

# ADVANCED ENTITY PORTALS

## RELATIONSHIP MANAGEMENT FOR NETSUITE

Advanced Entity Portals is a fully customizable platform built on top of NetSuite that enables companies to interact with their customers, vendors, employees at no additional cost per-user!

Manage entity relationships from onboarding to off boarding, by giving your vendors, customers, or employees access to self-service portals where they can view data that is relevant to them and interact with your company. No 3rd-party integration required.

## FEATURES

- ✓ Vendor Portal
- ✓ Native vendor onboarding
- ✓ Customer Portal
- ✓ Employee Portal
- ✓ Responsive design for desktop and mobile
- ✓ Drag-and-drop document upload
- ✓ OCR (Optical Character Recognition)
- ✓ Unlimited users



## USE CASES

- ✓ Allow customers to track item shipments
- ✓ Give entities access to NetSuite data in self-service portals
- ✓ Save on NetSuite licensing by giving employees portal access
- ✓ Manage customer support cases from within the customer portal
- ✓ Efficiently manage initial vendor onboarding and vendor reviews

## ABOUT

The Advanced Entity Portal module offering includes solutions for client / vendor onboarding, AP Automation, AI enabled OCR, Vendor Management, Employee information and more!

The self-service portals are fully customizable to match your brand. Onboard vendors and manage the full purchase-to-pay cycle right from the vendor portal! Use the employee portal to onboard employees, keep staff updated with reporting, and allow for time tracking, expense submissions, and more. In the customer portal your clients can view transactions, order status, and even make payments!

Entities can drag-and-drop a file into document upload section of the portal, where an AI enabled OCR engine can scrape the data, and pull it into NetSuite, automating repetitive business processes.

Document storage is powered by Document Collaboration for NetSuite.

The screenshot displays a web interface for a self-service portal. On the left is a vertical menu with options: Profile, Request For Quote, View Purchase Orders, View Item Receipts, View Vendor Bills, View Vendor Payments, View Return Authorizations, and View Vendor Credits. The main content area is titled 'Profile' and contains a 'Personal Information' section with a form. The form has fields for Company Name, Webaddress, Category, Email, Phone no, and Alt Phone no, each with a corresponding input box. An 'Edit' button is located at the bottom of the form.

