

# Customer Portals with Liferay DXP: Supporting Capabilities and Features



## Providing Unified Customer Experiences

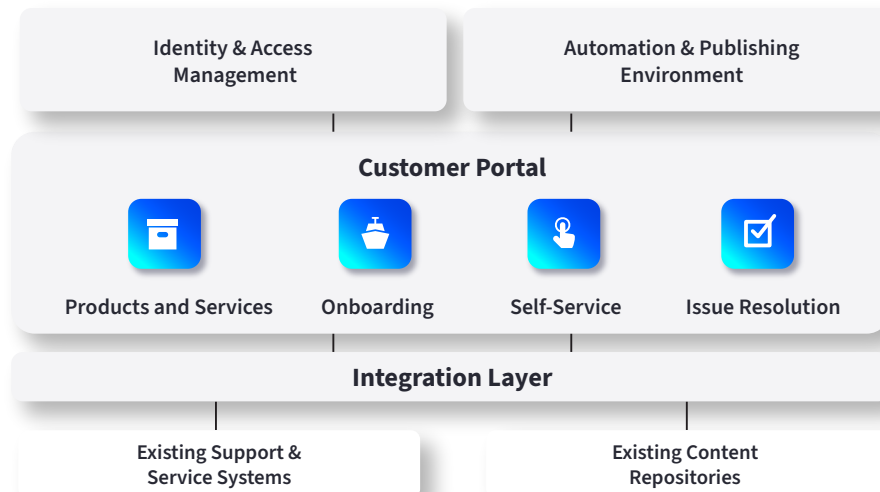
Providing a unified experience is the foundation for excellent customer service. But many companies today still struggle with offering a unified experience for their customers because the service and support systems they have in place aren't connected in a meaningful way.

Instead, they operate as stand-alone systems, which customers and employees must navigate separately in order to find answers to their questions or perform certain tasks.

**Unifying the customer experience begins by giving your customers and teams a single, brand-consistent gateway to access the content, tools, and resources they need: a customer portal.**

To do this, you will need to use a platform that has the flexibility and features to integrate your customer portal with existing back-end systems, automate business processes, and deliver a consistent look and feel across your entire site.

### Digital Experience Platform



# Using Liferay DXP to Unify the Customer Experience

Liferay Digital Experience Platform (DXP) is a complete platform that provides out-of-the-box functionality like personalization, account management, content management, commerce, and low-code to help build and optimize your portal faster. What truly sets Liferay apart, however, is its ability to integrate well with other technologies and surface the data from those technologies in one interface that is easy for your customers to use—enabling your teams to operate more efficiently.

In this guide, we'll explore some of the most common customer portal use cases, such as:



We'll also highlight the Liferay capabilities and feature you'll likely need to support these use cases.

For a full list of Liferay DXP's capabilities, visit:  
[www.liferay.com/platform](https://www.liferay.com/platform)



## Streamline Onboarding

One of the best ways to retain and engage your customers is to invest in an effective onboarding process that gets them up to speed on your product or service quickly.

For many organizations, however, customer onboarding can be complex, often requiring manual processes that are dependent on sales and service representatives.

That's problematic for two reasons: First, 74% of potential customers will switch to other solutions if the onboarding process is complicated.<sup>1</sup> Second, complex onboarding situations result in more calls and emails to your service centers from customers struggling to access your business and its services.

With Liferay, you can build a customer portal that enables you to:

### Relevant Functionality

### Supporting Liferay Capabilities and Features

Design different onboarding experiences based on a customer's segment or type

#### Personalization:

- With Liferay, you can **segment** users according to different attributes such as job function, customer tier, product type, location, etc. Either build dynamic segments, aggregating individuals automatically based on specified criteria, or build static segments, aggregated manually. Additionally, data can be pulled in from other sources, like your CRM, to build more granular segments.

#### Security:

- You can also use Liferay to assign **permissions** to different user **roles**, ensuring that each role can only see and access what is relevant to that role. Site administrators can define whether a role can view, update, configure, or take other actions throughout Liferay DXP.

<sup>1</sup> [11 Examples of the Best Onboarding Experiences in SaaS to Inspire Your Own](#)

Create step-by-step journeys

**Low-Code:**

- **Workflows** allow you to define a sequence of steps each individual must go through to complete the onboarding process. Part of that process could be designing an onboarding experience that requires customers to fill out additional information about their company on a Liferay **form**, accept a privacy policy, or take a required training. You may even need to design an onboarding experience where a manager has to sign off before moving the customer to the next step.

Automatically curate relevant content for different types of customers

**Personalization, Security, and Low-Code:**

- Once you've integrated with the different systems that hold assets associated with your onboarding process, you can use **personalization, roles, and workflows** to curate the right assets for your customers at the right time.
  - For example, you might present a new customer with a getting started video with accompanying documentation for their product. Depending on their actions, which you can define in a Liferay **workflow**, they might get additional content or the option to register their product or take a relevant training course.
  - If your customer is an organization with different users, you could also define onboarding journeys that present individual users with **personalized** types of content or options based on their **segment or role**. For example, technical users responsible for implementing or operating the product or service might receive curated technical resources for installation or configuration, while business users might get information on how to use the product or service.

**Get more details on Liferay DXP's capabilities:**

Discover Liferay's [Low-Code](#) and [Personalization](#) features.



## Reduce Costs and Time-to-Serve with Self-Service

Put customers in control and empower them to complete tasks on their own by providing user-friendly and efficient self-service options in your customer portal.

Use Liferay's self-service capabilities to enable customers to:

### Relevant Functionality

### Supporting Liferay Capabilities and Features

Edit and control account information	<p><b>Security:</b></p> <ul style="list-style-type: none"><li>• Provide basic <b>account management</b> capabilities to enable customers to change their addresses, update emails, edit preferences, and restore or change passwords without needing to contact a support rep.</li><li>• Assign <b>roles</b> to customers, allowing them to manage <b>permissions</b>. For example, an admin role has the ability to manage all users and passwords, add new members, and thereby assign them to role-specific onboarding workflows.</li></ul>
Manage orders and returns	<p><b>Commerce:</b></p> <ul style="list-style-type: none"><li>• Liferay provides <b>order management</b> capabilities out-of-the-box, allowing customers to place orders, set up recurring orders, check the status of their orders, and even manage returns on their own.</li><li>• Alternatively, you can <b>integrate</b> your portal with your existing order management system using our native connectors, APIs, or other integration tools.</li></ul>
Submit service tickets and warranty claims	<p><b>Low-Code:</b></p> <ul style="list-style-type: none"><li>• Liferay provides <b>low-code</b> capabilities to help set up convenient online ticketing and warranty claims processes for your customers (described in the “Streamline Service Operations with Automated Processes” section of this guide).</li><li>• Alternatively, you can <b>integrate</b> your portal with your existing help desk system using our native connectors, APIs, or other integration tools.</li></ul>

Access support content on multiple devices and channels

**CMS:**

- Liferay’s industry-leading **CMS** lets your teams create and manage content, such as knowledge bases, blog posts, web content, and wiki articles, that can be displayed on any channel, device, or browser. This ensures customers can access the content they need, no matter where they are, 24/7.

**DAM:**

- Liferay also provides **DAM** capabilities so you can consolidate and organize assets, like documentation, product diagrams, troubleshooting guides, and terms of service agreements.

Navigate and search for relevant information

**Search:**

- Liferay provides a number of different **search** tools and related capabilities to help users find what they need faster, including:
  - **Faceted Search** lets users narrow down search results on FAQ pages and knowledge bases using **filters or facets**, such as categories, tags, and other metadata attributes.
  - **Federated Search** provides the ability to search through several different data sources at once and then see the results in a simple interface.
  - **Prioritized Search** delivers results based on search relevance and ranking, determined by factors like keyword match, popularity, recency, and user segments.
  - **Applied AI/ML** customizes search results based on previous search history and what others in a similar role have searched for.

Access automated assistance through chatbots

**Integration:**

- Liferay provides integration with standard and AI-assisted **chatbots**. Chatbots can use AI and natural language processing to scan your content to offer your customers what they might need. A chatbot can also escalate an issue to a customer service rep if the customer still needs help.

**Get more details on Liferay DXP's capabilities:**



See why Liferay's [CMS](#) is analyst-recognized, and discover our platform's [DAM](#), [Commerce](#), and [Search](#) features.

## Streamline Service Operations with Automated Processes

Without a single, unified interface for your customers to handle product and service issues, customers will resort to less efficient channels such as email and phone to get support. For example, if a customer is unable to check the status of a pending issue or warranty claim online, their only option to get answers is to contact your team directly.

Lacking a unified interface often stems from disparate customer service systems that IT teams find challenging to integrate and connect in a meaningful way. With Liferay DXP, you can provide your IT teams with the framework they need to connect your support and service systems under one interface.

But even organizations with connected systems will struggle to automate their service operations if they must rely solely on their IT teams to do so. That's why Liferay also supplies easy-to-use tools that empower your non-technical business users with the ability to automate common processes on their own.

### Relevant Functionality

### Supporting Liferay Capabilities and Features

Connect with existing back-end support systems

**Integration:**

- **Integrate** with external technologies through native connectors, APIs, and other integration tools. By bringing together systems that are already in use, organizations can surface information such as the status of service tickets, product orders, account updates, and warranty claims, all from within the customer portal.

<p>Centralize service ticketing</p>	<p><b>Low-Code:</b></p> <ul style="list-style-type: none"> <li>Use low-code tools to set up a ticketing system that centralizes all customer service tickets in one place. You can use Liferay's WYSIWYG <b>form builder</b> tool to create forms that capture customer issues and create a ticket. Liferay <b>workflows</b> can then route the ticket to the right individual or team for follow-up. Additionally, you can use the <b>sites</b> feature to create an intuitive interface for your ticketing system, making it easier for your customers and teams to open and track issues.</li> </ul>
<p>Facilitate online warranty claims</p>	<p><b>Low-Code:</b></p> <ul style="list-style-type: none"> <li>Use Liferay's <b>form builder</b> and <b>objects</b> tools to help customers quickly submit warranty claims and validate whether or not a product is still under warranty. Then use <b>workflows</b> to guide your customers through the remaining steps they need to take to complete their claim. <b>Auto-notifications</b> can also be set up to inform customers of the status of their claims or remind them of any remaining actions.</li> </ul>
<p>Enable customers to schedule visits, create appointments, or register for courses and events</p>	<p><b>Low-Code:</b></p> <ul style="list-style-type: none"> <li>Use <b>forms</b> and <b>objects</b> to enable customers to schedule a service visit/appointment or register for events/courses within your portal. You can also display an up-to-date calendar that shows available dates and times, allowing your customer to add their appointment to their calendar.</li> <li>Use automated <b>notifications</b> to remind customers of upcoming activities or any next steps they may need to take.</li> </ul>
<p>Measure service and content performance to prioritize improvements</p>	<p><b>Low-Code:</b></p> <ul style="list-style-type: none"> <li>Implement feedback <b>forms</b> anywhere on your site or trigger them automatically after service interactions to gauge customer satisfaction and identify areas for improvement.</li> </ul>



#### CMS:

- Liferay's **CMS** provides several **analytics tools** to help you gauge the usability of your site and the effectiveness of your content, including:
  - **Behavior Metrics:** See where customers go on your site and how they get there. This helps identify where customers are getting stuck so you can plan improvements.
  - **Site Metrics:** View aggregate indicators such as top pages hit, top search terms used, and most popular topics, which can help guide future content creation.
  - **Asset Metrics:** View number of downloads and engagement levels for different assets, including blogs, ebooks, or videos, so you know what type of resources work best and can prioritize them accordingly.

#### Get more details on Liferay DXP's capabilities:

Discover Liferay's [Integration](#), [Low-Code](#), and [CMS](#) features.



## Intelligently Tailor Your Customer Portal for Different Users or Roles

Customers are more likely to use a customer portal for their support needs if the experience is tailored to their specific requirements and they can get answers faster.

With Liferay, you can personalize the content and layout of your site to different segments of customers. You can also use AI-powered recommendations to guide your users to what they might be looking for. Additionally, you can use role-based permissioning to control what different types of customers can see or do on your site.

All three of these options enable you to tailor your site in ways that facilitate your customers and service teams in discovering relevant products, services, content, or actions, as outlined below:

## Relevant Functionality

## Supporting Liferay Capabilities and Features

Create dashboard views that give your customers and teams quick access to the information and tools they need

### Integration:

- Pull in relevant customer information from different systems using **Liferay's native connectors and integration framework**.

### Personalization:

- **Segment** your customers according to the products/services they've purchased, tier level, or other criteria.
- Create a **personalized dashboard** that displays relevant products and services your customers have purchased along with links to related manuals, documentation, order history and, additional products they may need. All of this information could reside within Liferay's robust **CMS** and **commerce** tools, or it could be pulled in from separate document management, product information management (PIM), and order management systems.

Guide customers to relevant products, services, and content with AI-generated product recommendations and offers

### Personalization:

- Liferay's **recommendation engine** uses AI and machine learning to provide customers with recommendations that are based on their interests, past behaviors, what similar customers have viewed or purchased, and a wide range of other criteria.

Control access to site content and functionality

### Security:

- With **role-based permissions**, you can assign roles for users accessing your site and define a specific set of responsibilities, permissions, and access levels for each role. This allows you to:
  - Define different levels of access to your portal depending on the customer type. For example, you can provide different content, tools, and services to customers depending on their tier level or what types of products or services they have purchased.

- Boost the efficiency of your staff by providing them with the information and tools most relevant to their roles so they can focus on their responsibilities without distraction. For example, a customer service rep might get a summary view of their account, including product purchases, recent issues, and warranty status, so they have all the information they need to serve their customers at a glance. Similarly, your accounts receivable team might get a consolidated view of customer invoices with payment status.

**Get more details on Liferay DXP's capabilities:**

Discover Liferay's [Integration](#), [Personalization](#), and [Security](#) features.



## Next Steps

No matter how complex your tech stack is or how custom your sales processes are, you can configure the Liferay platform to build a customer portal that fits what your team and customers need to operate more efficiently.

**Ready to learn more about how Liferay can help your business?**

Get your free demo at [www.liferay.com/demo](http://www.liferay.com/demo).



Liferay helps organizations build for the future by enabling them to create, manage, and scale powerful solutions on the world's most flexible Digital Experience Platform (DXP). Trusted globally by over a thousand companies spanning multiple industries, Liferay's open-source DXP facilitates the development of marketing and commerce websites, customer portals, intranets, and more. Learn how we can use technology to change the world together at [liferay.com](https://liferay.com).

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