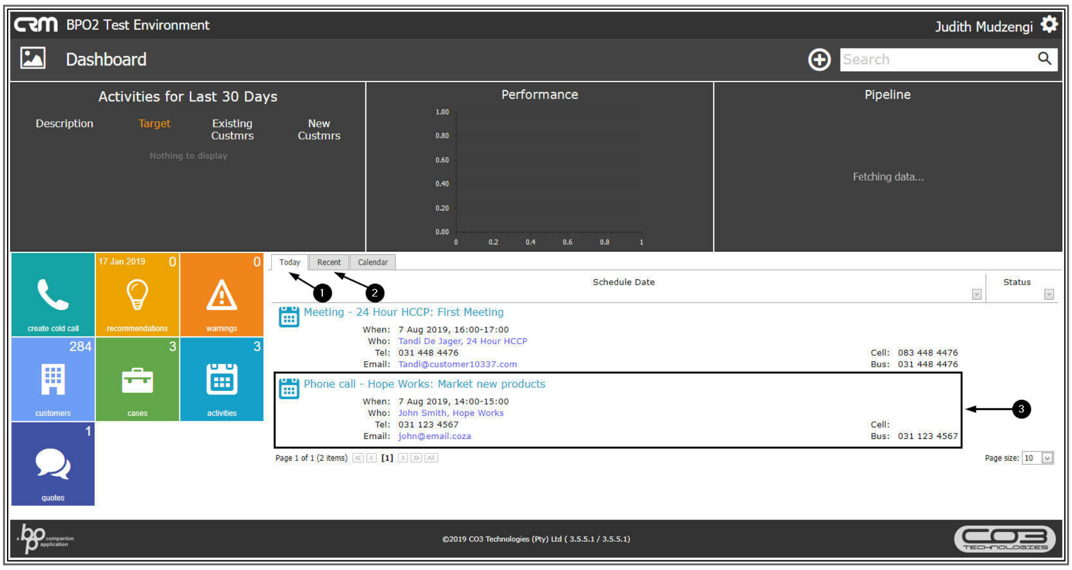
CRM CUSTOMERS

CUSTOMER FILES

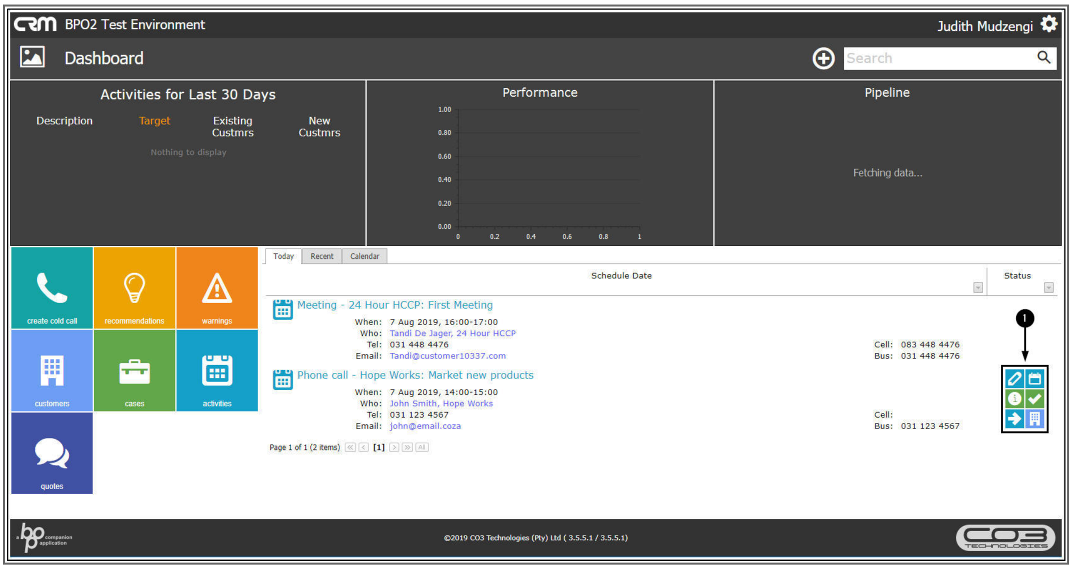
All case attachment files that are uploaded, can be accessed via the Customer 'Files' link (whether the case is open or has been closed).

Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

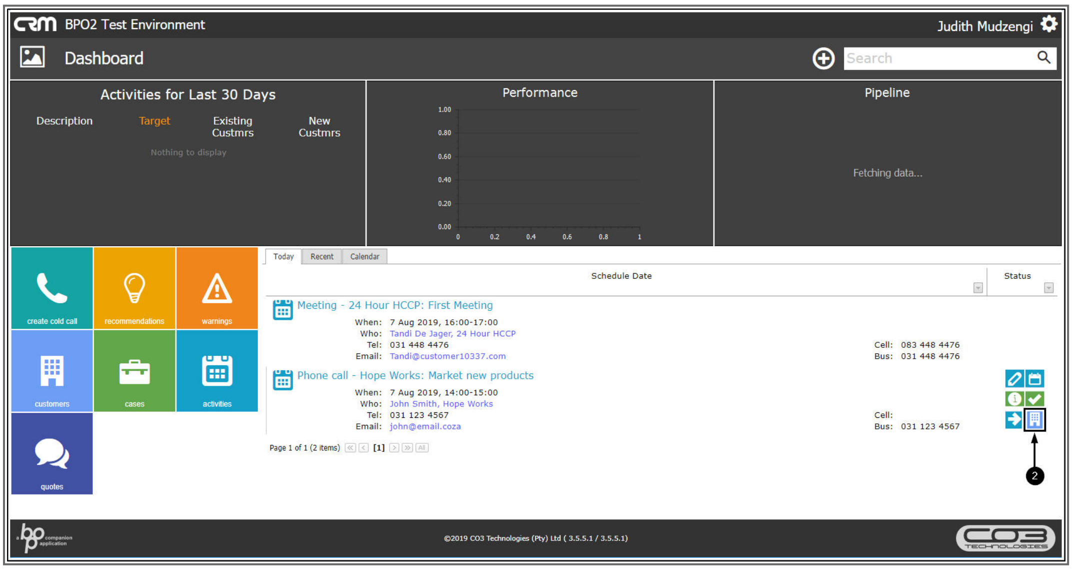
1. The ***Today*** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the ***Recent*** tab.
3. Hover over an activity linked to the customer you wish to view customer files for.



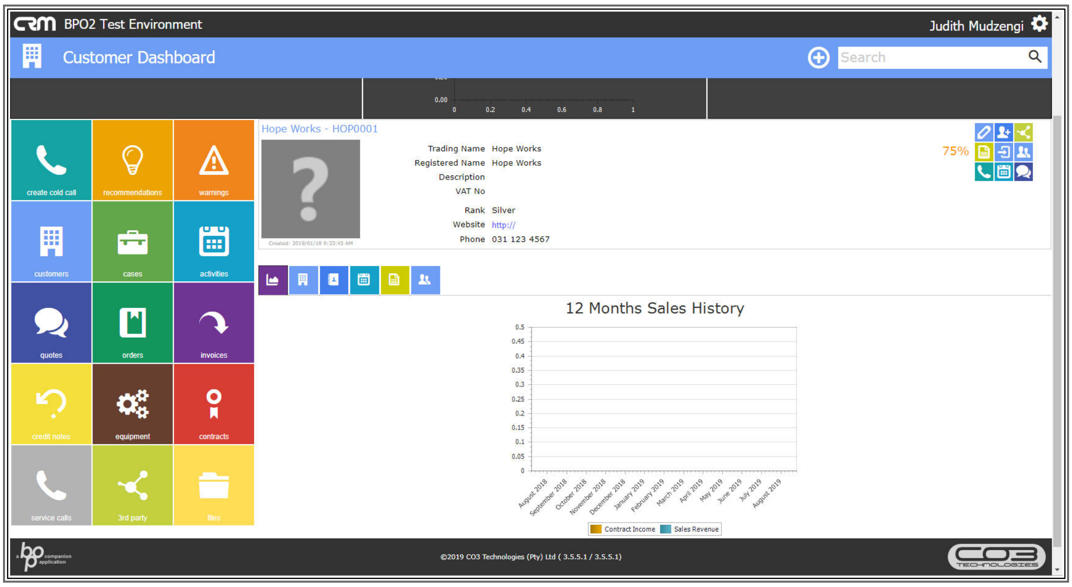
1. ***Action icons*** will be displayed to the right of the customer activity you are hovering over.



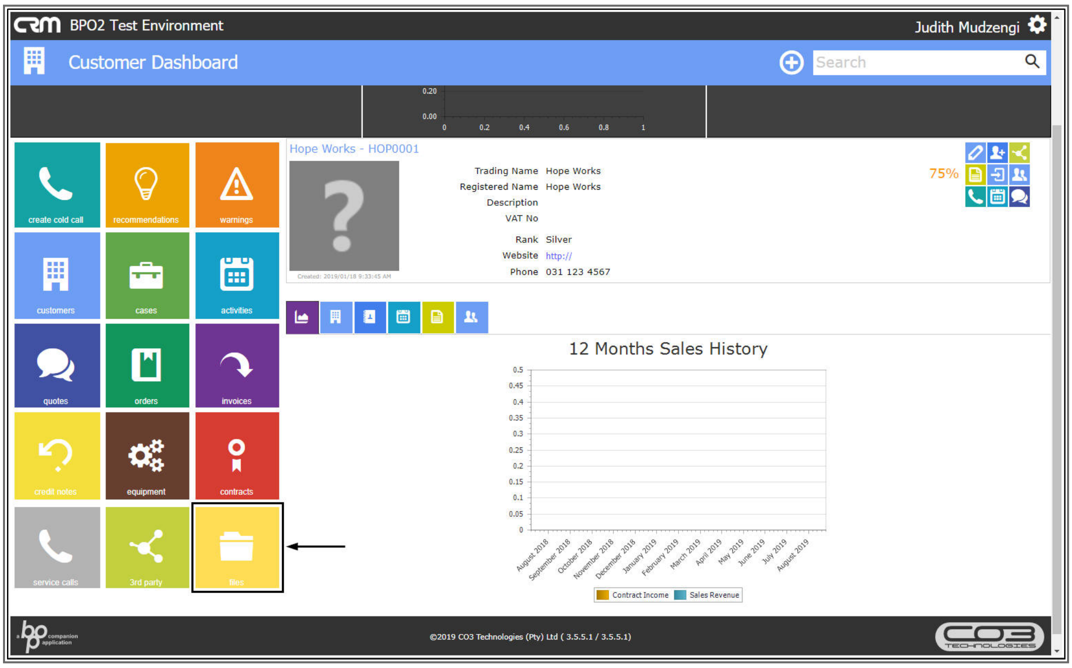
2. Click on the ***View Customer*** icon.



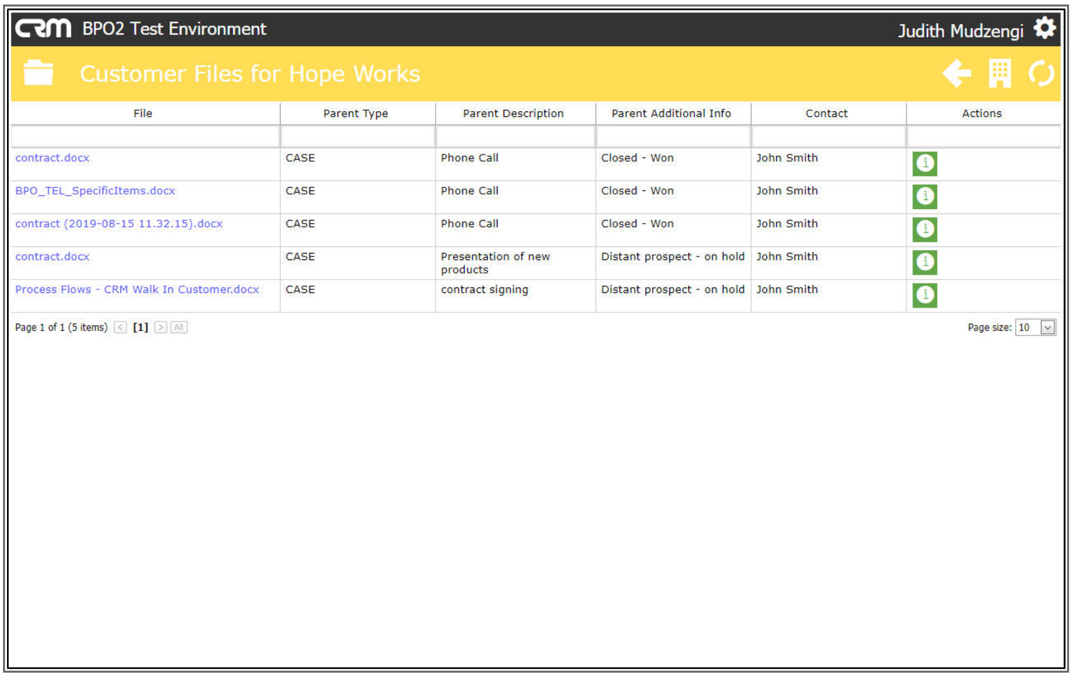
- The ***Customer Dashboard*** will be displayed.



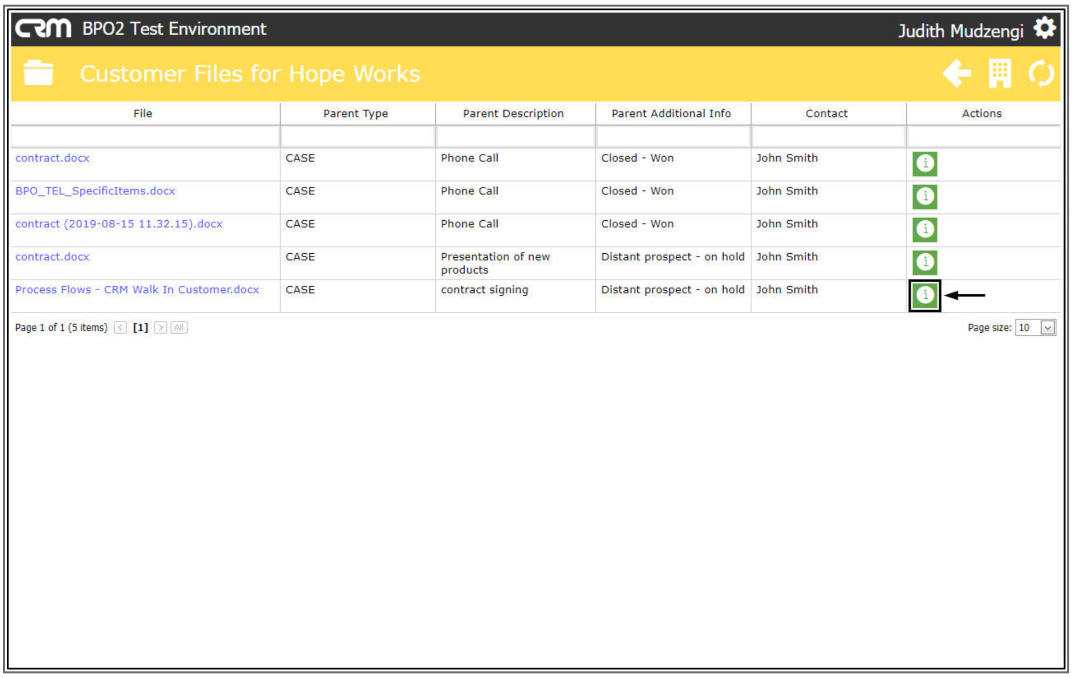
- Click on the ***Files*** tile.



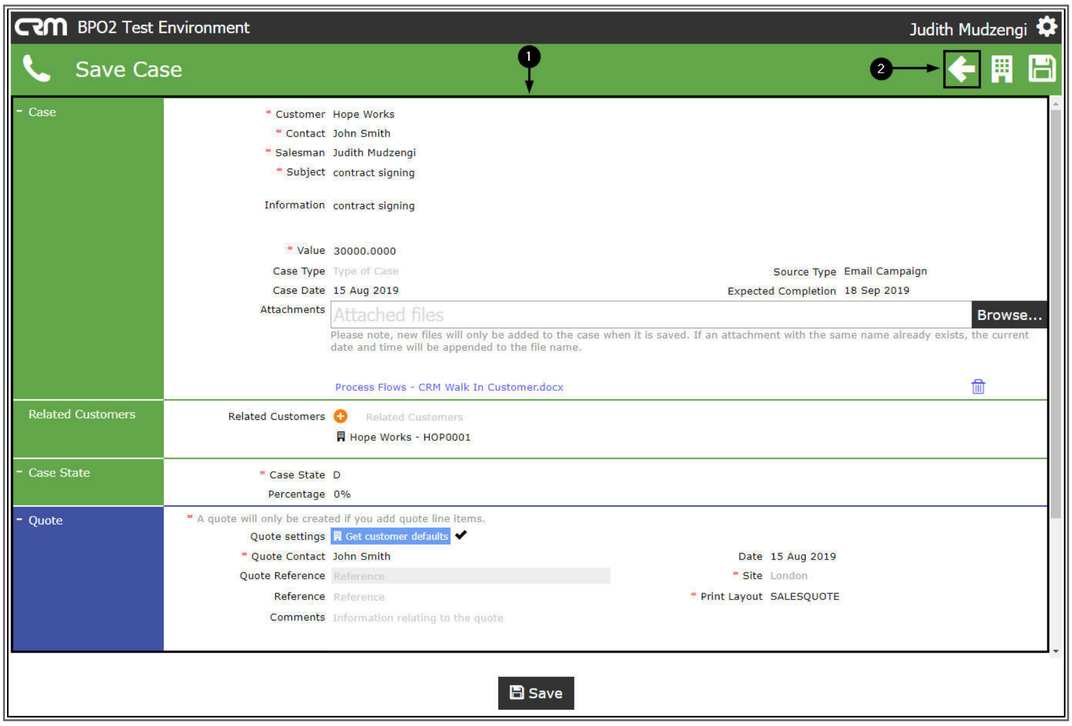
- The ***Customer Files for [ ]*** screen will be displayed.
- A list of all case attachment files will be displayed, with some information regarding the Case.



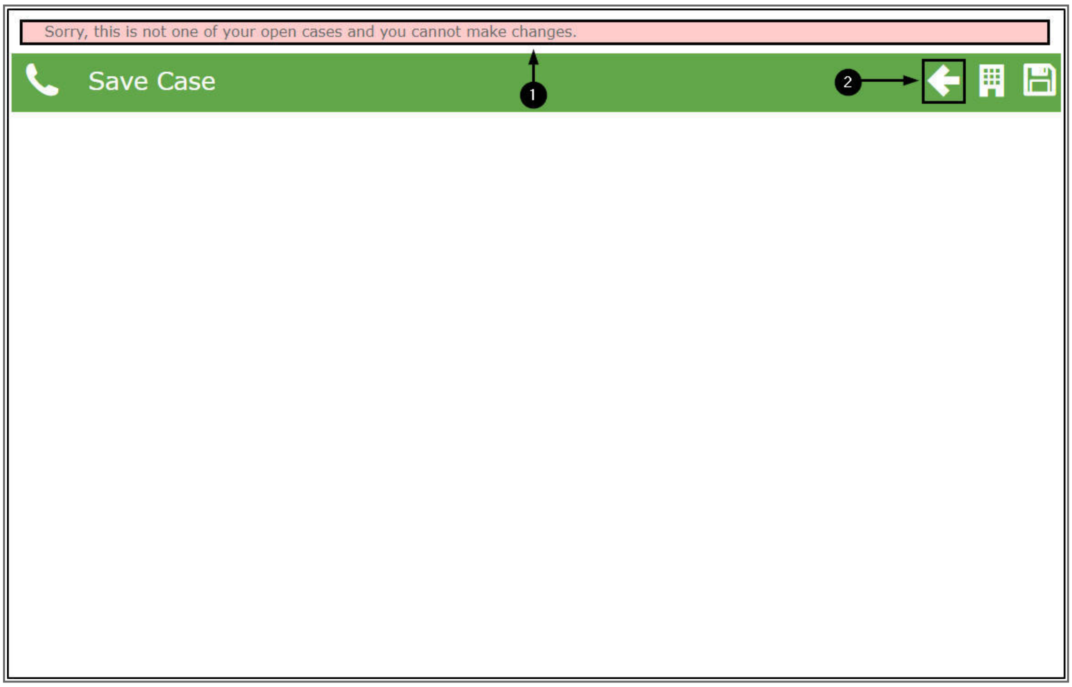
- To view case details, click on the ***Case Information button*** of the case you wish to view details for.



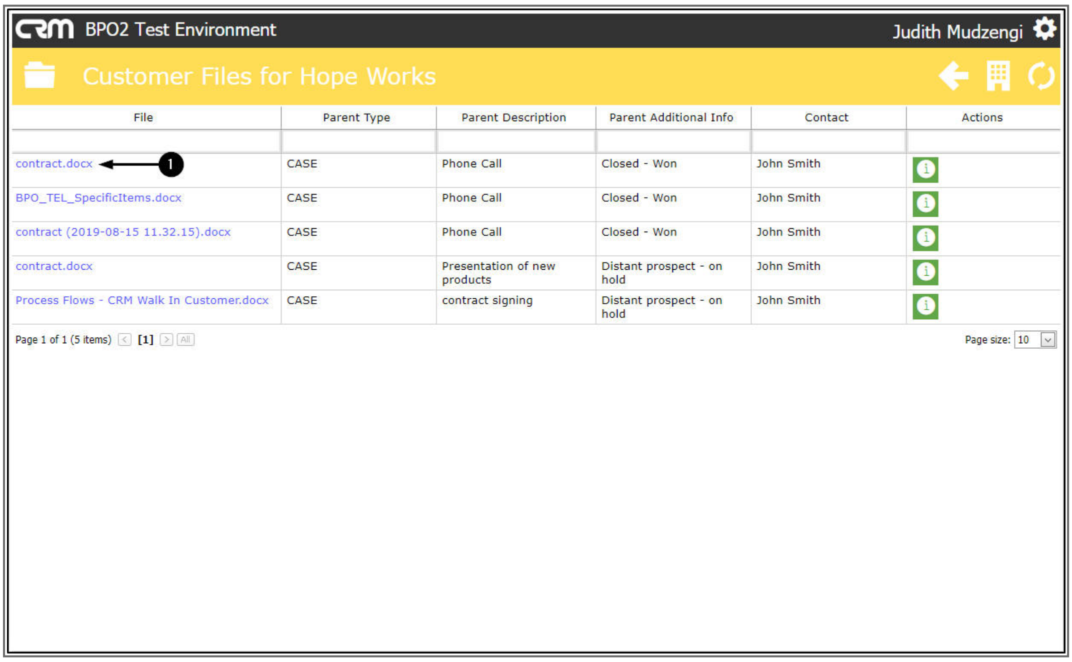
- The ***Save Case screen*** will be displayed.
    1. If the Case is still open, you can view more details of the case in this screen.
    2. Click on ***Back*** to return to the ***Customer Files for [ ]*** screen.



1. If the Case is not open, a message will be displayed telling you;
    - ***Sorry, this is not one of your open cases and you cannot make changes.***
2. Click on ***Back*** to return to the ***Customer Files for [ ]*** screen.

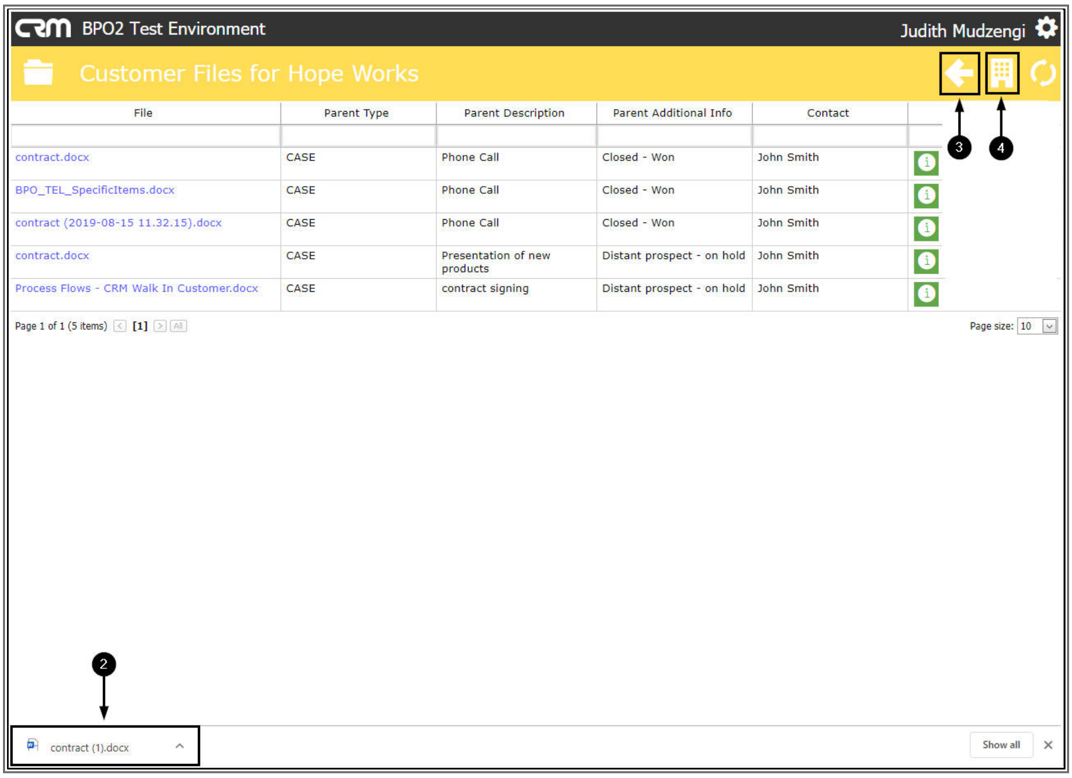


1. To view a document, click on the File name.

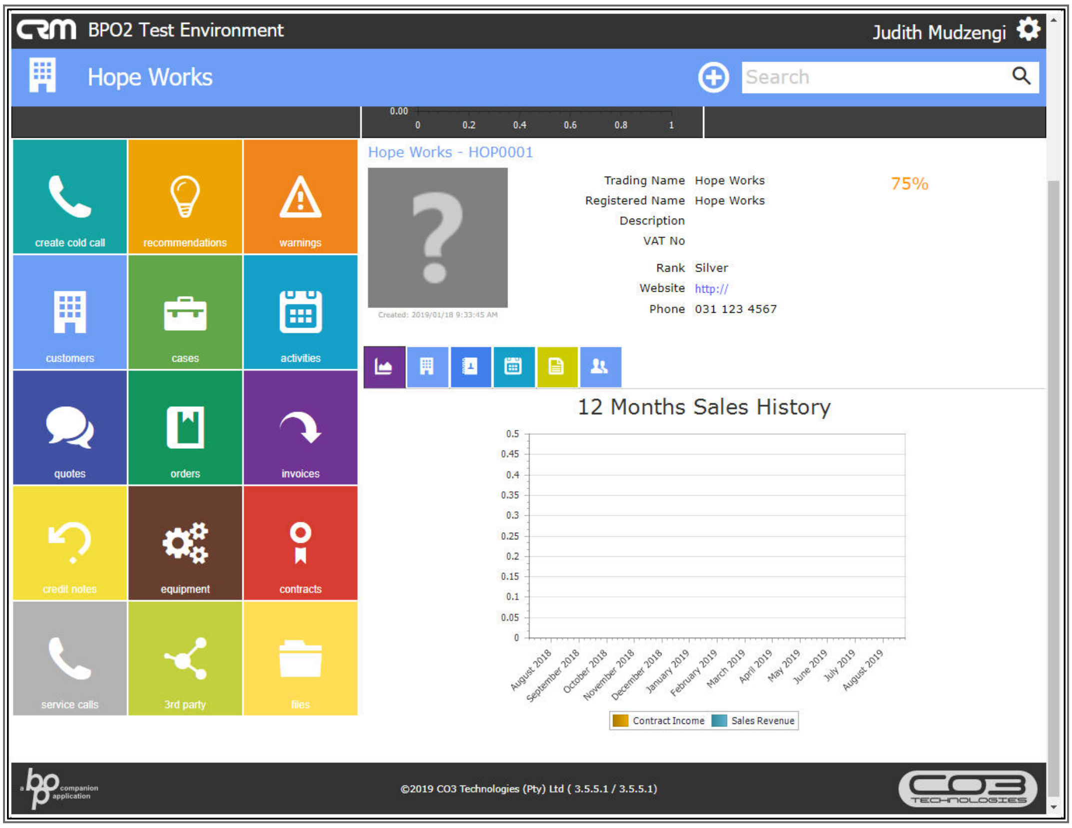


2. The file will be downloaded. You can open the downloaded file to view the file contents.

3. Click on either ***Back to Previous Page*** or
4. ***Back to Customer Page***



- to return to the ***Customer Page***.


BPO2 Test Environment
Judith Mudzengi
Hope Works
Search
create cold call
recommendations
warnings
customers
cases
activities
quotes
orders
invoices
credit notes
equipment
contracts
service calls
3rd party
files
Hope Works - HOP0001
Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
Rank Silver
Website http://
Phone 031 123 4567
75%
12 Months Sales History
August 2018
September 2018
October 2018
November 2018
December 2018
January 2019
February 2019
March 2019
April 2019
May 2019
June 2019
July 2019
August 2019
Contract Income
Sales Revenue
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