Quick Tour

DYNAMICPOINT PORTALS

DynamicPoint™
Create. Connect. Collaborate.

Portal Apps for Office 365

DynamicPoint's Portal App allows you to quickly create and securely share an Office 365 Portal with your customers, vendors, or employees that includes full integration of your ERP or CRM data, reports, and files.
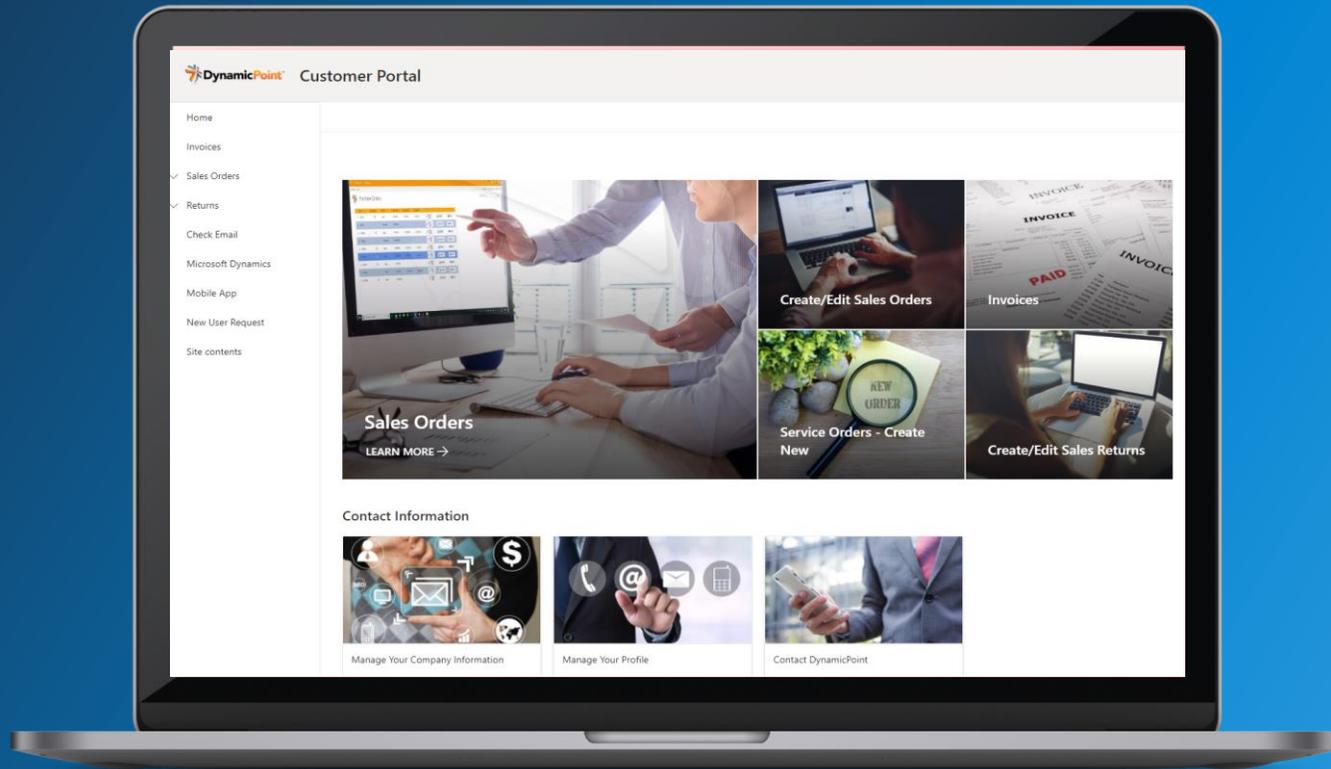
Share Information from Existing Data Sources

DynamicPoint's Office 365 Portal app connects your SharePoint intranet or extranet to the data that resides within your ERP, CRM, or other information sources.

Customers

Vendors

Employees

SharePoint Portal
OFFICE 365 · ON-PREMISE

CRM CUSTOMER RELATIONSHIP MANAGEMENT

ERP ENTERPRISE RESOURCE PLANNING

POWER BI

POWER APPS

POWER AUTOMATE

ODATA

FORMS

SHAREPOINT
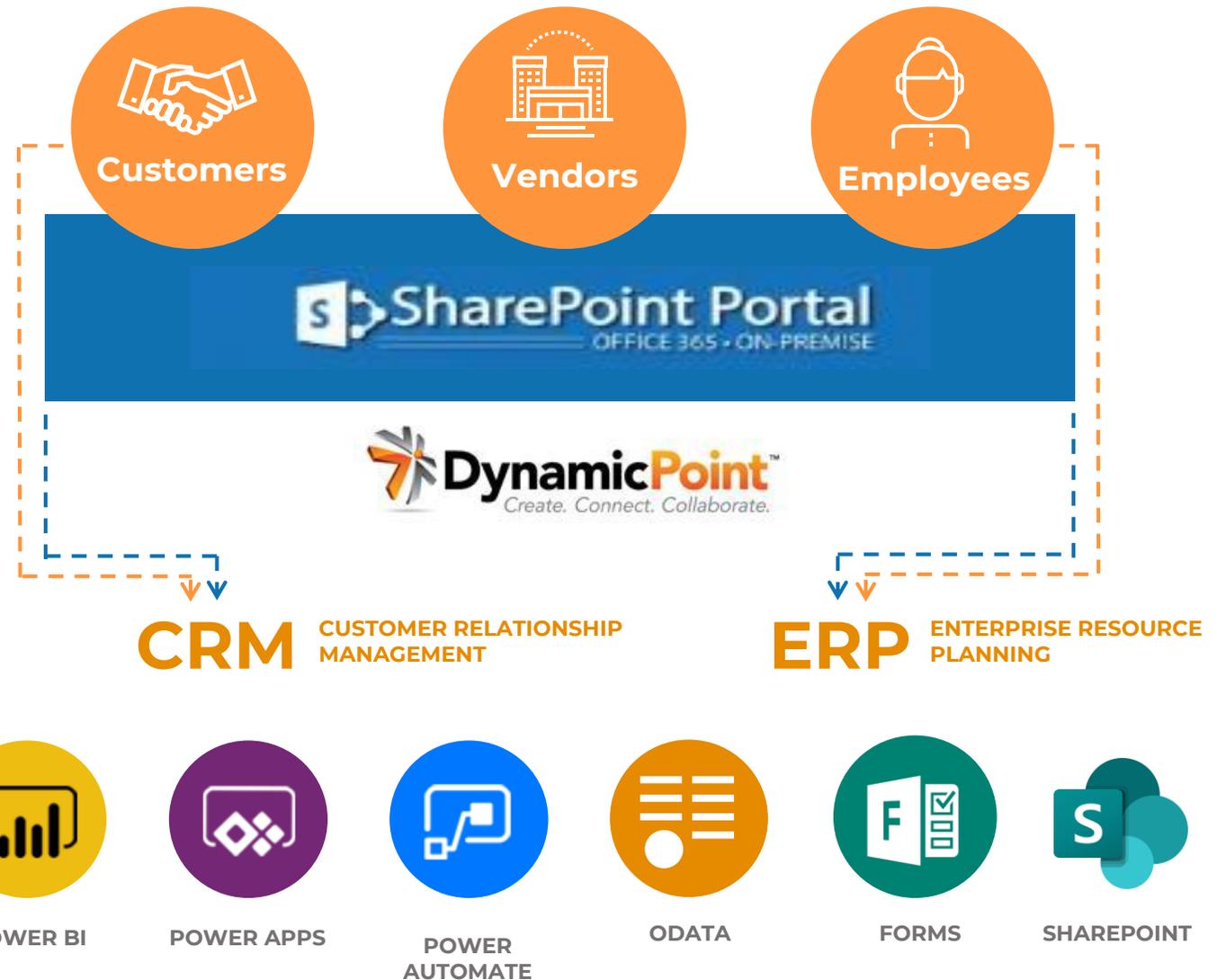
Portal Features & Functionalities

Integration of Any Data

The power of REST (OData) web services permits reading, editing, and creation functionality from virtually any data source

Reporting

On-demand rendering of ERP/CRM reports (such as invoices, sales orders, and purchase orders)

Workflow

Portal-initiated actions automatically generate notification emails, texts, alerts

Definable approval workflow for actions requiring internal review

Automate entire business processes

Define business process automation procedures and workflows

Achieve digital transformation, improve service, or reduce costs

Your Company's Hub for Collaboration

At logon, users encounter a customized layout that bears the company's/organization's branding, colors, and other distinctives—further customizable to reflect users' preferences for highlighting particular information.

Portals can also be configured to function as an information hub to announce:

Product Releases

Delivery Schedule Changes

Holiday Hours

Special Incentives

SharePoint-Power BI integration permits creation of dynamic reports in PDF format for sharing via download, email forwarding, or printing.

Share Data

- Connect to virtually any data source
- Configure the connection for view, edit or create permissions
- Establish filters so users (customer, vendors or employees) have access to their own information
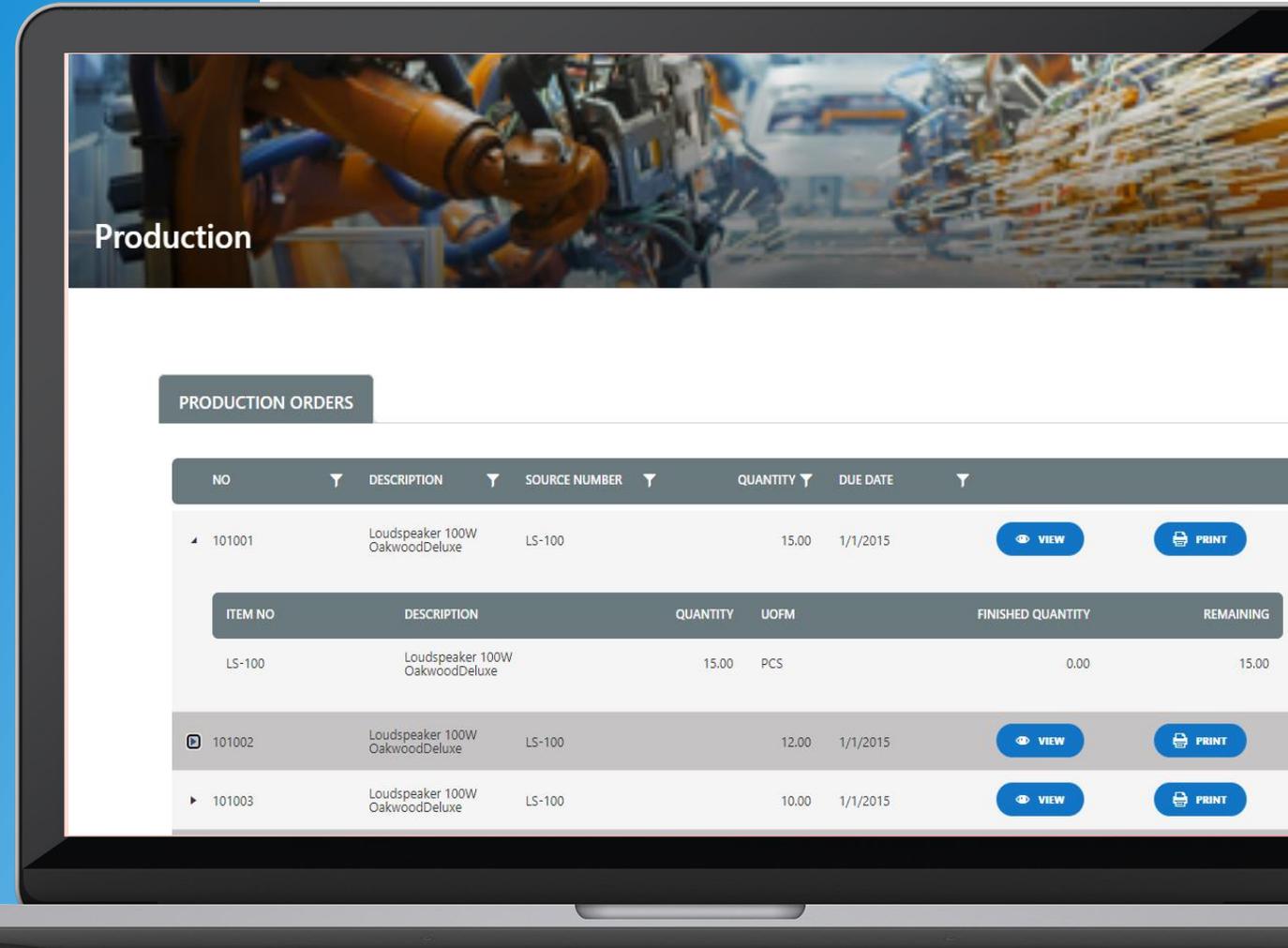
Reporting

- Allow portal users to generate their own reports as pdfs

- Reports can be downloaded or printed

- Leverage existing ERP reports to provide a consistent experience

- Examples include the ability to print such things as invoices, orders and service summaries
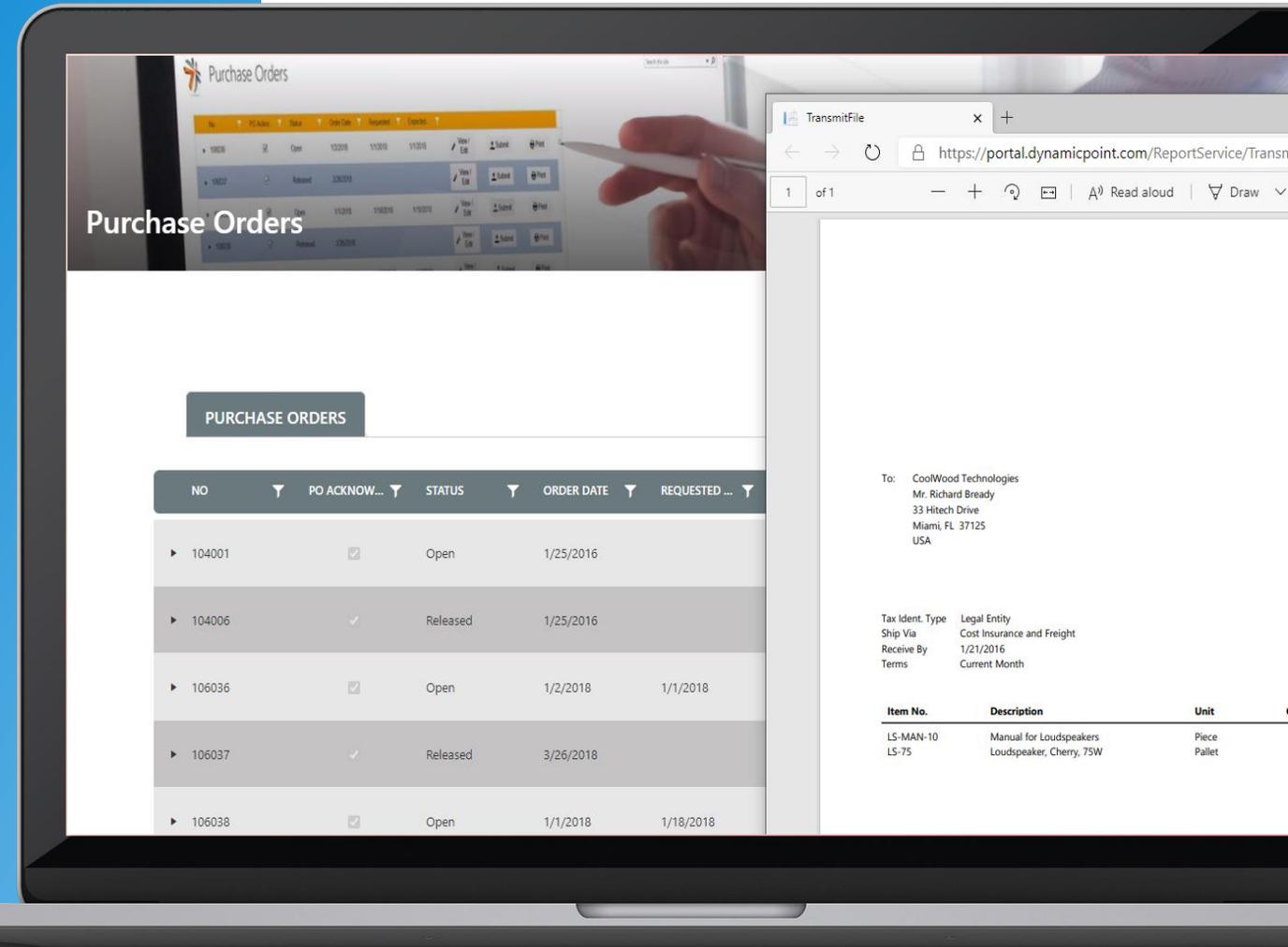
Workflow

- Workflow can be associated to any action in the portal, such as view info, submitting records or creating transactions

- Power Automate workflows offer several hundred actions and integrations with other systems

- Workflow can be utilized for simple alerts and notifications or complex approval processes
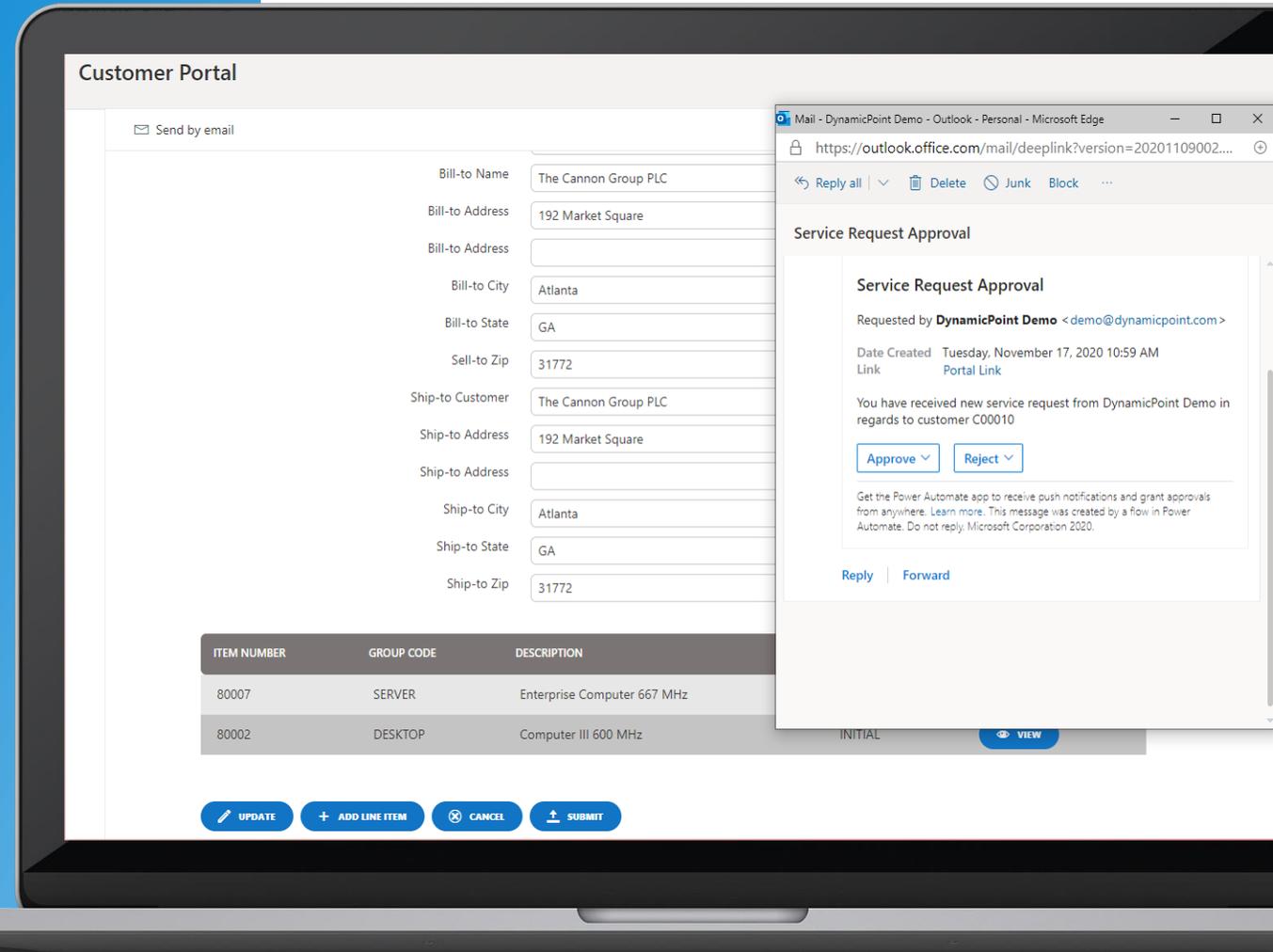
Business Automation

- Automate entire business processes, such as vendor onboarding, contract renewal or request for proposals

- Add your own configurable forms, contracts and electronic signatures

- Store the data in SharePoint or in underlining ERP
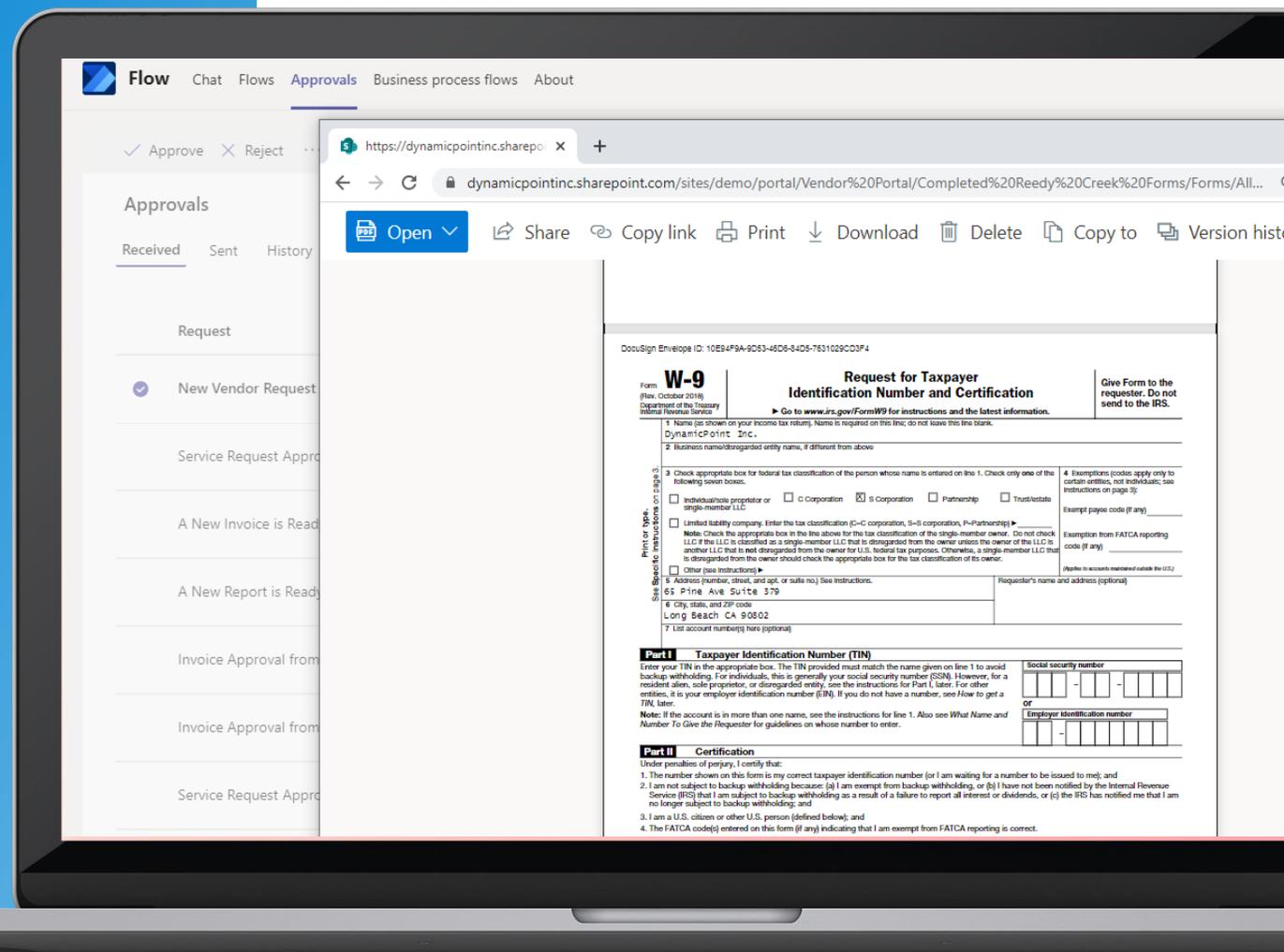
Create Portals Specific to User Type

Customers

Vendors

Employees
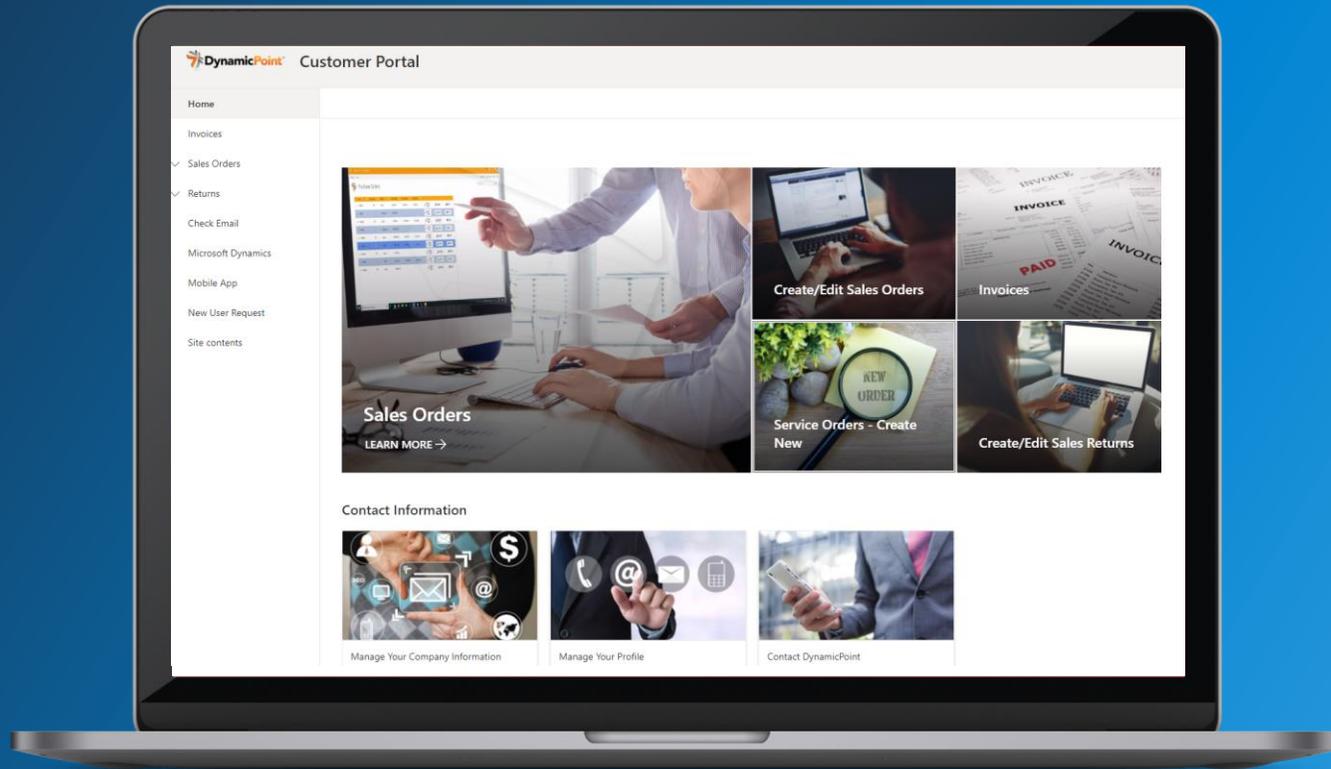
Customer Portal

Give customers fast, easy, anytime access to the information they want, including:

- Order Entry and Review
- Share Contracts and Agreements
- Create Service Cases and Manage Open Cases
- Share Inventory / Product Details
- Payment Processing
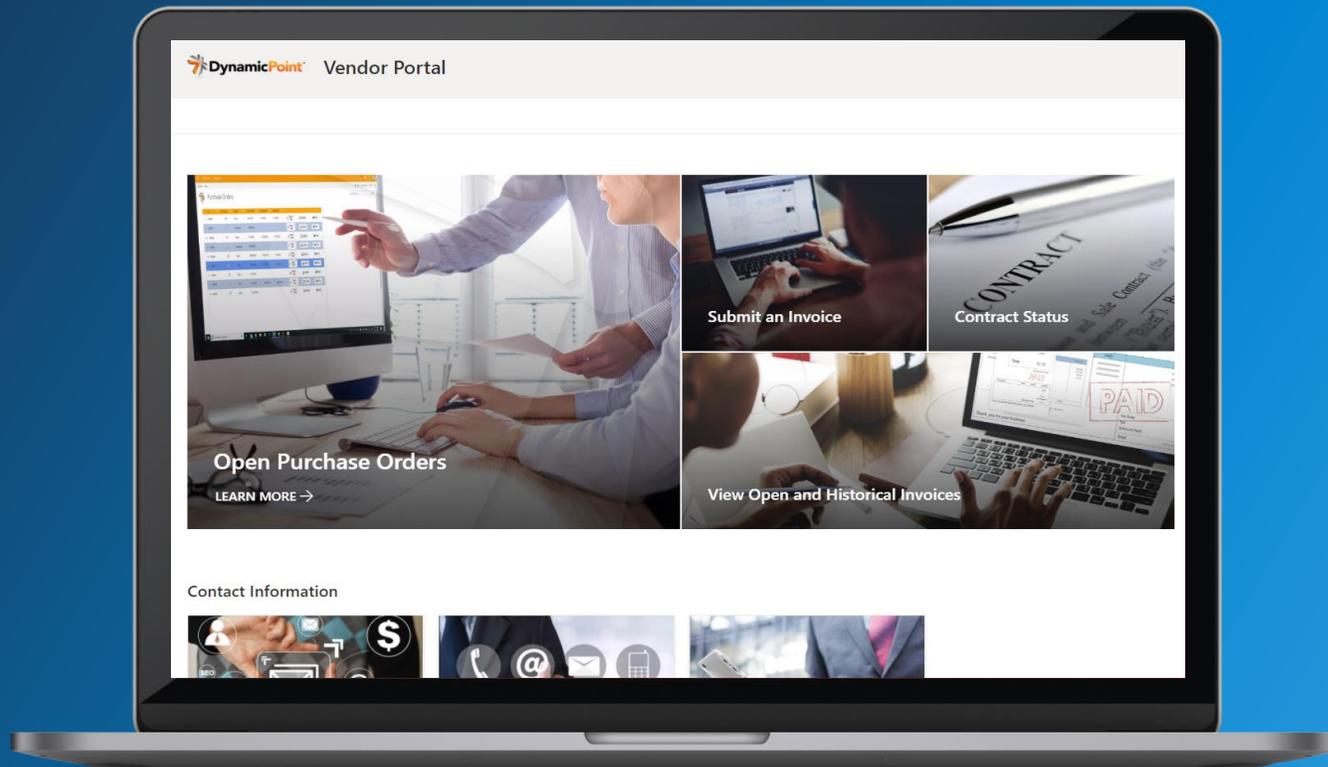
Vendor Portal

Streamline vendor management by letting partners see the information they need and manage their own data, including

- Company information

- P.O. and Edit Orders Confirmations

- Shipment Confirmations and Tracking

- Vendor Onboarding Process Automation

- RFP Management
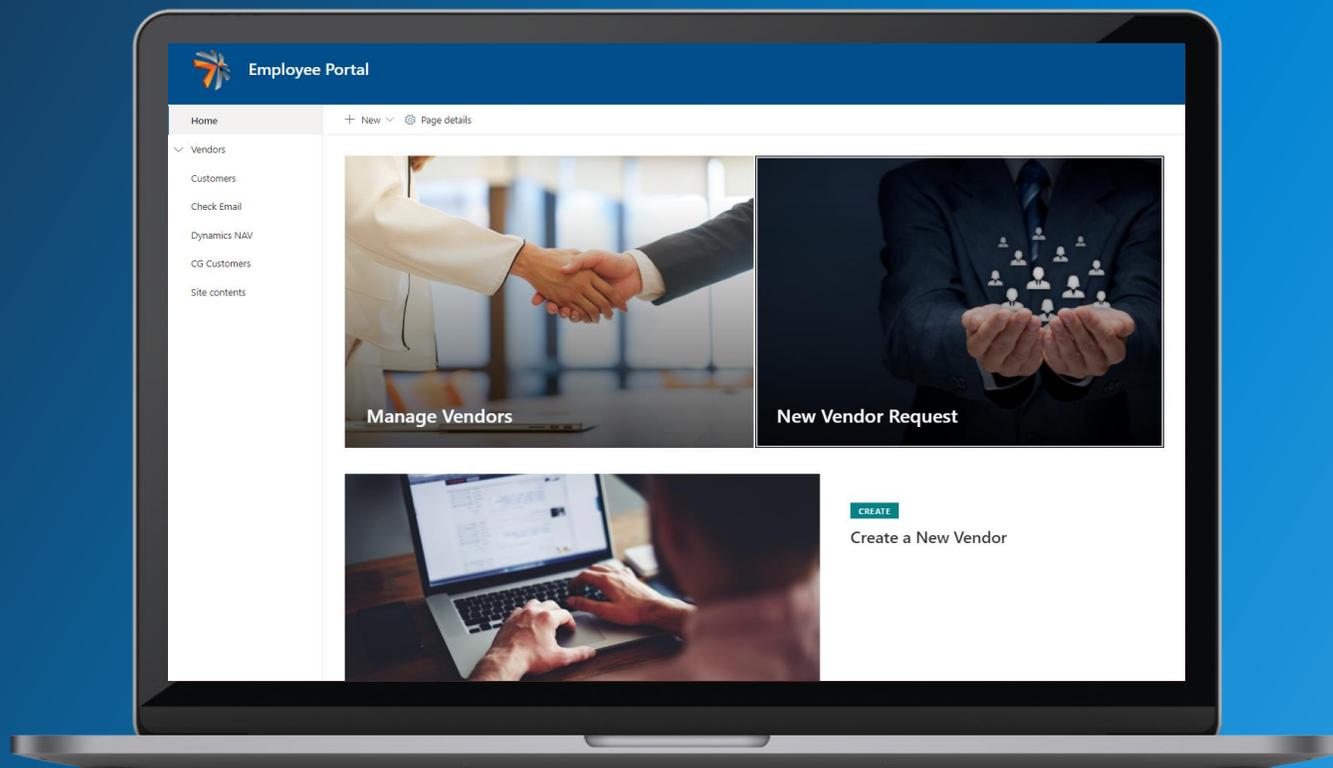
Employee Portal

Enable employees to better perform their jobs by giving them 'round-the-clock access to data they need, including

- Employee Forms and Handbooks

- Time Entry

- Project/Job Management Tools

- Company Operations Intel

- Reporting and Analytics

Benefits

Self Service
Most customers want self-serve on your site. Give your customers what they are demanding.

Savings
Reduce your internal costs by putting the information online without the need to consume employee time.

Increase Efficiency
Lower customer service requests with fewer phone calls and emails.

Improve Relationships
With 24/7 self-service, customer satisfaction will increase. Partners will have direct connection to your staff, so you can answer any questions they have immediately in real time without having to pick up the phone or send an email.

Streamline Processes
By leveraging the Office 365 platform, which provides the foundation for every DynamicPoint portal, Power Automate workflows can be added in conjunction with forms to streamline an otherwise labor-intensive process.

Information Collaboration
Easy to access and share customer, vendor or employee information from your ERP or CRM systems. The data is secured by displaying only the relevant information for the authenticated user.

![DynamicPoint™ logo — Create. Connect. Collaborate.]

Works on Practically Any Device

Because it's a cloud-based app running on the incomparable Office 365 SharePoint platform, users need no special hardware or software to log in and get going.

Desktop

Laptop

Tablet

Mobile

Seemingly Endless Possibilities

DynamicPoint's Office 365 SharePoint Portal Apps for customers, vendors, and/or employees make it possible to expose to users a little or a lot of data and functionality.

How much is entirely up to the company or organization.

Really, it's all about accessibility. Anywhere, anytime accessibility. And totally without the need of taxing the time and labors of an organization's personnel.
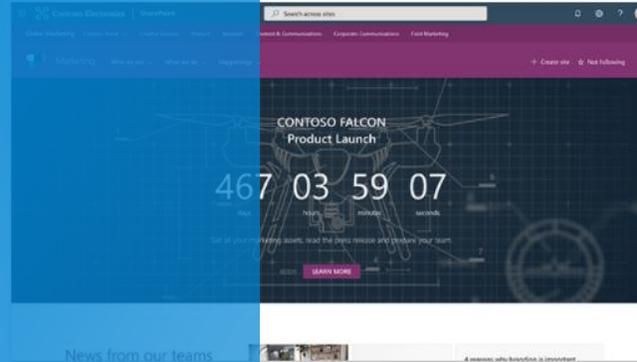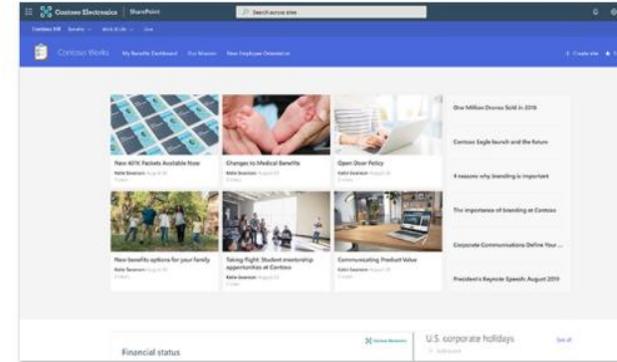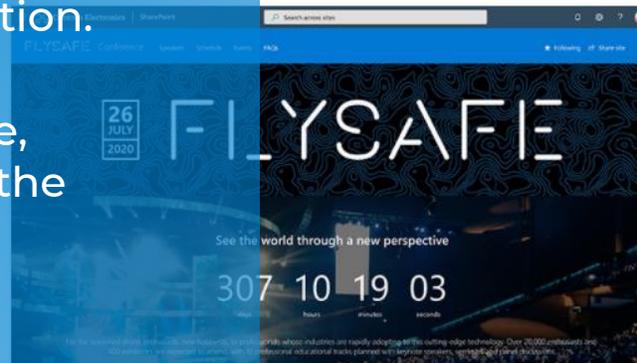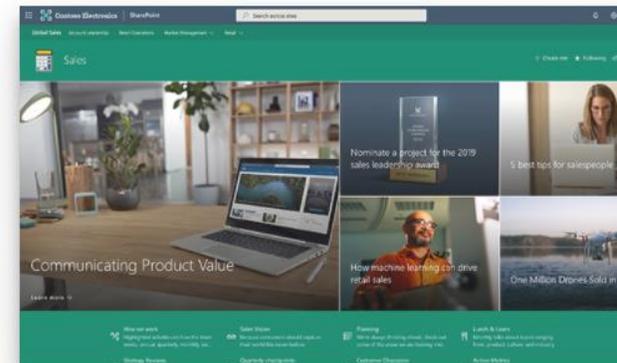
More Information

Product Page
https://www.dynamicpoint.com/customer-and-vendor-portal/

Pricing
https://www.dynamicpoint.com/customer-vendor-portals-pricing/

Video Demo
https://www.dynamicpoint.com/product-video-gallery/#cbpf=.customervendorportals

Ready to Take the Next Step?

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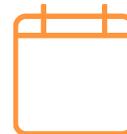
Schedule Demo
www.dynamicpoint.com/schedule/