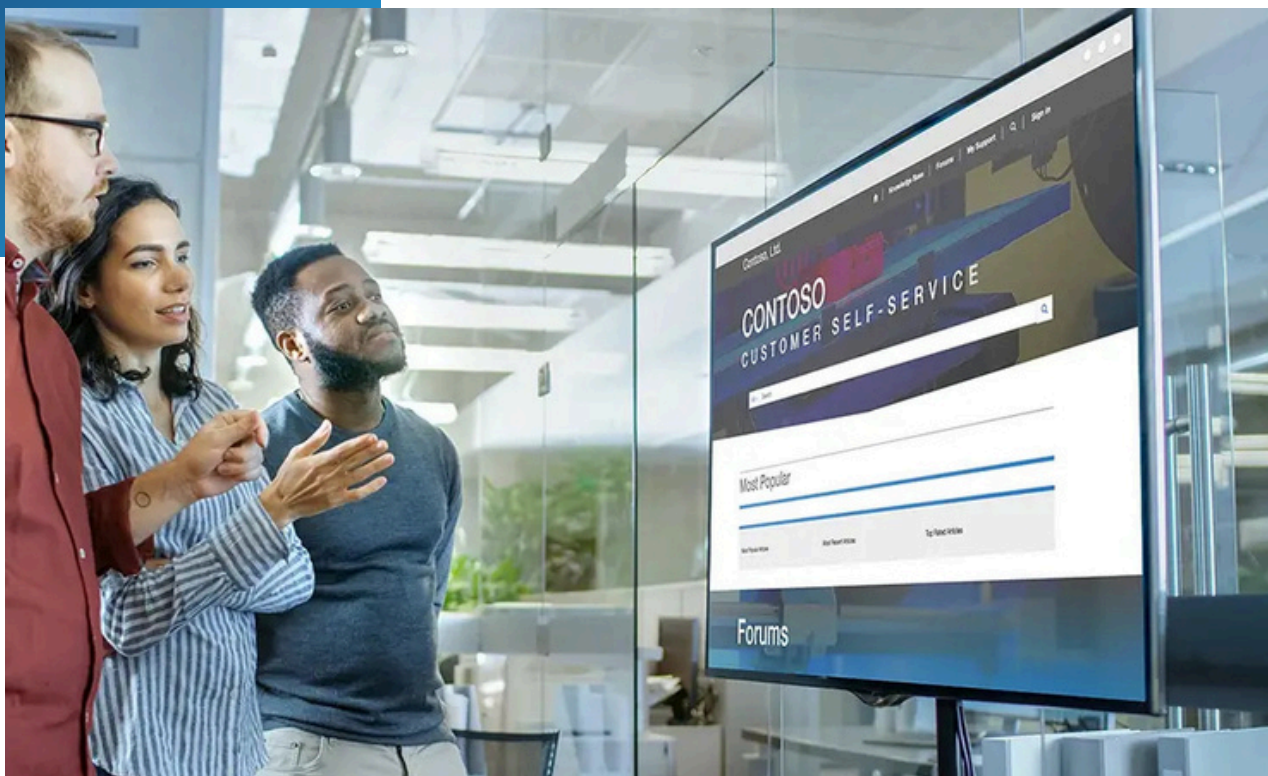




THE INTELLIGENT WEB PORTAL ADVANTAGE

A Comprehensive Guide
to Future Engagement
and Efficiency



Unlocking New Possibilities with Intelligent Portals

Organisations today face the constant challenge of optimising operations, enhancing efficiency, and reducing costs, all while striving to increase competitiveness and scale.

In this pursuit, web portals have emerged not as a new concept but as a powerful, evolved solution.

In recent years, these digital gateways have undergone a profound transformation, driven by innovations

in deeper integration capabilities, sophisticated automation and Artificial Intelligence (AI).

This guide examines how these technological advancements have expanded the traditional scope of portals, redefining them as truly intelligent websites that drive businesses to achieve strategic outcomes and redefine digital interaction.

At their core, web portals serve as centralised hubs, providing tailored access to information, services, and applications for specific user groups—be they customers, members, partners, or employees.

While earlier iterations offered basic information access, today's data-driven portals are dynamic, interactive websites meticulously designed to streamline complex processes and provide rich, personalised experiences. They are instrumental in bridging the gap between your organisation's internal systems and its external stakeholders, ensuring seamless data flow and efficient interactions.

For organisations committed to optimising operations and boosting stakeholder engagement, investing in a modern portal presents a compelling business case. These platforms can drive significant return on investment (ROI) by automating your routine tasks, offering robust self-service capabilities, and improving overall operational efficiency.

This not only reduces the workload on your internal teams, allowing them to focus on higher-value activities, but also leads to substantial cost savings and improved resource allocation. Crucially, intelligent web portals play a vital role in elevating customer satisfaction and fostering deeper relationships.

By providing 24/7 access to personalised account details, transaction histories, support resources, and other relevant information, businesses empower customers and other stakeholders with the autonomy and convenience they expect.

These self-service capabilities align with contemporary user preferences, build trust, and strengthen loyalty. Similarly, for internal teams, web portals offer a single point of access to essential resources, collaborative tools, and organisational information, contributing to increased productivity and job satisfaction.

ServerSys, through our dedicated brand, **The Portal Company**, specialises in utilising the potential of intelligent portals to help our clients achieve transformative outcomes.

Our expertise lies in crafting websites that smoothly integrate with an existing ecosystem, turning complex data into actionable insights and enabling a new level of digital interaction.

We understand that a portal is not just a technology deployment—it's a strategic asset. When professionally designed and implemented, your portal becomes the digital backbone of your business, facilitating communication and driving impactful results.

Portal Integration and Data Synchronisation

The effectiveness of a web portal is fundamentally tied to its ability to integrate with your data sources and key services.

At ServerSys, our solutions are deeply rooted in the Microsoft technology stack, leveraging the powerful capabilities of products such as Dynamics 365, Power Pages, and Azure.

This alignment ensures that our portals are not merely standalone applications but integral extensions of your core business processes and data to provide a unified and consistent digital experience.

Microsoft Ecosystem Integration

Our portals natively connect with Microsoft Dynamics 365 and other components within the Microsoft Power Platform, including Power Apps, Power Automate, and Power BI.

For example, this deep integration enables uninterrupted data flow between a portal and your CRM system. Customer interactions initiated on the portal, such as service requests or posted forms, are displayed immediately within Dynamics to trigger follow-up actions, and ensure that teams have access to the most up-to-date information. This eliminates data silos, reduces manual data entry, and significantly enhances operational efficiency.

WEB PORTAL AND DYNAMICS 365 INTEGRATION

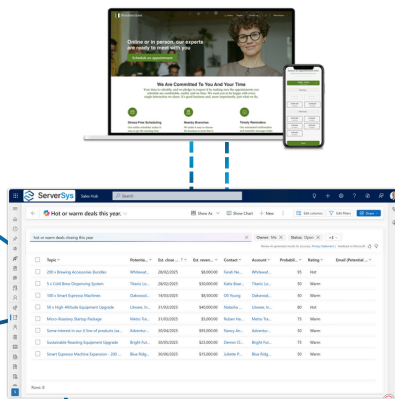
Our websites natively **integrate** with Dynamics 365 and other Microsoft platform products.



Use Dynamics 365 **security** controls to define portal user access, including view, edit and create permissions.



Share information with portal users using D365 views and forms within a branded website.



Personalise web pages by surfacing data from any Dynamics 365 table.



Automated process flows between CRM and your website.

Data Integration and Workflow Automation

Outside of the Microsoft ecosystem, portals can enable strong integration with various external data sources as needed. This capability is essential for handling additional workflows and augmenting the data accessible to portal users. Connected data flow plays a key role for process-centric websites that manage repetitive processes, aiming to lessen manual intervention and decrease the resources necessary to sustain these workflows.

Examples of external systems we have integrated include:

Accounting and ERP Systems: Including Sage Accounts and Business Central, enabling automated invoicing, payment tracking, and financial reporting directly through a portal.

Company and Address Data Providers: Integration with services like Companies House and Loqate address data ensures accurate and up-to-date business and contact information, simplifying registration and verification processes.

Credit and Risk Assessment Platforms: Connecting with services like Creditsafe company data allows for automated credit checks and risk assessments, which is particularly valuable for B2B portals handling applications or partnerships.

Through comprehensive portal integration, information is always up-to-date across connected systems, supporting decision-making and providing a consistent experience across all touchpoints.

Web Portal Outcomes

Effective data-driven websites help organisations achieve these outcomes.



Increase Engagement

Enabling external users to access resources, manage their accounts and request services.



Strengthen Relationships

Websites that earn trust and deepen relationships.



Simplify Operations

Process-driven sites to automate workflows and increase scale through self-service features.



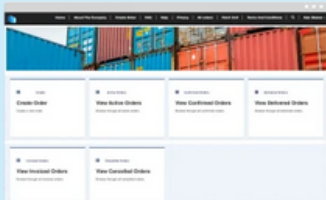
Unlock Insights

Member insights from portal interactions that inform strategic decision-making.

Frequent Portal Examples

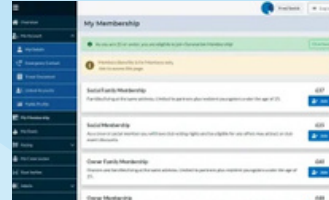
Data-driven portals can be designed to fit any organisation and purpose. Frequent examples we have designed include:

Customer Portals



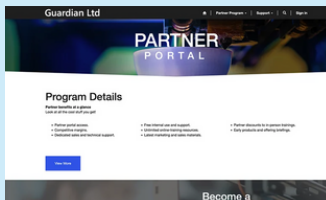
Empowering customers with connected self-service capabilities.

Member Portals



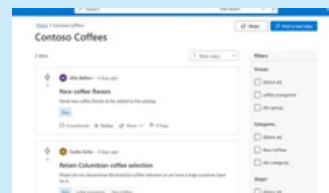
Boost member engagement and retention through personalised experiences.

Partner Portals



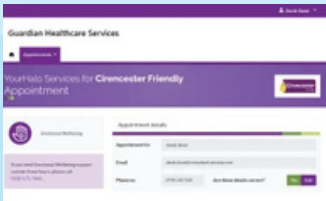
Helping businesses grow their partner channel through online collaboration.

Community Portals



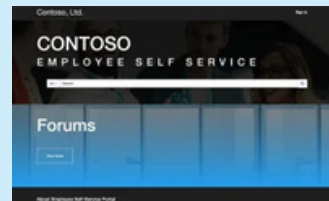
Online hubs to develop community networks and build engagement.

Supplier Portals



Increase supply chain efficiency with an integrated portal that refines processes.

Employee Portals



Simplify workplace operations with a centralised resource for essential services.

Research Portals



Securely share analysis and insights with subscribers through a unified entry point.

Accreditation Portals



Manage accreditation journeys with a dedicated portal to ensure compliance.

AI and Automation Capabilities

AI innovation and advanced automation are extensively transforming web portals, further enhancing self-service experiences and providing greater value to users and organisations.

These extended capabilities make portals more powerful and intuitive by integrating intelligent chatbots and automation for personalisation, proactive support, and efficiency.

Automation Workflows

Workflow automation is the cornerstone of an effective web portal, particularly when integrated with Microsoft Power Automate. Routine tasks, approvals, and requests that traditionally required manual intervention can now be automated, significantly enhancing efficiency and reducing processing times.

For example, an application submitted through a portal can automatically trigger a series of steps in the backend, including data validation, credit checks, and routing for approval. This not only accelerates the process but also minimises the risk of errors associated with manual handling.

Automation can also be applied to tasks such as onboarding new users, managing subscriptions, processing payments, and updating records in connected systems such as Dynamics 365, ensuring seamless and efficient operations.



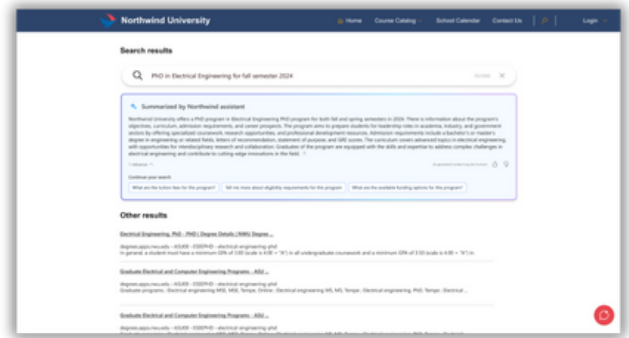
AI-Powered Features

With integrated generative AI features, portals can provide instant summaries of documents, tables, and interactions, helping users quickly grasp key information.

An **AI-generated summary** can simplify detailed instructions or search results. Additionally, when integrated data is displayed within a table, it can be overwhelming, so an AI summary will provide a concise overview with highlights to enhance accessibility and help individuals gain context.

AI-powered chatbots are becoming increasingly sophisticated, offering intuitive interactions and providing quick, accurate answers to user queries. These chatbots can handle a high volume of requests simultaneously, reducing demands on service teams. This is possible due to the emergence of **AI agents**, which connect to organisational resources, analyse data, make decisions and continually learn from these interactions to improve performance.

For example, portal users could use conversational chat as an alternative to completing traditional web forms. Chat agents can connect to your data sources, including CRM, allowing them to bring these resources to each conversation and personalise their responses. The bot can use this knowledge to ask questions aligned with your processing rules, thereby gathering the same information that would be collected from a web form. This means an individual can be guided through a multi-step process to complete an application or registration entirely within a chat experience, offering a choice that can create to a better user experience.

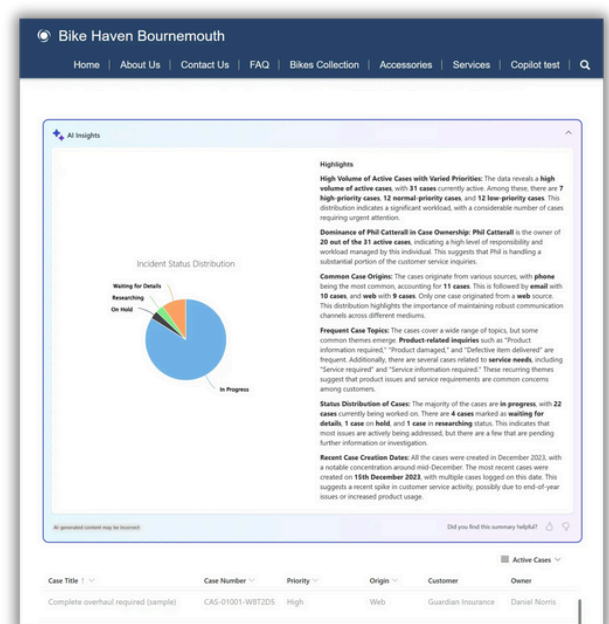


AI Search Summaries

Similarly, an agent bot can quickly respond to account questions by utilising its access to shared data, thereby minimising the need for people to search for information manually.

Natural Language Processing (NLP) enables portals to understand and respond to user input in a human-like manner, personalising experiences and making navigation even more intuitive.

AI can also understand sentiment and analyse user behaviour within the portal to proactively promote personalised content, recommendations, and proactive support, anticipating user needs to further improve engagement.



AI List Summaries

Portal Security and User Authentication

Security is of utmost importance when developing web portals to safeguard sensitive customer and business data. Our solutions use Microsoft's enterprise-grade security capabilities, including Dynamics 365 security roles and Entra ID (formerly Azure Active Directory), to ensure secure access, multifactor authentication, and compliance. This multi-layered security approach provides robust protection against unauthorised access and potential data breaches.

Crucially, security roles enable portal administrators to precisely control what information users can see and what actions they can perform. This granular access control ensures that sensitive data remains protected while providing personalised experiences to authenticated users.

For example, a customer may only view their order history, while a partner may have access to specific collaboration documents. Additionally, individual portal users within the same organisation may have different levels of access permissions that align with their roles.

These extensive controls are essential to maintaining data integrity and user trust. Our portals are configured to help organisations comply with data protection policies and regulations, including the GDPR and other industry-specific standards.

Features such as data encryption and secure authentication protocols are core to each portal's architecture. This commitment to security not only protects sensitive information but also builds trust, assuring portal users that their data is handled with utmost care.

By utilising Microsoft's trusted security infrastructure, we implement scalable and secure websites to combat rising security threats and meet the stringent demands of today's digital environment.



Analytics and Insights

AI-powered reporting and analytics provide valuable insights into portal usage, user behaviour, and operational performance.

By analysing the vast amounts of data generated by interactions with your portal, you can gain a deeper understanding of how your website is being used, identify areas for improvement, and make data-driven decisions. This information can be used to optimise your portal design, content, and functionality, ensuring it continues to meet the evolving needs of its users.

Furthermore, analytics can track the effectiveness of your automation workflows and AI-powered features, allowing you to measure their impact on efficiency and user satisfaction.

This continuous feedback loop will help drive ongoing improvements and contribute to sustained portal ROI.



OUR PORTAL TECHNOLOGY



Power Pages

Rapidly launch data-powered portals using templates for frequent scenarios.

- ✓ Faster deployment
- ✓ Lower upfront cost
- ✓ Simpler development



Custom Azure Portal

Complete design flexibility to tailor each aspect of your website.

- ✓ Reduced usage cost
- ✓ Increase scalability
- ✓ Fully bespoke design

5 Frequent Self-Service Portal Processes

Web portals excel at streamlining routine, repeatable business processes through self-service capabilities, which empower people and reduce administrative burdens. These processes are designed to be intuitive and efficient, allowing users to complete tasks independently.

Frequent integrated portal processes that we configure include:

Applications and Registrations



Handling the submission of various forms, including membership applications, grant requests, and event registrations. These processes involve collecting necessary information and documents from applicants and integrating with backend systems for automated processing.

Payment Processing



Enabling secure online payment handling for services, products, or fees. Portals can integrate with various payment gateways, such as Stripe, to ensure PCI compliance and smooth transaction processing.

Service Requests and Support



Allowing users to log service requests, submit enquiries, or report issues. These requests can automatically create and assign cases in Dynamics 365, ensuring timely resolution and efficient tracking in line with routing rules and service level agreements.

Account Management



Enabling people to manage their accounts online by accessing personal information, updating contact details, reviewing transaction history, managing subscriptions, and accessing relevant documents. Online access and management reduce the necessity for direct contact with support teams for routine administrative tasks.

Information Access



Offering a central hub for people to access important documents, FAQs, guides, and other resources, which may include gated content only available to paid subscribers. These portals ensure that people can quickly and independently find the information they need.

Project Planning and Portal Implementation

Implementing a web portal is a strategic initiative that requires careful planning and execution to ensure successful outcomes. At ServerSys, we adopt a comprehensive, end-to-end approach to managing these projects, guiding our clients through every stage, from initial scoping to launch and ongoing support.

We design our agile methodology to deliver tailored solutions that align with specific business objectives and maximise return on investment. This approach yields quick results, minimises upfront costs, and accelerates further progress.

OUR PORTAL PROJECT APPROACH

Scoping and Quotation

We start by understanding your needs to define the precise project scope, and provide clear quotation.

Authentication Setup

Configuring the login process for portal users, ensuring secure access while integrating with your identity management solutions.

Data Integration and Automation

Integrating your Dynamics 365 data and automation workflows to refine processes, ensure data integrity, and drive operational efficiency.

Security Role Setup

Defining user access permissions with appropriate security roles, ensuring users can access only relevant information and appropriate functionality.

Testing and Verification

Thorough portal testing and verification checks are carried out to ensure that the solution is robust, secure, and performs optimally before launch.

Web Theme and Branding

We'll collaborate to create a web theme aligned with your brand identity for a consistent look across your digital assets.

User Interface Customisation

The web interface will be customised to integrate your data and optimise layout and functionality for an engaging user experience. Whether your website starts with a template or involves fully a bespoke design, our portals are responsive and meet accessibility standards.

Additional Integrations

Enabling additional portal integrations with your data sources to enhance functionality and meet specific business needs.

Custom Domain Activation

We will activate a custom domain, establishing a professional and branded online presence.

Launch and Support

After your portal is launched, our partnership continues with ongoing support and consultancy, ensuring your website evolves to meet changing needs.

5 Steps to Maximise Web Portal ROI

Maximising the return from a portal investment involves a strategic approach that spans design, integration, user experience, promotion, and continuous improvement.

By working with a specialist provider and focusing on these key areas, you can ensure your website meets your objectives and will adapt to deliver sustained value.

Intuitive Design and User Journeys

A well-designed portal is essential for adoption, involving intuitive journeys, optimised page designs, and effective forms. Tools like Microsoft Power Pages provide responsiveness, accessibility, and templates, ensuring a user-friendly interface.

Seamless Integration

Efficient data handling is vital for a functional web portal. Integration with Microsoft Dynamics 365 provides a single source of truth to streamline processes including bookings, applications, and service interactions.

Enhanced User Experiences

Maximise user satisfaction through self-service solutions for account management, online support, and other functions. Increase understanding with interactive visuals and deploy AI capabilities for intuitive interactions and quick access to information, to enrich experiences.

Strategic Promotion Strategies

Emphasising your portal's 24/7 availability and planning a structured launch are key for successful adoption. Offer resources like FAQs to enhance engagement, simplify adoption, and raise awareness of your portal's convenience and value.

Continuous Improvements

A clear roadmap for updates based on feedback and market trends is important for long-term success. Gradually implementing new features will enable your resource to adapt to changing needs and drive recurring value.

Customer Success

Below are summaries of how our web portal solutions have addressed specific challenges and delivered significant value for our clients:



Cycling UK

Cycling UK, a leading cycling charity, struggled with an outdated membership management system. We implemented a new web portal integrated with Dynamics 365, boosting engagement and event participation through personalised content and self-service options.



Police Now

A charity for officer development, Police Now needed a secure platform to manage their recruitment process. Our resulting portal streamlined its applications, provided a secure environment for sensitive data and offered resources for community networking.



Healthcare RM

Healthcare RM is a leading provider of employee health management services. Our projects included developing a custom portal which enabled the company to expand its services and reach a wider audience. This portal is now the blueprint for subsequent portals deployed to its customers.



Office of the Data Protection Authority

Our portal for ODPA, Guernsey's data protection authority, streamlined registration management and created a secure channel for enquiries, providing access to data protection guidance. This enhanced efficiency, ensured compliance, and promoted best practices.



Tellimer

Tellimer, a global emerging markets platform, needed a portal to deliver its intelligence and research. Our solution provided access to premium content, personalised dashboards, and interactive visualisations, enhancing content delivery and engagement.



Junior Offshore Group

JOG is a yacht club organising competitive races. We developed a member portal to support the complex requirements of yacht racing, including payment handling, crew checklists and in-race timings, which modernised JOG's operations and revitalised its member engagement.



The Path Forward

Intelligent web portals represent a shift in how ambitious organisations interact with their stakeholders, offering unparalleled opportunities for efficiency, engagement, and strategic growth.

As demonstrated throughout this guide, these sophisticated platforms are far more than mere websites. They are integrated hubs that streamline processes, enhance user experiences, and provide secure, real-time access to resources and information. By embracing Microsoft technologies like Dynamics 365, Power Pages, and Azure, ServerSys delivers robust, scalable, and secure web portal solutions tailored to meet the unique needs of each client.

The journey to a high-performing web portal is a collaborative one rooted in meticulous planning, agile implementation, and a commitment to continuous improvement. From intuitive design and seamless system integration to the strategic application of AI and automation, every aspect of portal development is geared towards maximising business outcomes.

The ability to provide self-service options, manage frequent processes efficiently, and offer a superior user experience directly translates into reduced operational costs, increased productivity, and customer and employee satisfaction.

Ready to Transform Your Digital Interactions?

Connect with us to explore how an intelligent portal can transform your operational efficiency and enhance customer engagement.



ServerSys

www.serversys.com



The **Portal** Company

www.theportalcompany.com