

AppFinity Customer Portal for SAP Business One

FACT SHEET

AppFinity **Customer Portal for SAP Business One** opens a self-service access to your customers, allowing them to view detailed order history, check order status, review outstanding billings and make payments, print statements and update their profiles round the clock.



Logout		My Account		Orders Query		Order Date:	08/01/2005	to	08/31/2010	GO	PO #:	Search
Web Order #	SO #	PO #	Order Date	Total Amount	Shipped Amount	Unship Amount	Status					
	178		08/23/2010	\$4,900.00	\$0.00	\$4,900.00	Open					
	161		08/10/2010	\$984.41	\$0.00	\$899.00	Open					
	157		08/04/2010	\$2,452.80	\$0.00	\$2,240.00	Open					
100047	152	123456	07/07/2010	\$2,461.56	\$0.00	\$2,248.00	Open					
100046	151		07/07/2010	\$497.75	\$0.00	\$450.00	Open					
100040	149		07/06/2010	\$443.00	\$0.00	\$400.00	Open					
	146	43216	06/24/2010	\$175.82	\$0.00	\$156.00	Open					
100038	143	DEMO12345	06/15/2010	\$1,968.81	\$0.00	\$1,798.00	Open					
100036	141	DEMO	06/15/2010	\$443.00	\$0.00	\$400.00	Open					
	140	DMO	05/26/2010	\$1,422.41	\$0.00	\$1,299.00	Open					
	139	DEMO	05/26/2010	\$547.50	\$0.00	\$500.00	Open					
	138	DEMO	05/26/2010	\$443.00	\$0.00	\$400.00	Open					
	135		02/08/2010	\$4,400.00	\$0.00	\$4,400.00	Open					
	121		01/11/2010	\$1,197.46	\$0.00	\$1,089.00	Open					
	120		01/11/2010	\$2,389.91	\$0.00	\$2,178.00	Open					

With the Customer Portal, you can empower your customers by providing them complete access to up-to-date and accurate information. It is a cost-effective solution that eliminates countless phone calls to verify the status of sales orders. By enabling your customers to make payments in the system, it will lessen time-consuming paperwork to reconcile accounting discrepancies resulting from incorrect billings and payment applications. The added convenience at your customers' fingertips and the reliable automated payment entry processing result to an improved customer relationship, a sure win-win for both your business and your customers.

AppFinity Customer Portal and SAP Business One systems are linked to each other thereby enabling the transferral of a multitude of information from Customer Portal to SAP Business One, and vice versa. The synchronization is automatically done, in real time. There is no need to manually import or export data ensuring accuracy of transferred data.

Key Benefits

- Provides a shared view of data between company and customers for greater transparency.
- Self-service access to your customers to manage their accounts.
- Automated payment processing lessens clerical errors.
- Reduces unnecessary administrative and overhead costs.
- Helps you keep up with increasing sales volume while minimizing costs.
- Online, real-time integration with SAP Business One.

www.appfinity.com

Key Features

View Orders And Invoices History

The ‘Account Activities’ menu provides your customers with a snapshot of their accounts. On this menu, they can check their outstanding sales orders and invoices, view full order history for previous orders, and preview their statements. For each sales order, the system provides details on the shipped amounts and amounts on backorder.

Invoices Query					
Invoice #	Date	PO #	Invoice Amount	Paid Amount	Balance Amount
39	07/30/2010		\$443.00	\$0.00	\$443.00
27	10/28/2008		\$1,428.50	\$0.00	\$1,428.50
6	01/25/2005		\$21,905.00	\$0.00	\$21,905.00

The Customer Portal also extends your billing and collection facilities by providing your customers with updated balances of their accounts online and in real time. This enables customers to review their accounts anytime and spot any possible discrepancies sooner. With this capability, your accounting department can avoid the time and expense of generating and mailing hard-copy statements to your customers. The customer can click on the ‘SO #’ or ‘Invoice #’ link to print/preview the entire sales order or invoice.

Statement Date	Customer #	Company Name	Attention To	Phone #
9/3/2010	C23900	Parameter Technology	Judy Brown	(812) 224-9000

Invoice #	Invoice Date	Due Date	Amount	Balance	Currency
6	01/04/2005	02/03/2005	21,905.00	21,905.00	USD
27	10/28/2008	11/27/2008	1,428.50	1,428.50	USD
39	07/30/2010	08/30/2010	443.00	443.00	USD
Total:			23,776.50	23,776.50	

Update Profile

In the ‘Account Settings’ menu, customers can make changes to their personal information and change their Email address, account username and password in the Customer Portal, billing and shipping addresses.

Make Payments Online

The ‘Make a Payment’ function enables your customers to pay online. They can view their outstanding invoices and pay any amount or the full balance using a credit card. With an online credit card payment gateway installed, the payment will be deposited to the company’s bank within one business day.

Contact Us

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General Information

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OEC Computers, Inc.
ONLINE SHOP

Logout My Account

Hello Judy Brown

▶ Make a Payment

ACCOUNT ACTIVITIES

- ▶ Outstanding Sales Orders
- ▶ Outstanding Invoices
- ▶ Customer Statement
- ▶ Orders Query
- ▶ Invoices Query

ACCOUNT SETTINGS

- ▶ Change Email Address
- ▶ Change Password
- ▶ Change User Name
- ▶ Change Address

Credit Card Type: MASTER

Card Holder Name: Judy Brown

Credit Card #: 5423123456781234

Security Code: 111

Expiration Date: May 2012

Note: Partial payment for AR Invoices 39 and 27.

Invoice #	Invoice Date	Installment #	Due Date	Invoice Amount	Balance Due	Payment
39	07/30/2010	1	08/30/2010	\$443.00	\$443.00	200.00
27	10/28/2008	1	11/27/2008	\$1,428.50	\$1,428.50	200.00
6	01/25/2005	1	02/03/2005	\$21,905.00	\$21,905.00	0.00
					\$23,776.50	Total \$400.00

Visit our website at www.appfinity.com to get more information about the AppFinity Customer Portal System. To view a self-running demo, go to the **Online Demos** page of our website.