



Customer Self Service Portal

Presented by IVG



Content

1. What is a Customer Self-service Portal?
2. Why Should You Use a Customer Self-service Portal?
3. Key Features of a Service Portal
4. Self-Service Portal Interface Sample
5. Key Service Portal Integrations
6. Q&A

What is a Customer Self-service Portal?

- A customer self-service portal provides one-to-many customer support resources for customers who are searching for instant answers to their problems. It removes the need to contact your customer support team and allows customers to help themselves.
- Customer satisfaction rises when you offer them self-service support. A customer self-service portal is an important part of the user experience of your product, allowing customers to find easy solutions and avoid bothering your company with repetitive questions.
- A self-service portal means your customers are uninterrupted when using your product. They don't have to wait for a lengthy answer for your support team when they encounter common issues.

Why Should You Use a Customer Self-service Portal?

- **24/7 self-service access**

When customers use a self-service portal, they have 24/7 access to the support that your company can provide. There are no times when agents are unavailable and they can take advantage of instant answers to their problems. Your company can offer truly global support which is unaffected by the times when your agents are available to work.

- **Reduce customer service costs**

A customer self-service portal means that fewer requests are sent to your customer support team. You can employ fewer agents to handle the same volume of customers, which is good news for your budget. A self-service interaction costs pennies when compared to the same interaction with a human agent, which costs dollars. You can expand your customer support team with less resources and save money in the long-run.

- **Improve Agent Productivity**

When agents are dealing with fewer repetitive queries, they are much more productive overall. They have more time to devote to the more complex cases and have more time to devote to non-customer facing tasks. It's easier for your customer service agents to be good at their jobs when they aren't dealing with the same questions over and over again.

Why Should You Use a Customer Self-service Portal?

- **Boost Site Traffic**

Your site's SEO is boosted when you have customers visiting your knowledge base. When knowledge base content is indexed by search engines, you have more traffic coming to your site's domain. This improves your ranking in the Search Engine Results Page (SERPs). The more visitors you have coming to your site, the more visitors you attract in the future, meaning you expand your site's visibility to new customers.

- **Reduced customer frustration**

When customers have their small issues solved, they are less frustrated with your product as a whole. If a customer just wants to find out how to change their password, they shouldn't have to fire off an email to your support team. Having access to instant answers improves the customer experience and increases the chance they will stay with your brand for the long-term.

- **Consistent service across the globe**

No matter where your customers are based, a customer self-service portal means your customers will have equal access to support. This reduces the pressure on your support team to provide service out of hours and means you can offer 24/7 support with minimal effort, independently of the location of your customers.

Why Should You Use a Customer Self-service Portal?

- **Competitive edge for your business**

You can be assured that your competitors will be providing a customer self-service portal. In order to keep pace, your business should do the same or your customers will start looking elsewhere. A self-service portal has become part of what your customers expect from your business and they will be disappointed if your business doesn't offer it.

- **Enhance customer satisfaction**

When you provide a customer self-service portal, customer satisfaction is enhanced. Customers are easily able to find answers to their most pressing questions and they don't have to wait for a reply from your support team. When customers can rate your response as instant, they have a much higher approval rating for your business.

Key Features of a Service Portal

Accessing services, product settings and subscriptions

- Requesting, cancelling, re-activating services.
- Placing orders.
- Tracking order statuses.
- Notifications on status updates.
- Scheduling services.
- Viewing and editing subscription details.
- Remote product (device) management (viewing device information, password reset, managing settings, performing remote actions).

Paying for products/services

- Checking payment information.
- Managing subscriptions.
- Paying bills.
- Viewing a billing history.
- Filing claims.
- Viewing, tracking and downloading invoices.
- Viewing and filtering transactions by status.

Self-support for customers, employees, citizens and business organizations, etc.

- A knowledge base (user manuals, supporting documentation, educational materials).
- Forums, communities.

Assisted support

- Live chat with a service agent, HR specialist, etc.
- Submitting support requests for customers or employees.
- Getting notifications on support ticket status.
- Viewing support and account history.

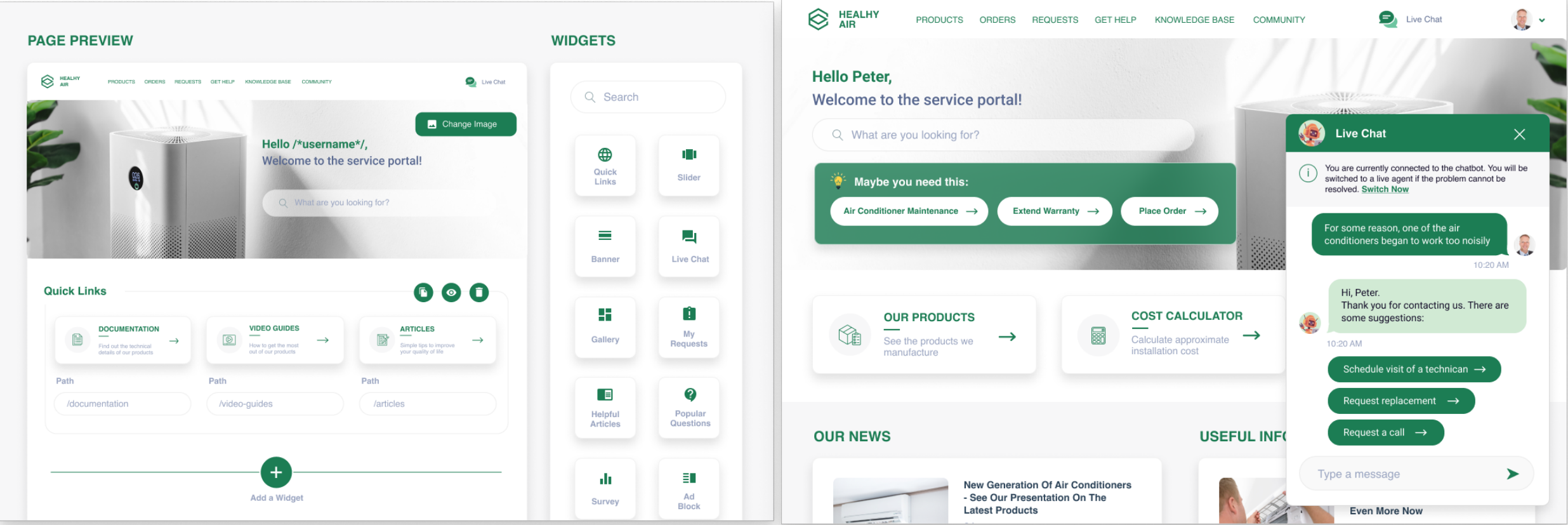
Portal administration

- Configuring widgets displayed in the portal.
- Setting up location-based portal content and ads.


Advanced capabilities


- A service chatbot.
- Auto-suggested AI-based service solutions based on customers' or employees' queries.
- Automated AI-based routing of users' support tickets to an agent or a bot for help.

Self-Service Portal Interface Sample




Self-Service Portal Interface Sample

PRODUCTSORDERSREQUESTSGET HELPKNOWLEDGE BASECOMMUNITY

Live Chat

Community > Questions > What is an optimal temperature for an office?


QUESTIONS


**Daniel Smith**
35 min ago

What is an optimal temperature for an office?


What is the best temperature to maintain with air conditioners in the office in the summer, when it's hot outside? Some employees complain that they are cold and afraid of catching a cold 😬

5 Likes2 Comments

Comment here... 

**Kani Nayar**
2 min ago

We came to the conclusion for our office that the most comfortable temperature for everyone is 69 °F.

**Adam Nipp**
2 min ago

SIMILAR QUESTIONS

Sort by: Most Commented

What is ideal office temperatures for productivity?

Most of sources say that recommended temperature range is between 68 and 76 degrees F, but most studies show the ...


235 Likes82 Comments


How to resolve the office temperature debate?

We have constant debates in the team because someone does not feel comfortable - half is hot, and half is cold ...

213 Likes78 Comments

What temperature should be in

PRODUCTSORDERSREQUESTSGET HELPKNOWLEDGE BASECOMMUNITY

Live Chat

WHAT SERVICES DO YOU NEED?

MAINTENANCE

REPAIR

MY REQUESTS

Filter

Request ID	Title	Close Date
<input type="checkbox"/> RQST345543	Air conditioner replacement	03/15/2021 12:00
<input type="checkbox"/> RQST336378	Air purifier replacement	02/14/2021 11:34
<input type="checkbox"/> RQST347738	Air conditioner replacement	12/05/2020 13:03
<input type="checkbox"/> RQST348390	Air conditioner maintenance	10/25/2020 11:23
<input type="checkbox"/> RQST347839	Air conditioner maintenance	09/30/2020 11:01
<input type="checkbox"/> RQST348393	Air purifier replacement	05/22/2020 10:32
<input type="checkbox"/> RQST347383	Air conditioner installation	03/21/2020 09:11

NEW SERVICE REQUEST

Repair

Items that Need a Service

The air conditioning unit I bought two months ago is leaking liquid. I need checkup.

Urgency Level

☐ Low (week or more)

☐ Medium (3-5 working days)

☒ High (1-2 working days) *

* Please note that urgent service requests may incur additional charges

Nearest Available Time Slots

Today

2:00 PM3:00 PM


Tomorrow

9:00 AM12:00 PM4:00 PM


 Open Calendar


CancelBook Service

Self-Service Portal Interface Sample


HEALTHY
AIR


PRODUCTSORDERSREQUESTSGET HELPKNOWLEDGE BASECOMMUNITY


Live Chat



WHAT SERVICES DO YOU NEED?

MAINTENANCE

INSTALLATION

REPLACEMENT

MY REQUESTS

Filter

Search

Sort by: Date Placed


Request ID	Title	Type	Status	Assigned To	Opened	Close Date
<input type="checkbox"/> RQST345543	Air conditioner repair	Repair	Processing	Amy Lee	03/13/2021 16:14	03/15/2021 12:00
<input type="checkbox"/> RQST336378	Air purifier filter replacement	Maintenance	Completed	Ray Smith	02/10/2021 12:16	02/14/2021 11:34
<input type="checkbox"/> RQST347738	Air conditioner replacement	Replacement	Completed	Lewis Caryl	12/03/2020 13:44	12/05/2020 13:03
<input type="checkbox"/> RQST348390	Air conditioner maintenance	Maintenance	Completed	Amy Lee	10/22/2020 13:53	10/25/2020 11:23
<input type="checkbox"/> RQST347839	Air conditioner maintenance	Maintenance	Completed	Paige Turner	09/28/2020 11:24	09/30/2020 11:01
<input type="checkbox"/> RQST348393	Air purifier filter replacement	Maintenance	Completed	Ray Smith	05/20/2020 14:53	05/22/2020 10:32
<input type="checkbox"/> RQST347383	Air conditioner installation	Installation	Completed	Paul Molive	03/19/2020 16:14	03/21/2020 09:11

New notification


Request status has been changed just now


Your request **RQST345543** status has been changed to Processing.

Details

HEALTHY
AIR

PRODUCTSORDERSREQUESTSGET HELPKNOWLEDGE BASECOMMUNITY











Live Chat



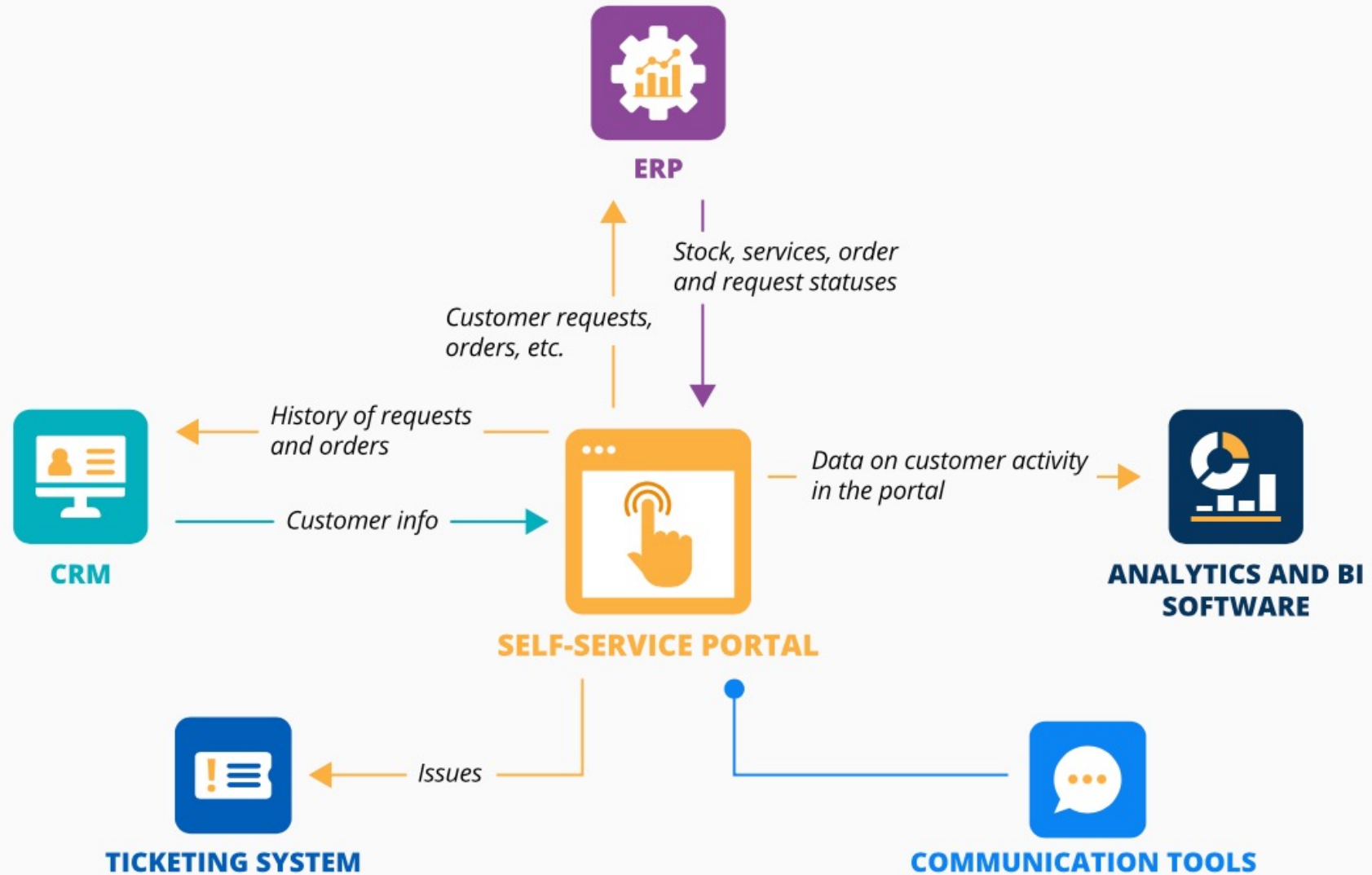
TRANSACTION HISTORY

All TransactionsCompletedPendingRefundedCanceled

Sort by: Date Placed

Transaction ID	Description	Amount	Date Placed	Status	Invoice
<input type="checkbox"/> RP44557856	Order Payment	\$701.20	08/13/2021 16:14	Pending	 Download Invoice
<input type="checkbox"/> RP45632123	Service Payment	\$635.56	06/22/2021 11:22	Succeed	 Download Invoice
<input type="checkbox"/> RP15546645	Service Payment	\$201.23	06/01/2021 08:54	Succeed	 Download Invoice
<input type="checkbox"/> RP45684255	Order Payment	\$1,145.00	03/13/2021 09:54	Succeed	 Download Invoice
<input type="checkbox"/> RP54689549	Order Payment	\$1,145.00	03/12/2021 18:33	Declined	 Download Invoice
<input type="checkbox"/> RP15554654	Order Payment	\$1,205.00	01/23/2021 16:12	Succeed	 Download Invoice
<input type="checkbox"/> RP45611564	Service Payment	\$323.75	11/15/2020 15:02	Succeed	 Download Invoice
<input type="checkbox"/> RP84361254	Order Payment	\$1,003.22	09/18/2020 13:11	Succeed	 Download Invoice
<input type="checkbox"/> RP22458845	Service Payment	\$304.55	06/27/2020 10:12	Succeed	 Download Invoice
<input type="checkbox"/> RP54953156	Order Payment	\$643.45	03/01/2020 08:45	Succeed	 Download Invoice

Key Service Portal Integrations



Key Service Portal Integrations

Service portal + CRM

- to get a 360-degree view of customer interactions with the business due to uploading the full history of requests and orders made via a portal to CRM, to personalize communication in the portal using customer info from CRM.

Service portal + ERP

- to keep stock, services, order and request statuses in the portal accurate, to send customer requests, orders and other input to ERP for verification and fulfillment.

Service portal + a ticketing system

- to automatically pull issues from the service portal to the support ticketing system.

Service portal + analytics and BI software

- to analyze user interactions with the portal and improve customer/employee experience.

Service portal + communication tools (online chat, social media, email)

- to allow for a prompt and convenient switch to assisted help.

Q&A