

A photograph of a man with dark hair, wearing a dark grey suit jacket, a blue dress shirt, and a red tie. He is smiling and has his arms crossed. The background behind him is a clear blue sky.

POWERTRAK MEMBER PORTAL

SOLUTIONS FOR THE ASSOCIATION MANAGEMENT INDUSTRY

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Powertrak™ Member Portal

Improve business potential, add value to your members, reduce costs and enhance productivity by providing user-specific access to information, applications, and business processes from a single, web-based portal.

Finally, CRM interaction for everyone inside and outside your company, without the complex training that drives CRM implementation costs up and ROI down. The Powertrak Member Portal offers a cost-effective, web-based solution to provide your members with the information that they need. A complete interaction system to communicate with your company!

Powertrak Member Portal provides a completely configurable way for everyone to work with Powertrak, ERP, and virtually any other information they need to provide the ultimate self-service experience. Add Knowledge Management to extend rich, web document content to the Portal.

Key Features

- Account and Contact Phone Book
- Member incident registration
- Member Case history and status
- Product/Pricing information
- Member order/shipping status
- Member Asset tracking information
- Company News

SUMMARY

Accelerate productivity

Focus your employee teams to the most critical member requests first.

Reduce costs and increase the speed of member service

Information your members need is available 24/7 in a format that encourages self-service.

Streamline service processes

Eliminate hassles associated with the most routine service requests such as viewing case status, viewing order and shipping status, and tracking member account information.

Expand visibility and versatility

Provide access to other systems and web-based applications to your members directly from within the Member Portal.



Product Details

Focus to the Critical Member Needs

- Extends Case Management to your members
- Provides incident registration and tracking to your members over the web with no training required
- One place to deliver all information to your members
- Works with the Powertrak Workflow engine to allocate incidents and provide alerts instantly
- Powertrak Member Portal comes built-in with secure access to so that each member sees just the information that belong to them

Complete Self-Service Web

- Provides instant information and saves phone calls
- Separate website running 24/7 so members can work with critical information such as cases, company news and account status when it fits their schedule
- Direct access is the proven way to save hundreds and thousands of phone calls and emails, and keep your call center costs down
- Provides a rich user experience, with graphics, data and scripted communications with no training

Custom Configuration View

- “My Portal” configuration gives each user just what they need
- Users can select just the functions that they need for tailored one-to-one interactions with your organization
- On-the-fly choices include colors, screen view and access to all “nuggets” of information that you authorize
- Each nugget shows “what’s new” at a glance so that users can go right to the hot items

Interact with ERP and other Systems

- Interact with Powertrak, ERP and other data sources
- Member Portal can provide interaction with anything in the Powertrak CRM system
- Use the Portal to expose other data sources outside of Powertrak such as ERP, supply-chain, eCommerce and more with no coding
- Optional Powertrak XML Data Exchange, you can further extend the Portal across multiple architectures

Configure with No Coding

- The Member Portal provides a separately installed website that can be moved inside or outside firewalls for full compliance with your corporate security policies.
- All standard functions are built within the modifiable Powertrak Portal Toolkit and can be changed on-the-fly
- Build an unlimited number of portal “nuggets” right inside the Powertrak administration module
- Set up sorting, presentation, table selections, column layout, colors and more for each nugget right from an easy to use toolkit and administration panel

Link to Knowledge Management Systems

- Optional link to Microsoft SharePoint or other Knowledge Management (KM) systems
- Extend the Portal through links to your KM solution to provide access to all the unstructured documents that your members need
- Simple HTML links can be set to provide full text and advanced web searching
- Modify the HTML Portal web pages to seamlessly integrate with your other websites.

Optional Add-ons Include:

- Knowledge Manager | Powertrak XML data pump | Event Management and Registration | Certification | eCommerce