The first sales portal built for real
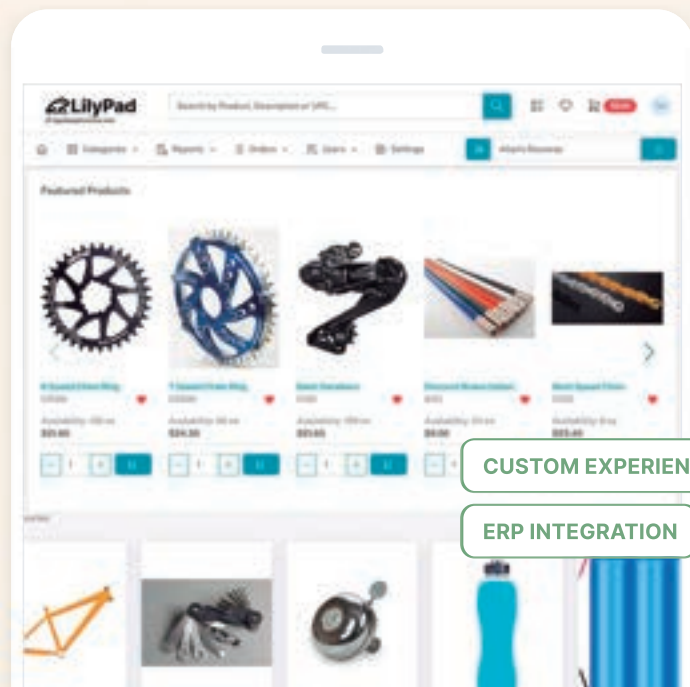# Business-to-Business operations

LilyPad Vortex

A customized digital storefront **accessible from any device** — perfect for route sales, trade shows, and 3PL operations.

Launch a fully functional customer portal, directly integrated with your ERP, and designed for both your sales team and your clients. Not a stripped-down B2C tool — this is **built from the ground up for how B2B sells today.**

Key Features

- Customer Portals in Seconds
- Direct Rep Order Entry
- Real-Time Custom Pricing
- Highlight Featured & Sale Items
- Category Navigation + Images
- Signature Capture & PDF Export
- ERP-Based Payments & Credit
- Full Access Anywhere with Wi-Fi

CUSTOM EXPERIENCE

ERP INTEGRATION

This is a real Business to Business Solution, not a stripped-down B2C application. Designed from the ground up for the way we do business today.

Paul Rossi, President – Bronx Toys

LilyPad
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LilyPad Vortex

General Features

Integration & Access
- 2-Way API Between Vortex and Your Software
- Simple Link From Your Company Website
- User Login Creation
- Customer Login
- Redirect After Log In
- Two Factor Authentication

User Management & Customization
- Company Logo
- Add User's Company Logo
- Customer Categories
- Salesperson Categories
- Manager View
- Admin Panel

Info & Reporting
- Look Up Inventory
- Look Up Customer Information
- Reports Tab
- Private Memo Notes

Payments & Logistics
- Accept Payments
- UPS Rates
- Tax Rates From Your Software
- Custom Shipping Chart Rates
- Account Status — Hold / Open to Buy
- No Backorders vs. Allow Backorders
- Purchase Orders
- 3PL Auto-Billing

Shopping Experience & UI
- Easy-to-Use Design and Layout
- Customize Home Page Display
- Works Anywhere With Wi-Fi
- Adjust # of Items to Display
- "Featured Items" Slider on Home Page
- True Shopping Experience
- Full-Color Images
- Mobile-Device Friendly
- Multiple-Level Categories
- Google Maps
- Transfer Orders
- Multiple Images Per Product (Up to 5)
- Add Products to a "Favorites" List
- "Item Now In Stock" Email Notifications

Sales Order Features

Order Creation & Editing
- Create Sales Orders
- Save Sales Orders Locally
- Edit Saved Sales Orders
- Duplicate Existing Orders
- Enter Customer PO# on Sales Order
- Enter Vendor PO# on Sales Order
- Line Item Notes
- % Discount Per Line Item
- % Discount Per Sales Order
- Price Override

Submission & Export
- Submit Sales Orders to Your System
- Export Sales Order to .csv File
- Email PDF of Sales Order
- Export Orders to Your System Immediately or by Batch
- Export Orders as "Issued" or "Estimate"

Processing & Status
- SO $ Amount on Homepage
- Order Status Updated from Your System
- Show Sales Orders From Your System
- Show Estimates From Your System
- Sales Order "Pending" Status in Vortex
- Send Estimate to Your System
- Drop Ship Sales Orders
- Credit Return Sales Orders

Payments & Rules
- Payhub Payments
- Require Payment By Type
- Require Payment For All
- Pricing Rules From Your System
- Show Credit Limit
- Hide Pricing

Shipping & Fulfillment
- Require Shipping (All)
- Require Shipping (By Dollar Amount)
- Customize Ship To
- QuickShip Prompt
- Automatically QuickShip Orders

Alerts & Visuals
- Notification Emails When an Order is Placed
- Customer Alert Notifications
- Show Quantity Available
- Inventory Images
- Show Last Cost on Sales Order
- Public Memo Note
- Signature Capture

Organization & Favorites
- Create Lists of Favorite Products For Easy SO Creation
- Scan Barcodes For Product Lines
- Sales and Inventory Reports Easily Accessible

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