



# Digital Commerce Portal

Empower your partners & customers with a self-service digital portal

The 24/7 B2B digital portal that enables  
**self-service account management** for  
your customers and partners

**CDS Visual Platform**

**CDS** Partable™

**CDS** Mentor™

**CDS** CPQ

## Why Digital Commerce Portal?

### Built for Any Channel with 24/7 Access

Empower customers with 24/7 support while providing distributors access to easily assist customers by viewing orders, alerts, and quotes.

### Self-Service Quoting

Easily create, view, and manage quotes with the ability to convert them directly into orders to accelerate the sale.

### Order Inquiry & History

A centralized hub to quickly check real-time order status and access comprehensive history details in one place.

### Automated Re-Ordering

Drive repeat business by allowing customers to re-order favorite products instantly from their history or pre-defined order templates.

### Secure Payment Management

A dedicated, secure environment for customers to manage payment methods and billing preferences with transaction security.

### Pending Order Insights

Real-time visibility into active orders, including status updates and direct communication from the business team.

### Automated Notifications

Enable automated notifications to share order updates and other key information to drive engagement.

### Standalone or Add-On Deployment

Launch as a dedicated solution or seamlessly integrate into your ERP and ecommerce solutions for unified product, parts, and service sales.

### Enterprise-Grade Integrations

Seamlessly connects with ERP, eCommerce, and other critical systems through standard connectors and robust APIs.

### Self-Service Invoices

Reduce manual friction by giving customers and partners secure, 24/7 access to view and download invoices directly from the portal.

### Warranty Management

Simplify the claims process with an intuitive workflow for digital submissions and real-time tracking of warranty status.

### Easy Return Workflows

Frictionless RMA process initiated directly from order history, providing customers with a clear, guided return request process.

### Role-Based Digital Assets

A tailored library of manuals, media, and technical documents linked to specific products and filtered by the user's specific role.

### Dynamic Chat Integration

Close the loop on customer service by providing instant access to support through an embedded, responsive chat integration.

### Analytic Dashboards

Achieve high-level business intelligence through integrated Power BI reports that offer specific insights into their purchasing trends and data.

### User & Role Management

Maintain security and control with an interface to manage users, assign specific permissions, and customize experiences based on staff roles.

### Branded Partner Onboarding

Effortlessly scale your network with a professional, branded onboarding experience that makes it simple for new partners to join the portal.

### Built with Enterprise-Grade Security Standards

Hosted on AWS for enterprise-grade security standards and SOC 2 Type II compliance for data protection and regulatory peace of mind.

## Trusted by Industrial Equipment Manufacturers

"We needed a solution that could handle the complexity of our product line without overwhelming the end-user. The CDS Digital Commerce Portal bridges that gap perfectly, providing a seamless experience from initial quote to long-term warranty management for our customers and distribution partners."

**Vice President of Digital Transformation**  
Industrial Equipment Manufacturer