

## SALES

### CUSTOMERS - DOCUMENTS

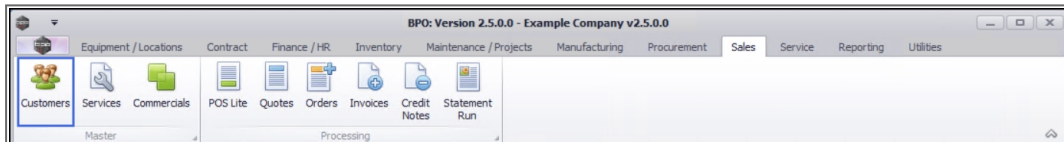
The **Documents** tile allows you to link, view or delete a customer's digital documents effortlessly. All your customer documents can be kept in one place by making use of this link.

These documents need to be saved in a shared folder on the server.

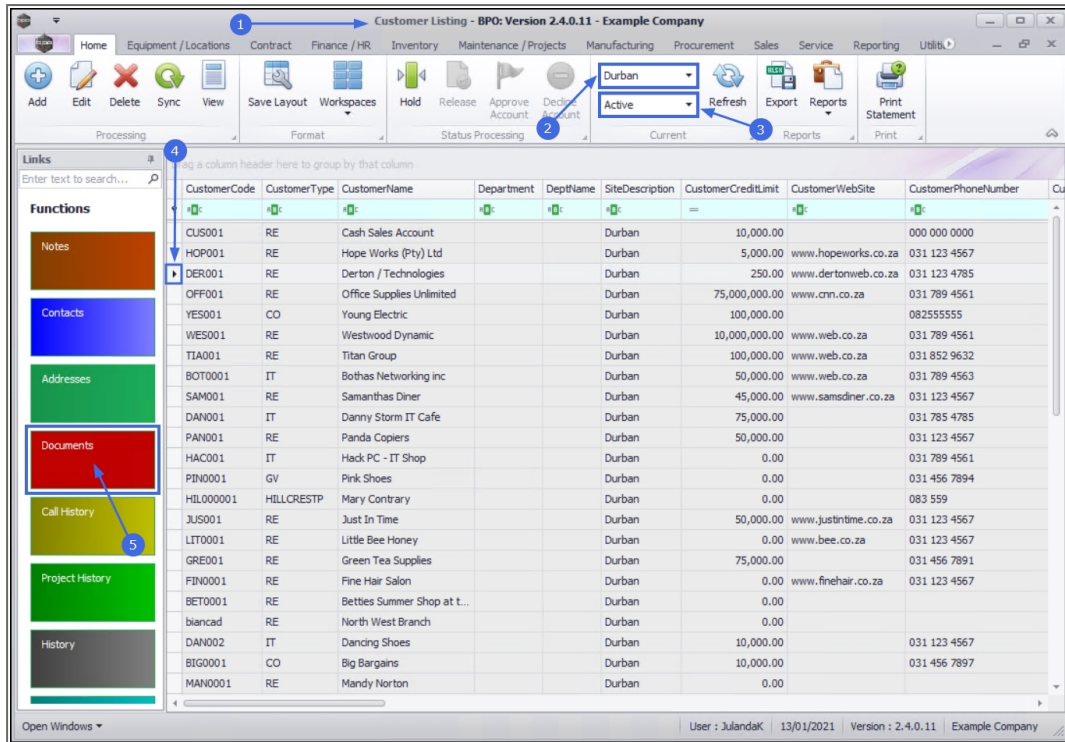
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**Ribbon Access:** *Sales > Customers*

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1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located.
  - The example has **Durban** selected.
3. Select the **Status** for the Customer.
  - The example has **Active** selected.
4. Select the **row** of the customer you wish to link documents to.
5. Click on the **Documents** tile.



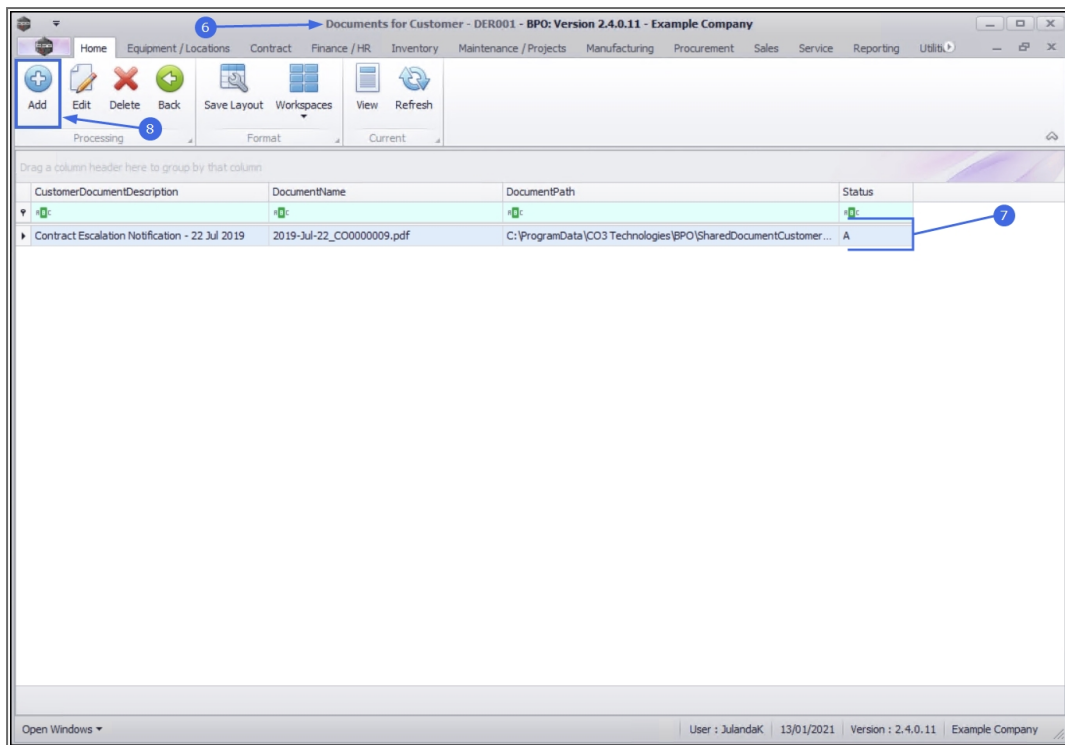
6. The **Documents for Customer - [customer code]** screen will be displayed.
7. A list of all the documents currently linked to the selected customer will display.

## LINK DOCUMENT

8. Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.

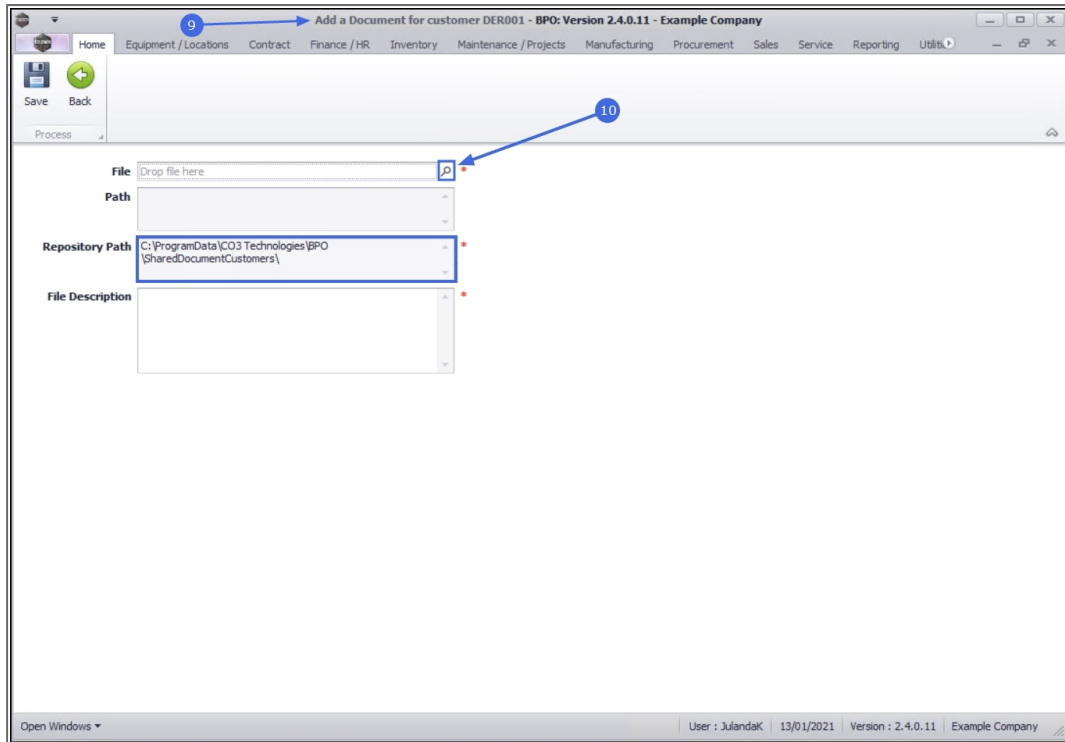


9. The **Add a Document for customer** [customer code] screen will be displayed.



Note that the Repository Path field is populated with the path configured in your [Company Configuration](#).

10. Click on the **search** button in the **File** field.

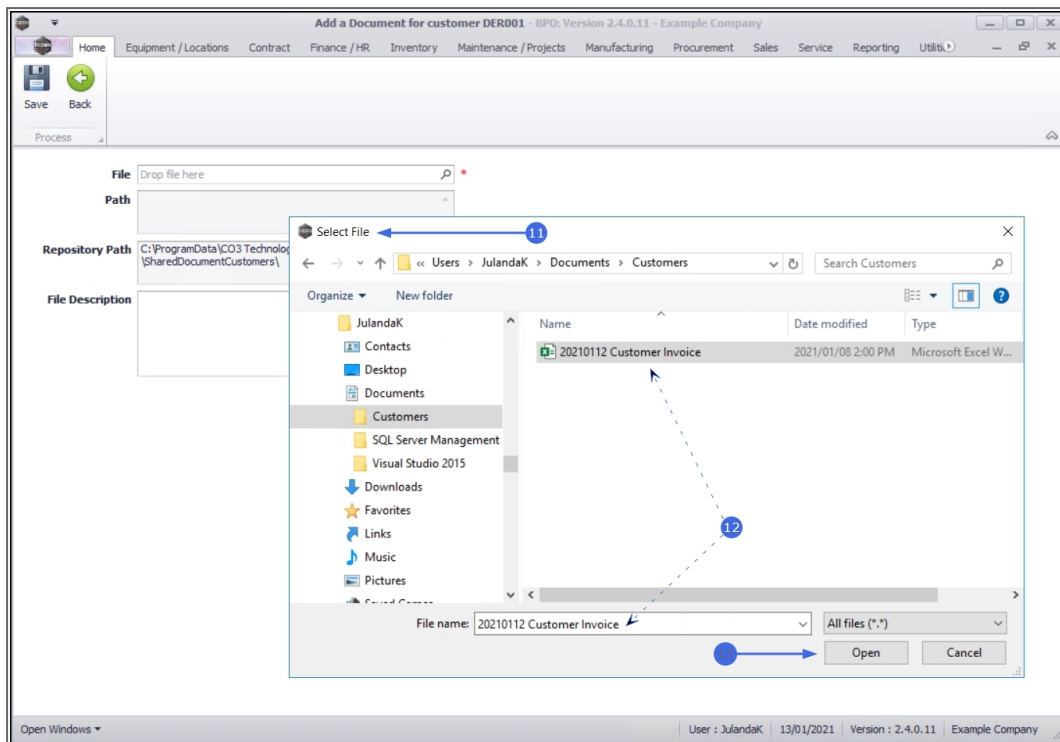


11. The **Select File** screen will display.
12. Locate the **file** on your **server / computer** that you wish to **link**.

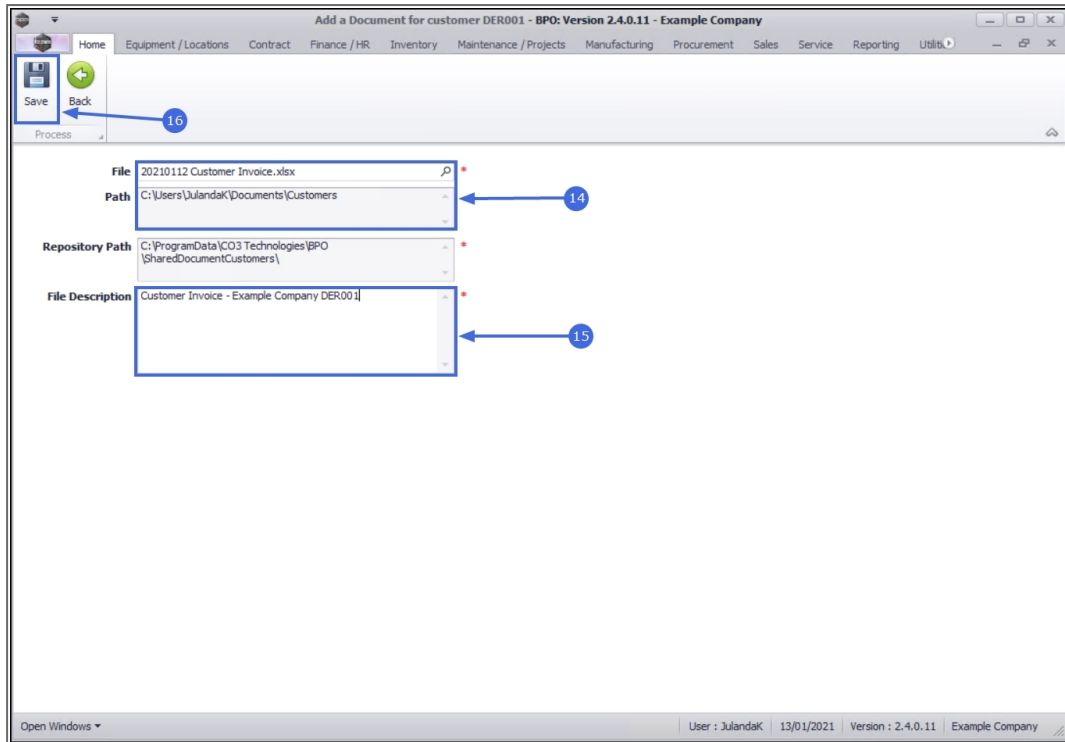


Ensure that the document name appear in the **File name:** field by clicking on the document to select it.

13. Click on **Open**.



14. The **File** and **Path** fields will be populated with the details of the selected document.
15. Type a **description** of the document in the **File Description** field.
16. Click on **Save** to save the link.



16

14

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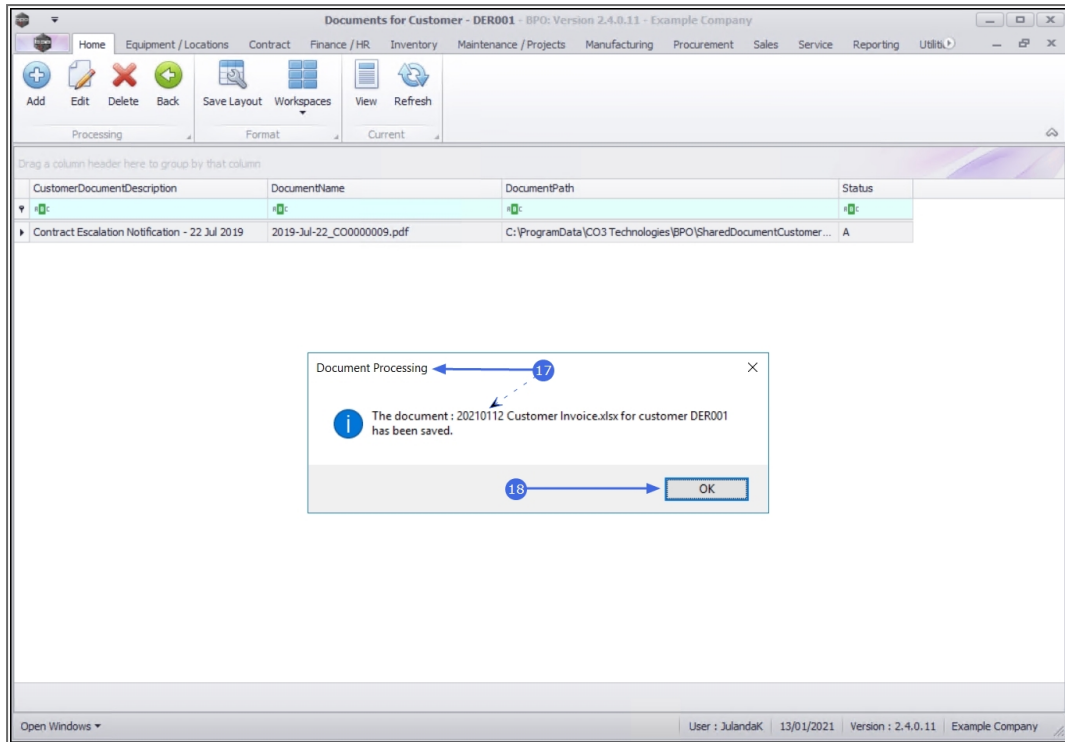
17. When you receive the **Document Processing** message to confirm that;

- **The document:** *[document name]* **for customer** *[customer code]* **has been saved.**

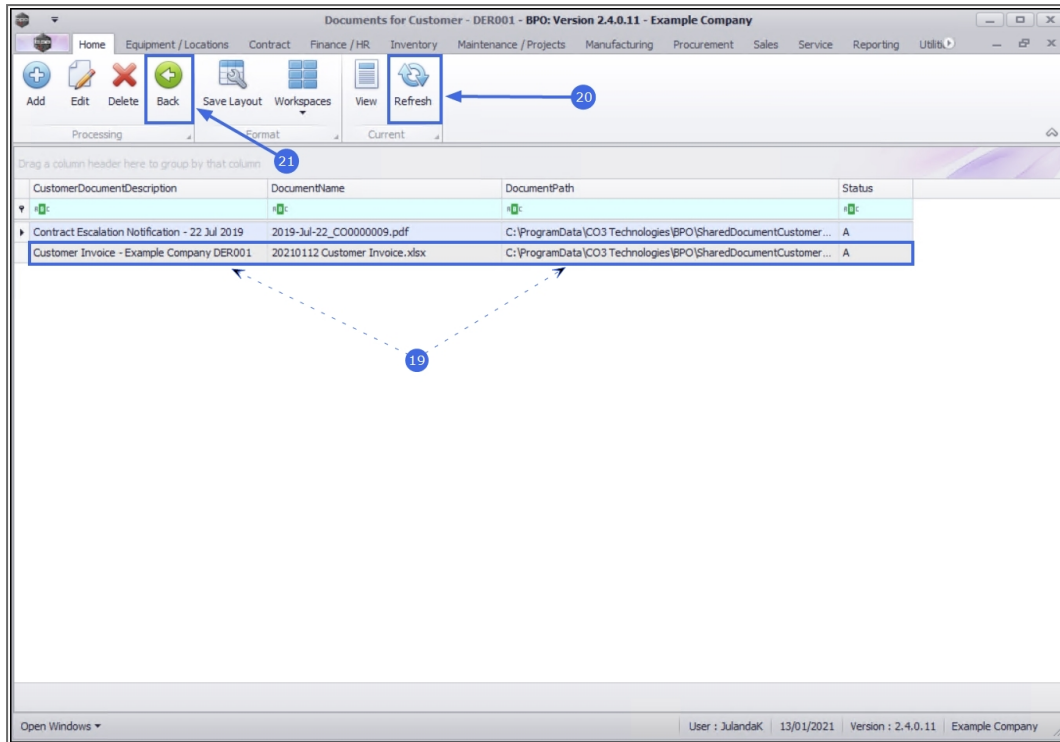
18. Click on **OK**.



BPO does not save the physical document, but a link to where the document has been saved.



19. The **Documents for Customer** screen has been updated with the document you have linked.
20. Click on **Refresh** to update your screen, if required.
21. Click on **Back** to return to the **Customer Listing** Screen.



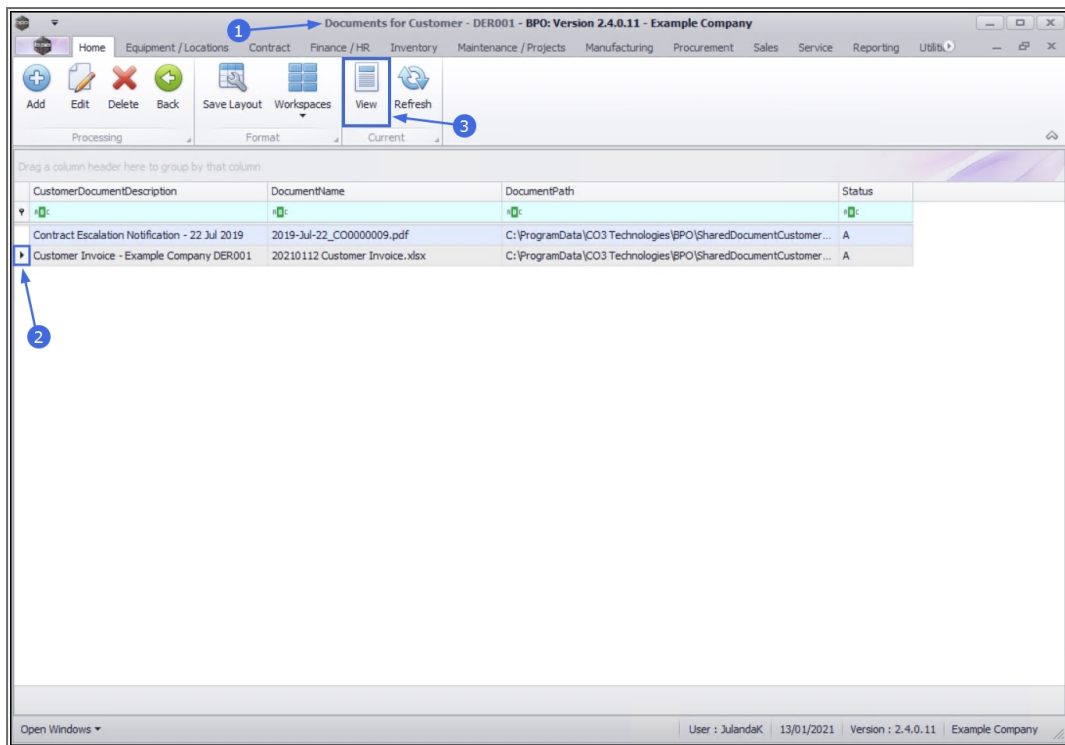
## EDIT DOCUMENT

1. From the **Documents for Customer - [customer code]** screen,
2. Select the **row** of the document you wish to edit.
3. Click on **Edit**.

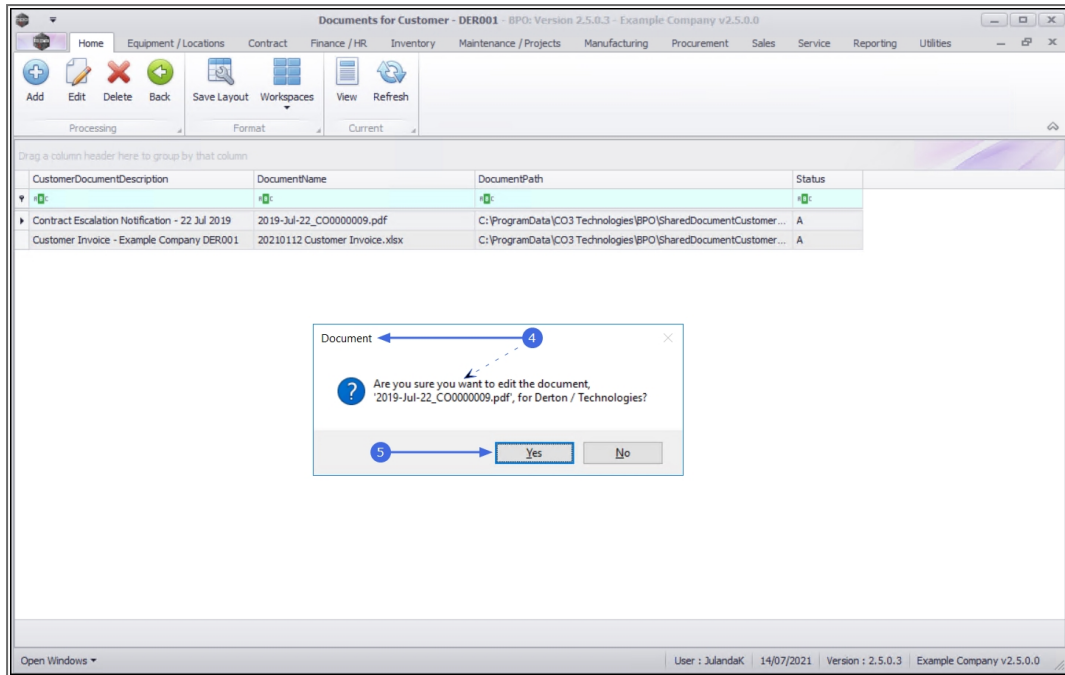


Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.





4. When you receive the **Document** message to confirm;
  - ***Are you sure you want to edit the document [document name], for [customer name]?***
5. Click on **Yes**.

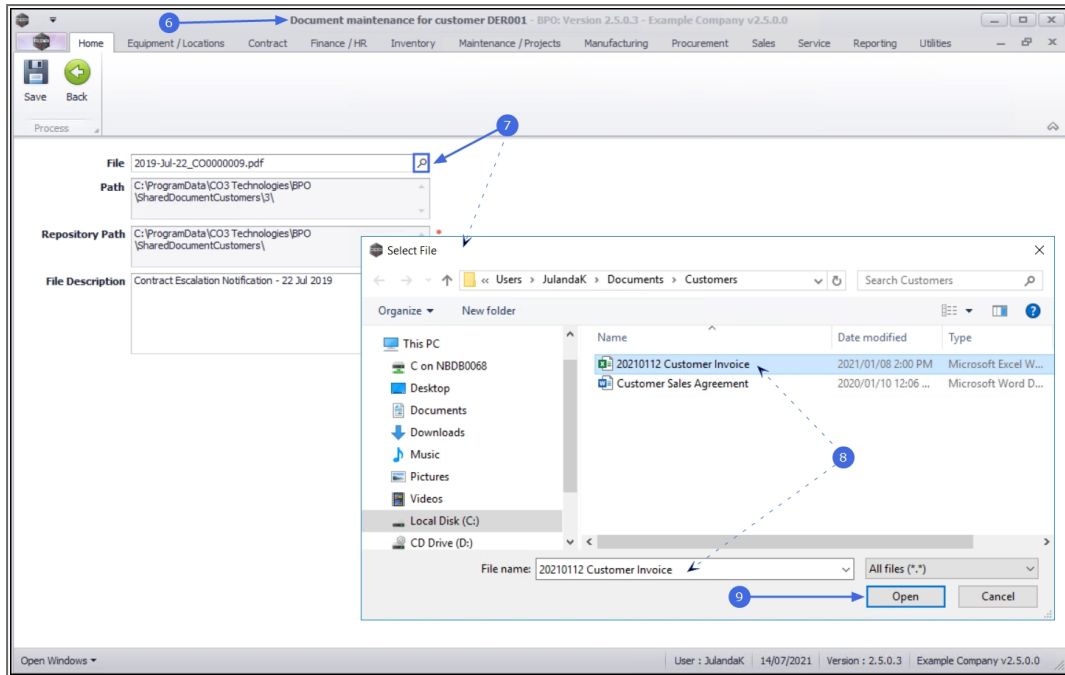


6. The **Document maintenance for customer** [customer code] screen will be displayed with the selected file information populating the fields.
7. To edit the document currently linked to the customer, click on the **search** button in the **File** field to display the **Select File** screen.
8. Locate the **file** you wish to replace the current file with, on your **server / computer**.

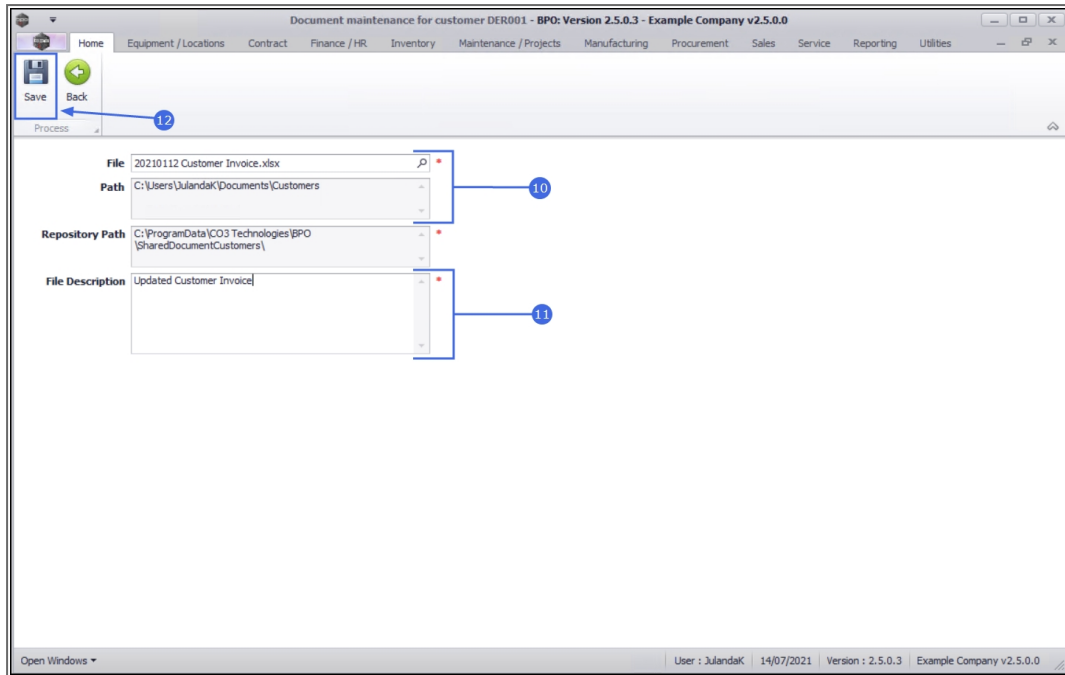


Ensure that the document name appear in the **File name:** field by clicking on the document to select it.

9. Click on **Open**.



10. The **File** and **Path** fields will be populated with the new document details you have selected.
11. Type a **description** of the document in the **File Description** field, if required.
12. Click on **Save** to save the link.



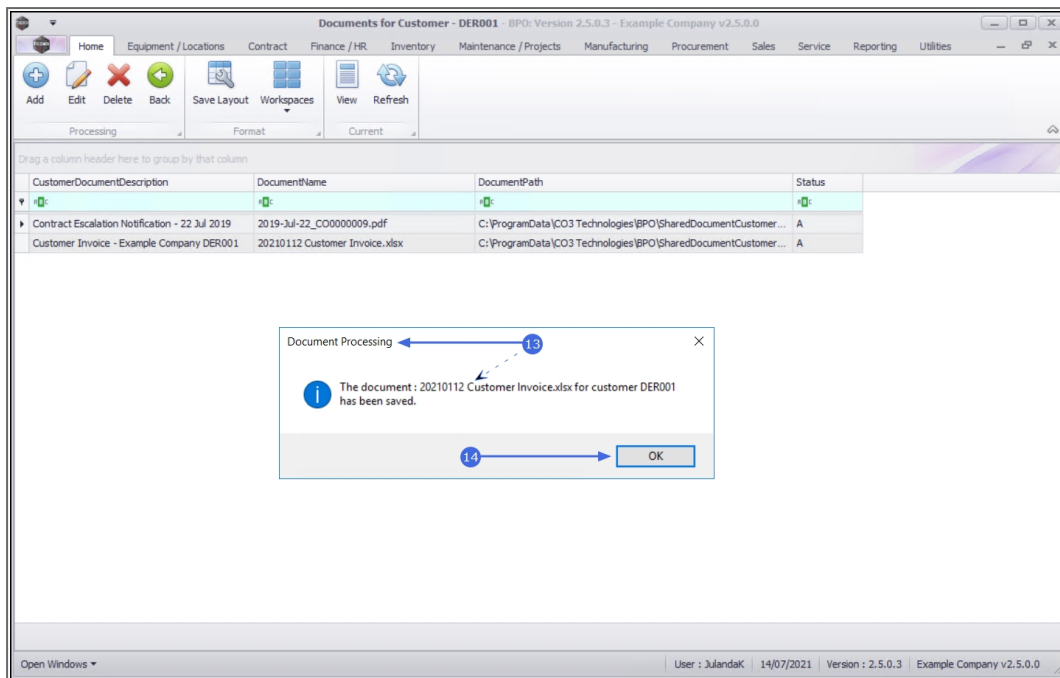
13. When you receive the **Document Processing** message to confirm that;

- **The document:** *[document name]* **for customer** *[customer name]* **has been saved.**

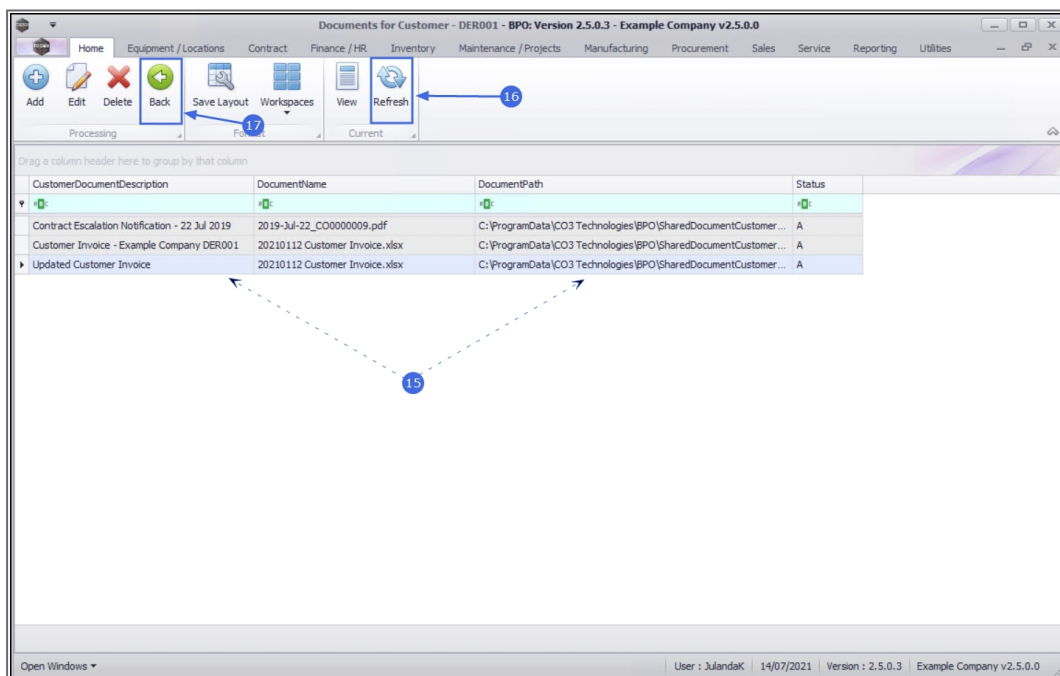
14. Click on **OK**.



Note that BPO does not save the physical document, but a link to where the document has been saved.



15. The **Documents for Customer** screen has been updated with the document you have linked.
16. Click on **Refresh** to update your screen, if required.
17. Click on **Back** to return to the **Customer Listing** Screen.

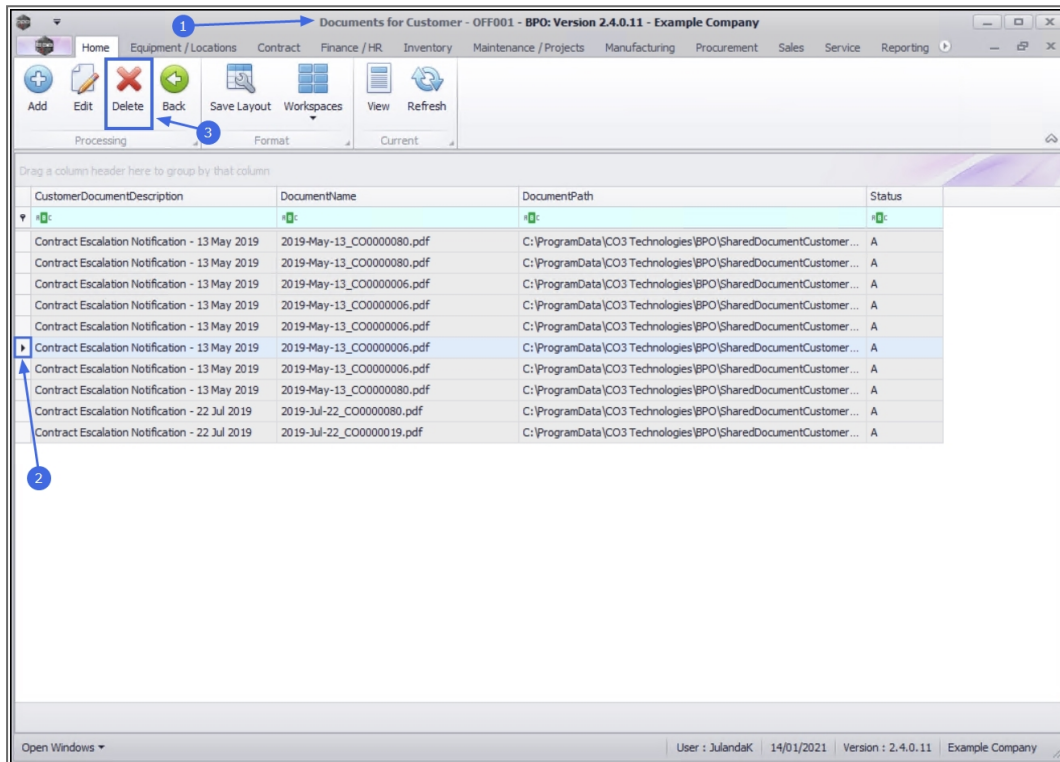


## DELETE DOCUMENT

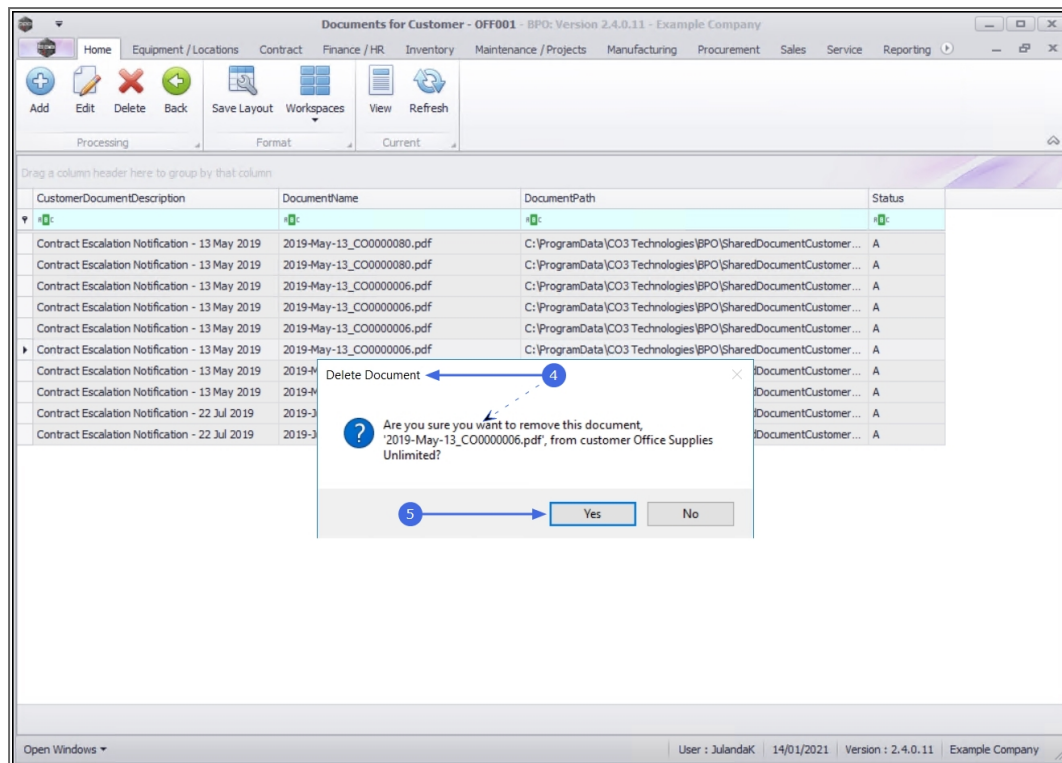
1. From the **Documents for Customer - [customer code]** screen,
2. Select the **row** of the **document** you wish to remove.
3. Click on **Delete**.



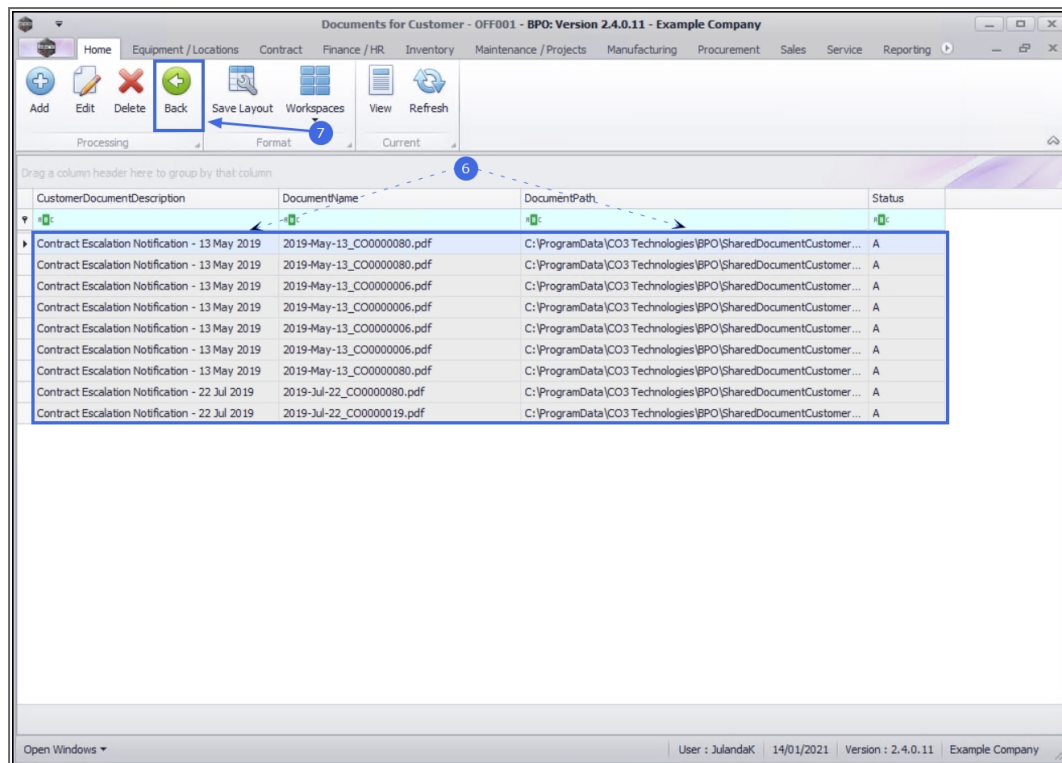
Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.



4. When you receive the **Delete Document** message to confirm;
  - **Are you sure you want to remove this document?**
5. Click on **Yes** if you are certain about your selection.



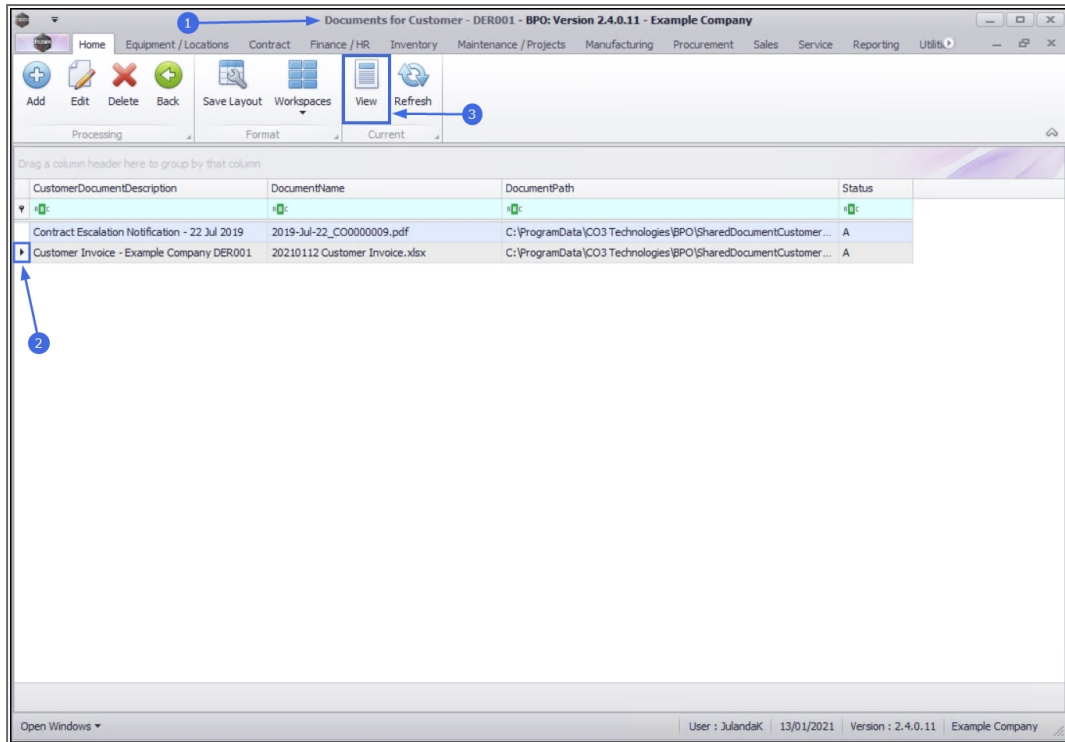
6. The document has now been **deleted** from the **Documents for Customer** screen.
7. Click on **Back** to return to the **Customer Listing** Screen.



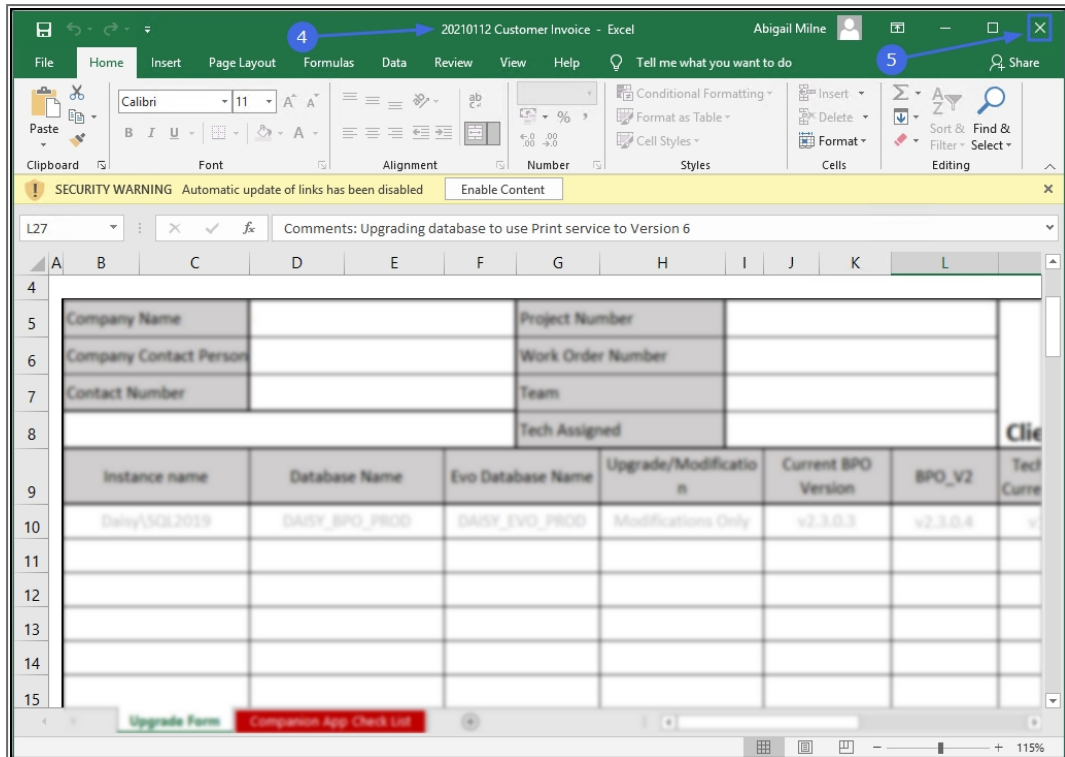
## VIEW DOCUMENT

1. From the **Documents for Customer - [customer code]** screen,
2. Select the **row** of the **document** you wish to **view**.
3. Click on **View**.





4. The digital document will open within the relevant program for you to view the document in.
  - In this example, an **Excel** document has opened.
5. When you have finished reviewing the document, **close** the document screen that you are in, to return to the **Documents for Customer** screen.



20210112 Customer Invoice - Excel

Abigail Milne

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

Clipboard Font Alignment Number Styles Cells Editing

SECURITY WARNING Automatic update of links has been disabled Enable Content

L27 Comments: Upgrading database to use Print service to Version 6

Instance name	Database Name	Evo Database Name	Upgrade/Modification	Current BPO Version	BPO_V2	Tech Current
Daisy/SQL2019	DASY_BPO_PROD	DASY_EVO_PROD	Modifications Only	v2.3.0.3	v2.3.0.4	v

Upgrade Form Comparison App Check List

115%

MNU.061.005