

How far up have you really climbed?

If you're below rung 5, you're running a view-only portal, not true self-service.

Full self-service. Your portal is doing the heavy lifting.

Functional but incomplete. Customers still need reps.

Basic portal. Manual work is still heavy.

6. **Multi-Channel Order Visibility**
Orders placed by phone, rep, or online all appear in one view for the customer.

If order history is incomplete, adoption will lag.

5. **Documents, Returns, & Claims**
Invoices, POs, COAs, & spec sheets are downloadable instantly, with the ability to initiate returns or warranty claims online.

If they have to email for paperwork or returns, you haven't removed the friction.

4. **Complete Catalog Access**
Catalog reflects exactly what they can buy, with stock availability and accurate restrictions.

Showing items they can't order creates confusion and frustration.

3. **Order Editing & Approvals**
Customers can edit open orders or submit them for approval online.

If they can't fix it themselves, your reps are still doing the work.

2. **Terms & Credit Control**
Net terms, credit limits, and pre-approvals carry through automatically.

Forcing credit card checkout on terms customers is a fast way to lose orders.

1. **Pricing & Freight Accuracy**
Contract pricing, tiered discounts, rebates, and ERP freight logic display in real time.

If customers still call to confirm prices or freight, it's not self-service.