Portals and business systems

A portal gives staff one place to record and review work. Start with a routine process your team knows well.

Define records and user roles

List the records you want to manage, such as sales, expenses, stock or requests. Decide who creates, edits, approves and exports each type. Record what should be kept when a user leaves.

Use real examples to design screens

Walk through ordinary events and exceptions. For example, a sale might need a correction, an expense might be rejected or an approver might be absent. Decide which actions require notes and which changes must be traceable.

Test over a small period

Try the proposed system with a small group and a limited set of records. Compare totals with the current records. Ask users whether they can find and complete their tasks on the devices they normally use.

How M-CreativeHub can help

We can scope custom portals, reporting, user roles and approval flows. The handover can include basic training, access details and a maintenance plan. Integrations depend on the tools and access available.

What to bring to the first conversation

A blank sample of your current form or spreadsheet, user roles, approval steps and examples of the reports you need.

When custom software is worth the cost

Build a custom portal when the process is stable enough to describe and the existing tools cannot meet an important requirement.

Compare a simpler option first

Try a controlled spreadsheet, an existing product or a prototype with one process. Evaluate role access, reports, corrections, export and running cost. If the existing option can meet those needs, spend effort on adoption and documentation first.

Write the exceptions into the brief

Describe how staff reverse a sale, recover from a wrong entry or act when an approver is absent. Decide which changes need a dated record. Use sample figures for tests and reconcile them against a known report.

Ask about migration and operating costs

Estimate time to clean historical records, map fields and test imports. Agree which records move and which remain archived. Ask about hosting, support, training, recovery time and how your team can export the data in a usable format.

Set a pilot exit condition

Do not switch off the existing process until the pilot has matched agreed totals and users can do routine work. If results differ, reconcile the difference before expanding. Decide what triggers a return to the current process during the pilot.

Before you commit

Approve a build once users, exceptions, exports and the first report have been tested with representative records.