

BPO CUSTOMER PORTAL

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

VERSION RELEASE NOTES

BPO Customer Portal Version List:

[\[1.0.0.5\]](#)

1.0.0.5(08.07.2022 11:01 AM)

- **Release Priority:**Low
- **Database Prerequisites:**
 - BPO v2.5.0.8 or later.
 - BPO WebPortal v2.5.0.5 or later.
- **Application Type:** BPO Companion Application – Web Application

BPO CUSTOMERPORTAL v1.0.0.5

- CR 139 – Improved efficiency when dealing with BPO run companies as customers now have transparency when accessing documents and records related to their account.
 - Serial numbers are now available from a drop-down list when logging a call.
 - A customer can select any serial number that is linked to a contract, and they are the shipping customer.

- A call request will automatically be created where the customer is on hold, or they are a non-contract customer.
- Calls can be logged via functional locations on a contract (drop-down).
 - A call request will automatically be created where the customer is on hold, or they are a non-contract customer.
- Any of the customer's contacts are selectable as the call contact and the logged in contact will be the default.
- A character count has been introduced to indicate the number of characters used for the description box and limit imposed.
- Specific call types can be made available for Customer Portal call logging via the Configurator.
- A tab has been added for the customer to view sales invoices and contract invoices as well as the linked credit note numbers and values.
- A tab has been added for the customer to view all calls, in all states, and the related work order documents.
- Separate tabs have been added for the customer to view quotes, sales orders, and statements.
- A user can be linked to multiple customer contacts and a drop-down is available to select a customer on the home screen.
- A User Management function has been added where the customer can create their own username and password as well as reset it.

- A BPO Admin Console login to activate and admin customers and contact users.



Rollout Details

- Run the BPO_CustomerPortal_v1.0.0.5 upgrade and check for errors in the results file.
- Run the Open4Business_v1.0.0.5 validation, and check that there are no errors.
- Install CustomerPortal-1.0.0.5-Release.

File Location on WinSCP

`\Implementations\CO3_Releases\Applications\BPO_CustomerPortal\v1.0.0.5`

BPO.RSI.061

