

## InsitePortfolio™ Features & Services

Insite Software's InsitePortfolio is an enterprise-class digital delivery platform designed to provide reliable access to digital product catalogs and related sales, marketing and education content in a branded native application. It is a SaaS platform that provides online or offline access to digital information to defined audiences, while reporting key data on usage activity to management—connecting sales, marketing and leadership teams with the right content, insights and tools for the ultimate customer experience.

InsitePortfolio is a single source of truth for all product, sales, marketing and education materials with built-in presentation and sharing tools that allow for a searchable single source of digital content, offline access, consistent message and branding, flexible content organization, annotation and sharing of content assets, and controlled access to content by group, role and region.

### PLATFORMS SUPPORTED

FEATURE	DESCRIPTION
Web	Safari®, Chrome™, Firefox®, Internet Explorer® 10+
Mobile	iOS, Android™, Windows® 10

### DIGITAL PRODUCT CATALOG

FEATURE	DESCRIPTION
Browse Products	Assigned users can browse product categories, sub categories and product detail pages, limited to the products made available to them.
Product Search	Users can perform keyword searches to quickly locate a product family or specific product detail page.
Filter & Sort	While browsing or after performing a search, users can filter or sort by available criteria in order to more rapidly locate a specific product.
Share Product Details	Share a link to a product detail page with a customer or colleague using the InsitePortfolio email client.

## PLATFORM CUSTOM BRANDING

FEATURE	DESCRIPTION
Branded Native Application	InsitePortfolio can provide a company-branded native application, including app icon and login screen extending the reach of a company's brand to new mobile audiences.
Custom Platform Logo & Colors	Account Admins can select platform logos and accent colors allowing customers to fully brand the InsitePortfolio end user experience.
App Store Management	Insite Software can provide management of app store pages or enterprise app stores enabling the seamless deployment of app updated as new features become available.

## PRESENTING & SHARING

FEATURE	DESCRIPTION
Offline Access	Access InsitePortfolio core functionality without an internet connection across all native application platforms.
Platform White Labeling	Account Admins can select platform logos and accent colors allowing customers to fully brand the InsitePortfolio end user experience .
Salesforce® Syncing	When enabled, contact records residing in Salesforce are accessible in InsitePortfolio and any email activity is logged as activities in Salesforce against the selected contact and account objects.
PDF Annotation	When enabled, users can annotate, using text or free hand drawing, on a PDF and share an annotated version with a customer.
Email Sharing	When enabled, users can email content directly from the InsitePortfolio platform and track recipient activity such as content item views and sharing.
Email Templates	Admin users can create rich-text email templates accessible by end users to streamline email sharing and to provide control over messaging and branding.
Playlists	When enabled, users can create unique lists of existing content for a specific purpose and share entire playlists.

## PRESENTING & SHARING *(continued)*

FEATURE	DESCRIPTION
Share Selected Page of PDF	When sharing a PDF content item, users can select whether to share the entire PDF or only select pages.
Link Click Tracking Notifications	When enabled, the InsitePortfolio platform automatically notifies sender when the View Items link they've shared via email is accessed by the recipient.
Item View Notifications	When enabled, the InsitePortfolio platform automatically notifies sender when the individual items are accessed by the recipient.
My Portfolio	When enabled, end users can access and manage a portfolio that they control, including the ability to upload and organize content assets, change content imagery and share content with customers. Admins can view the contents of a user's My Portfolio and can control whether content loaded to a user's My Portfolio is shareable.

## CONTENT MANAGEMENT & ORGANIZATION

FEATURE	DESCRIPTION
Content & Portfolio Custom Fields	Allows for the creation of custom content metadata fields and tagging.
Sharing Controls	Control whether content can be shared with customers.
Global Search	Admin users can search across their Account for users, groups, portfolios, collection, content items and playlists.
Advanced Global Search	Admin users can access advanced search including the ability to filter based on one or more criteria, including keyword, content type, user type, upload date, custom fields and more.
Real-time Content Publishing & Updates	Admin users can implement and preview updates prior to the updates being published. After publishing, content updates are applied in real-time and immediately available to all end users.
Image Library	Account Owners can create and manage groupings of imagery that can be utilized by Account Admins when creating portfolios, collections and items.

## USER & PERMISSION MANAGEMENT

FEATURE	DESCRIPTION
User Types	Account Owners, Account Admins, Content Managers, End Users
Manage Users and Permissions and Content Access by	User can be organized into groups, enabling flexible control over access to content, functionality and tools by role, region/ geography, business unit, etc.
Permission Management	Users can be granted varying level of permissions that control whether they can manage content, manage users, access reports, link content and update account settings.
User Profiles	User can customize their profile, including profile image, contact information and custom signature.
User Preferences	User can customize their preferred portfolio, view preferences and notification settings.

## ANALYTICS

FEATURE	DESCRIPTION
User Reports	User Activity Summary, User Activity Detail
Content Reports	Item View Summary, Item View Detail
Customer Activity Reports	Customer Activity Summary
Admin Dashboard	Widgets visually displaying most popular items viewed, user activity, users by platform, users by device.
Custom Reports	Custom Reports can be requested and generated as needed depending on unique needs of customers.

## ADMIN & END-USER PRODUCT TRAINING

FEATURE	DESCRIPTION
Access to Insite Knowledge	Access for administrative users and end users to Insite Software's Documentation Repository. This platform contains learning assets and can be accessed both before & throughout implementation and after go-live for performance support.
Documentation	Provide just in time learning and support on all InsitePortfolio platforms.
Learning Management System	Role and task based training designed to provide continual knowledge growth at a pace designed by the user.

## ADMIN & END-USER PRODUCT TRAINING *(continued)*

FEATURE	DESCRIPTION
Instructor Led Training (Billable)	Instructor led, role-based training designed to enable individuals within your organization to accomplish your business objectives.
Continual Learning Webinars	Invitation to Insite Software's webinar series including new release features.

## INSITEPORTFOLIO SERVICE *not included in base subscription*

FEATURE	DESCRIPTION
Strategy Services	Strategy Workshops, Content Audit, Content Creation, Measurement Strategy, Architecture Assessment
Prioritize Services	Discovery and Requirements Gathering, Configuration and Setup, Content Migration, Reports and Dashboards, Integrations
Growth Services	System Administration, Content Production, Analytics and Insights

## INSITEPORTFOLIO ADD-ONS

FEATURE	DESCRIPTION
Interactive Portfolio	Enable users to invite external recipients to a portfolio. External users can share, annotate and collaborate with the sender.
Quizzing	Create custom quizzes to assess knowledge and understanding, delivered in a portfolio as a content item.
Surveys	Create custom surveys delivered in a portfolio as a content item.
Learning Modules	Create modular learning portfolios consisting of HTML5 eLearning, videos, PDF, surveys and quizzes.
Quick Create	Enable users to rapidly create and update CRM-based records such as Accounts, Opportunities, Contacts, Activities or other custom objects in branded, custom user interface.
Opportunity Locator	Enable users to view, create and update CRM-based records including Accounts, Opportunities and Contacts on an interactive map based on the location of the user.
Guided Selling Tools	Interactive Calculators, Conversation Facilitation Tools, 360 Degree Product Rotators, Offline Product Simulators

# ABOUT INSITE SOFTWARE

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Insite Software helps B2B organizations grow revenues across both online and physical sales channels—and reduce their cost-to-serve—via a hybrid channel strategy that optimizes digital commerce and turbocharges the productivity of account-based sales and service reps.

Insite's solutions fully integrate with leading ERP, PIM, CRM and content management systems, and can be flexibly deployed on-premises or in public/private clouds.

Learn more about Insite Software at [www.insitesoft.com](http://www.insitesoft.com).