



FACTSHEET

SANA COMMERCE CUSTOMER PORTAL



The emergence of B2B e-commerce and technological disruptors is impacting all business processes —and driving demand for technology-enabled improvements to once highly-manual operational tasks. The most notable is the order-to-cash (O2C) process, and Sana Commerce's Customer Portal does just that.

Overview: Why Choose the Sana Commerce Customer Portal?

The Sana Commerce Customer Portal is dedicated to streamlining and expediting businesses' O2C processes. We do this by leveraging our tight Microsoft Dynamics and SAP ERP integration to offer your business and customers an unparalleled level of control over account management, customer invoicing, quote and order management, RMA, and more.

Whether your business is making account or order changes in the ERP, or customers are making changes from the web portal, this data is integrated in real-time, offering clarity and transparency that would be challenging (and tedious) to achieve without an integrated approach.

“Businesses who have adopted best-in-class O2C practices are over 80% more effective at order management than those who have not.”

- IBM

Fortunately, investing in a solution like Sana's that is centered on improving the end-to-end O2C cycle can pay off in a major way, too. With Sana Commerce's Customer Portal, the complete O2C cycle —from purchase to invoicing, and returns— is supported, streamlined, and enhanced by accurate, real-time ERP data.



Key Capabilities of the Sana Commerce Customer Portal

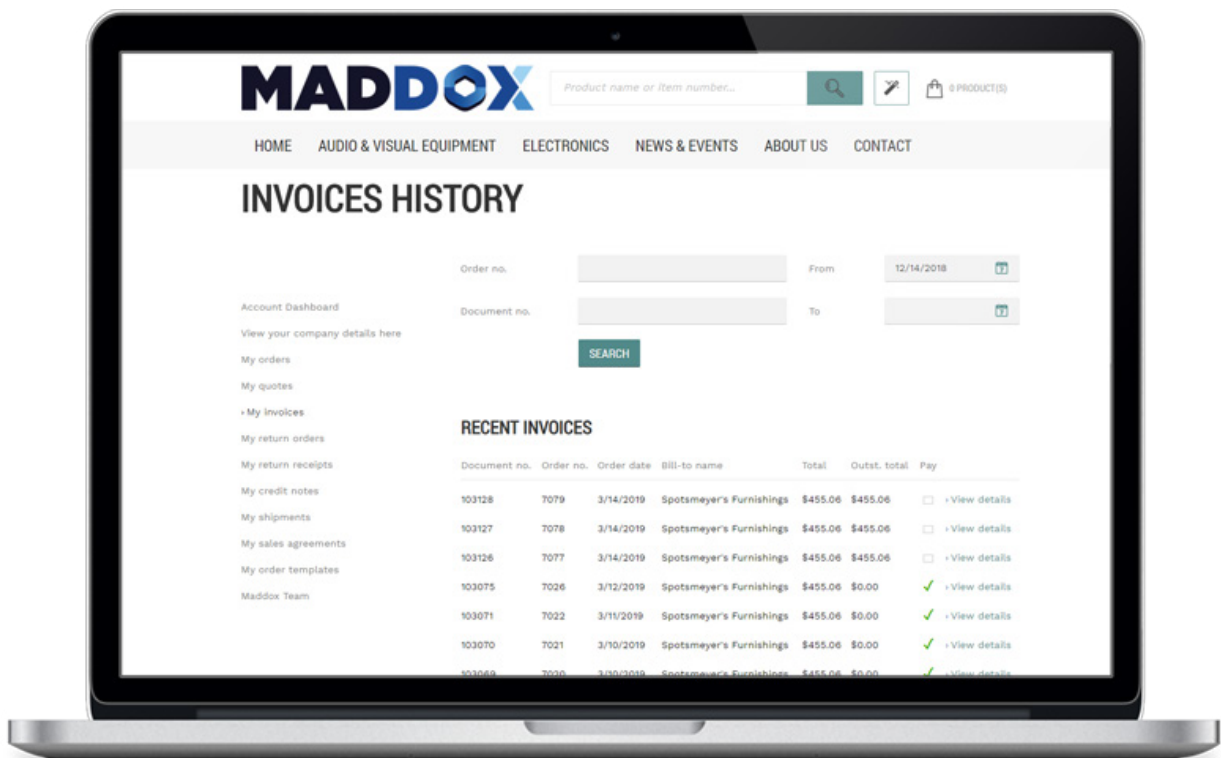
Empower Customers to View and Pay Open Invoices Online, No Matter the Source

Make invoice management easy for IT, for finance, and for the people at the very core of your business: your customers.

Thanks to the Sana Commerce Customer Portal, merchants can accept client payments on open invoices directly from the web portal. Business clients can also pay multiple outstanding invoices at the same time from the portal.

Because our Customer Portal integrates seamlessly with your ERP's sales order processing and cash management modules, multiple payment methods are accepted, and transactions will remain linked with their corresponding order in your ERP system. Paying invoices online saves time and decreases the likelihood of human error by your account payable representatives.

Whether the invoice was created from an order placed online, by phone, via email, or in store, the payment can still be made via a secure web-based portal. Once the invoice is paid, the payment status will be updated in your ERP in real time. Customers can also access pending and paid invoices and obtain a receipt of payment via the portal.





Offer Real-Time Information, Attachments, and Historical Data

In addition to online and offline invoices, customers also have 24/7 access to their complete document history. All documentation is available in real time, so the moment something is updated in the ERP, the new version is available to your customers online. This includes supporting product and sales documentation (including sales quotes, delivery documents, and more), which improves your customers' visibility into historical data and improves their overall experience.

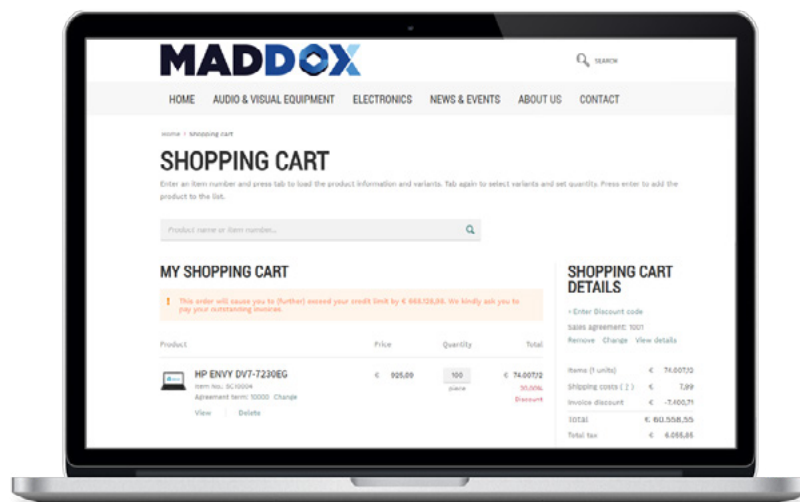
Enable Customer Account Management

When it comes to account management, the Sana Commerce Customer Portal puts the power in your customers' hands (and saves your internal teams from handling the tasks themselves).

From the web store, your customer can manage their account details, like billing and shipping information, regardless of whether they have an individual customer profile or a business profile. Sana pulls real-time information from the ERP (Customer ID, Customer Name, Customer Bill To Address, Customer Ship To Address(es), etc.) to keep this accurate, and any changes made by the customer on the My Account page are conversely instantly available from the ERP. Even if information is updated over the phone by an internal employee, the customer can see their information updated online right away.

Set Credit Limits and Let Customers Pay via On Account Balance:

Set on-account limits for purchasing to ensure steady cash flow and guarantee that your customers stay within spending limits that your business is comfortable with.



The Sana Commerce Customer Portal supports on-account payments (which means that as a business, you can allow your customers to make purchases on account without requiring an immediate payment, and then invoice them later) and use credit limits to keep clients' amount outstanding within what is reasonable to you. If, for example, a customer has reached their term (spending) limits, a warning is sent, prompting them to pay with a credit card instead, or to log in and pay open invoices to free up available credit.



Offer Online RMA Handling

Good customer service is a top strategic goal for companies striving for a high level of customer loyalty, and this must include an efficient and automated sales return process. With the Sana Commerce Customer Portal, you (and your customers) can handle Return Merchandise Authorizations (RMA) online and integrate that data in real-time between the ERP and web portal.

Your customers have two options for creating a return order: based on invoice (from the posted invoice detail page in a Sana web store) or by adding the product to the 'My Return Orders' page in their account (for any order that is not connected to any sales document or invoice), to be processed by a sales rep.

To create a return order, a customer must only worry about:

- ✓ Choosing the product and defining the quantity to return.
- ✓ Selecting a reason for the return.
- ✓ Optionally entering comments and attaching files (for example, a photo or a copy of a receipt, to provide the business with more details).

This streamlined process minimizes manual work for your business and improves the customer experience by ensuring convenience and allowing customers to be compensated for returned products sooner.



Ensure Portal Security

Sana's Customer Portal integrates seamlessly with your ERP, so security of that data is of the utmost importance. Sana Commerce helps you create a secure, user-friendly online environment for your clients with software that is evaluated, tested and certified by Lionbridge, Microsoft and SAP.

Here's a detailed look at what else we have to offer in order to guarantee security:

Firewalls, IP Restriction and DMZ.

You can use a firewall to secure your Sana application and ERP system, or even set up IP restriction.

SSL/TLS

Our implementations always make use of SSL or TLS protocols. These provide security for the data traffic between web servers and browsers.

Cloud Source

Our source code is reviewed only by trusted clients and partners. This lets us offer the benefits of open source, without granting access to anyone and everyone.

VPN

Sana Commerce lets you use a Virtual Private Network, a secure private internet connection, for the data exchange between the web-based portal and your ERP system.

Password and Credit Card Data Storage

Sana Commerce never stores credit card information (this remains with the payment service provider) or unhashed passwords.

Failover

It's possible to set up a failover system using multiple Sana installations. This ensures that your web environment is always available for use.

Data Redundancy

If you choose to host your web store with Sana, you can rest assured that your data is safe due to our highly redundant data storage setups.

OWASP Best Practices

Excellent security starts with your source code. That's why our developers apply best practices as defined by the Open Web Application Security Project (OWASP).

Want to learn more about what the Customer Portal can do for your business?

[Contact us!](#)

