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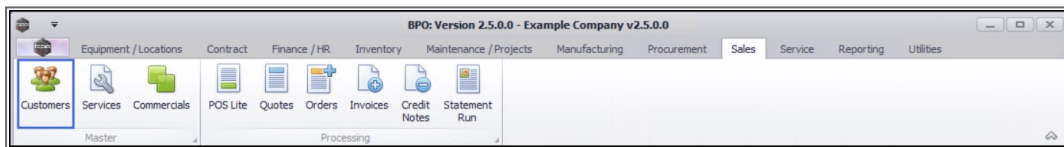
SALES

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.

Ribbon Access: Sales > Customers

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.
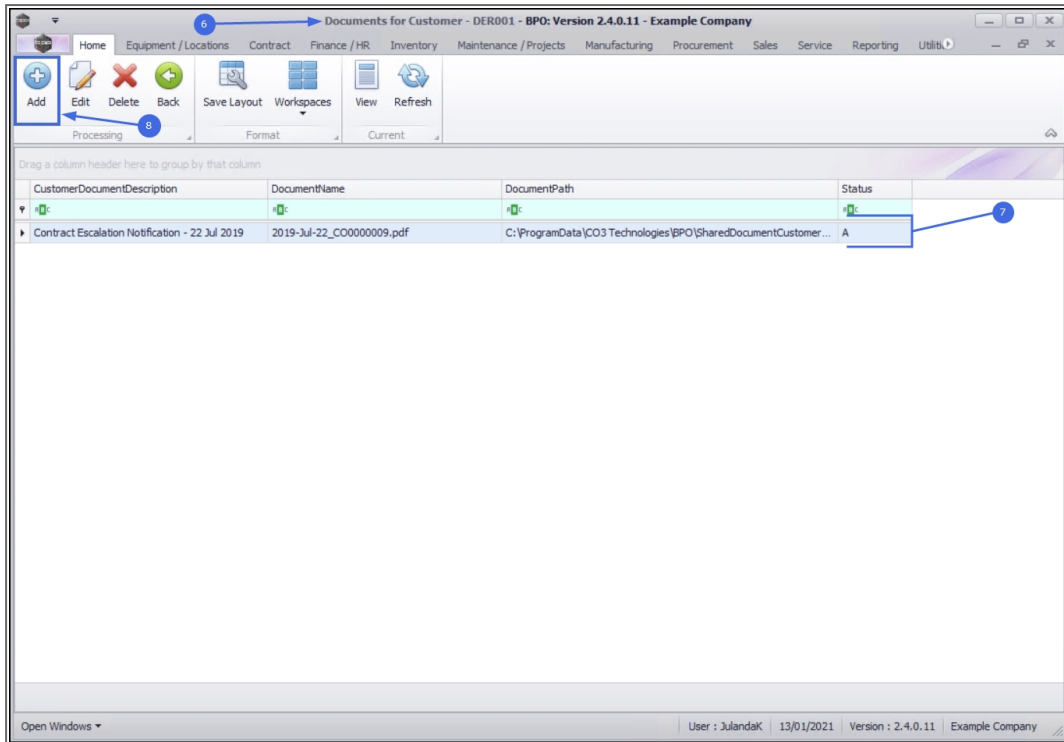5. Click on the **Documents** tile.
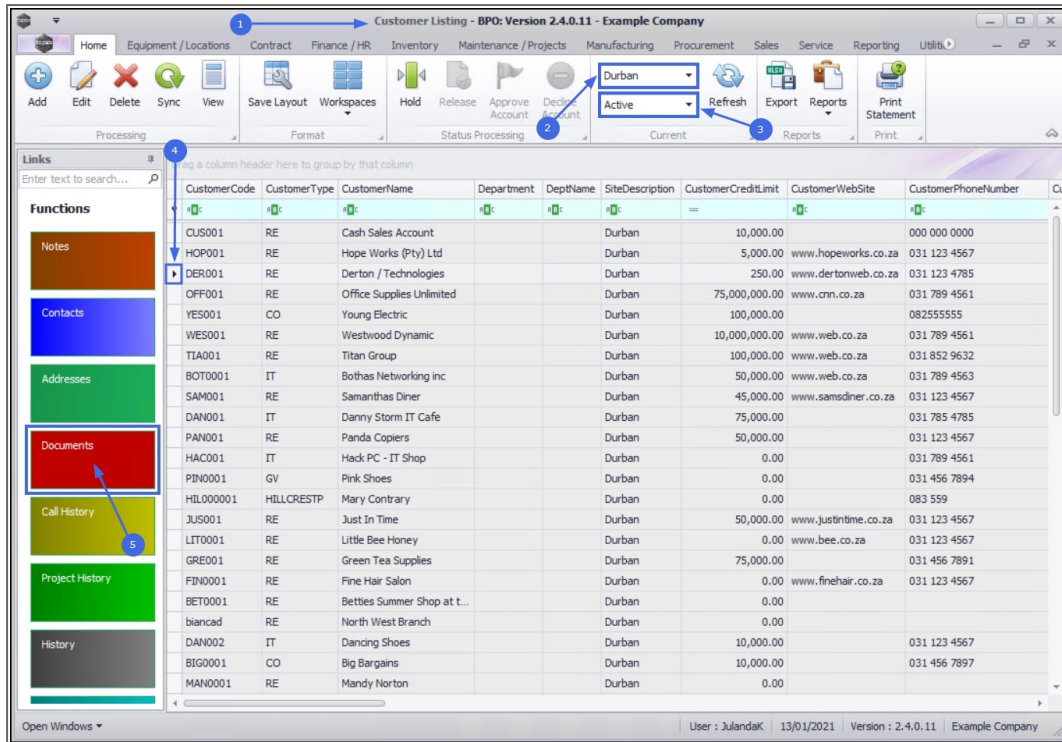
6. The **Documents for Customer - [**customer code**]** screen will be displayed.

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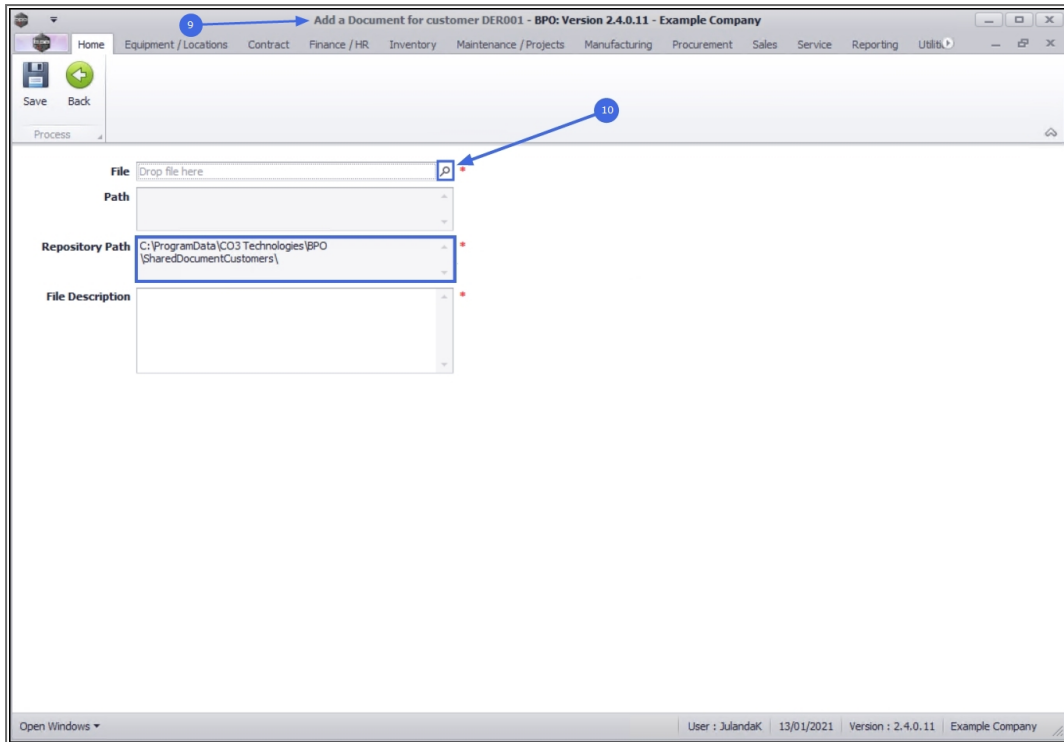
9. The **Add a Document for customer** [customer code] screen will be displayed.

> **Note** that the Repository Path field is populated with the path configured in your Company Configuration.
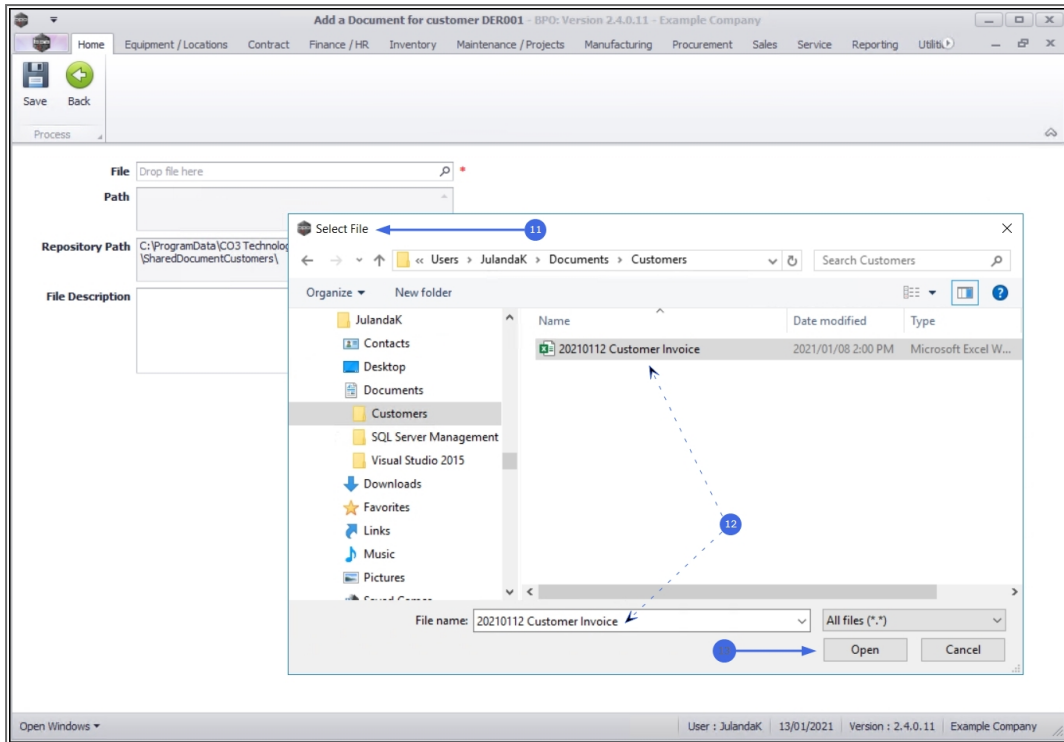
10. Click on the **search** button in the **File** field.

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.
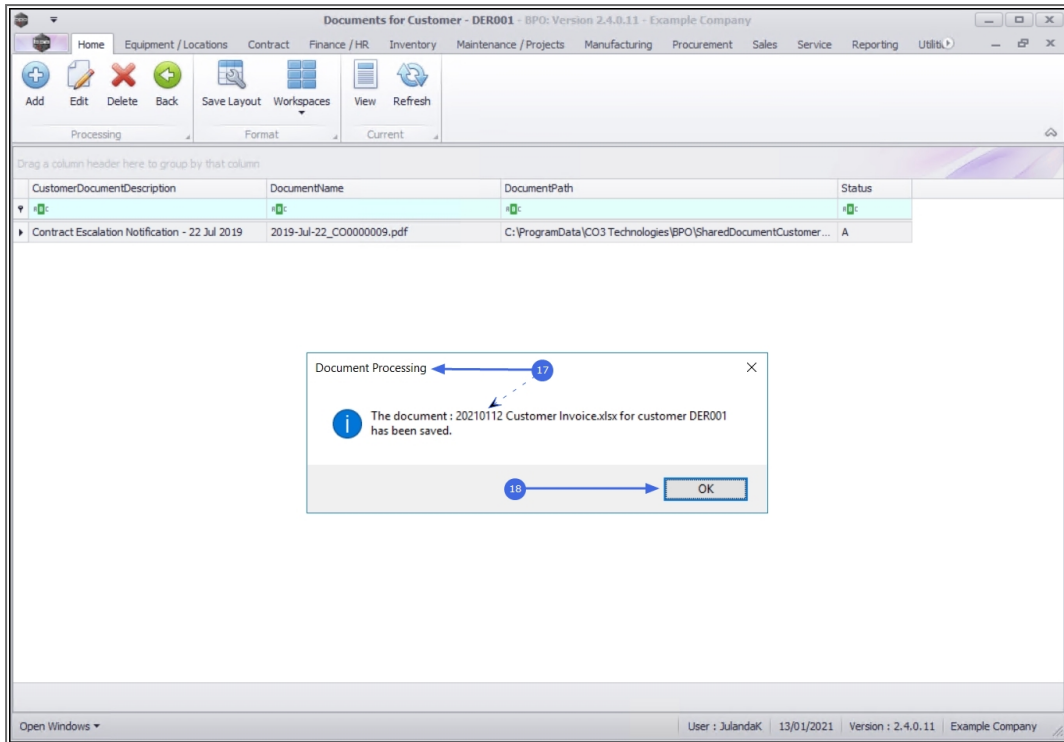
16. Click on **Save** to save the link.
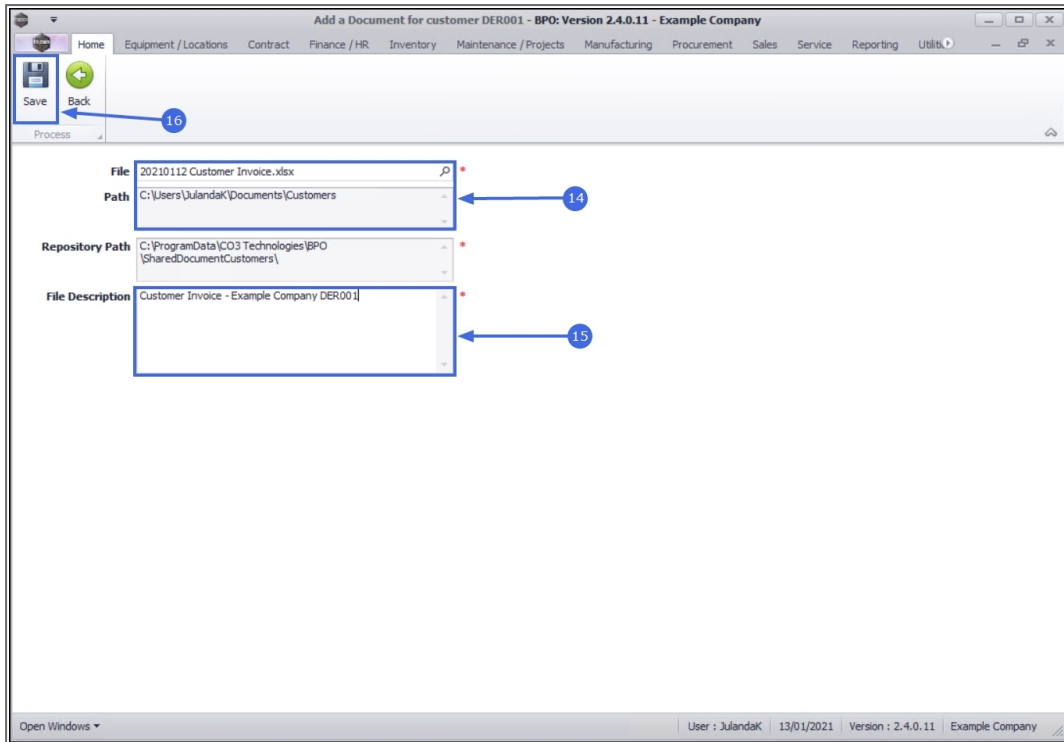
17. When you receive the **Document Processing** message to confirm that;

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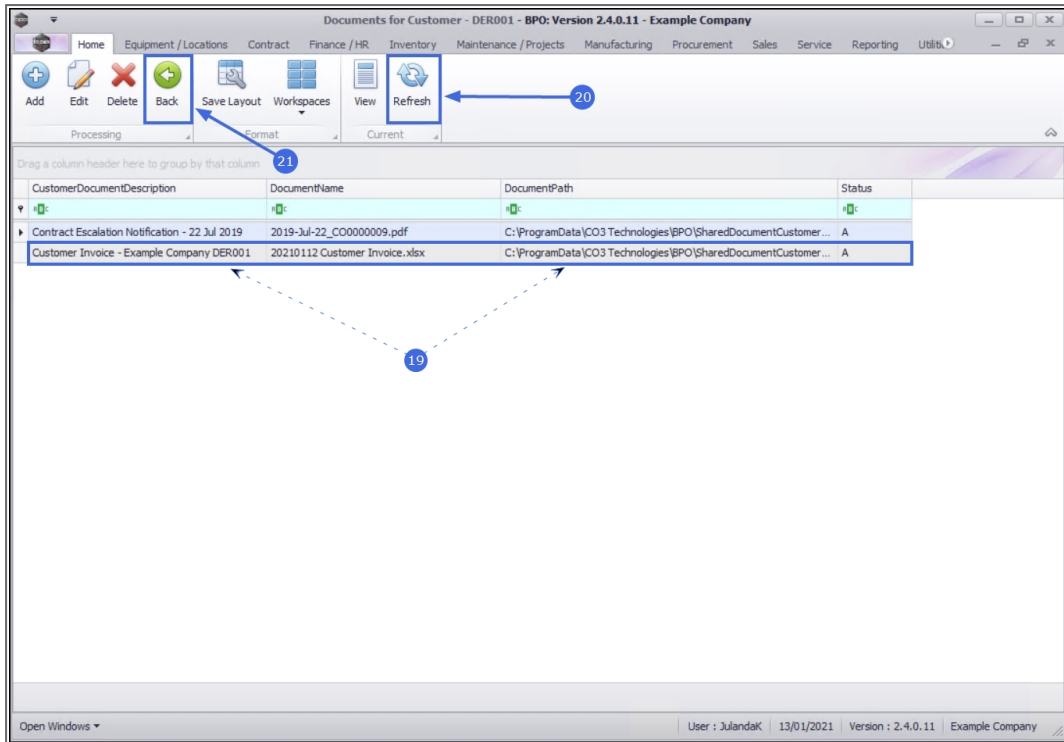 [customer code] **has been saved.**

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.

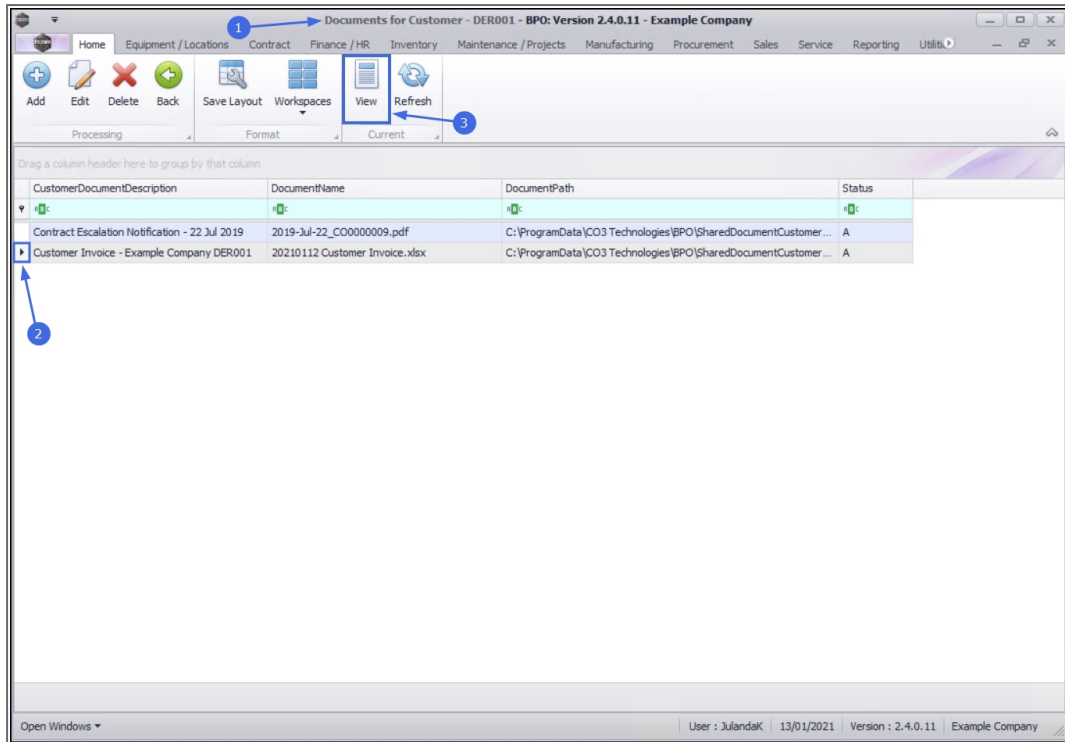21. Click on **Back** to return to the **Customer Listing** Screen.

EDIT DOCUMENT

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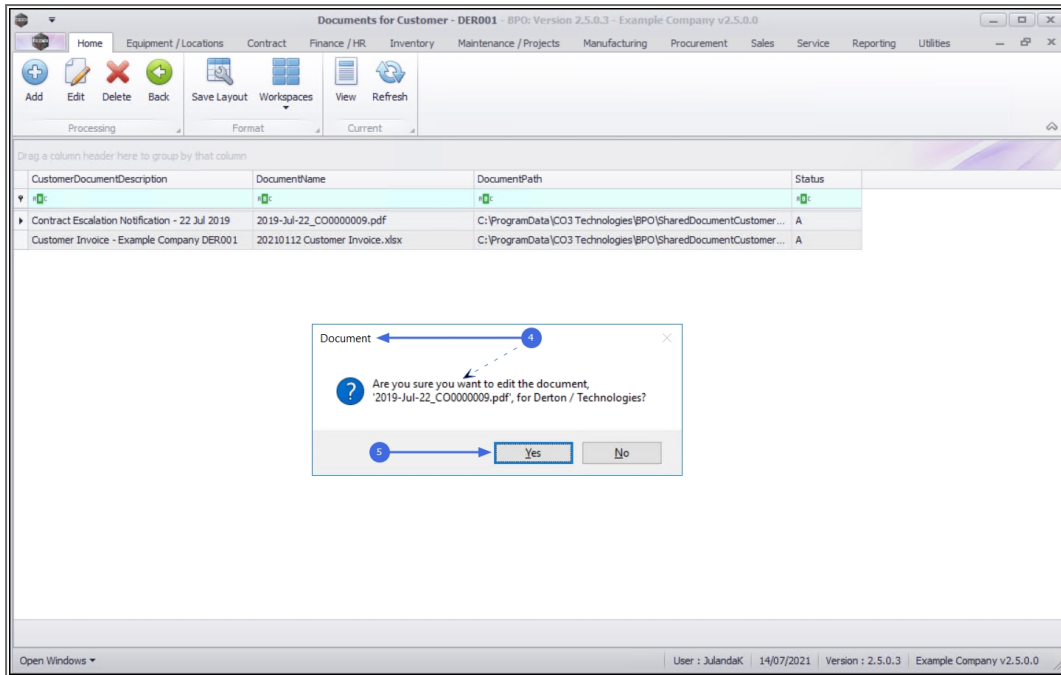3. Click on **Edit**.

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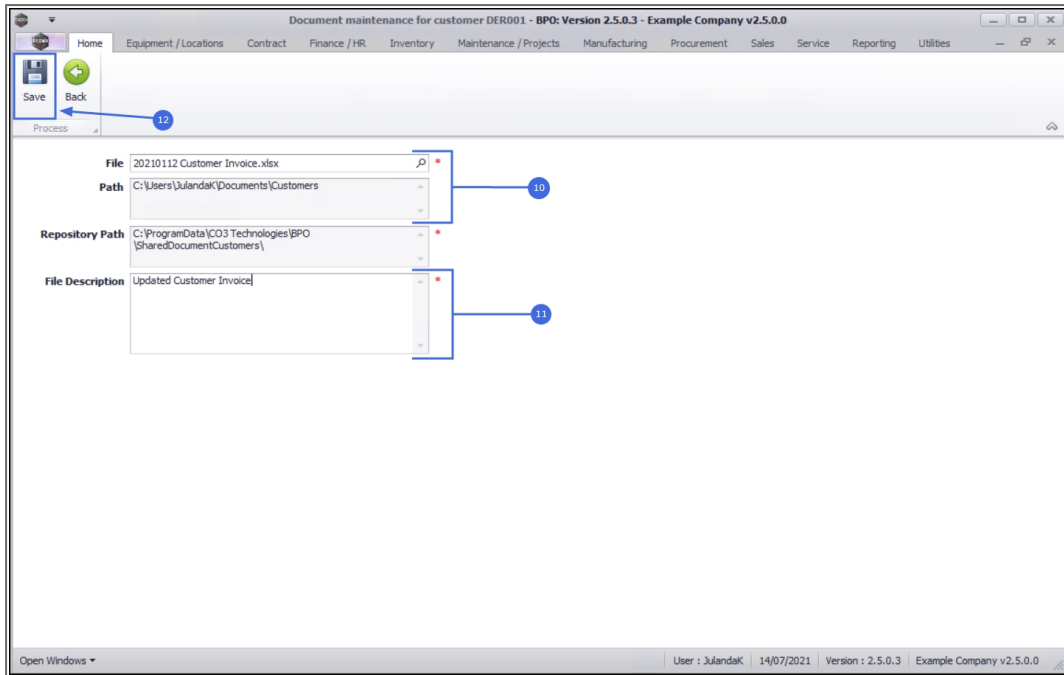
> 🖉 Ensure that the document name appear in the **File name:** field by clicking on the document to select it.

9. Click on **Open**.
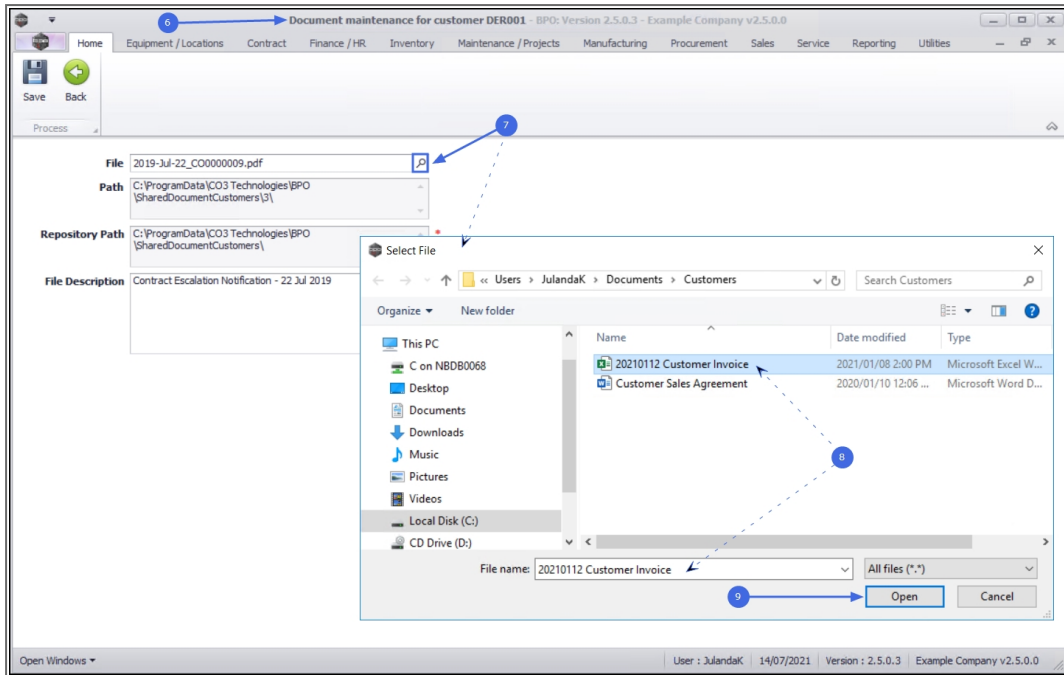
10. The **File** and **Path** fields will be populated with the new document details you have selected.

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.**

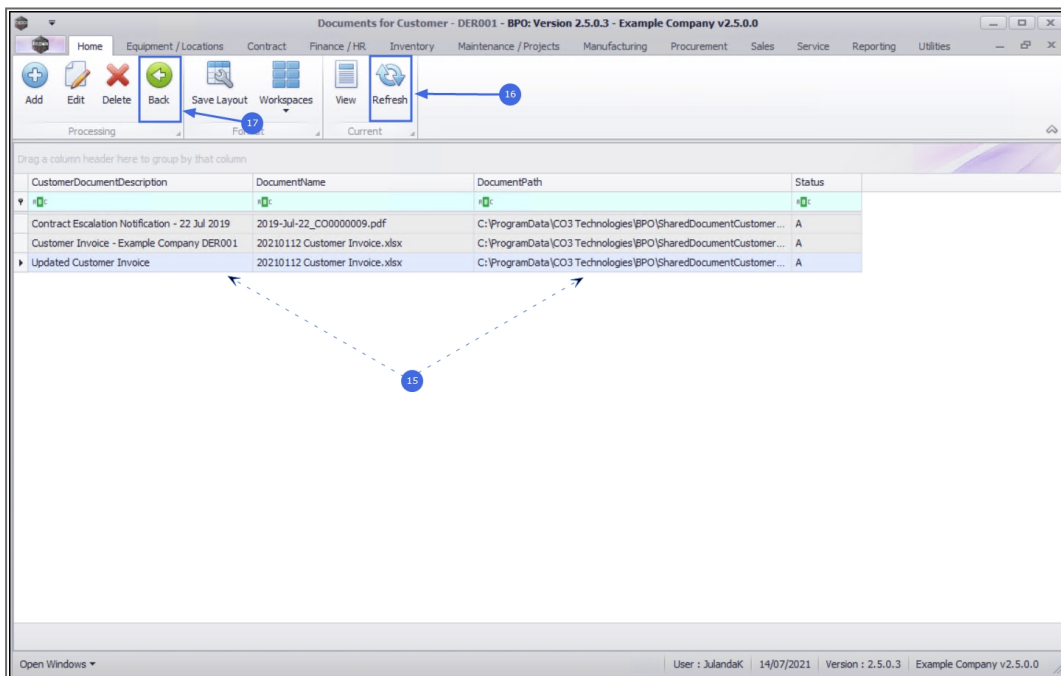14. Click on **OK**.

> **Note** that **BPO** does not save the physical document, but a link to where the document has been saved.
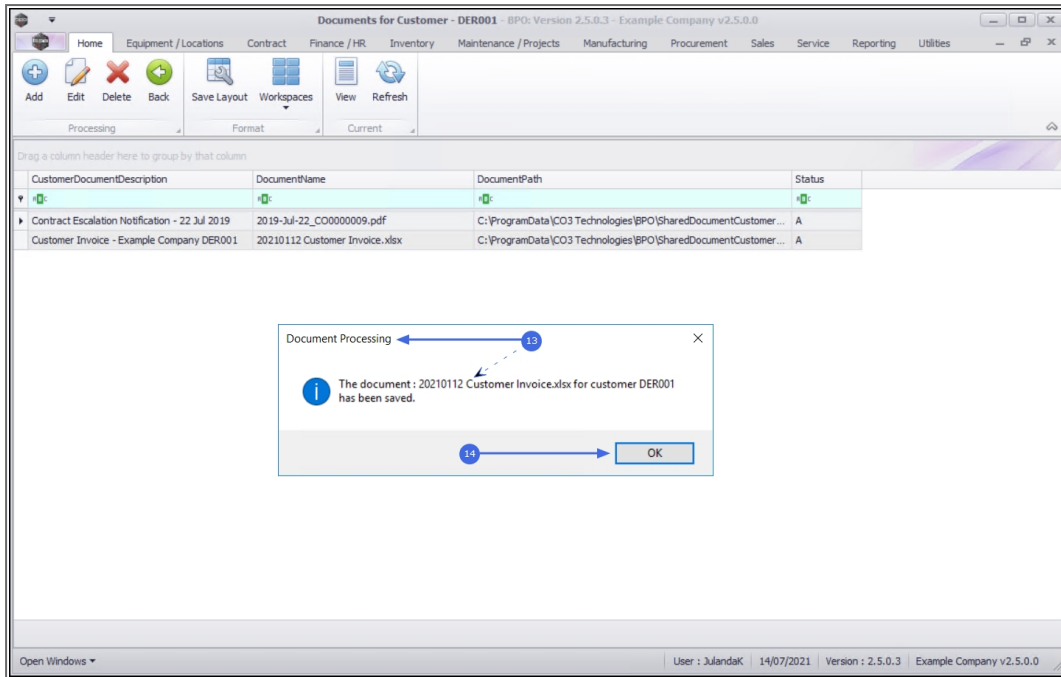
15. The **Documents for Customer** screen has been updated with the document you have linked.

16. Click on **Refresh** to update your screen, if required.

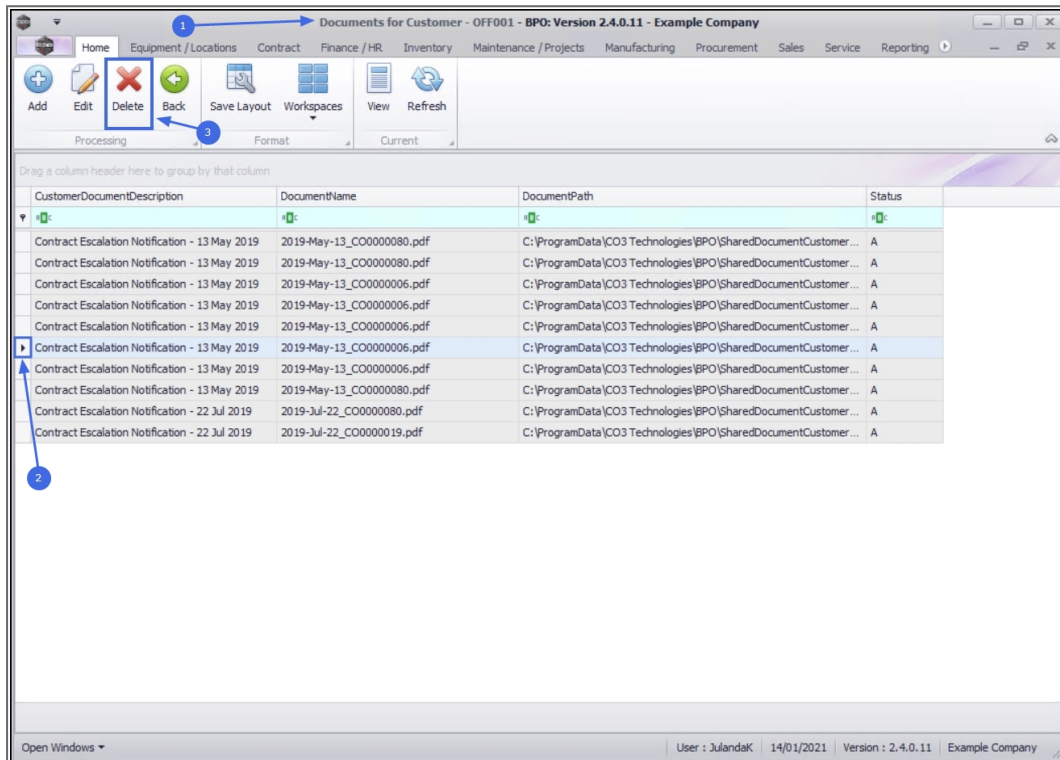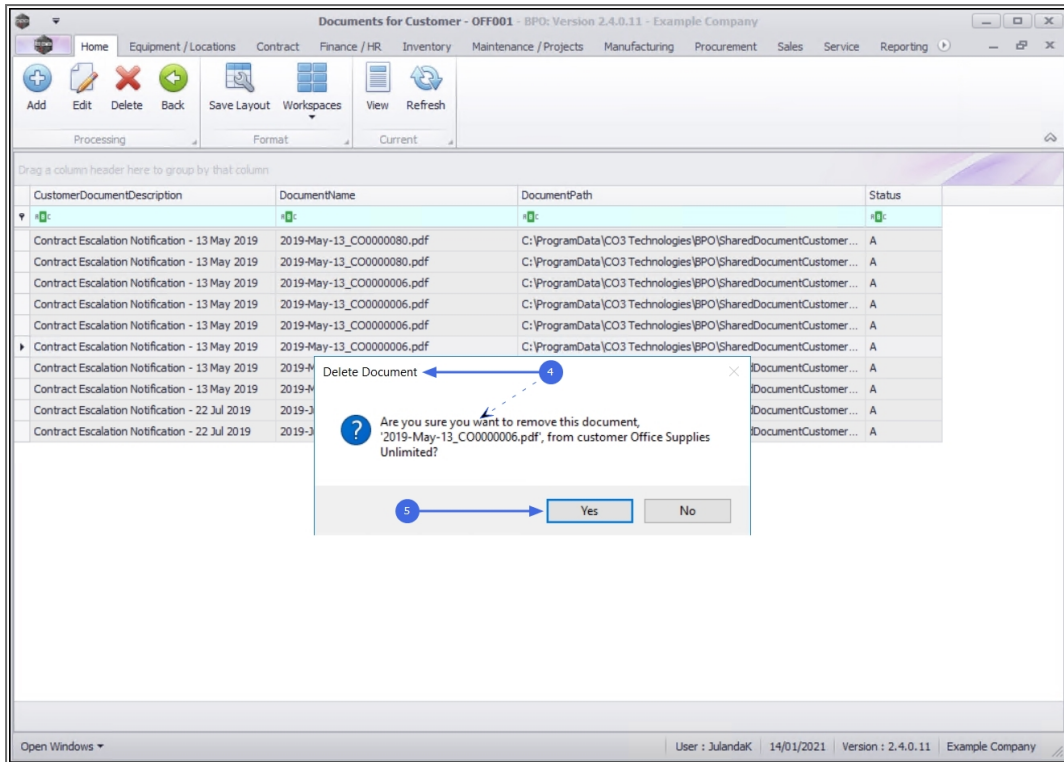17. Click on **Back** to return to the **Customer Listing** Screen.

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?**

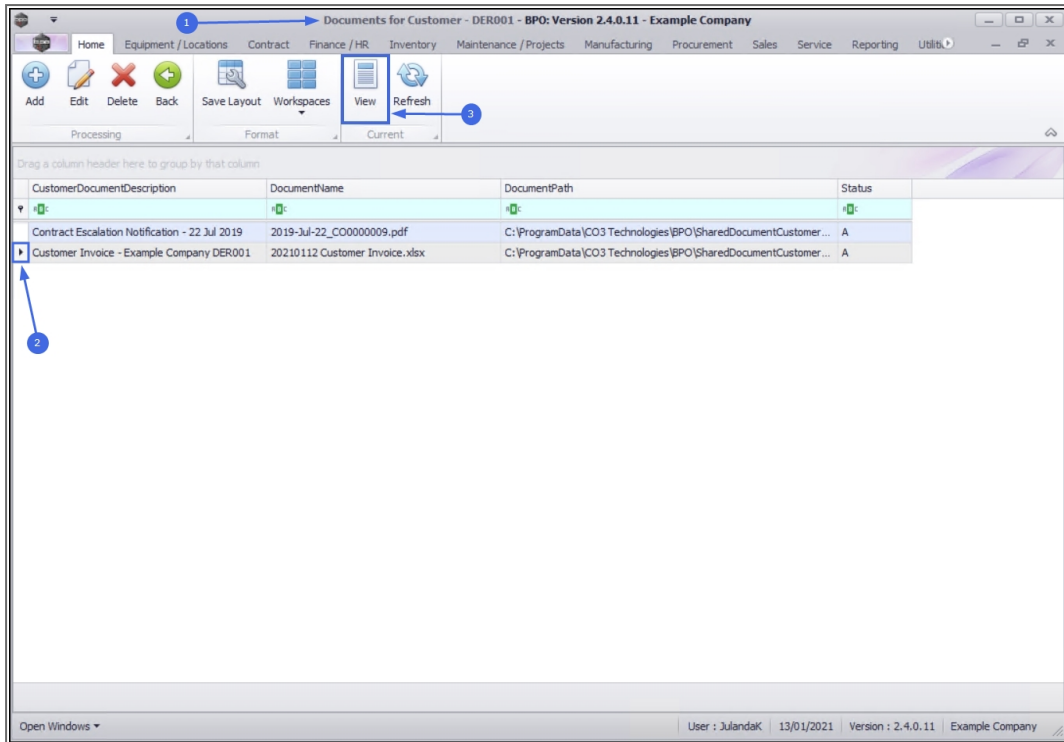5. Click on **Yes** if you are certain about your selection.

6. The document has now been **deleted** from the **Documents for Customer** screen.

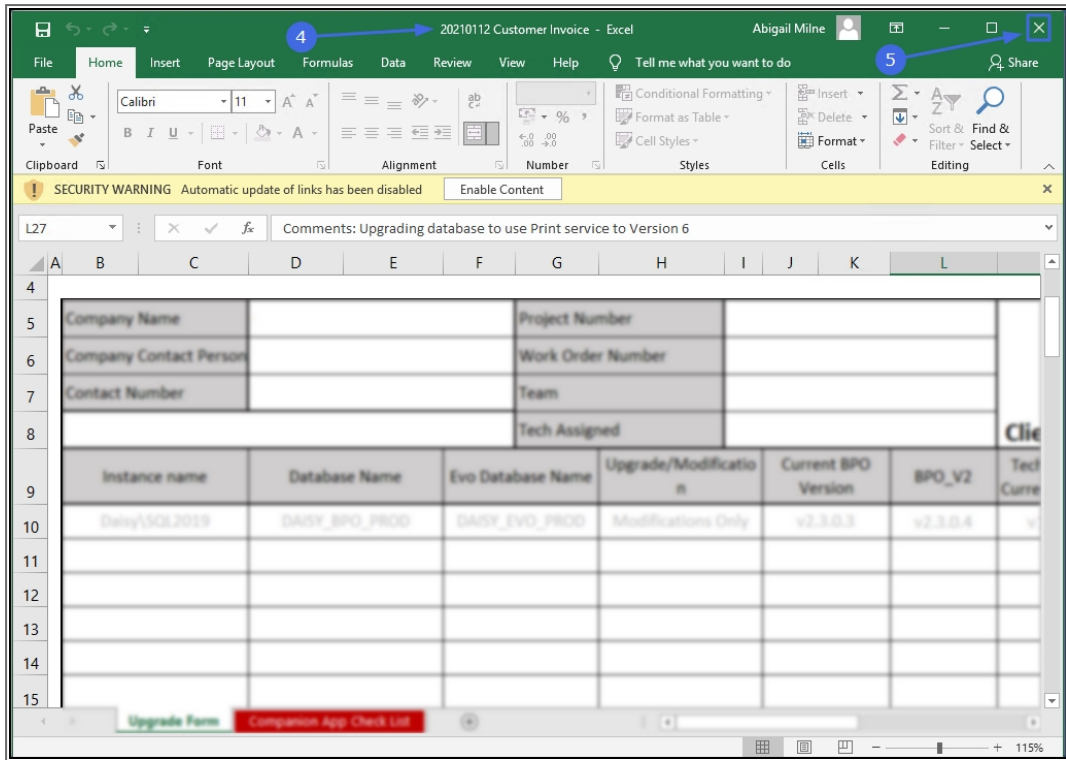7. Click on **Back** to return to the **Customer Listing** Screen.
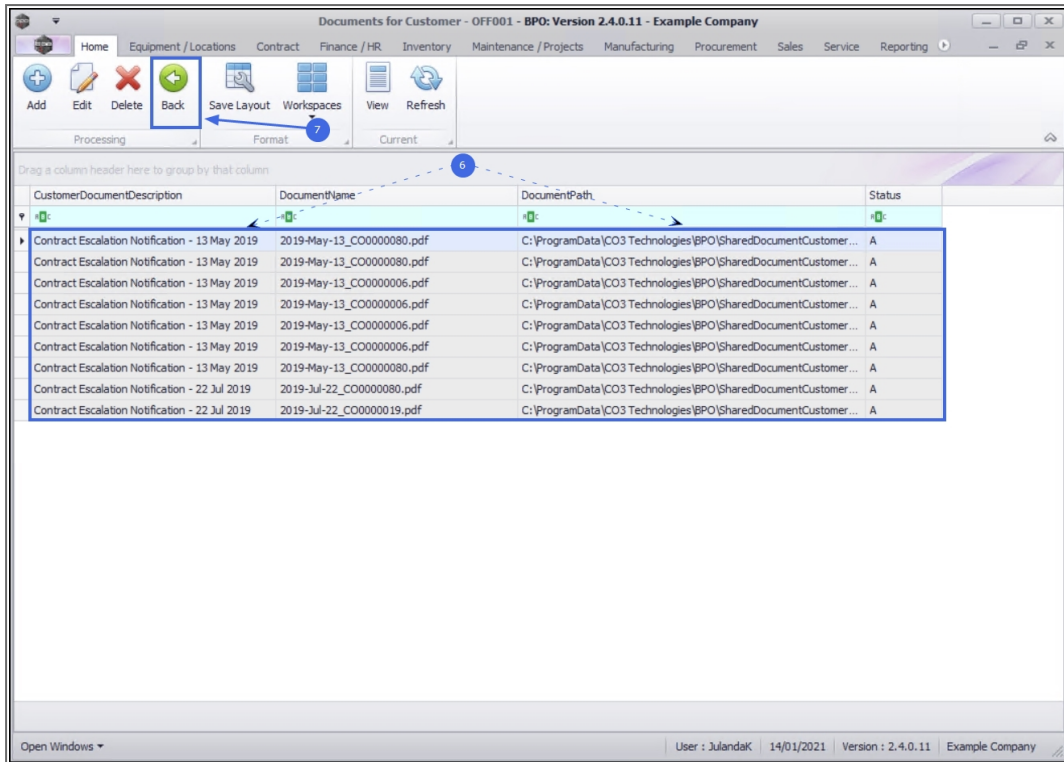
VIEW DOCUMENT

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.

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