

Ten ways to put a B2B portal to work.

A portal gives your clients, partners, and teams one shared place to interact with your organisation — instead of a scatter of emails, calls, and spreadsheets. Here are ten proven use cases. Most organisations start with one or two, then grow from there.

01 Service & support requests

Clients report issues and track status through one channel. Every request is logged and routed automatically — nothing lost in an inbox.

02 Asset & installed-base management

A live overview of the products, machines, or licences clients hold — with configuration, history, and warranty in one shared record.

03 Order & reorder management

Clients place, repeat, and track orders themselves, with their own pricing applied. Less manual handling, effortless reordering.

04 Quotes & contract management

Review, approve, and sign quotes, renewals, and contracts digitally. Everyone works from the current version, trail captured automatically.

05 Knowledge base & self-service

Manuals, FAQs, and troubleshooting steps clients can find on their own, around the clock. Every self-answer saves both sides time.

06 Partner & reseller collaboration

Give resellers and service partners their own workspace with assignments, leads, documents, and reporting — no email back-and-forth.

07 Onboarding new clients

Guide new clients through a clear, step-by-step start. A structured onboarding makes a strong impression and shortens time to value.

08 Project & delivery tracking

Show the status of projects, deliveries, and implementations in real time. Transparency reduces status calls and builds trust.

09 Invoicing & financial overview

Clients access invoices, payment status, and history in one secure place. Self-service on billing cuts admin and speeds up payment.

10 Feedback, reporting & insight

Collect structured feedback and give clients dashboards on their usage or service levels — the same data sharpens your own decisions.

Not sure which fits your organisation?

Start with the one or two that solve a real problem. We'll help you think it through in a free intake session.

Contact & Support

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