



# Customer Portal

**A single solution for all your Customer & Sales-related operations**

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Customer Portal is a futuristic solution on BPortaly, along with other Partner applications. Customer Portal's purpose is to effectively aid businesses with sales and customer management. It is available in a yearly subscription model and can be used as a standalone system or as an integrated solution with your business application/ERP. So say no to struggles managing pre and post-sales operations and increasing user demands with Customer Portal.

## Key Modules

### Customer

Manage customers effectively with comprehensive insights into customer data and details such as name, id, and history.

### Sales Documents



#### Quotes

Generate accurate quotes with Products, Salespersons, Warehouses, Payment terms, and other details. Also, you can link them in no time from ERP to the Customer Portal with real-time quote synchronization.



#### Orders

Convert Quotes into orders in Customer Portal with a click! The Sales Orders module enables easy order generation and links it to ERP. Once the order gets synced into the ERP, shipment is initiated, and an invoice is created in the ERP.



#### Invoices

The Sales Quotes Module allows businesses to sync invoices with order details seamlessly and accurately. Once an invoice is generated in the ERP based on order details obtained from Customer Portal, invoices are synced back into Customer Portal.

### Inventory



#### Products

Sync products from ERP and see all available products in Customer Portal. This enables one to easily choose from the list and add products in quotes and orders in Customer Portal.



#### Check Stock

Keep track of your stock availability in real-time at a specific warehouse using product code with a real-time inventory module. This enables Salesperson to check stock levels anytime, anywhere.

### Set up

Customer Portal also syncs supporting masters of Customers, Products, Warehouses and others from ERP to streamline processes.

### Admin

Set up your company, manage roles of users and access from this module. The admin has to register on BPortaly to use Customer Portal and then invite other users. Admin also decides the role of the user (Customer/Sales reps etc.) which will further alter the information based on the role assigned to them. One can also customize security settings to tailor-make the app according to their business needs.



## Here's how it can help you



### Improved Sales Efficiency

Sales representatives can make informed decisions by comprehensively viewing customers' sales history/movement and product availability.



### Secure Order Processing

Track changes in order history and ensure seamless and secure order processing, and that too within an assured timeframe.



### Real-time Data Sync

All relevant ERP entities are synced real-time in Customer Portal enabling a comprehensive view ensuring seamless operations and no manual errors. Get all product, order and customer-related info at your fingertips.



### Comprehensive View of Customers

Users can get an inclusive insight into customer data to keep a check on customers' buying patterns and preferences and fulfill their needs.



### Multi-Company Support

Customer Portal comes with a multi-company support feature. It allows an organization to add and manage sales-related pursuits of more than one company in one place but in different environments.



### Customized User Access

In the Customer Portal, the admin user is given the feature of unique login access in which they have the liberty to define the user role to all the users.



### Product Information

Get up-to-date product information like availability, product ID, real-time inventory, category, and choice of the warehouse using product synchronization.

## About Greytrix

Greytrix is one of the leading service providers with more than 23+ years of delivering top-quality solutions for CRM and ERP systems. Under that, we offer an array of services, including integration, development, consultation, support, and customization. Over the years, we have served more than 1500 customers and 350 partners. BPortaly is one of our IP products built for businesses across all industries, and the Customer Portal is an eminent part of it. So, subscribe to BPortaly and get Customer Portal for your business to seamlessly manage customers and sales operations.

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