



5 Features that Make the Perfect Customer Portal Solutions

As businesses are going online, customer portal solutions turn into a preferred option for customers to interact with the businesses. Customers now prefer to find the answers on their own, at their convenience. A CRM online customer portal provides a place for customers to manage their orders, history, payments, invoices, personal details, documents, and more.

It benefits you with customer satisfaction, reduced workload, improved communication, and better productivity. Overall, the portal renders enhanced customer service without the need of an extra employee. However, they vary based on your business needs and requirements. While going for customer portal development, it is better to have a portal that's easy to integrate and use; it has a bundle of features.

Make sure to include the below mentioned first.

- **24*7 Self Service**

Self-service means providing customers with the freedom to solve their order issues, and other product-related problems without contacting a representative. The standard services include FAQs, chat support, how-to guides, online discussion forums, etc.

But, it's not a 'good to have' feature. It's a necessity for portal solutions to give customers access to self-services 24*7. It implies a positive experience and customer loyalty. In fact, all-time services have become so important that [67 percent of customers](#) expect companies to include a self-service portal. But around 55% find it challenging to access it, according to a [North Ridge Group](#). Therefore, make sure that self-service provides quality content, images and videos for better understanding, and is up-to-date.

- **Ability to Customize**

A CRM portal varies in flexibility and adaptability. However, a perfect solution would adapt to your business needs. It would allow you to customize the portal, enable or disable the features

accordingly. The home page of the portal would then present the features that you want your customers to access.

For example, you have a retail clothing store. You would require basic features like selling, orders, payments, etc. You don't need to provide your customers with heavy transaction details, often asked in banking solutions.

Ensure that the portal allows you to customize. Canned solutions can address your requirements but see if they allow modifications, or they might leave you spending more on unnecessary elements.

- **Role-based Accessibility**

A portal is a medium of communication between staff, customers, and admin. Therefore, there needs to be a degree of access levels for different roles. Make sure to select from the [customer portal solutions](#) that help assign specific rights to the customers to login directly and others for the backend. Based on the access, your employees can serve the customers with the best of services. Similarly, you can predefine roles for different categories of customers. For instance, a premium member group would have some extra features. And regular customers should not access it, is not your task anymore. By setting the roles in the CRM online customer portal, you can restrict customer access.

- **Knowledge Base**

No customer is the same. They all vary. A few might be tech experts; others may not have the slightest understanding of a CRM portal. Thus, your portal should be capable of equipping customers with relevant information in different forms. Training videos and group forums are one way to go for it. The other includes a library full of knowledge base content, FAQs, blogs, documentation, guides, announcements, news updates, etc. These knowledge base resources would supply your users with adequate information to solve their queries on their own without looking for online videos or asking in the forums.

- **Communication Channels**

Ultimately, customer portal solutions should be able to engage and foster customer relationships. No matter how valuable and useful a library is, human beings are social animals. At the end of the day, they want approval, support, and people to interact with. Thus, make sure to provide your customers with a way to communicate and feel supported through your

products or services. A CRM online customer portal with communication channels like online discussion, group forums, and communities will be a huge asset for your business. Not only will it support your customers, but it will also be strong support for your business as you scale up.

These channels would enhance engagement and build you a large customer-centric support service.

A Brief Idea

When you set out for customer portal solutions, make sure you choose the one that has functionalities required by your users. You will come across a lot of advanced portal solutions like multi-support, search function, security hierarchies, access, etc. But the best would be the one that meets your business needs. If you need a multi-support solution, it's right for you. If you don't, it's not. Choose wisely!