

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

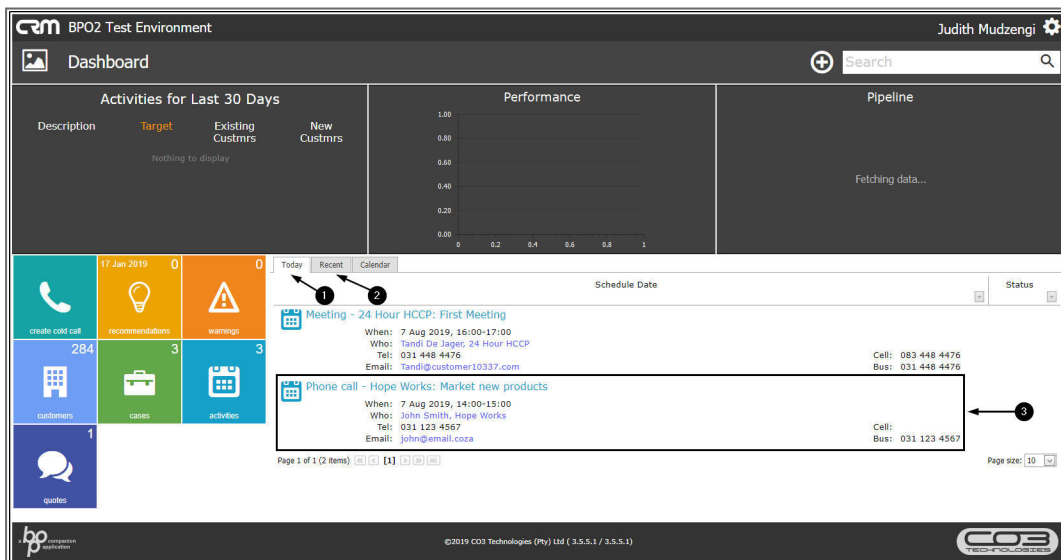
# CRM CUSTOMERS

## CUSTOMER FILES

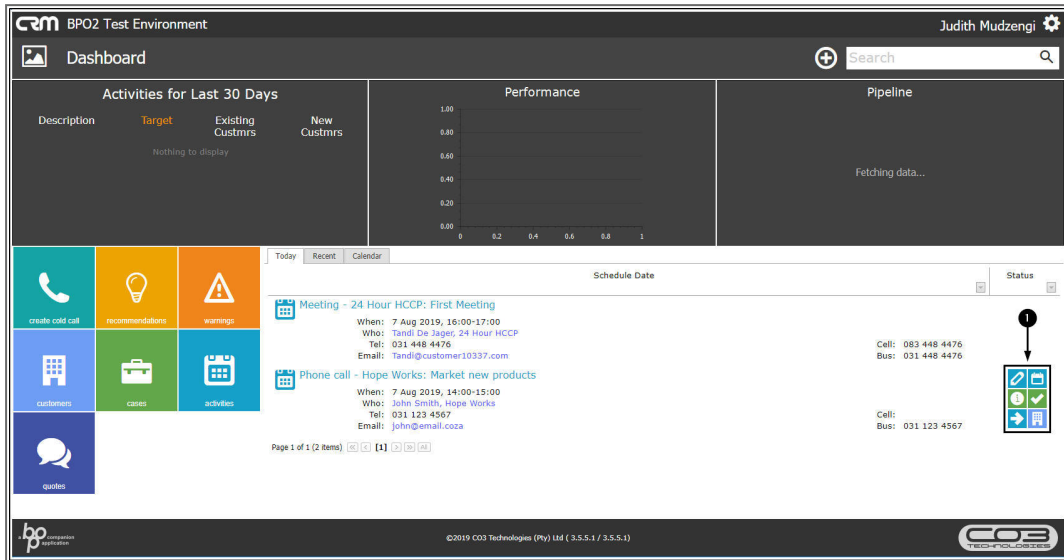
All case attachment files that are uploaded, can be accessed via the Customer 'Files' link (whether the case is open or has been closed).

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

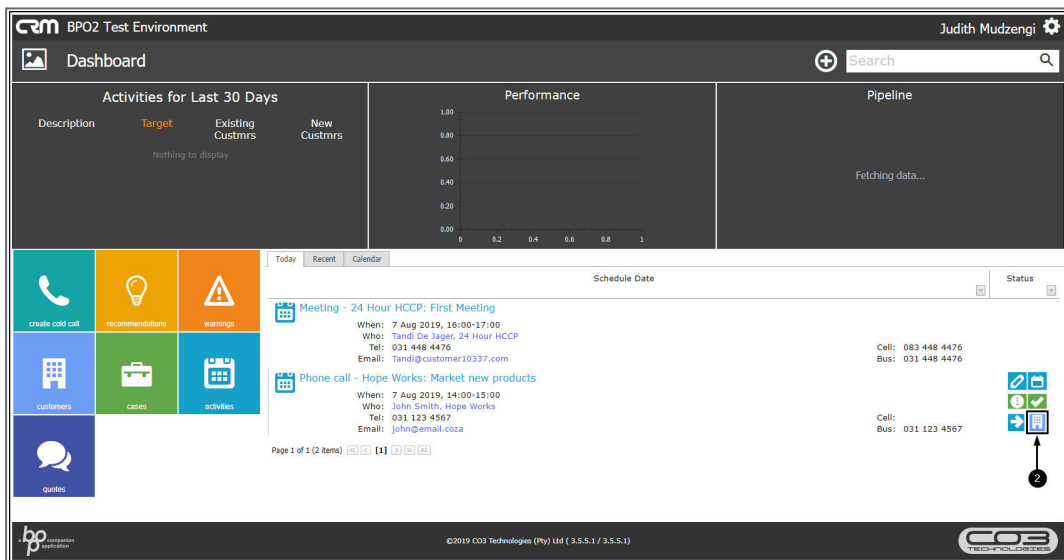
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view customer files for.



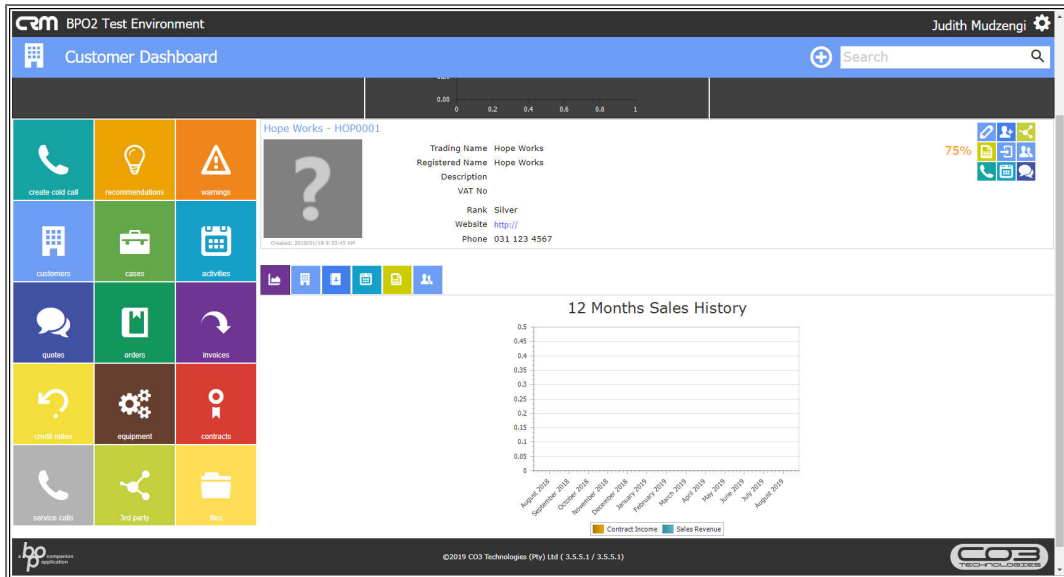
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



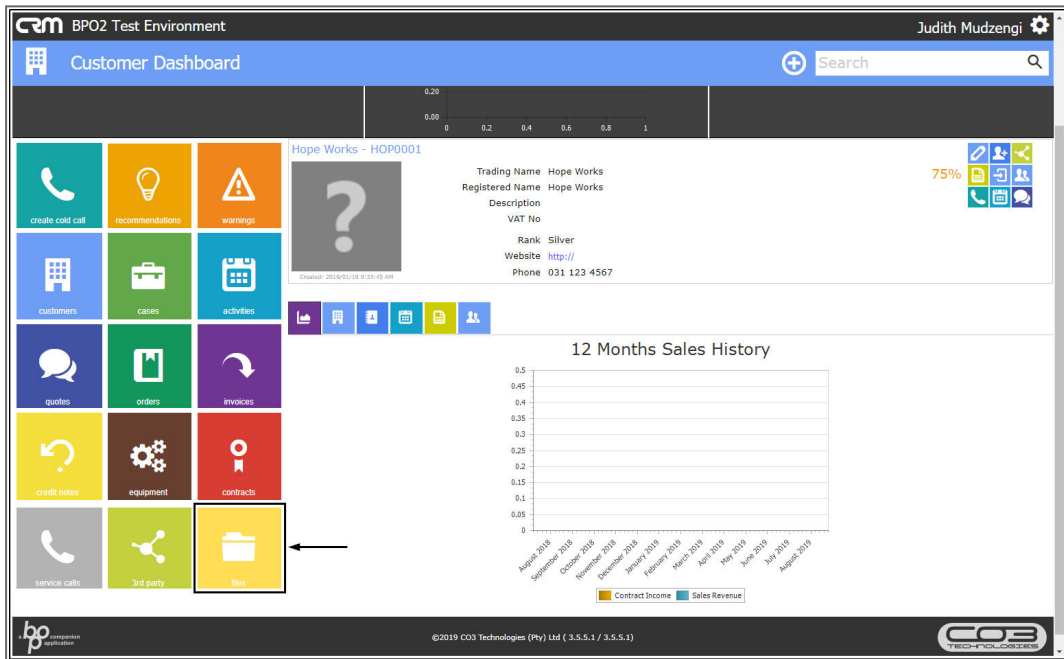
2. Click on the **View Customer** icon.



- 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
<a href="#">contract.docx</a>	CASE	Phone Call	Closed - Won	John Smith	
<a href="#">BPO_TEL_SpecificItems.docx</a>	CASE	Phone Call	Closed - Won	John Smith	
<a href="#">contract (2019-08-15 11.32.15).docx</a>	CASE	Phone Call	Closed - Won	John Smith	
<a href="#">contract.docx</a>	CASE	Presentation of new products	Distant prospect - on hold	John Smith	
<a href="#">Process Flows - CRM Walk In Customer.docx</a>	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.

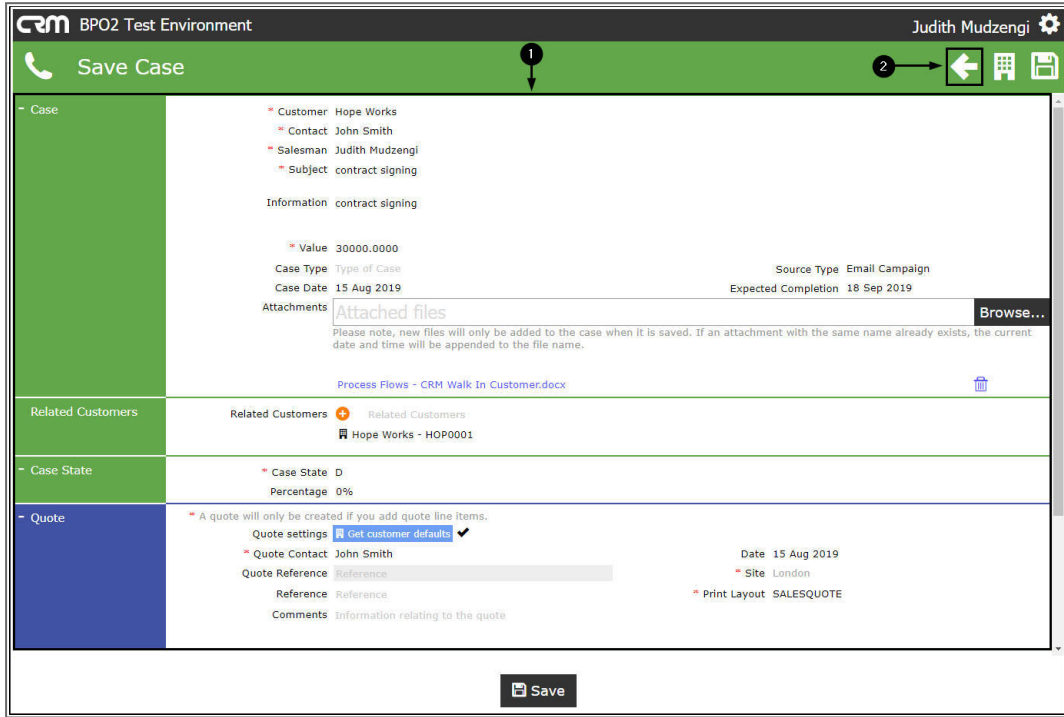
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Customer Files for Hope Works

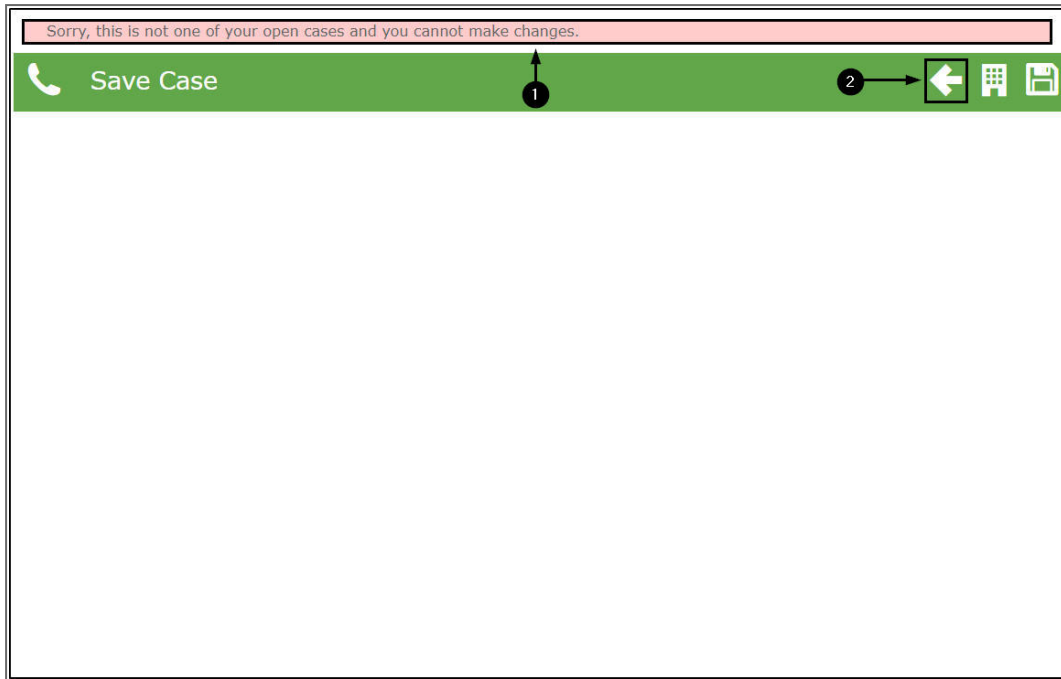
File	Parent Type	Parent Description	Parent Additional Info	Contact	Actions
<a href="#">contract.docx</a>	CASE	Phone Call	Closed - Won	John Smith	
<a href="#">BPO_TEL_SpecificItems.docx</a>	CASE	Phone Call	Closed - Won	John Smith	
<a href="#">contract (2019-08-15 11.32.15).docx</a>	CASE	Phone Call	Closed - Won	John Smith	
<a href="#">contract.docx</a>	CASE	Presentation of new products	Distant prospect - on hold	John Smith	
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Page 1 of 1 (5 items) [1] [All] Page size: 10

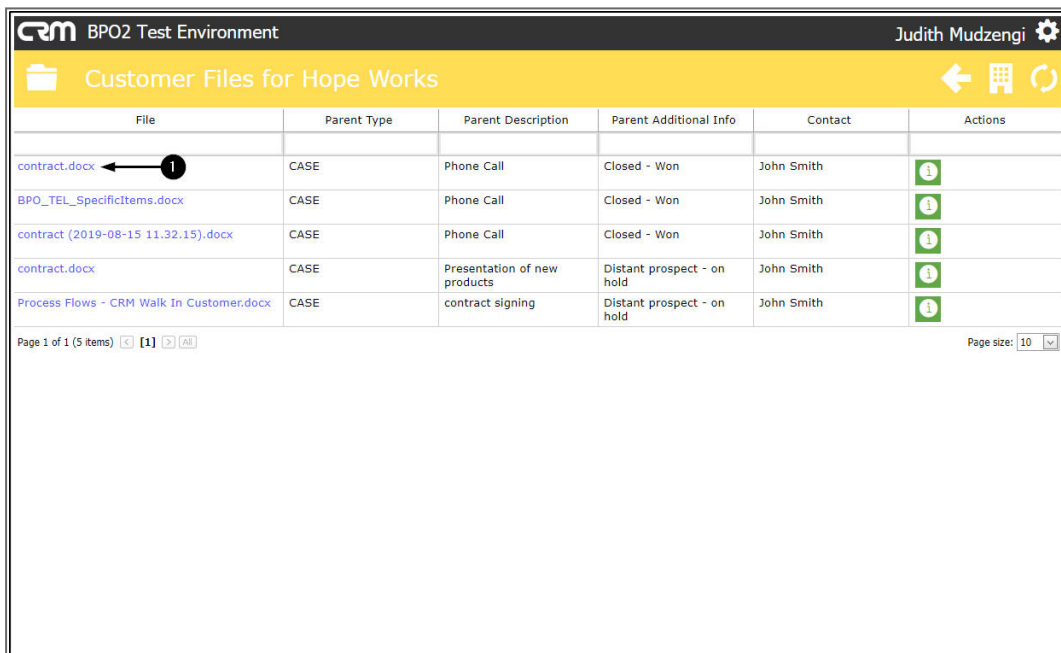
- The **Save Case** screen will be displayed.
  1. If the Case is still open, you can view more details of the case in this screen.
  2. Click on **Back** to return to the **Customer Files for [ ]** screen.



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.

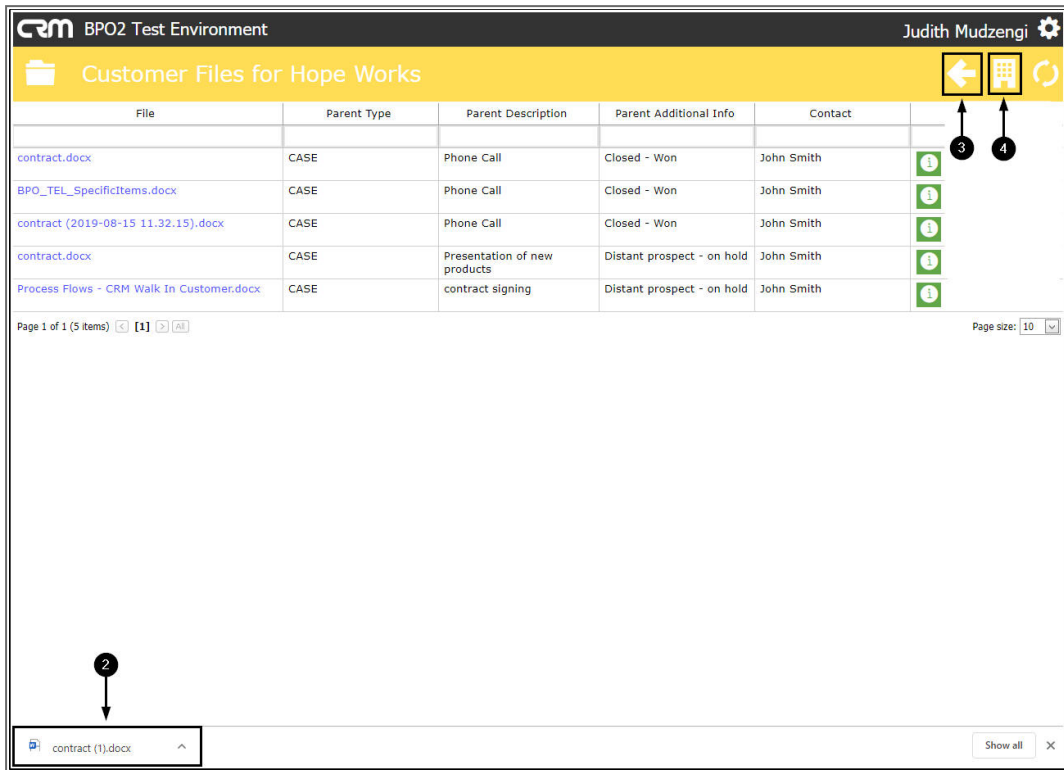


1. To view a document, click on the File name.



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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Judith Mudzengi

Hope Works

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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

bpo companion application
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