

axisfirst

axis® portal

ONLINE
ACCOUNT
MANAGEMENT

FROM AXISFIRST

axisfirst Web Services

AXIS PORTAL

Online Account Management for your Customers

axisfirst.co.uk/web/portal

AXIS PORTAL

Provide your customers with the facilities they want whilst saving you time.

Would you like to offer your customers the option of managing their accounts online but feel that an online shop is not appropriate? Perhaps your products or services are not suitable for selling online or maybe you are just not ready to embrace a full eCommerce solution at this time.

As an online customer portal, **axis® portal** allows your customers to manage their account but without the associated functionality of a full online shop.



Current
Statement



Historical
Transactions



Manage
Payment
Cards



Managed
Users



Contact
Details



Subscriptions



Change
Password

STATEMENTS & PAYMENTS

With **axis® portal** your customers can view their current statement, download invoices and credit notes and, if you wish, settle outstanding invoices using the debit or credit card.

The portal has been designed to be fully responsive from the ground up so it's as happy running on a smartphone as on a desktop PC - which means that your customers can access the information they need, wherever they are.



Call axisfirst today for more
advice about axis® portal:

01278 421020



BE COMPLIANT

The **axis® portal** can also help with your regulatory compliance - whether that is the General Data Protection Regulation (GDPR) or the Payment Card Industry's Data Security Standard (PCI DSS).



GDPR

Facilities within axis portal also allow your customers to manage their marketing preferences. This may be as simple as offering subscribe/unsubscribe options or you can offer the choice of contact methods (email, phone, etc.).

You can also allow them to choose which types of newsletter they want to subscribe to.

PCI DSS

Allow your customers to manage stored debit/credit cards securely so that you can take subsequent telephone payments without needing to take card details.

Use **axis® portal** as a payment gateway that your customers can use to pay pro forma invoices in a safe and secure PCI DSS-compliant way.



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AXIS PORTAL OVERVIEW

Features

With axis portal, your customers can:

- View their current statement
- View historical transactions
- View or download invoices and credit notes as PDFs
- Store credit/debit cards for future use
- Use credit/debit cards and/or PayPal to make payments on account or settle outstanding invoices
- Manage additional users
- Update their contact details
- Update their marketing preference

Benefits

With axis portal, you can:

- Reduce the time spent dealing with accounts queries and providing copy invoices
- Improve credit control by allowing customers to pay outstanding invoices online
- Improve data integrity by allowing customers to update their contact details and their list of users
- Help with your PCI DSS compliance by taking online card payments rather than over the phone
- Help with your GDPR compliance by allowing customers to update their marketing preferences

Please note that some facilities may require additional axis diplomat modules and/or subscriptions to third party services. Please refer to the axis portal Feature Guide (see below) for further information. axis portal is designed to work with axis diplomat 2016 and above.



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