



Bpm'online new portal



# Implementation

bpm'online portal – is a component of the bpm'online platform, which allows for streamlining servicing processes for internal users as well as company partners and customers.

It also helps to organize processes for users that require limited access to data and functionality of the bpm'online system.

## Main portal capabilities:

- Configuration and development tools of bpm'online platform
- Setting up sections and pages on the portal with the system designer
- Business process management and case management
- Portal users management
- Managing access rights for portal users
- The ability to use portal with limited access to the main application
- Mobile app
- Ready-made products: Self-Service Portal, Customer Portal, Partner Portal

# Types of portal licenses

Product	Use-case
<b>Self-service Portal</b>	<p>Providing the self-service portal capabilities as part of the service processes. A portal user can find the information in the Knowledge Base or create a support request. The license allows for working with Cases and Knowledge Base sections only. The user can customize the basic sections. Configuration of additional sections is not available.</p> <p>Users can leverage the portal only after purchasing the following licenses: bpm'online customer center, bpm'online service enterprise, bpm'online bank customer journey.</p>
<b>Customer Portal</b>	<p>Providing the portal capabilities within all bpm'online products for automating such processes as: service provision, document coordination, reconciliation of service requests.</p> <p>A portal user can act as an initiator (creating orders, requests) or a process participant (approvals).</p> <p>The license allows for configuring and using up to three custom sections on the portal.</p>
<b>Partner Portal</b>	<p>Providing portal capabilities for external dealers and partners involved in all stages of the sales processes from the first contact to deal closure. Ability to work on the portal with Leads, Sales, Orders and Documents.</p> <p>Ability to use the solution within bpm'online sales and CRM bundle.</p>

Sections available for portal users		SELF-SERVICE PORTAL	CUSTOMER PORTAL	PARTNER PORTAL
bpm'online studio	Contractors	-	-	-
	Contacts	-	-	-
	Knowledge Base	Read	Read	Read
bpm'online service	Cases	Read/Create/Edit	Read/Create/Edit	Read/Create/Edit
bpm'online sales	Leads	-	-	Read/Create/Edit
	Sales	-	-	Read/Create/Edit
	Orders	-	-	Read/Create/Edit
	Documents	-	-	Read/Create/Edit
bpm'online marketing	Marketing activities	-	-	Read/Create/Edit
bpm'online bank customer journey	Requests for financial products	-	Read/Create/Edit	-
	Contracts	-	Read/Create/Edit	-
Ability to create custom sections for portal users, the number of sections		Ability to extend the set of sections for portal users is not available	Up to 3 custom sections	Up to 3 custom sections
Price, USD per user / year		Free	\$70	On request
Price, USD per user / perpetual license		Free	On request	On request



# Additional restrictions of portal licenses

1. Self-service Portal is available only as a part of bpm'online customer center, service enterprise and bank customer journey. It cannot be used with bpm'online sales and bpm'online studio products.
2. Partner Portal is available only as a part of bpm'online sales enterprise and CRM bundle and cannot be used with bpm'online sales and bpm'online studio products.
3. Customer Portal is available within all bpm'online products.
4. Custom section is a new section created on the portal without the possibility of inheritance from the basic sections.
5. The portal user has a daily limit of 1 000 API calls\* on licensed objects.
6. The number of free portal users for the Self-service Portal doesn't exceed 10 000 users and can't exceed the number of users of the main product by more than 100 times.

\* The exact number will be calculated based on portal users actual performance data [success.bpmonline.com](https://success.bpmonline.com)