplifies customer self-service increasing their usage, thereby increasing productivity and lowering support costs. The Customer Portal leverages the power of the Pivotal Platform and the flexibility of the UX client that's configurable to your specific needs.

Improve Efficiency and Customer Satisfaction

By putting in place a customer self-service solution, you will:

- Increase customer engagement, feedback, and satisfaction by servicing customers via their preferred channel
- Track orders, incidents, contracts, and service level agreements in real-time
- Reduce ticket volume and close service incidents faster
- Increase data accuracy rates while lowering support costs
- Improve service reps productivity and satisfaction by decreasing workload and off-loading routine enquiries
- Increase administrator efficiency via delegated security
- Open another channel to nurture clients and improve cross-sell and upsell



The screenshot displays the 'My Portal' interface with several key sections:

- My Company's Open Incidents (1):** A table with columns for Code, Name, Priority, Status, and Message Left. One incident is listed with Code '583', Name 'General Test', Priority 'Medium', and Status 'Message Left'.
- My Open Incidents (1):** A similar table showing the user's own open incidents.
- Technical bulletins (1):** A table with columns for Name, Type, Publication Date, Description, and Product. One bulletin is listed with Name 'Nube Cell...', Type 'Technical B...', Publication Date '05/07/2011', Description 'Specifatio...', and Product 'NubeList'.
- KB Items for registered products (7):** A list of knowledge base items with checkboxes for selection. Items include 'Assembly instruction changes', 'Detail setting does not work with wireless remote control', 'Less than optimal lighting performance', 'Light flickers when used with linear slide switch', 'Lighting assembly requires extensive expertise', 'Part of document missing with latest shipment', and 'Polished chrome finish scratches during installation'.

The bottom section shows a detailed view of an incident titled '380: (SERIOUS) LAMPING OVERHEATS: ANALYST TO TEST'. It includes a 'STATUS' bar, a 'PROBLEM' description, 'INCIDENT INFO' (Product: Iris Semi-Flush, Priority: High, Created by: Allen Ditzel), and 'INCIDENT ACTIVITY' with a table of activities.

Customer Portal Features



Task-Specific UI & Navigation

Improve usability and access to information with self-service content that is front and center, increasing customer adoption.



Ticket Tracking

Enable customer to report an issue by creating a ticket, add a step to an existing ticket, anytime, anywhere on any devices.



Knowledgebase and FAQ

Share complex solutions in the searchable Knowledgebase. Answers to the most common questions can be presented through a FAQ table.



Self-Service Reports

Generate reports to view progress on outstanding service requests, order information, registrations, and support contract statuses.



Literature Access & Press Releases

Provide ready-access and the ability to download literature, case studies, product briefs, and technical bulletins, to support the sales cycle and nurture customers long term.



Order Tracking

Enhance the customer experience by allowing customers to view and track the status of open orders in real-time.



Product Feedback

Improve customer service by allowing customers to submit product feedback on-line.



Product Registration & Contracts Tracking

Register purchased products and track warranties or contracts. Customers can also request quotes for new contracts and extensions.



Message Center

Ensure customers receive the information that they care about through configurable messages and alerts.

User Management

User Management gives you the ability to manage internal and external users:

- Creation & maintenance for External user, including reset of password
- Creation & maintenance for External user, including license assignment
- Assign users to appropriate security groups
- Link external user to Contact or internal users to Employee

User Management is available separately as well as part of the Customer Portal Package.

Delegated Security

Improve security and alleviate the security administration burden by authorizing customer administrators to add users, remove users, and assign security rights to the Customer Portal for their organization. Your external administrators will help ensure customers increase portal usage and are engaged with your organization

Password Resets

Save time on user management by enabling customer to reset their password anytime and full support on “Forget Password” workflow

Learn More

Contact your account manager today to learn more or email us at info@aptean.com.



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