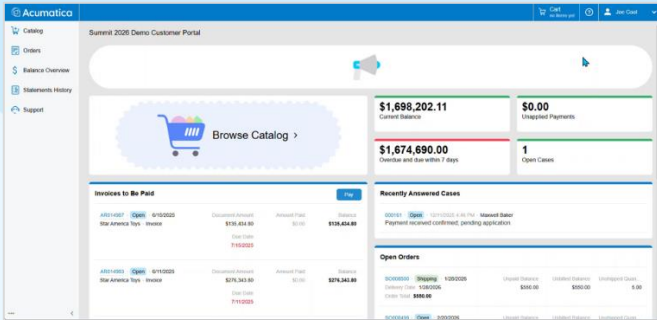




Customer Self-Service Portal

Acumatica Customer Portal brings self-service ordering, support, and account management together in one connected experience. It also gives employees a central place to share policies, procedures, and quality documentation.

- **Real-time B2B ordering tied to your backoffice data**
- **Self-service support and account management**
- **Connected customer and employee experience**
- **Centralized policies and procedures**

Key business benefits

- Enable customers to browse catalogs, check inventory, and place orders anytime.
- Give customers real-time access to balances, invoices, payments, and open orders.
- Help customers submit, track, and update support cases online.
- Share policies, procedures, training, and compliance content through integrated wikis.
- Keep customer, order, inventory, and accounting data aligned in real time.

Related resources

- 5 Ways CRM Maximizes Profitability > [LEARN MORE](#)
- Why Growing Businesses Need ERP Software > [LEARN MORE](#)
- Schedule a Personalized Demo > [LEARN MORE](#)

Drive Faster Service, Stronger Relationships, and Greater Efficiency with a Secure, Self-Service Portal

The Acumatica Customer Portal helps growing businesses deliver faster service, strengthen relationships, and improve efficiency. Built as an all-in-one extension of Acumatica, it connects directly to accounting, ordering, and inventory, so customers and employees always work from the same information.

Customers can place B2B orders, review balances and invoices, make payments, and submit support cases without manual updates or disconnected systems.

Employees can also share policies, procedures, training content, and compliance documentation through custom wikis that surface critical knowledge to company staff. Together, these capabilities create a responsive customer experience, support better internal alignment, and help your business scale with greater confidence and control.

- **Streamlined B2B Sales:** Customers browse real-time catalogs, check inventory, view customer-specific pricing, and place orders through self-service that stays aligned with Acumatica ordering and inventory data.
- **Effortless Account Self-Service:** Customers review balances, invoices, statements, payments, and open orders in one place, with real-time visibility.
- **Integrated Case Management:** Customers submit, track, and update support cases in the portal, gaining clear status visibility while helping service teams stay aligned through shared customer data.
- **Centralized Knowledge with Wikis:** Teams publish FAQs, policies, procedures, training materials, and compliance documentation in a single shared workspace that serves employees, customers, vendors, and partners.

“I am excited to explore the self-service customer portal solution. It’s possible we could use the portal for statements, billings, and collections so our customers and agencies we deal with feel like they are part of the process and are more in the loop on their project status.”

—Eric Hugunin, Chief Operating Officer, Phoenix Renovation and Restoration

> CUSTOMER STORIES

B2B Ordering Made Simple

Customers browse a real-time product catalog with detailed item descriptions, multimedia, inventory levels, and account-specific pricing. Adding items to the cart is seamless, and at checkout, prefilled shipping and billing details save valuable time. Secure payment options include credit card processing via Acumatica Payments or placing orders on account with credit validation.

Effortless Support Case Management

Creating a new support case is quick and intuitive. Customers select severity levels, provide detailed descriptions, and submit cases, which automatically route to the appropriate support agent. The portal enables clear, ongoing communication, with messaging and updates managed directly within each case.

Comprehensive Account Self-Service

From the dashboard, customers view account summaries, including balances, unapplied payments, overdue amounts, and open invoices. Drill-down options provide access to detailed documents, such as invoices and credit memos, with intuitive filters to quickly find specific information.

Integrated Wiki for Knowledge Sharing

The Acumatica Customer Portal includes a customizable wiki, enabling businesses to create a centralized knowledge base directly within their core ERP solution. Publish FAQs, standard operating procedures, and compliance documentation to empower employees, customers, vendors, and partners. This collaborative hub ensures your team has instant access to critical information, breaking down data silos and improving operational efficiency.

Online Payments

Customers pay single or multiple invoices securely, override payment amounts for disputes, and add new payment methods while ensuring complete PCI compliance for card details and payment transactions.

The top-left screenshot displays the 'Support' section of the Acumatica Customer Portal. It shows a case titled '000162 - Service Request for Equipment' with details such as Case Number, Priority (Medium), Severity (Medium), and Case Class (PRODUCT - Product Support - Incidents). The 'Additional Info' section lists the product as 'Keurig 5000'.

The top-right screenshot shows the 'Balance Overview' section. It includes a table of open documents with columns for Reference Nbr., Application Date, Type, Status, and Payment Amount. A summary table on the right shows Totals (\$): Overdue Total (\$1,674,090.00), Unapplied Payments (\$0.00), Outstanding Total (\$1,674,090.00), and Balance (\$1,698,262.11).

The bottom screenshot shows the 'Catalog' section, which displays a grid of products for sale. Each product card includes an image, name, price, and an 'Add to Cart' button. Products include Acer Laptop Computer, Lego 500 piece set, Injection molding machine, Poweraid 12 Oz - lot, Data Backup, Haveli 4 Foot Air Hockey Table, South Shore Savannah Changing Table, Little Tikes Bodd n Bright Table & Chairs, Orac Pack N Play with Newborn Nappieration, Groom Body Balance Ball, Eddy Insulated Bottle, Gervan Canopy Recliner, Davinci Jayden Convertible Crib, and Graco Stylus Classic Travel System.

Customers can easily access their contact information, statements, and invoices; pay bills with Acumatica Payments; create and manage support cases; and place B2B sales orders safely and securely online.

ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on [LinkedIn](#).