

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.

The screenshot shows a web portal interface for 'CONTOSO PHARMACEUTICALS'. The top navigation bar includes 'HOME', 'QUESTIONS', 'REVIEW', and 'UPLOAD'. The main content area is titled 'QUESTIONS' and 'PROGRESS'. It contains several prompts and answers:

- Please provide the name of the director signing the Strategic report: Bernard Purdie
- Please provide the date of signing the Strategic report: 26/03/19
- Please provide the name of the director signing the Directors report: Elin Jones
- Please provide the date of signing the Directors report: 21/06/19
- Please provide the name of the director signing the statement of financial position: Joe Morello
- Please provide the date of signing the statement of financial position: 21/06/19
- Does the company have any subsidiary undertakings?: NO YES
- How many subsidiary undertakings does the company have?: 3

Below the questions is a table of subsidiary undertakings:

Company name	Registered office	Country of incorporation	% shareholding	No. of share
1 Contoso Communications	Contoso Communications	USA	32%	30,000
2 Contoso Technologies	Contoso Technologies	USA	15%	100,500
3 Contoso Research	Contoso Research	USA	8%	280,500

Additional prompts and answers:

- Does the company have any tangible fixed assets?: NO YES
- Does the company have any debtors: amounts owed by group undertakings: NO YES

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.

The screenshot shows a 'PLACE AN ORDER' web portal interface. The top navigation bar includes 'WHAT'S NEW?', 'ORDERS', 'DELIVERIES / INVOICES', 'PAYMENTS', 'CREDIT MEMOS', 'STATEMENT', 'MAKE PAYMENT', and 'PLACE AN ORDER'. The main content area is titled 'PLACE AN ORDER' and contains a summary of orders:

- Past Due: \$ 41.64
- Due Soon: \$ 41.64
- Total Outstanding: \$ 41.64

Below the summary are buttons for 'MAKE PAYMENT' and 'PLACE AN ORDER'. The main content area is titled 'PLACE AN ORDER' and contains a form for billing and shipping addresses:

Billing Address: CP_B, 25 Bourne Valley Road, Bourne Gate, Poole, BH12 1DY, United Kingdom

Shipping Address: CP_S, 25 Bourne Valley Road, Bourne Gate, Poole, BH12 1DY, United Kingdom

Below the addresses is an 'ADD ORDER LINE' section with a table of order lines:

Product	Req. Multiple	Quantity	Rate
100256 - Silver Multi Star Napkins (Small)	6	6	\$8
100099 - Party Plastic Cups	8	8	\$8
100018 - Test Poppy Lily Vase	48	48	\$5

Below the table is a 'SUBMIT' button.

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

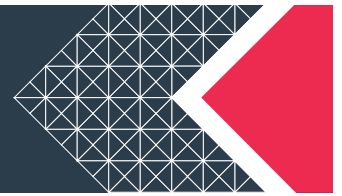
Users can view and download important information like statements, price lists and marketing material.

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.

The screenshot shows a web portal interface for 'ORDERS'. It includes a navigation menu at the top with options like 'WHAT'S NEW', 'ORDERS', 'DELIVERIES / INVOICES', 'PAYMENTS', 'CREDIT MEMOS', 'STATEMENT', 'MAKE PAYMENT', and 'PLACE AN ORDER'. On the left, there are summary boxes for 'Past Due \$ 41.64', 'Due Soon \$ 41.64', and 'Total Outstanding \$ 41.64'. Below these are buttons for 'MAKE PAYMENT' and 'PLACE AN ORDER'. The main area displays a table of orders with columns for Business Partner, SO No., PO Ref No., Status, Order Date, Qty, Amount, Currency, and Requisite. The table lists three orders from 'Codeless Platforms Core'.

Business Partner	SO No.	PO Ref No.	Status	Order Date	Qty	Amount	Currency	Requisite
Codeless Platforms Core	130010605		Open	15-Mar-2018	48	240.00	USD	22-Mar-2
Delivery no.		Status	No records to display		Ship Date	Ship Method	Tra	
Codeless Platforms Core	130010604		Open	15-Mar-2018	48	240.00	USD	22-Mar-2
Delivery no.		Status	No records to display		Ship Date	Ship Method	Tra	
Codeless Platforms Core	130010396	12345	Open	15-Mar-2018	14	26.82	USD	16-Mar-2
Delivery no.		Status	No records to display		Ship Date	Ship Method	Tra	



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.