

Customer portal

Your customers follow their project on their own.

CLIENT PORTAL · MARBRERIE DORNÉVIA

Hello Marc

2 to approve

Project · Jambes showroom

Stage 3 / 5 · Manufacturing in progress

In progress

Deliverable · Plans v2

Uploaded yesterday by the team

To approve

Invoice F-2026-104

Due 30/09

Pay online €2,855

Invoice F-2026-098

Paid on 02/09

Paid

Message from Julie

"Delivery confirmed Thursday"

New

✓ Delivery approved

Plans v2 · approved by Marc Dornévia

14/09 · 10:42

Next stage

Your customers follow their project on their own.

"Where's my order?", "Could you send me the invoice again?": questions like these keep your teams busy. The customer portal gives every customer secure access to their projects, documents, invoices and conversations. Your customers feel reassured, your teams get their time back.

Reassured customers

Progress, documents and invoices available at any time.

Fewer interruptions

Answers are self-service.

Centralised conversations

Messages and files linked to the right project.

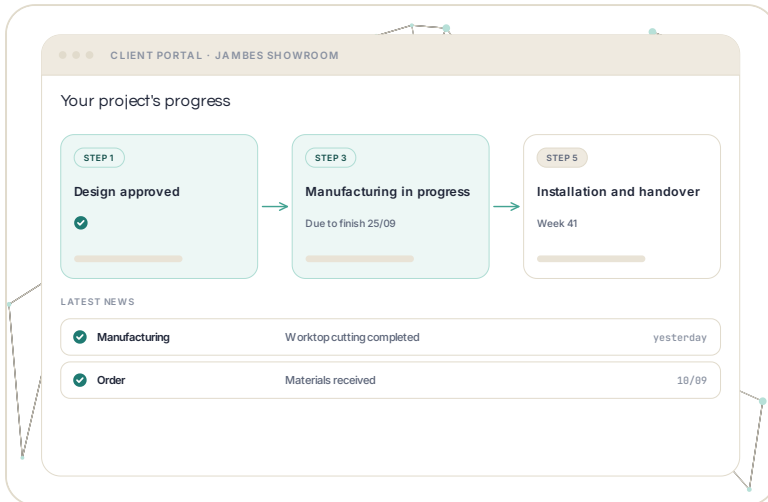
A modern image

A portal in your name, simple and secure.

In this module

- 1 Live project tracking
- 2 Documents and shared drive
- 3 Messages and support
- 4 Approvals and deliveries
- 5 Secure, multi-user access

FEATURES



1 Live project tracking

Every stage visible to your customer.

Customers see how their projects or orders are progressing, with the stages you choose to make visible. Internal tasks stay internal.

What it enables

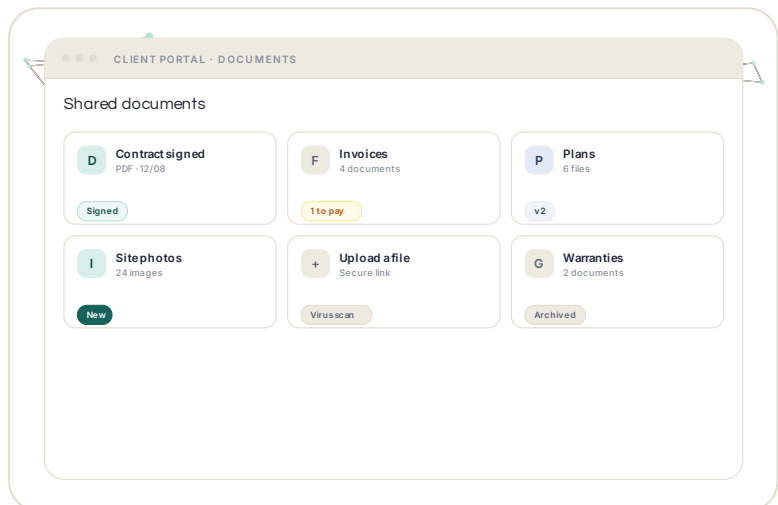
- Visible status and stages
- Notifications at every step forward
- Visibility set per project
- Several projects per customer

2

Documents and shared drive

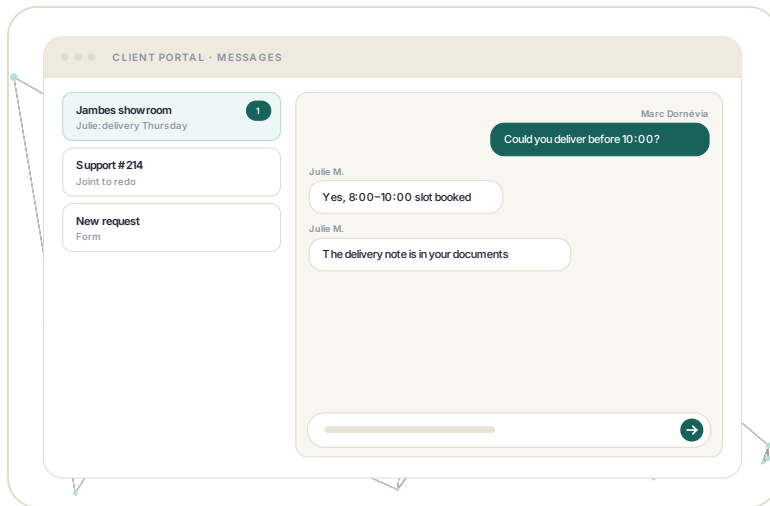
Everything they need, neatly filed.

Quotes, contracts, invoices, plans, photos: shared documents are organised and ready to download. Customers can also upload their own files through a secure link, with a quota and virus scanning.



What it enables

- Shared drive per customer
- Tracked sharing (who opened what)
- Secure upload links
- Online invoices and payments



3 Messages and support

One clear channel, linked to the project.

Customers talk to your team from their portal, project by project. Support requests become tickets that are tracked through to resolution.

What it enables

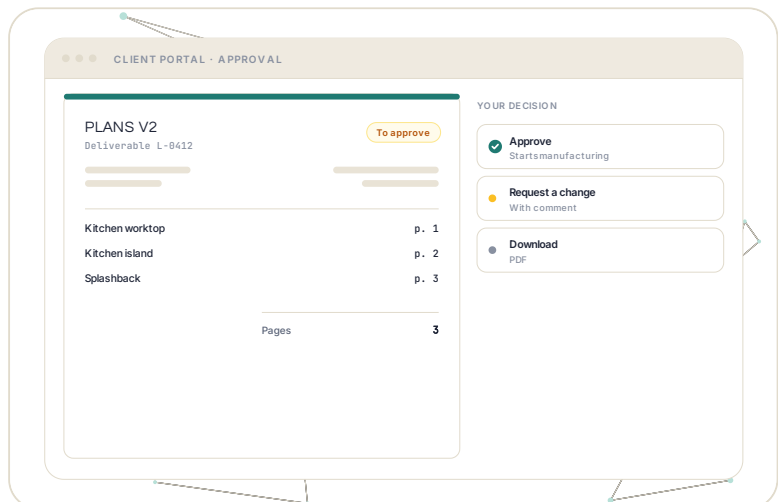
- Messaging per project
- Support requests and tickets
- Custom request forms
- Full history

4

Approvals and deliveries

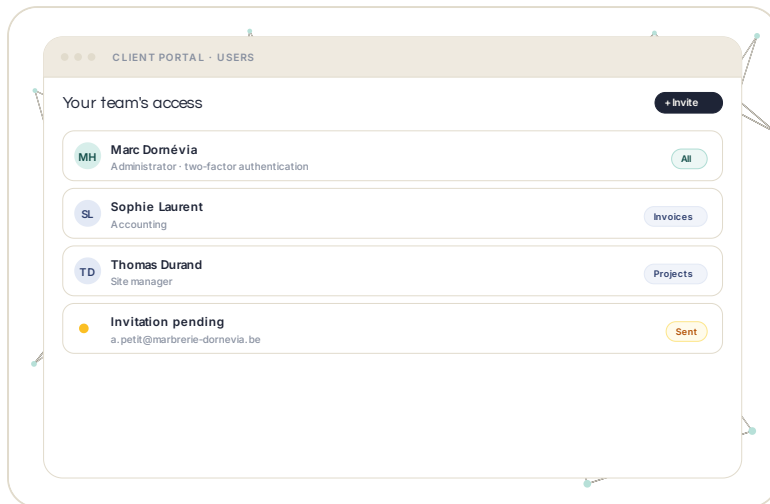
The customer approves in one click.

Mock-ups, deliverables, delivery notes: customers approve or comment directly. Approval moves the project forward and is time-stamped.



What it enables

- Deliverable approval
- Comments and change requests
- Time-stamped acceptances
- Next stage triggered automatically



5 Secure, multi-user access

Every person on the customer's team gets their own access.

A customer can invite several colleagues with different rights. Sign-in by password, temporary link or Google / Microsoft account, with two-factor authentication.

What it enables

- Several users per customer
- Rights per user
- Simplified sign-in and two-factor authentication
- Shared secrets vault (access details, credentials)

TAILORED

Adapted to your business

You decide what your customers see and what they can do: visible stages, shared documents, delivery sign-off, support requests, custom forms. The portal carries your colours and your own domain name.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Sign-in

Google

Microsoft

Apple

Two-factor authentication

Payment

Stripe

PayPal

Mollie

Storage

Google Drive

OneDrive / SharePoint

Dropbox

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.contacts` Customers & contacts

`dms.documents` Document management & media library

`erp.billing` Invoicing

`comms.chat` Team chat & real time

`comms.visio` Sovereign video conferencing

`ops.feedback` Internal feedback & support

Let's talk about your future tool

Tailored demo, by appointment.

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