Portal Software for Sage Systems
Data Sheet

What is it?

Codeless Platforms' portal software provides organisations with the ability to easily build and/or deploy portal solutions to exact business requirements. The portals can provide users, such as customers, contractors and suppliers, with a secure, single point of access to company information that is relevant to them.

Our web portals are built upon Applications Platform, our cloud-based, rapid application development platform. With the addition of BPA Platform, our portal software can be easily integrated with any Sage system, enabling organisations to automate the transfer of data between the two systems in real-time.

What can our portal software do?

Common portals that we have deployed to our customers include:

- Customer portal
- Sales portal
- Client portal
- Supplier portal
- Membership portal
- Field service portal
- Self-service portal
- Employee portal

An online business portal can provide you with greater control over your day-to-day processes as well as be designed to replicate the look and feel of your business. Regardless of time or user location, a web portal can be accessed quickly and easily on a desktop or mobile device.

Our portals allow users to:

Access and view information

Customers can access orders, invoices, payments, deliveries and credit memos. Sales reps can also view this information if it relates to their customers. Vendors are able to view purchase orders, receipts, invoices and payments.

Make a payment against balances

Customers can make a payment against open documents through a preferred payment gateway, which is then automatically recorded in a Sage system.

Place an order

Customers can place an order directly via the portal, including sales reps, who can place an order on a customer's behalf.

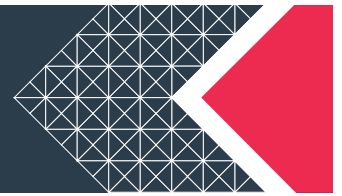#### Download / view reports and related information

Users can view and download important information like statements, price lists and marketing material.

Integrate with any ERP system

BPA Platform will integrate the portal with your Sage system for a number of these scenarios. For example, pushing item and pricing data from your Sage system to the portal along with information such as orders, invoices, receipts, etc. Orders generated and payments made in the portal can be automatically pushed into your Sage system.

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The benefits of our portals

The benefits of a web portal can typically include user satisfaction, improved access to important data and basic user login stats. However, most organisations that have deployed our web portal software cite the following commercial benefits:

- Provide users with 24/7 self access to information
- Removal of back office administration of data collected 'off site'
- Improved decision making with real-time information
- Stronger relationships and improved communication
- Access on desktop and mobile devices
- Provide a scalable IT licensing option

Achieve more with portal development

Applications Platform's quick create wizard provides you with all the tools you need to rapidly build, deploy and manage secure web portal solutions via drag and drop functionality. Features that come as standard include:

- Embeds into company websites
- Custom CSS styles
- Unauthenticated/authenticated users
- Read/write information
- Supports high load volumes
- Point and click configuration

What system requirements do I need to implement a portal?

Codeless Platforms Portals

Browsers - desktop and mobile:

Google Chrome (Recommended)

Apple Safari (Mac)

Mozilla Firefox

Opera

Microsoft Edge

Microsoft IE 11

Safari (iOS)

Chrome (Android and iOS)

BPA Platform

The following indicates the supported operating systems and minimum service pack required:

Microsoft Windows 2008 Server 32-bit / 64-bit / R2

Microsoft Windows 2012 Server / R2

Microsoft Windows 2016 Server 64-bit

Supported Sage Systems

Sage 200

Sage Enterprise ERP (formerly Sage X3)

Sage 1000

Sage Line 500   ...plus more.

Learn more about portal software

Visit **www.codelessplatforms.com** to view the Knowledge Base and forum, request a demo or register for a webinar. Alternatively, contact K3 FDS using the details below.

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