# INTRODUCTION

Credit Device is a provider of SAAS software and we sell online financial company data. The Credit Device products are sold by our own sales team and distribution partners/resellers. The aim of this development is to improve and simplify our product settlement to customers in a number of phases. The development is a standalone application separated from the APP’s within which we deliver our products.

The application is being built for Credit Device, however a part of the functionality is made available to our distribution partners.

Name of this project is **Customer Portal Development**.

## Development goals

Functionality within which customers and users of customers can be recorded and managed. Solving administrative problems by developing API’s that feed individual production systems.

## Instruction documents

Description and project scope

Overview screens

Wireframe per screen

## Definitions

**Customer portal** the new software to be developed in which the customer's data is recorded and the connections through various APIs with the portal application.

**Portal application** is software as a service in which CreditDevice customers can purchase credit information and take care of credit management (reminders).

## Functionalities developed phase 1.

* Central storage of all Credit Device and distribution partners client data, internal users and client users.
* User interface distribution channel Credit Device owner
* User interface distribution partners (equal Credit Device other rights)
* Contract data
* Customer settings
* API of users applications to central storage
* API client settings by processing in credit information systems and other modules
* User users within APP renew
* Configuration internal users
* Configuration create distribution partners
* Configuration product groups
* Configuration rights and roles
* Configuration tables management
* The design of a contract administration system.
* The structure of product tables.
* Recording prices per product at customer level
* Simplifying the implementation of annual price increases.
* Contract management

## Functionalities developed in phase 2.

Wallet management

Create invoice lines

Create invoices

Send invoices

## Functionalities developed in phase 3.

Improvement authentication level (two factor authentication).

Single sign on.

Active directory.

## Development phases

Credit Device can decide to switch the sequence from phases. Depending on the priority and the applicability of the development, we will determine the definitive subdivision of the phases.

## Explanation

Development of APIs for the connection of customer data between the customer application and the portal application.

Development of API for the connection between the portal application and the customer application. Such as new customers created in the portal application and termination of the employment of a user of the portal application, whereby the user ID and password of the user are terminated. This connection is two-sided. From portal application to customer application and differently.

Development of API for the connection customer application and the portal application whereby on the basis of contract termination the relationship with the customer is terminated and the user-id and password of the users are terminated.

## Explanation

A distribution partner uses the same application as a limited back office functionality for capturing customers and customers. This application is also used to cover the expiration of an agreement with customers and then immediately terminate the online access of the users connected to the customer.

Which functions are available for the owner and the distribution partner:

# CENTRAL STORAGE CLIENT DATA

COMPANY DETAILS

Company name 1

Address 1 and 2

House number 1 and 2

Postal Code 1 and 2

City 1 and 2

Country (default Netherlands) (ISO country table)

Address type (table)

* Visiting address
* Mailing address
* Billing address

Registration number (Chamber of Commerce number)

VAT number

Telephone number centrally

Client type 3

Table client type

* Client (default)
* Distribution partner

Client Owner (select employee)

Client segmentation

Table client segmentation

* Minor account
* Account
* Major Account
* International account

Client product lines (multiple product lines per client are possible)

Product line list product are recorded with a checkbox 8

* Credit reporting

1. Traditional credit reports
2. Catalogue
3. Alert Service
4. Web service
5. Chamber of Commerce HUB access

* Credit management software
* Risk Analysis
* Policy manager
* Marketing information
* Outsourcing
* Debt collection
* Other

Assign customer client number Credit Device (auto number) 4

Assign sub client numbers under customer number (allocation code) (equal customer number customer at distribution channel) 5

Prefix allocation code 6

Attachment(s) (saving documents PDF, Excel and Word) 7

1 The business information of a company is first searched using a search API on the data of the Dutch Chamber of Commerce. The name and address details and the registration number are entered in the appropriate fields.

2 A company can have multiple addresses.

2 In a next phase, the system will also send invoices to customers. The selection of the address type is made on billing address in combination with the contact person checkbox invoice address YES.

3 Credit Device can add multiple distribution partners to the application. A distribution partner can add and manage customers. When entering a company, it is determined which function the company has. Credit Device gets the status owner (there can only be one company with this status), distribution partner (multiple) and customers. The customers are uniquely linked to the owner or one of the distribution partners.

4 The customer number is generated automatically and is numerically up to six positions. The first two positions of the customer number consist of the last two positions of the year and the other four positions is a sequence number (example) 190101 - 190102. The start is one hundred.

5 The sub client number consists of alphanumeric six positions and is entered by the user.

6 If the customer type is distribution partner, filling in the prefix allocation code field is mandatory. The field is alphanumeric and consists of three positions.

7 With the help of drag and drop, documents are placed in an upload container and then stored with the company.

8 The development of a product line table is part of the next phase.

# CONTACT PERSONS/DEPARTMENT

## Introduction

Selection of natural person or department.

**Natural person (multiple contact persons)** 8

First Name

Initials

Inserts

Name

Full name (initials – insert – name)

Sex (unknown - male - female)

Contact type (table)

* Contract owner
* User
* Creditors administration

Telephone number (multiple telephone numbers)

Phone number type (table)

* Work
* Mobile work
* Privately

E-mail address (multiple e-mail addresses)

E-mail address type (table)

* Work
* Privately

Contact type invoice detail

* Send invoices to a contact person (check box)

Additional contact person data

* Role (select box) (In phase one we start with a defined set of roles)
* Contact person access to modules (selection of modules)

Similar to product lines at the company level. At this level it is determined which user has access to which product lines.

* Contact person cancellation YES/NO
* Contact person cancellation date

**Department as a contact (multiple departments)** 8

* Department description
* Telephone number
* E-mail address
* E-mail address type (table)
* Send invoices to a department (checkbox) 9

8 A customer can have multiple contact persons.

8 A customer can have multiple departments.

9 The invoice can be sent to multiple e-mail addresses that have been selected with a check box. E-mail

addresses can be from natural persons and from departments. The combination invoice address with a

contact person YES is used in phase 2 for creating and sending invoices.