

# Portals With Synergy Enterprise



***SYNERGYEXPERT.COM***

Powered by The Donas Group, Inc.

**=exact**

# What is a Portal ?

- A Portal is a Tool That Provides Access to Information in Your Database for Selected Accounts or Resources
- Provides the Infrastructure for Collaboration of Information and Workflow Tasks with Resources and Accounts

# Type of Portals ?

- ✓ Standard
- ✓ Employee
- ✓ Employee Self Service
- ✓ Customer
- ✓ Supplier
- ✓ Reseller

# Standard

- ✓ When Connected to a Corporate Web Site, It Would Provide Links to Documents That Have a Security Level of “0” in Synergy
- ✓ Forms for Assistance Can be Created That Are Used by Resources in Synergy Workflow Requests (Request for Assistance)

# Employee

- ✓ An Employee will Provide All of the Functionality That They May Create, View and Interact That They Have Within Synergy at Their Office and With Their Defined Roles
- ✓ This Portal (When Outside Access is Granted), Allows Resources to Interact Outside of Their Normal Office Environment Through a Secured Web Browser Connection

# Employee Self Service

- ✓ Employees Will Have Limited Functions and Access in Synergy (Workflow Requests and Accounts)
- ✓ Useful for Sharing and Allowing Downloads of Information with Employees

# Customer

- ✓ Customers Can View and Update Their Information on Account and Contacts
- ✓ Customers Can Create, View and Search Workflow Requests (Support Calls, Need for Product Info)
- ✓ Customers Can Create, View and Search Documents (Product Info, Manuals)

# Customer

- ✓ Customers Can Search and View Quotations and Sales Orders Pertaining to Their Account

***SYNERGYEXPERT.COM***

Powered by The Donas Group, Inc.

**=exact**



# Supplier

- ✓ Suppliers Can View and Update Their Information on Account and Contacts
- ✓ Customers Can Create, View and Search Workflow Requests (Support Calls, Need for Product Info)
- ✓ Customers Can Create, View and Search Documents (Product Info, Manuals)

# Supplier

- ✓ Suppliers Can View and Update Item Information
- ✓ Suppliers Can Search and View Quotations and Sales Orders Pertaining to Their Account

# Reseller

- ✓ Resellers Can Assign Roles for Other Employees to Access Data Belonging to Their Account Listing
- ✓ Resellers Can Search, View and Modify Information Pertaining to Your Accounts & Contacts
- ✓ Resellers Can Create or Modify Requests Belonging to Their Account Listing

# Reseller

- ✓ Resellers Can Create, Search, View and Modify Information Pertaining to Your Workflow
- ✓ Resellers Can Create, Search, View and Modify Documents Pertaining to Your Account
- ✓ Resellers Can Search and View Quotations and Sales Orders Pertaining to Their Accounts

# Portal Look & Feel

- ✓ Portals to Customers, Resellers and Suppliers Can Be Personalized to Have The Look and Color Schemes of your Existing Corporate Website
- ✓ Links to Other Websites Can Be Used
- ✓ Customer and Reseller Portals May Be Created for Separate Account Types Using Divisions, Sectors and Classifications

# Portal Enhancements

- ✓ Portals for Customers or Resellers Can Be Used for Placing Customer Orders into Back Office ERP Software (Repeat Orders with No Credit Card Integration)

# Accessing Synergy

Hosted Internally by Your Organization or Hosted by a Cloud Provider, But Accessed Through Portals, such as Employee, Customer, Reseller or Supplier



**SYNERGYEXPERT.COM**

Powered by The Donas Group, Inc.

**=exact**

# More Information

Please contact us to schedule a demo or  
receive additional information on our tools

Dave Kloepfer

Sales Manager

[SynergyExpert.com](http://SynergyExpert.com)

[dkloepfer@synergyexpert.com](mailto:dkloepfer@synergyexpert.com)

847-956-6500 (Office)

847-867-4401 (Cell)

***SYNERGYEXPERT.COM***

Powered by The Donas Group, Inc.

**=exact**