

## Powertrak™ Partner Portal

Improve business potential, add value to your business partners, 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 Partner Portal offers cost effective, web-based solutions to provide your key internal and external business partners with the information that they need. The Powertrak Partner Portal is the foundation for a complete partner relationship management system for Microsoft Dynamics CRM.

Powertrak Partner Portal provides a completely configurable way for everyone to work with Powertrak, ERP and virtually any other information that they need to provide the ultimate self-service experience. Add Microsoft Share Point, Powertrak Knowledge Management or your own Knowledge Management add-on to extend rich web document content to the Portal.

### Product Summary

#### Accelerate partner productivity

24/7 access to the information and tools they need.

#### Reduce costs

Increase the speed of delivery of key business information to partners without the added expense of taking numerous calls and email requests.

#### Streamline partner processes

Eliminate hassles associated with routine tasks such as lead registration, pipeline management, and tracking customer account information.

#### Expand visibility and versatility

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

### Key Features

- Account and Contact Phone Book
- Lead Registration and status
- Product/Pricing Configuration
- Opportunity/Pipeline Management
- Marketing Co-op Funds Management
- Customer Case history and status
- Customer order/shipping status
- Customer Asset tracking
- Marketing Campaigns
- Company News

### Product Details

#### Multi-channel Sales and Marketing

- Provides lead registration and tracking, integrated distributor forecasting, and opportunity tracking to your business partners over the web with no training required.
- One place to deliver leads to your partners.
- Also works with the Powertrak Workflow engine to allocate leads and provide alerts instantly.
- Powertrak Partner Portal comes built-in with secure access to so that each partner sees just the deals that belong to that sales channel and dealer.

#### Self-Service Web

- Provides instant information and saves phone calls.
- With a separate website running 24/7, partners can work with critical information such as leads, cases, company news and account status when it fits their schedule.
- Direct access is the proven way to save hundreds or 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.

## **Product Details**

### **Custom Configuration View**

- “My Portal” configuration gives each user just what they need.
- The Portal can provide interaction with anything in the Powertrak CRM system.
- 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**

- Interact with Powertrak, ERP and other data sources.
- The 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 and more with no coding.
- With optional Powertrak XML Data Exchange, you can further extend the Portal across multiple architectures.

### **Configure with No Coding**

- Powertrak Portal installs as a separate website.
- 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 without needing extensive IS support or learning custom tools.

### **Link to Knowledge Management Systems**

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

### **Optional add-ons include**

- Knowledge Manager, Powertrak XML data pump.
- All standard functions are built within the modifiable Powertrak Portal Application Builder and can be changed on-the-fly.
- The Partner Portal provides a separately installed website that can be moved inside or outside firewalls for full compliance with your corporate security policies.