



## Improve the Customer Experience

### Key Features

- Aggregate information and applications in one convenient place for your customers (From Soffront CRM or others)
- Customize the layout of every portal
- Deliver content based on customer role
- Submit service tickets via the web
- Supply Superior Multi-Channel Service
- Let customers update their account and contact profile
- Deliver product information
- Leverage cross-sell and up-sell opportunities
- Provide targeted alerts
- Let customers view a history of transactions
- Deliver quotes
- Integrate with other applications to receive orders or take payments
- Release independence
- SSL support
- Part of a complete CRM solution

Soffront Customer Portal centralizes your customer's view of all information & applications in a personalized way. Forge a stronger relationship with your customer by providing valuable services & information through the portal.

Soffront Customer Portal provides customers with a self-service interface that will reduce support costs, plus enhance revenues by offering the right product at the right time.

### Strengthen Customer Loyalty

Make it easy for your customers to do business with you. Customers can view all kinds of information at their own pace including transaction history, updating of their account & contact information, viewing of quotes, placement of orders and payments.

### Multiple Applications in One Place

Everything they need is in one place from Soffront CRM applications to others. Web-tickets, Soffront Knowledge Management (self-service), Soffront Contact Center, all integrate as gadgets in the portal. You can even integrate applications from other solution providers.

### Deliver 24x7 Service Online

Increase customer satisfaction by providing customers the flexibility to manage tickets online, twenty-four hours a day, seven days a week.

### Role Based Delivery of Applications

The application gadgets that appear in a customer's portal can be customized based on their role in a transaction. For example, the "invoices and payment history" information can be provided only to the financial customers in an organization.

### Superior Service Through Multiple Channels

Save money and provide comprehensive service through self service, live web chat, voice chat and email support within the portal. Customers can check status, exchange comments, without real time attention from employees. Customers can review product information and make requests for more all through the portal.

### Information Driven Marketing

Leverage a 360 view of your customer from the unified CRM data base using the internal facing features of Soffront CRM such as Soffront Sales, Soffront Marketing, and Soffront Support. Use this information to enhance the customer experience and increase brand loyalty. For example, promote a complementary product or service or build on customer knowledge through an online survey. Achieve greater levels of 1 to 1 marketing.

### Configurable Layout

The user decides which application gadgets to see and where to see them within the portal. The layout is configured by the end user with just a few clicks.

### Customer Portal dashboard



The screenshot displays the Soffront Customer Portal dashboard. At the top, there's a navigation bar with 'Home', 'Manage Contacts', and 'Logout' buttons. Below this, the dashboard is divided into several sections:

- Upload File:** A section for uploading and downloading files, with a list of previously uploaded files including 'Sofffront.jpg', 'SofronCRM.doc', and 'SofronCRM.docx'.
- My Tickets:** A table showing a list of tickets with columns for Ticket ID, Status, Synopsis, Opened, and Closed. Three tickets are listed, all with a status of 'Closed'.
- My Products:** A list of products and their licenses, including Knowledge Mgmt System (1 License), Customer Portal (1 License), Defect Tracking (1 License), Customer HelpDesk (1 License), CRM Server (1 License), Email Response (1 License), and Dedicated Web (10 Licenses).
- What's New:** A section for the latest news and events from Soffront Software, featuring three items with 'More' links.
- All Search:** A search bar with the prompt 'Please enter a keyword' and a 'SEARCH' button.
- Product Upgrade:** A section for product upgrades, listing various versions of 'TeamWeb' (e.g., TeamWeb 8.5.0.0, TeamWeb 8.5.0.2, etc.).
- Documentation:** A section for documentation, including links for 'Installation Guide', 'Admin Guide vol 1', and 'Admin Guide vol 2'.

### **Targeted Alerts to Improve Sales and Service**

The portal feature provides an "alerts" application gadget to highlight timely information for your customers. Customers can be drawn to pertinent knowledge base articles, support warnings or new purchase opportunities. The customer portal is an excellent opportunity to reinforce brand integrity and marketing messages each time they log in.

### **Provide Self Service**

Customer Self-Service can lower the cost of providing customer support, while at the same time improving your customer's sense of being provided with quality support when it is needed. Soffront Customer Portal comes integrated with Soffront Knowledge Base.

### **Extend Your Existing Web Site**

Soffront Customer Portal does not replace your company's current Web site. It enhances it by presenting the personalized content that you present to a specific customer or group of customers.

### **Soffront CRM Solution**

The Soffront CRM solution spans sales, marketing and service functions. The complete suite is available as the Soffront CRM application.

### **Flexible Licensing**

Soffront offers an end-to-end CRM solution. However, because the Soffront solution is modular, you don't need to deploy the entire solution at once. Select the modules you need today, and activate the rest when you are ready. Soffront offers very flexible licensing options - floating, dedicated, site, departmental, timed or leased licensing options. You can also select either hosted or server licensing.

### **The Soffront Advantage**

- Over 13 years of product maturity
- Unmatched adaptability
- Deployed in days
- Zero footprint web-client

### **Customer Portal**

- Enter Support Tickets and check status.
- Enter Returned Material Authorizations (RMA) and check status.
- See order status from the Order system.
- See invoice status from the Accounting system.
- Read or download Product literature and company news.
- Download software updates.
- Read and Print CRM reports, such as Service history report.
- Provide self service with Soffront Knowledge Base.
- Configure and provide Role based access.

### **Base features included in all configurations**

- Create, configure and manage user groups and users.
- Calendar and Task Management
- Configurable Dashboards.
- Full Email functionality including reusable email templates.
- Standard report writer, with Drill down Graphical and Matrix reports.
- Integrated with MS Word to create, edit, and link documents from templates.
- Data management tools— easily copy, batch update/delete and merge records.
- Ad-hoc and complex querying capabilities including direct SQL queries.
- Data import and export capabilities.
- Integration with Active Directory and LDAP.
- Business Rules & Notifications.
- Escalation Rules for all Modules.
- Linking Rules.
- Sales Rep and Helpdesk Agent Assignment Rules.
- Customize tables, fields, views and pick-lists.
- Define relationships between all tables.
- Create and customize workflows through system.
- Scripting interface and documented API with examples.

### **Add-Ons**

- Integration with Outlook: Calendar, Contacts and Email.
- Mobile and PDA Server
- Offline Client and synchronization Server
- Knowledge Management— Create, edit, manage, publish searchable knowledge database.



[www.soffront.com](http://www.soffront.com)

### **Headquarters**

45437 Warm Springs Boulevard,  
Fremont, CA 94539  
United States  
Tel.: (510) 413-9000  
Fax: (510) 413-9027

### **Sales U.S. & Canada:**

Tel: +1-800-SOFFRONT  
Email: [sales@soffront.com](mailto:sales@soffront.com)

Tel. +1-510-413-9000 Ext. 235  
Email: [sales@soffront.com](mailto:sales@soffront.com)