

INGENIUX



Solution Guide for Customer Portals

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The Ingeniux Customer Portal: Your Hub for Customer Success

Customer satisfaction is business critical. A report by [Bain and Company](#) found that increasing customer retention rates by 5% increases profits by 25% to 95%. But how do you deliver the best customer experience? One of the most impactful ways is a customer portal.

A customer portal is a secure website designed to deliver your customers all the information and services they need to be successful. The problem for most organizations is they use multiple applications to deliver service and support. Most solutions are only built around a single application, like help desk, training, or knowledge management. What you need is one place to deliver all your services and support.

Enter Ingeniux CXP.

Ingeniux CXP is an enterprise customer portal solution. It enables you to bring together information and support services from your existing applications into one centralized website, giving both you and

your customer a 360-degree view of the customer's service and support requirements.

Unlike traditional enterprise portal applications, which are often complex and offer limited choices around branding and customer experience,

Ingeniux is a modern portal designed to create a brand-forward experience and deliver services across multiple applications.



The Ingeniux Approach to Customer Support Portals

Page Builder: the Ingeniux Portal Designer

Page Builder is a visual web page and template designer you use to create your portal experience without coding. Page Builder is a responsive visual design tool that supports Bootstrap and other responsive frameworks ensuring your portal experience is mobile and tablet friendly.

Using Page Builder, individual modules of CXP such as the case listing, available learning courses, new knowledge objects and other special components can be moved around within the layout of the CMS template and then published to the DSS site underlying the CXP portal. Page Builder allows you to add, remove, and reorganize these widgets from a CXP page.

Customer Profile

The customer profile is the most important component of the Ingeniux CXP. The profile is stored in the CXP database. The database is seeded with CRM data, but you can also create custom fields for CXP for profile information not stored within your CRM.

By connecting to the customer profile in the CRM, you can pull all ticketing and support information related to the customer into the portal. In addition to external profile information, you may also want to create additional profile metadata that is stored directly within the CXP database. This additional metadata enables you to customize the experience for each customer. For example, you may pull all tickets for the customer account, but want to filter them to show only the tickets a specific user placed.

The customer can update his/her profile within the database and updates to the CRM are synchronized in real-time due to the low volume of these requests.

Security

End user SSO is done many ways depending on the platform integrations and requirements. The most common form is to use SAML 2.0 and any number of Identity Providers (IDP) – such as Okta, Ping, Salesforce, or Azure AD. When using an external IDP Ingeniux delegates credential management to the external system.

The Ingeniux CXP platform can also act as an IDP and provide SAML SSO services to other systems and applications. In this case, acting as IDP Ingeniux manages the user credential and account management features.

The CXP platform can also use OAuth instead of SAML for other types of federated login.

A key differentiator for Ingeniux CXP is that it can support more than one Identity Provider at the same time, whereas most Portal solutions only support a single IDP.

User Management & Delegation

There are four approaches for user management:

1. Bulk account data loading
2. Time-based synchronization of account data from the core system (CRM, Directory)
3. Just in time provisioning
4. Local registration

The first two approaches focus on mass creation of accounts. Just in time provisioning enables the CXP to create an

account for a user who can authenticate to a valid IDP system at the time of first login. The CXP creates the account using their IDP metadata (username, email, first, last, group, etc.).

Local registration allows the CXP to create a record for the user and optionally link them to a source IDP system or CRM system.

Each user can belong to one or more CXP groups – which can correspond to accounts from a CRM or other IDP system. Each account identifies users who can manage Groups/Accounts and control membership and other settings for that group within CXP.

Ticketing & Customer Service

If your company uses a ticketing system for support, such as Salesforce.com, you can integrate it into the Ingeniux CXP. You can create an interface that allows customers to submit support tickets, view current tickets and see past tickets. This is a real-time integration ensuring that the ticketing information is always up to date.

In the case of a Salesforce ticketing system, integration happens using the Force.com API.

You can use customer data from the CRM to show customers content they might require on a regular basis. For instance, if a customer reports several tickets for a particular product, you could show them a list of knowledge base articles that could help them solve their problems themselves. You could also show them knowledge base content from other customers who experienced similar problems.

Learning Management

Many companies offer online training for their products. This training is provided using a learning management system (i.e. Absorb LMS). There are two integration elements for learning management.

1. Single sign on is set up to enable the customer to log into the portal and then seamlessly connect to the learning management system without having to perform a second authentication. The CXP passes the authentication credentials to the LMS system. Typically, if you see a consistent branding, it's done separately from the CXP experience.
2. You can provide an interface directly in the CXP portal that provides information to the customer on the courses they are taking, courses available or that

are needed, along with a history of completed courses.

Both the single sign on and the course information are performed through APIs from the LMS.

Knowledge Base

Your company provides a lot of content that helps a customer use your products or services. This information is provided via a knowledge base. This information might be located in different locations across your company and need to be pulled together and provided in the CXP knowledge base.

There are three ways you can integrate knowledge base content:

1. Manage your content in the Ingeniux CMS as content items taking advantage of Ingeniux's structured content, authoring, workflow and multilingual capabilities.
2. Sync Salesforce Knowledge articles on a scheduled basis.
3. Import structured content from DITA or other formats. This approach leverages structured content importing capabilities within the Ingeniux CMS.

Technical Content Delivery (DITA and other Sources)

Organizations produce a great deal of technical content that can support customer self-service. However much of this content is hidden in silos in backend systems that only developers or support people can access.

Ingeniux CXP provides the ability to import technical content from CCMS systems and deliver it to the customer portal. With Ingeniux CXP you can:

- Publish technical and structured content from CCMS solutions to the portal quickly and easily
- Import XML directly from CCMS solutions (Supports the import of DITA, SCORM, Custom XML and other formats)
- Enhance discoverability with guided search, personalization, and related content
- Optimize content for mobile devices and tablets
- Safeguard content with secure user access and management

Search

Ingeniux CXP provides a rich search experience that helps customers find the information they need easily and quickly. CXP search offers guided or faceted search experiences that enable customers to narrow down the results they need in the least amount of clicks possible.

In addition, you can narrow down the search scope to occur within a specific section of the portal to surface the best information quicker. For example, a user might be looking for specific information on a product in the knowledge base, but only wants to look at KB articles.

You can personalize the search experience based on the customer's profile settings, including an additional profile information maintained directly within CXP. This enables you to bring the most relevant content to the top of the results list so the customer can quickly find the information they want.

Live Chat

Integrating live chat within your CXP is done through a simple script integration.

Community and Social Networking

Ingeniux CXP provides a number of community and collaboration features for your customer portal:

1. Forums
2. Blogs
3. Interest Groups
4. Social Feedback (commenting, ratings, voting)
5. Activity Feeds
6. Leader boards, badges, and gamification
7. Social connections

The inclusion of these capabilities enables you to create a strong community experience for customers. They can share information and ideas about challenges and things they are doing, in addition to providing user-generated content that supports your products and services.

Community features are proven to lower support costs and improve customer loyalty and retention. They can also support cross-selling and upselling opportunities.

Cross Selling

Another aspect to providing a consistent customer experience focused on cross-selling and upselling opportunities in the Ingeniux CXP.

By connecting your marketing automation system and CRM application you can show customized or targeted content to your CXP customers. Customer data from a marketing automation system can tell you if the customer has downloaded new content assets, or viewed new web pages on your website. You can use this information to show new product ads or provide recommended reading in the CXP experience.

Architecture

The Ingeniux CXP platform has four core components: web content management, membership and community, enterprise search, and application integration:

- Manage your portal experience and publish content to the portal website.
- Support membership and community capabilities
- Deliver guided and faceted search, and federated search of structured and unstructured content
- Integrate third-party applications through a service-oriented API

Summary

Winning a customer is only one aspect of the customer experience. Delivering a consistent and supportive experience on-going is also necessary and is often more challenging. Dealing with multiple service and support systems from different departments leads to a disjointed and frustrating customer experience.

The Ingeniux Customer Support Portal is designed to bring together these disjointed services into a single branded experience where the customer can find everything they need to use your products and services. It demonstrates to your customers your desire to give them the tools they need to solve their problems.

About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent “structured” content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on-premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at <http://www.ingeniux.com>.

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