

We are currently updating our site; thank you for your patience.

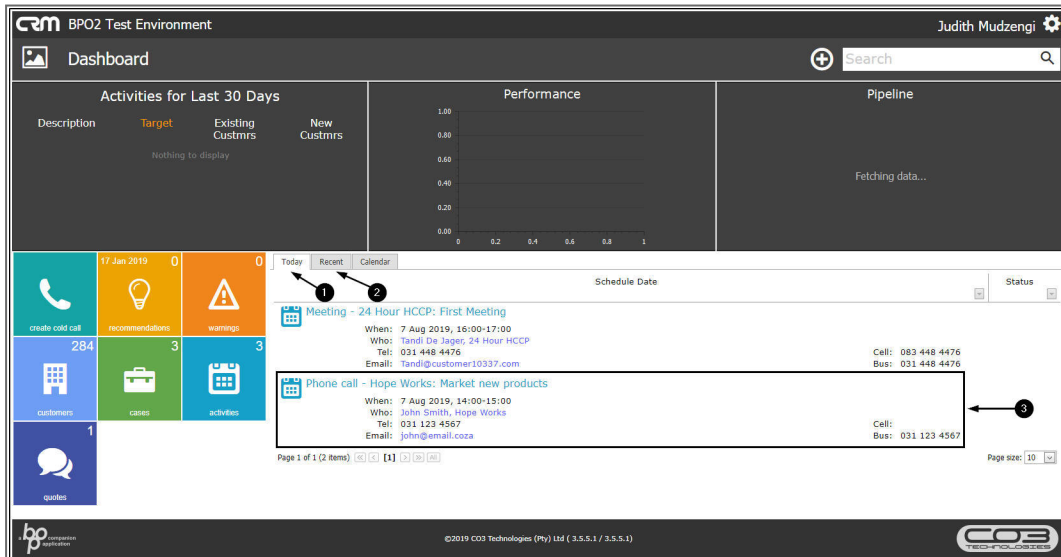
CRM CUSTOMERS

CUSTOMER FILES

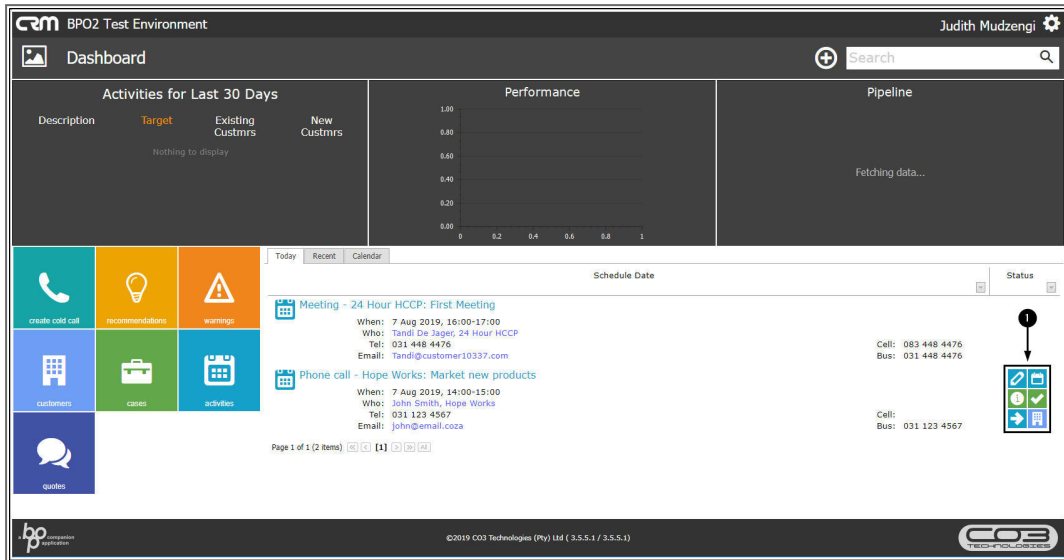
All case attachment files that are uploaded, can be accessed via the Customer 'Files' link (whether the case is open or has been closed).

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

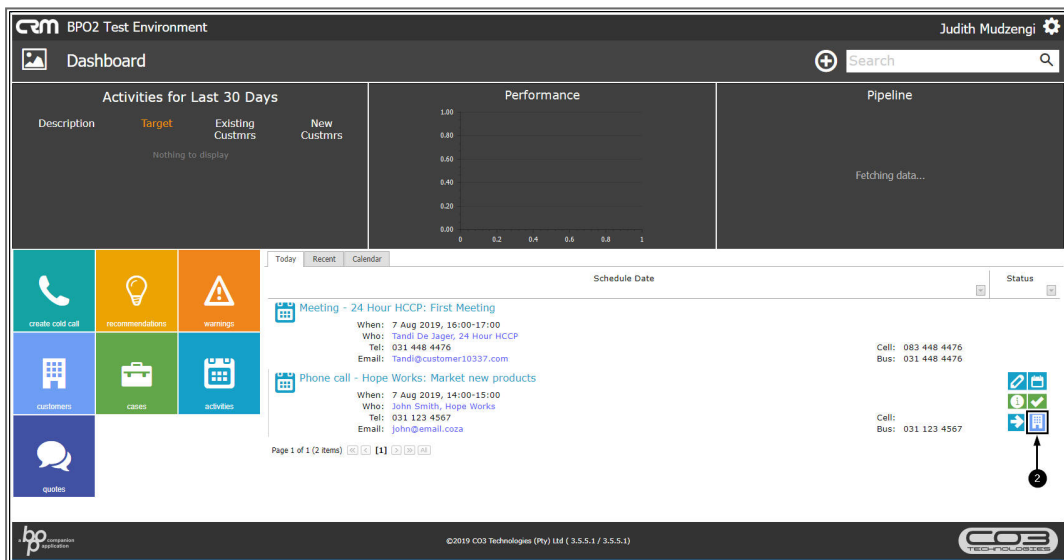
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view customer files for.



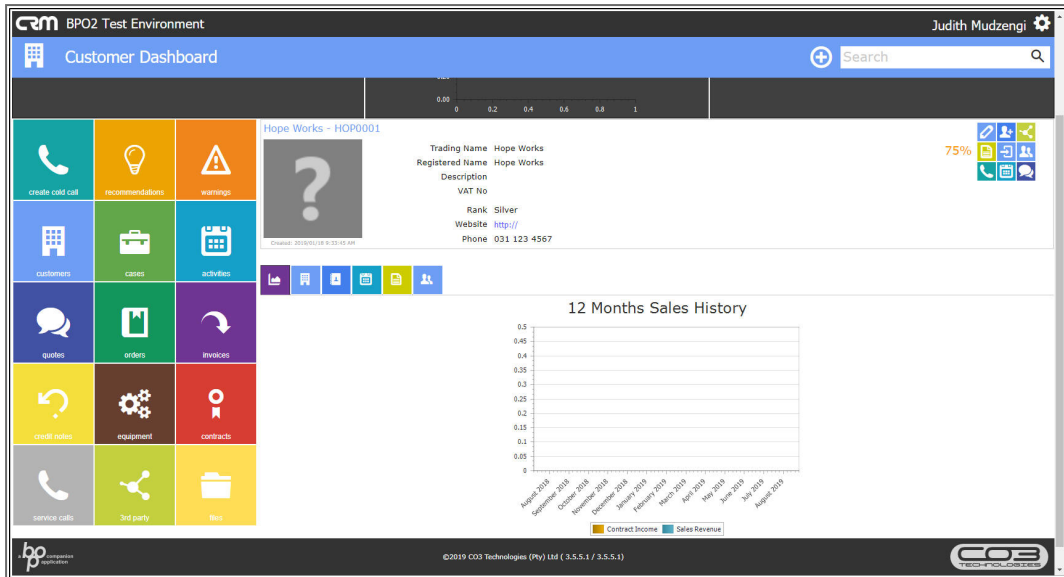
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



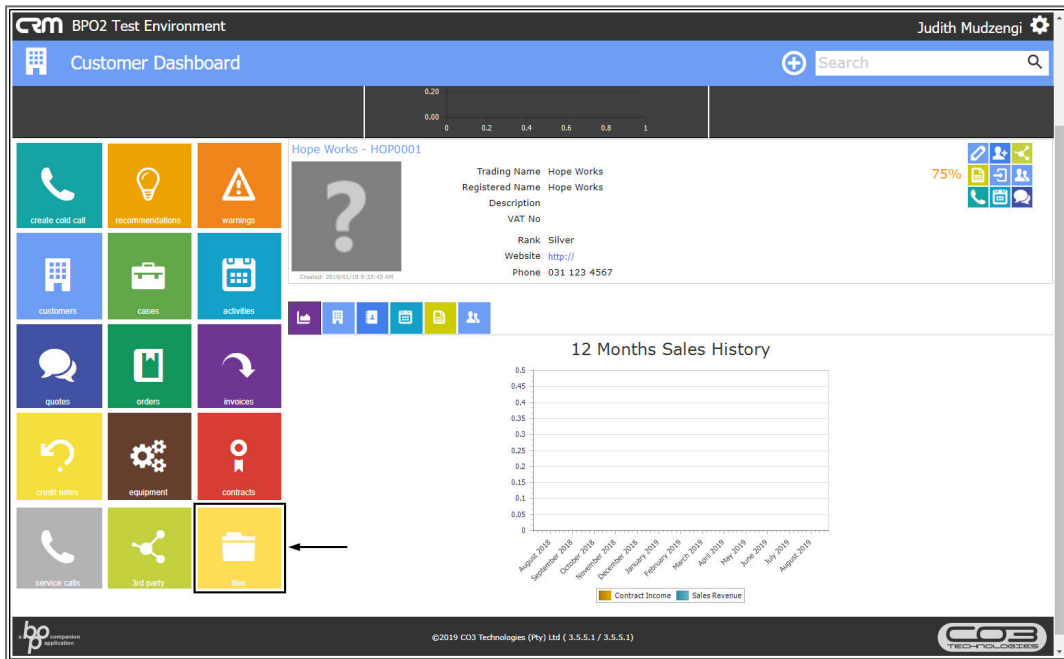
2. Click on the **View Customer** icon.



- 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.

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Customer Files for Hope Works

File	Parent Type	Parent Description	Parent Additional Info	Contact	Actions
contract.docx	CASE	Phone Call	Closed - Won	John Smith	
BPO_TEL_SpecificItems.docx	CASE	Phone Call	Closed - Won	John Smith	
contract (2019-08-15 11.32.15).docx	CASE	Phone Call	Closed - Won	John Smith	
contract.docx	CASE	Presentation of new products	Distant prospect - on hold	John Smith	
Process Flows - CRM Walk In Customer.docx	CASE	contract signing	Distant prospect - on hold	John Smith	

Page 1 of 1 (5 items) [1] [All] Page size: 10

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

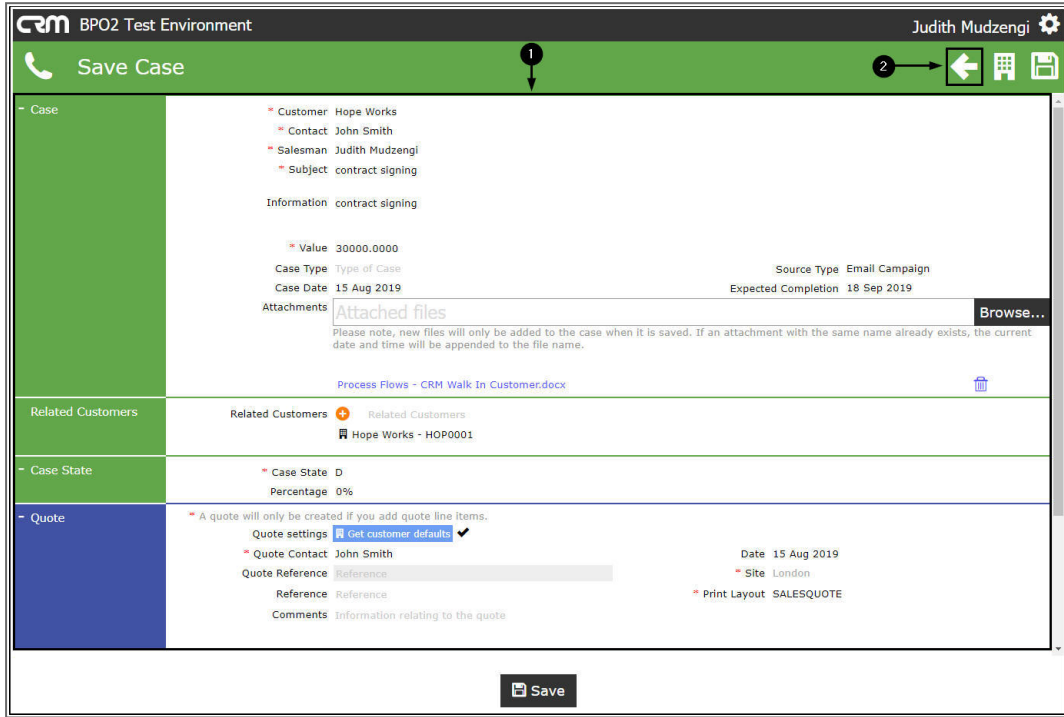
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Customer Files for Hope Works

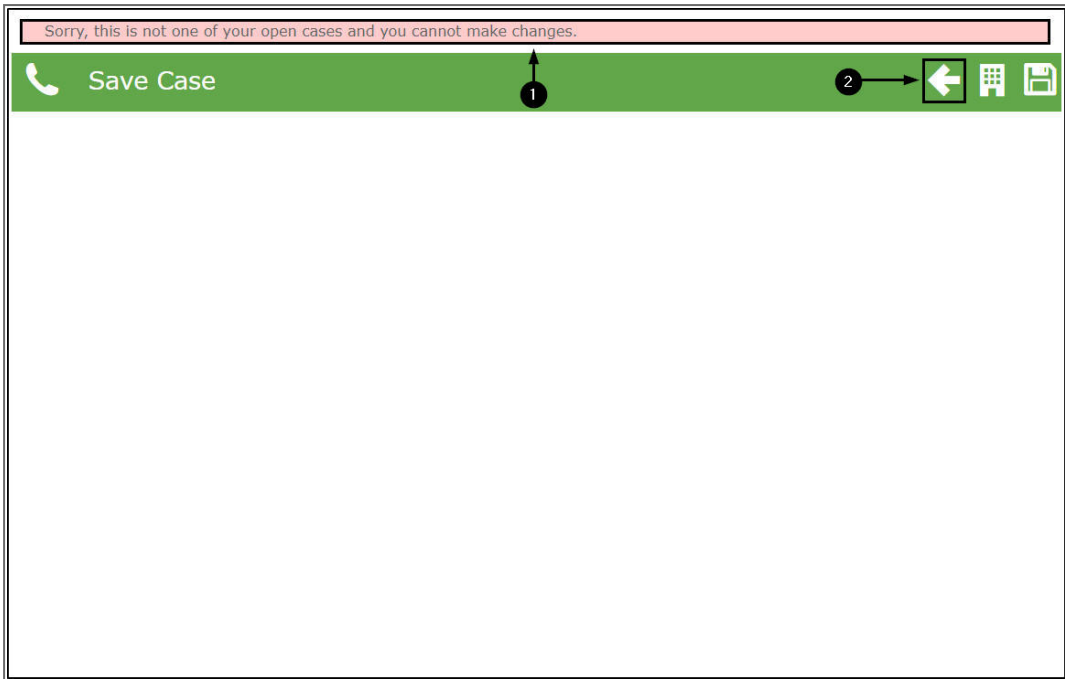
File	Parent Type	Parent Description	Parent Additional Info	Contact	Actions
contract.docx	CASE	Phone Call	Closed - Won	John Smith	
BPO_TEL_SpecificItems.docx	CASE	Phone Call	Closed - Won	John Smith	
contract (2019-08-15 11.32.15).docx	CASE	Phone Call	Closed - Won	John Smith	
contract.docx	CASE	Presentation of new products	Distant prospect - on hold	John Smith	
Process Flows - CRM Walk In Customer.docx	CASE	contract signing	Distant prospect - on hold	John Smith	←

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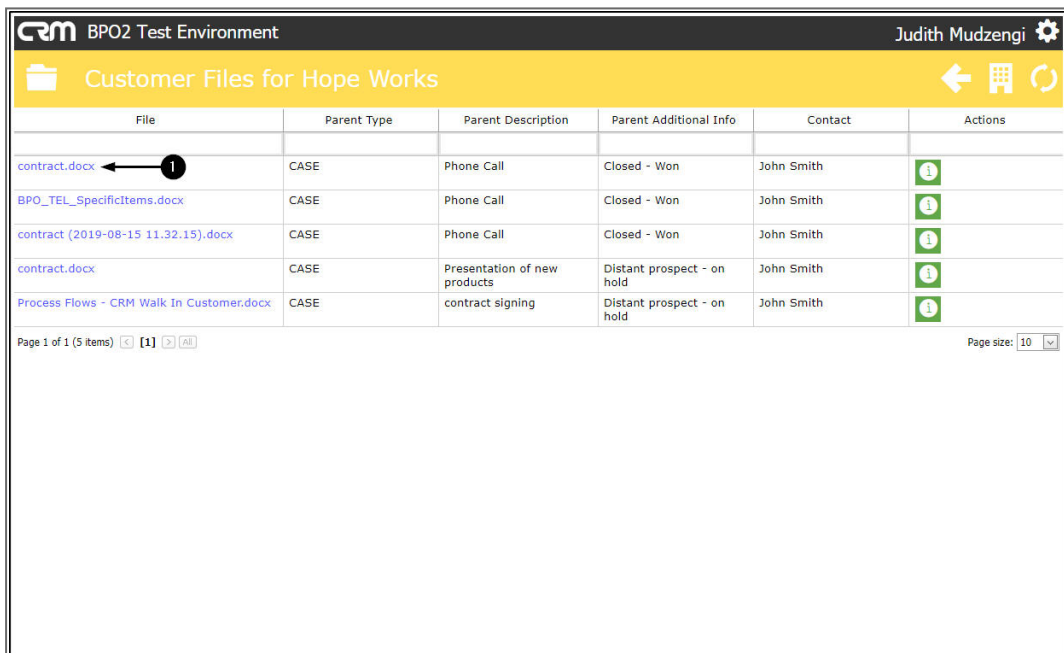
- The **Save Case** screen will be displayed.
 1. If the Case is still open, you can view more details of the case in this screen.
 2. Click on **Back** to return to the **Customer Files for []** screen.



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.

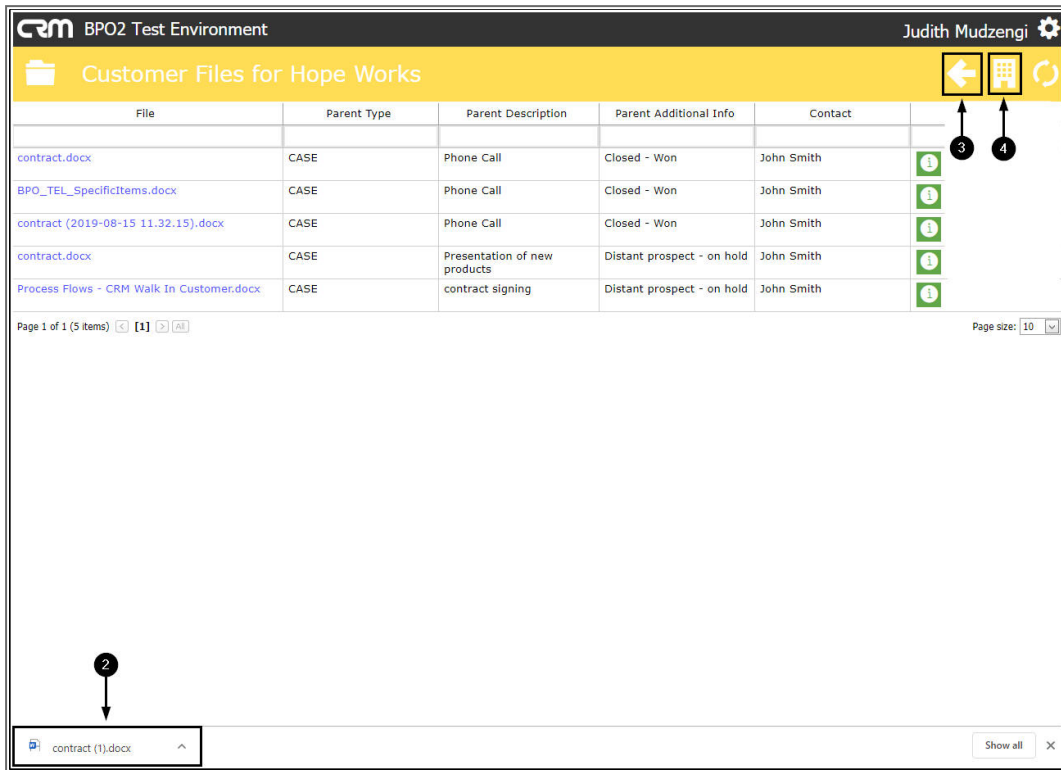


1. To view a document, click on the File name.



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**.

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🔍

📞 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 75%

Registered Name Hope Works

Description

VAT No

Rank Silver

Website <http://>

Phone 031 123 4567

Created: 2019/04/18 9:33:45 AM

12 Months Sales History

Contract Income
 Sales Revenue

bpo companion application
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