



CDS PARTNER EXCHANGE™

Connect every partner process. In real-time. In one place.

**A Partner Automation Platform for real-time
collaboration on critical commercial
processes and workflows**

Why CDS Partner Exchange™?

Built for Any Channel with 24/7 Access

Empower customers with 24/7 support while providing distributors access to easily assist customers by viewing orders, alerts, and quotes.

Self-Service Quoting

Easily create, view, and manage quotes with the ability to convert them directly into orders to accelerate the sale.

Order Inquiry & History

A centralized hub to quickly check real-time order status and access comprehensive history details in one place.

Automated Re-Ordering

Drive repeat business by allowing customers to re-order favorite products instantly from their history or pre-defined order templates.

Secure Payment Management

A dedicated, secure environment for customers to manage payment methods and billing preferences with transaction security.

Pending Order Insights

Real-time visibility into active orders, including status updates and direct communication from the business team.

Automated Notifications

Enable automated notifications to share order updates and other key information to drive engagement.

Standalone or Add-On Deployment

Launch as a dedicated solution or seamlessly integrate into your ERP and eCommerce solutions for unified product, parts, and service sales.

Enterprise-Grade Integrations

Seamlessly connects with ERP, eCommerce, and other critical systems through standard connectors and robust APIs.

Self-Service Invoices

Reduce manual friction by giving customers and partners secure, 24/7 access to view and download invoices directly from the portal.

Warranty Management

Simplify the claims process with an intuitive workflow for digital submissions and real-time tracking of warranty status.

Easy Return Workflows

Frictionless RMA process initiated directly from order history, providing customers with a clear, guided return request process.

Role-Based Digital Assets

A tailored library of manuals, media, and technical documents linked to specific products and filtered by the user's specific role.

Dynamic Chat Integration

Close the loop on customer service by providing instant access to support through an embedded, responsive chat integration.

Analytics Dashboards

Achieve high-level business intelligence through integrated Power BI reports that offer specific insights into their purchasing trends and data.

User & Role Management

Maintain security and control with an interface to manage users, assign specific permissions, and customize experiences based on staff roles.

Branded Partner Onboarding

Effortlessly scale your network with a professional, branded onboarding experience that makes it simple for new partners to join the portal.

Built with Enterprise-Grade Security Standards

Hosted on AWS for enterprise-grade security standards and SOC 2 Type II compliance for data protection and regulatory peace of mind.

Trusted by Industrial Equipment Manufacturers

"We needed a solution that could handle the complexity of our product line without overwhelming the end-user. The CDS Partner Exchange™ bridges that gap perfectly, providing a seamless experience from initial quote to long-term warranty management for our customers and distribution partners."

Vice President of Digital Transformation
Industrial Equipment Manufacturer