



Open Bee™

Setting up a Customer Portal with Open Bee™

Quick Start Guide

Open Bee™ Portal enables you to deliver superior document sharing while at the same time lowering the cost of serving your customers. See how in this implementation guide.

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Introduction

From version 6.4 and onwards, Open Bee™ Portal enables you to share documents with your business contacts through a private and secure Customer Portal website.



45 %

of business leaders
complain about
customers' outbound
documents
management.

92 %

of customers would
like to get an online
private access
to documents
exchanged with
their suppliers.

Acquiring a
new customer costs

5 to 10

times more than
retaining an
existing one.

Cost-effective

Offer a cost-effective solution to deliver electronic documents such as invoices, traditionally sent by postal mail.

Customizable

Fully customizable solution to tailor the Customer Portal to your look (branding, color, content), without any expertise.

Cloud platform

As a cloud platform ready to use, no need to implement complex virtual private networks (VPN).

Multilingual

Customers can navigate into your Customer Portal in their favorite language.

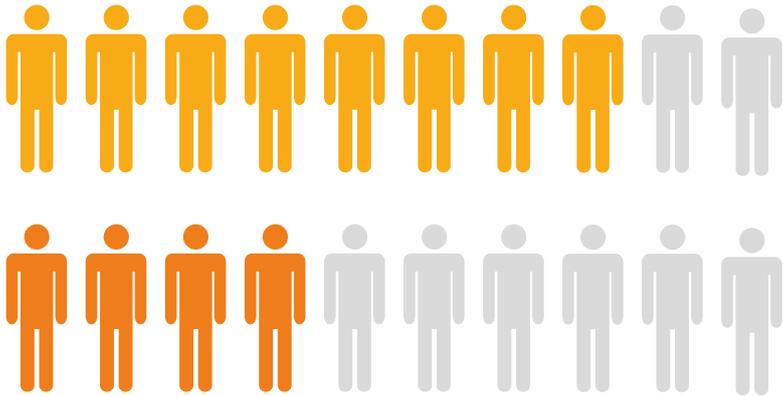
24/7 access

Provide each customer with a 24/7 access to the most reliable, accurate and up-to-date information.



1 - Add Customer Portal user licenses

Open Bee™ Portal enables you to purchase (in bulk) at a preferential rate « external user licenses » that are required for each customer who access your Customer Portal.



1

From the **Administration** section, select **License**.

2

Check the message **“You have x external user account(s) out of xxx available”** to view your credit.

4

Click **Manage** to add more external user licenses.

3

If needed, **contact** your local reseller to purchase required licenses.

2 - Enable your Customer Portal

1

From the **Administration** section, select **Extranet**.

2

Click **Add an Extranet**.

3

Select the **Customer Portal** folder (as explained in the tip).

4

Click **Validate**.



TIP: to ease the set-up of your Customer Portal, we advise you to build a folders structure as follow:

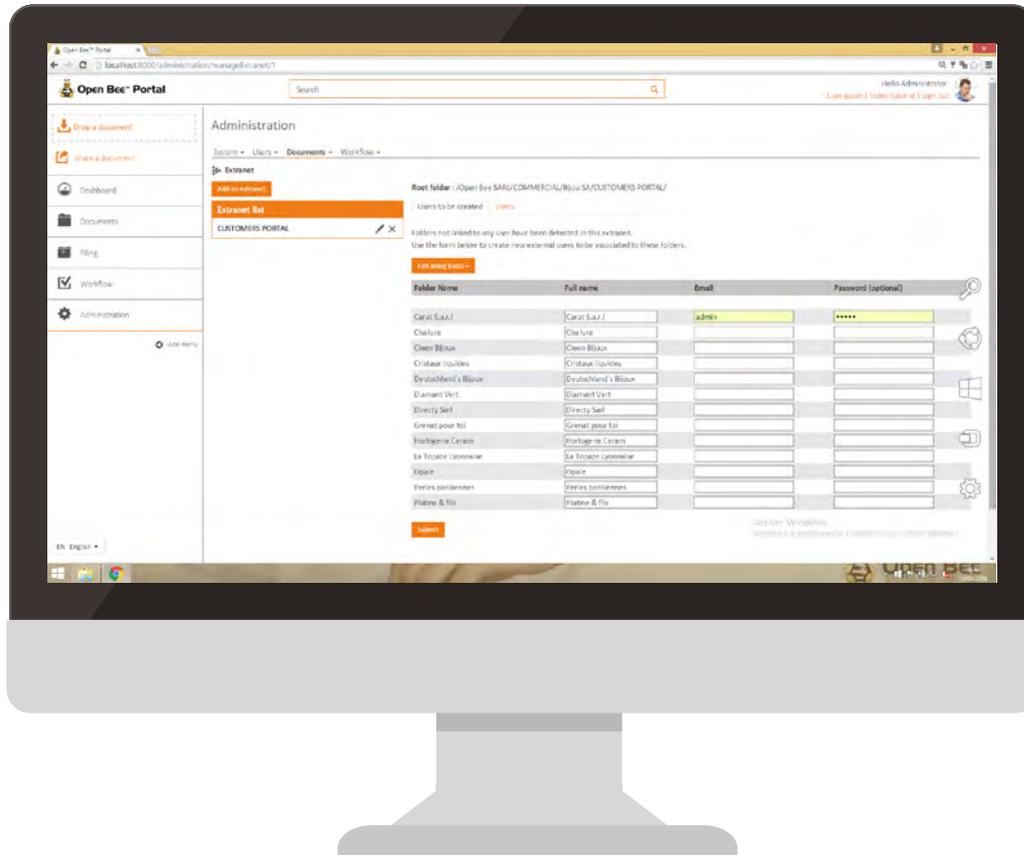
Create a top folder called for instance "Customer Portal" and add subfolders named as your customers' company name.

Note: once this done, you can start adding content to each customer's folder.



3 - Set up login credentials for your customers

Once the extranet has been set-up, the following window appears:



Note: password is optional. Should you leave the field empty, your customers will be asked to prompt a password before being able to connect to your Customer Portal.

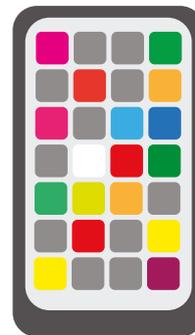
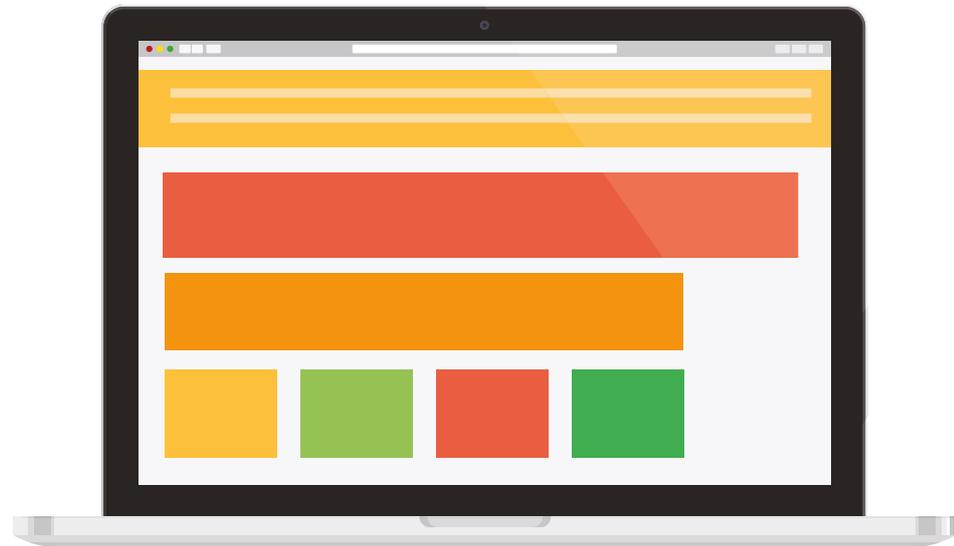
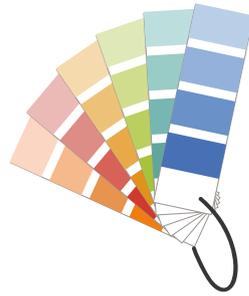
You can either manually add (one by one) email addresses (as login to the Customer Portal) for each of your customer or click **Edit using Excel** to bulk upload email addresses of your customers.



4 - Customize your Customer Portal

You can customize the logo, images, and color of your Customer Portal to reflect your company's branding.

1. From the **Administration** section, select **Customization**.
2. Use the different options available to change settings: color, logo and images.
3. Click **Save Configuration** to save all changes to the theme values.



5 - Customize your emails

You can also standardize the email templates sent to the users of your Customer Portal by clicking the **Email Customization** link from the **Administration** section.

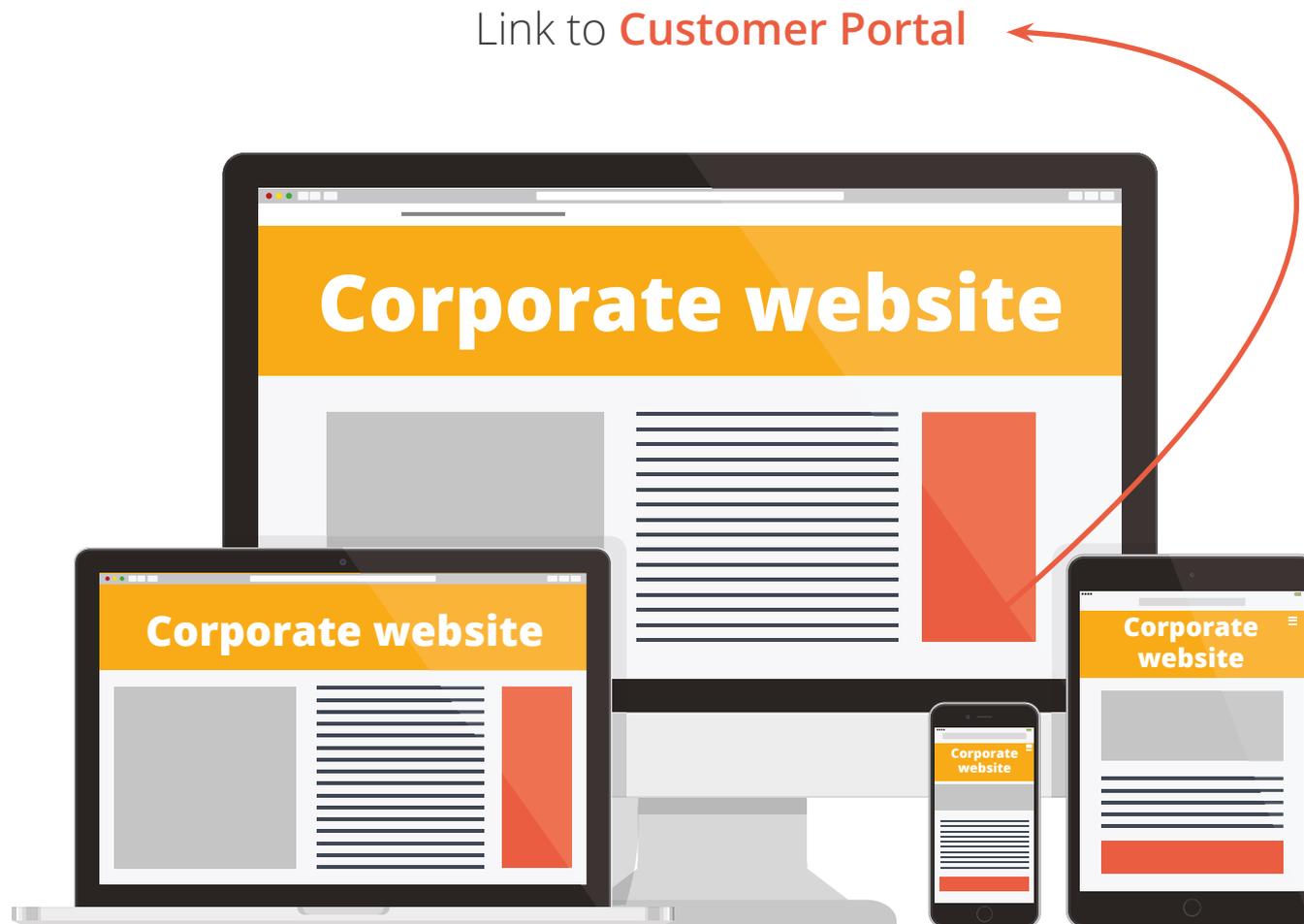
The template list shows all email templates to use when sending email notifications, such as a new document posted or a reset password, to Customer Portal users.



6 - Add the Customer Portal URL to your corporate website

Allow your customers to easily find your Customer Portal by adding a link on your corporate website to the Portal's URL.

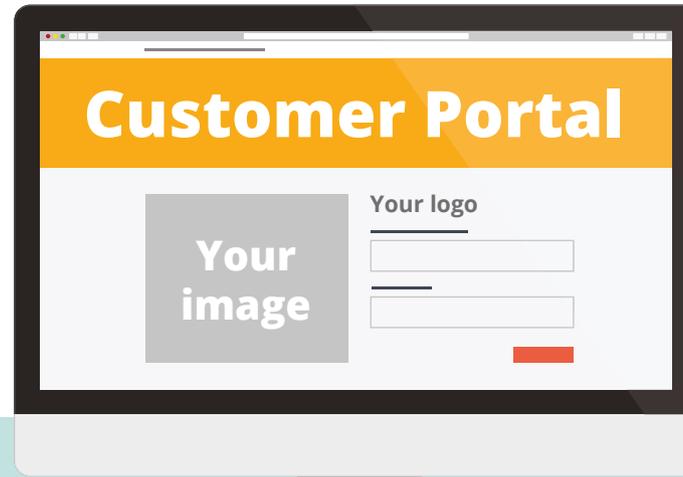
1. Copy the URL of your Customer Portal.
2. Paste the URL into the HTML of your corporate website.



7 - Access as a user to the Customer Portal

Each of your customers can now easily log in to their private workspace that you have just created. They just need to:

1. Connect to the URL of your Customer Portal.



2. Enter their own login and password.





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