

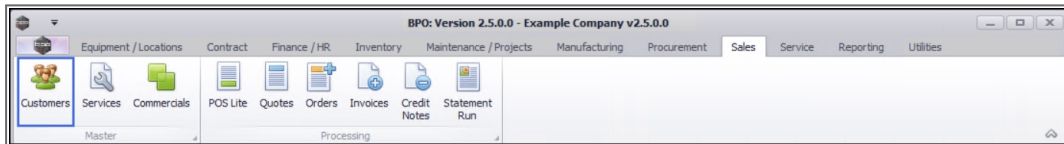
SALES

CUSTOMERS - DOCUMENTS

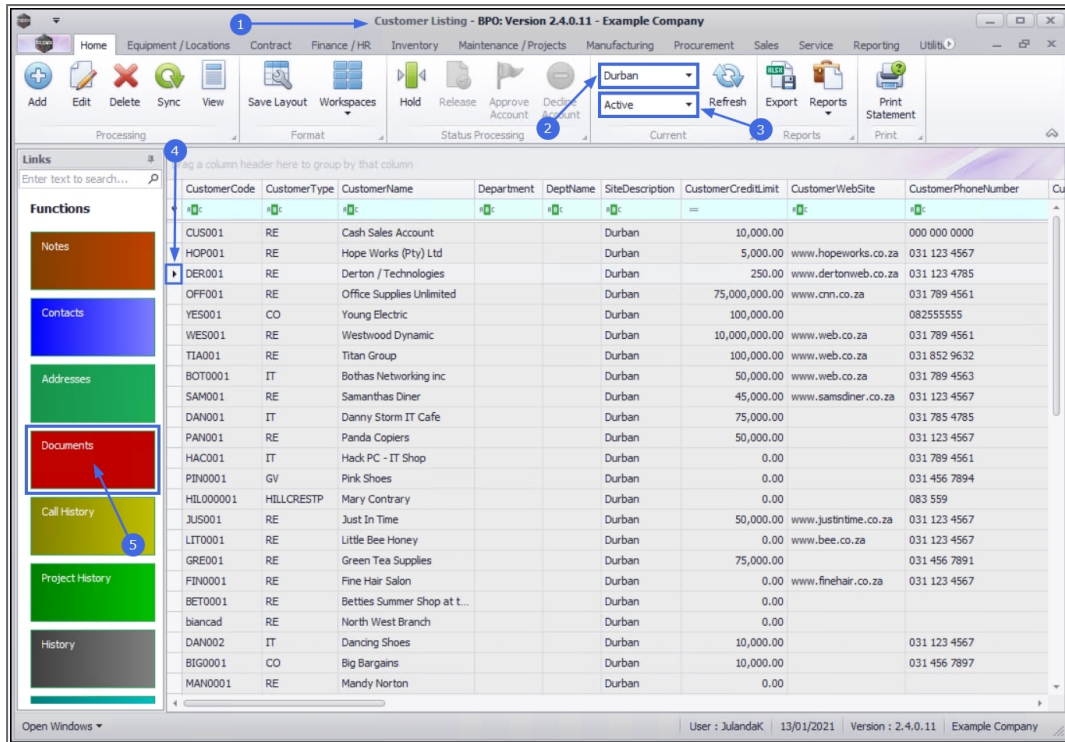
The **Documents** tile allows you to link, view or delete a customer's digital documents effortlessly. All your customer documents can be kept in one place by making use of this link.

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.



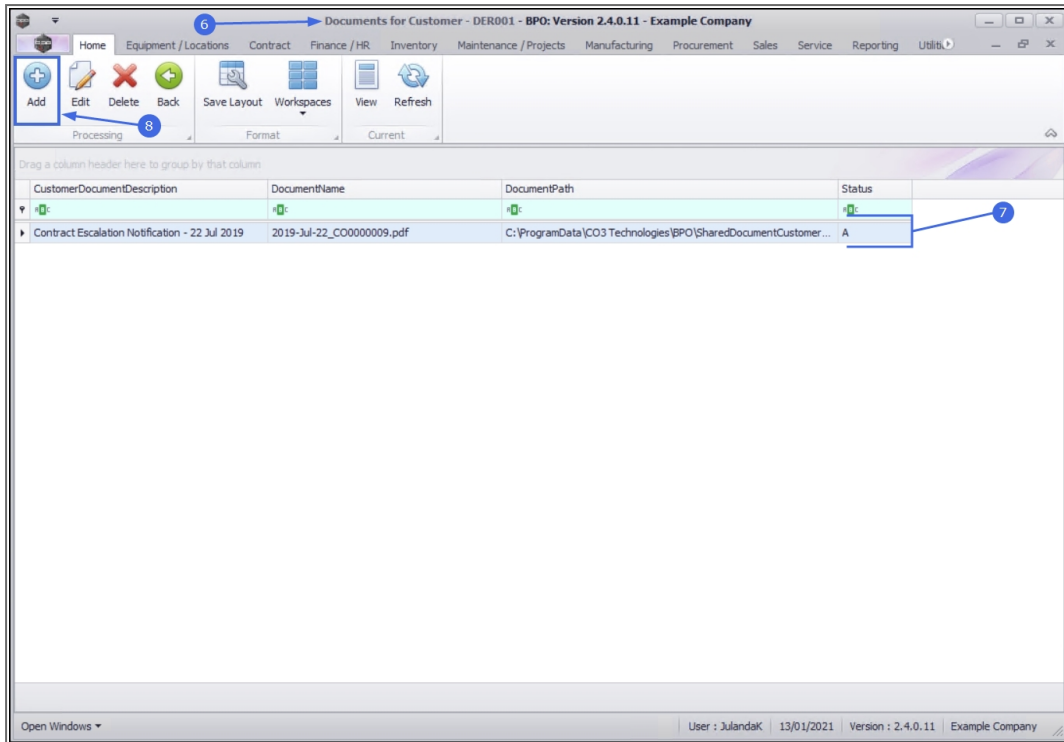
- The **Documents for Customer - [customer code]** screen will be displayed.
- A list of all the documents currently linked to the selected customer will display.

LINK DOCUMENT

- Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.

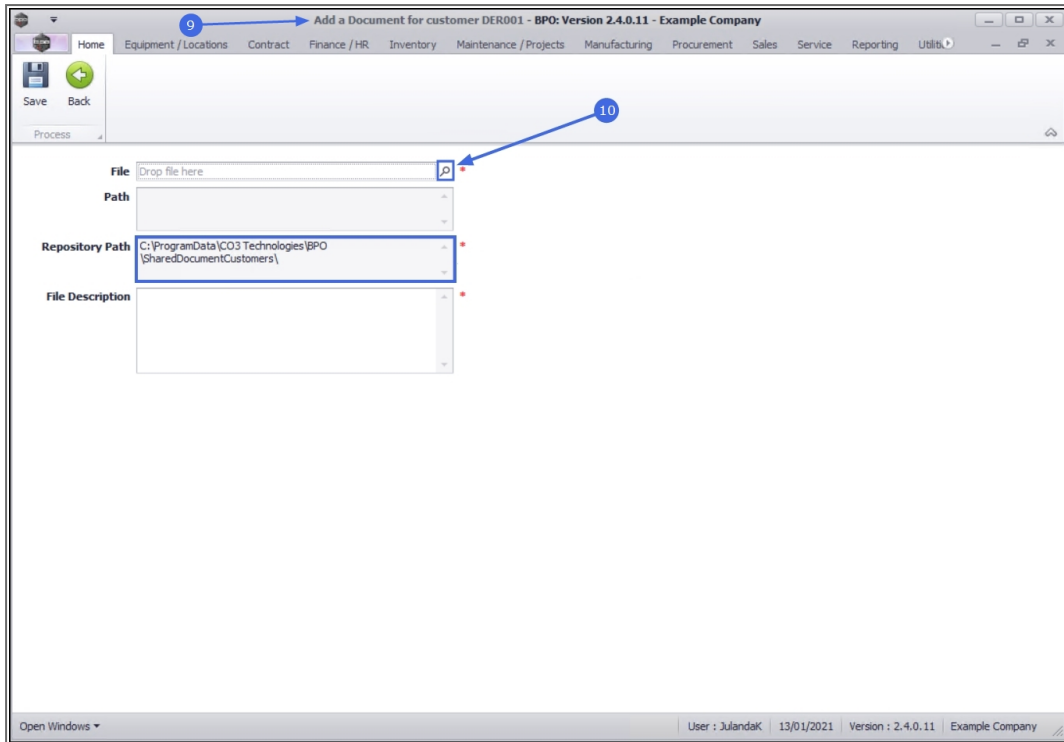


9. The **Add a Document for customer** [customer code] screen will be displayed.



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.

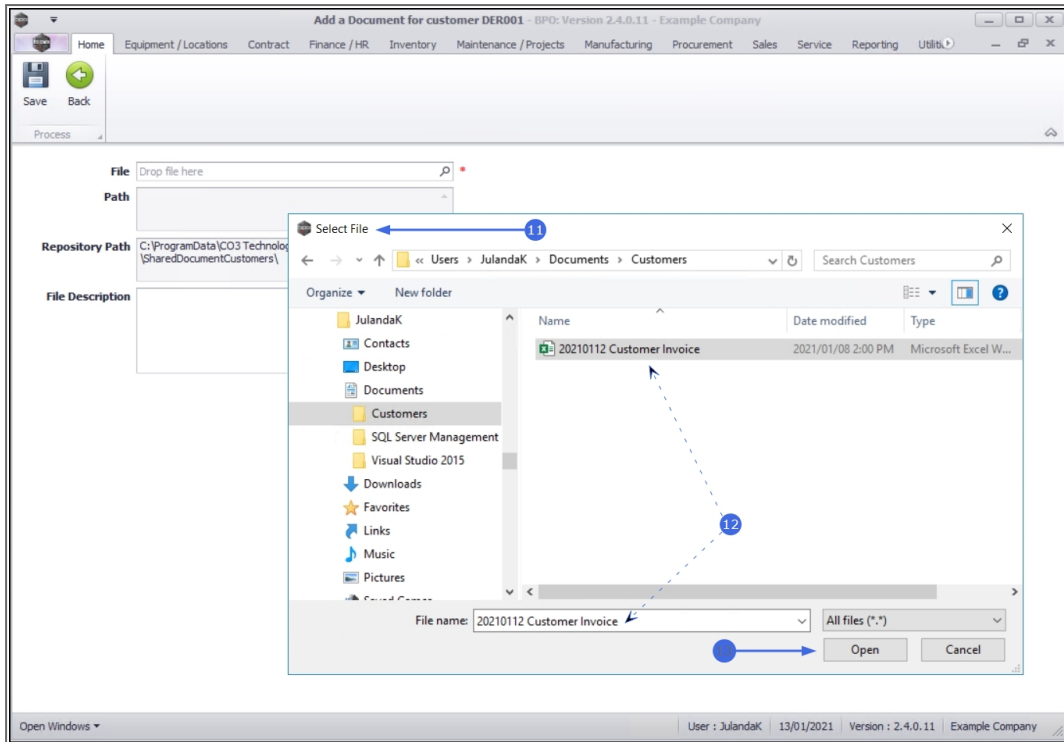


11. The **Select File** screen will display.
12. Locate the **file** on your **server / computer** that you wish to **link**.

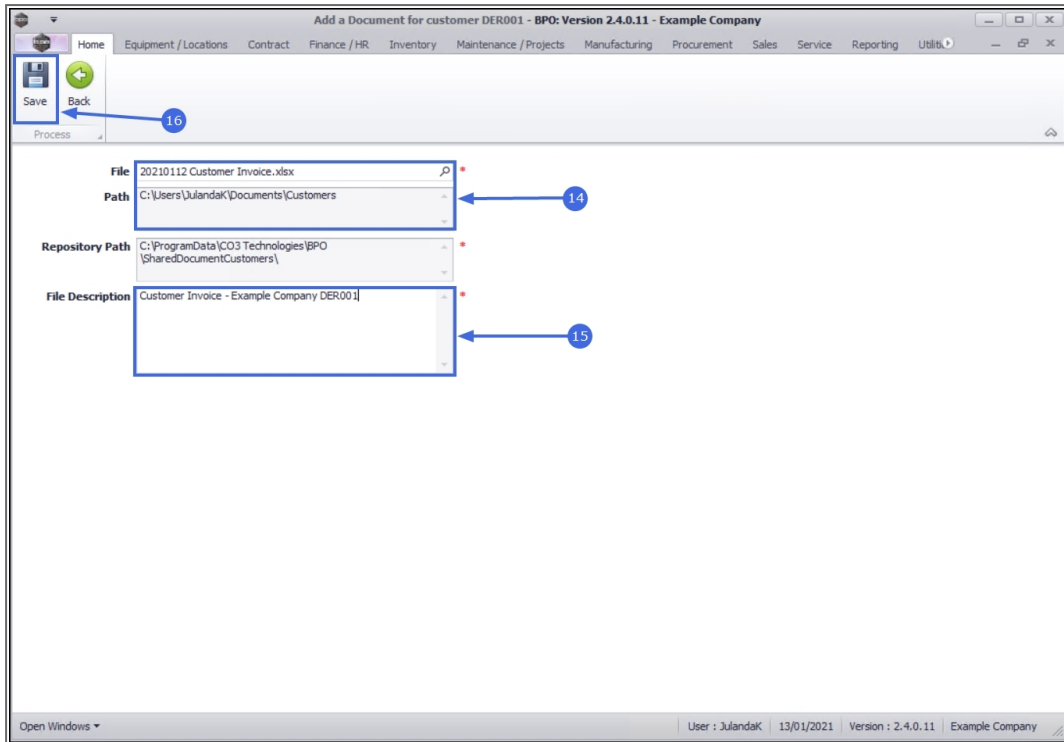


Ensure that the document name appear in the **File name:** field by clicking on the document to select it.

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.



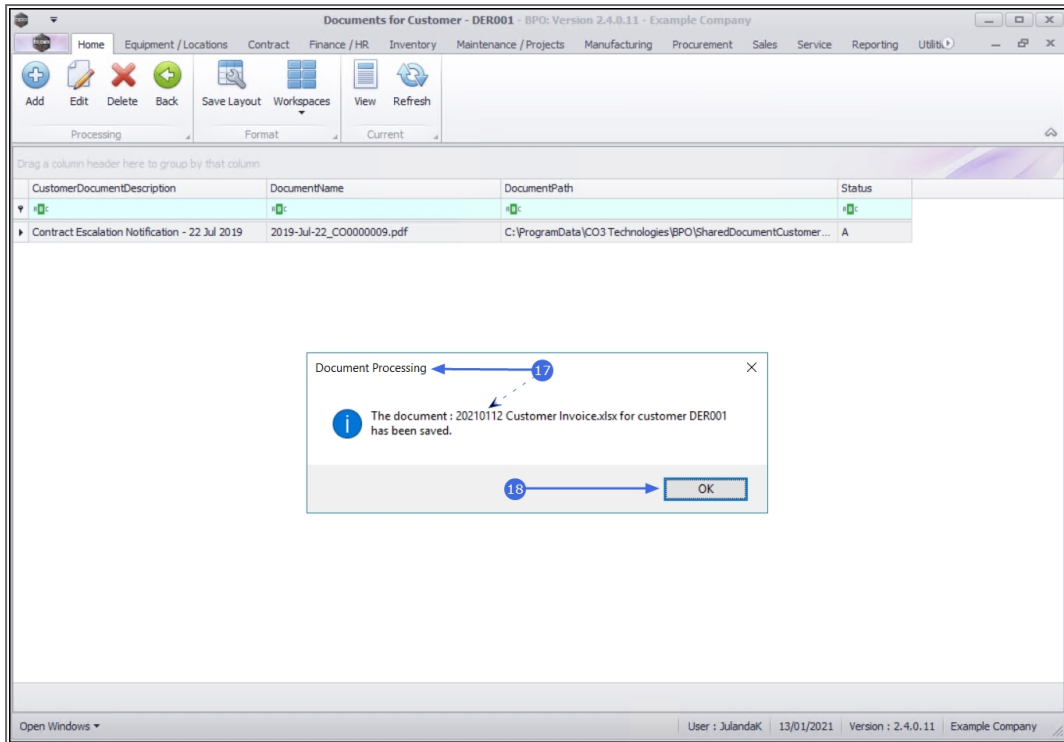
17. When you receive the **Document Processing** message to confirm that;

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

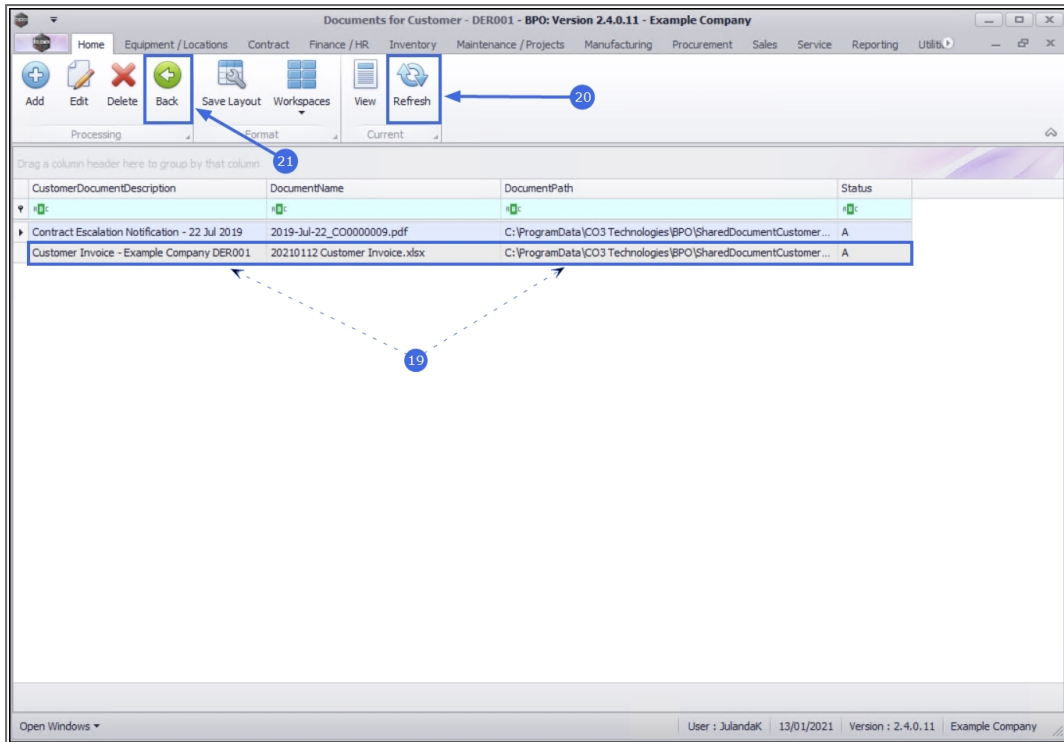
18. Click on **OK**.



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.

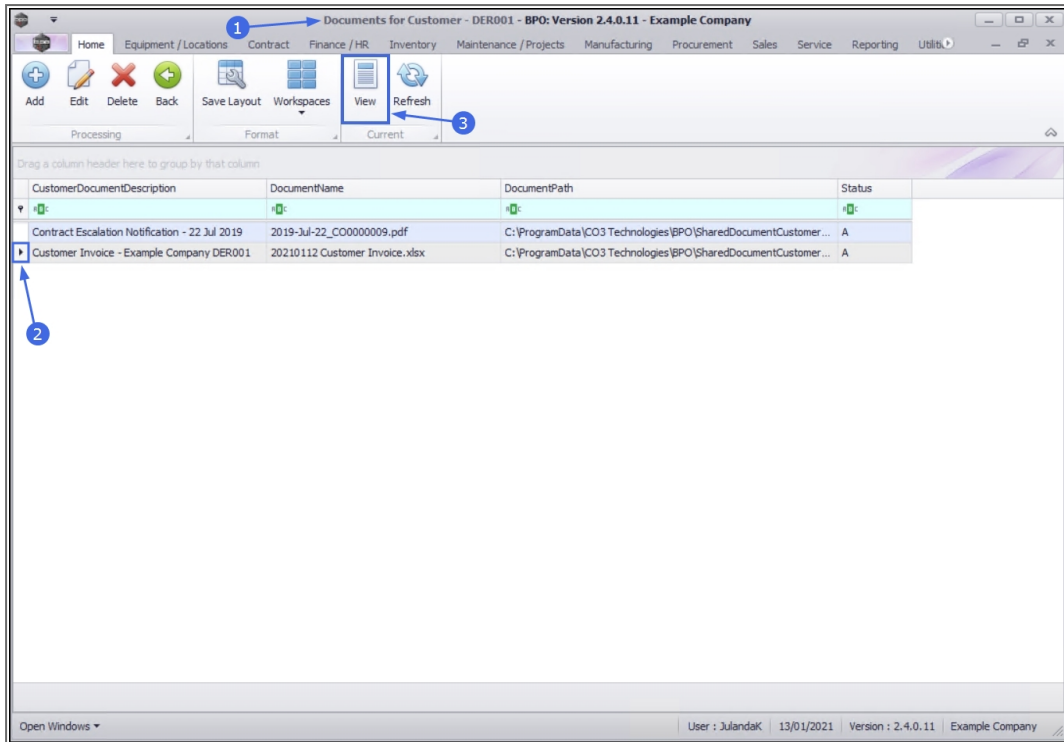


EDIT DOCUMENT

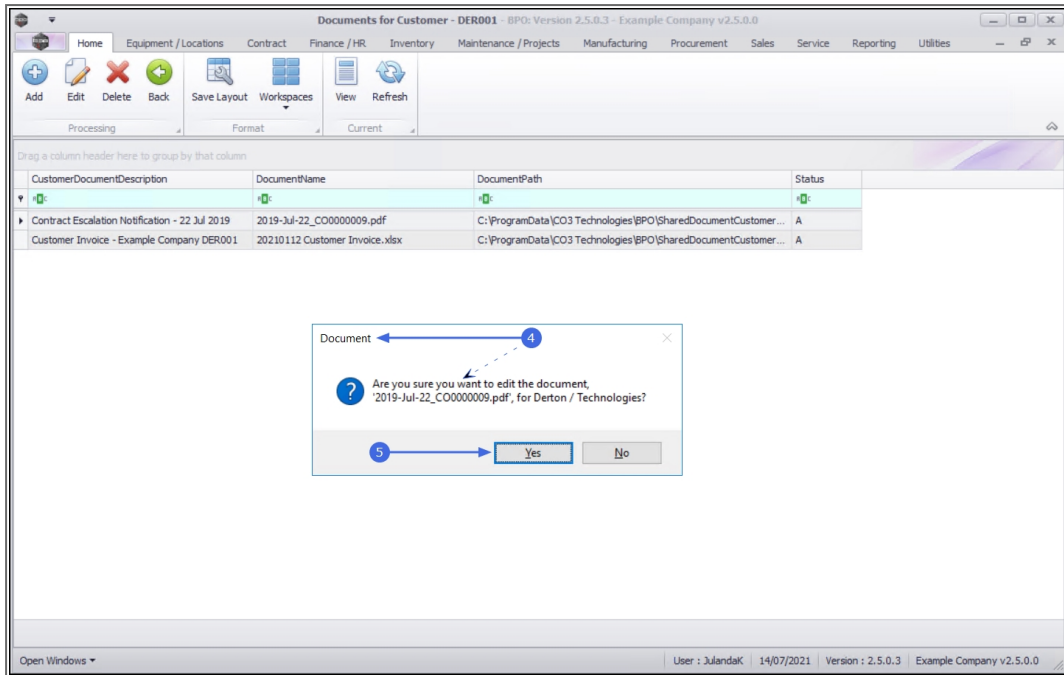
1. From the *Documents for Customer - [customer code]* screen,
2. Select the **row** of the document you wish to edit.
3. Click on **Edit**.



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**.

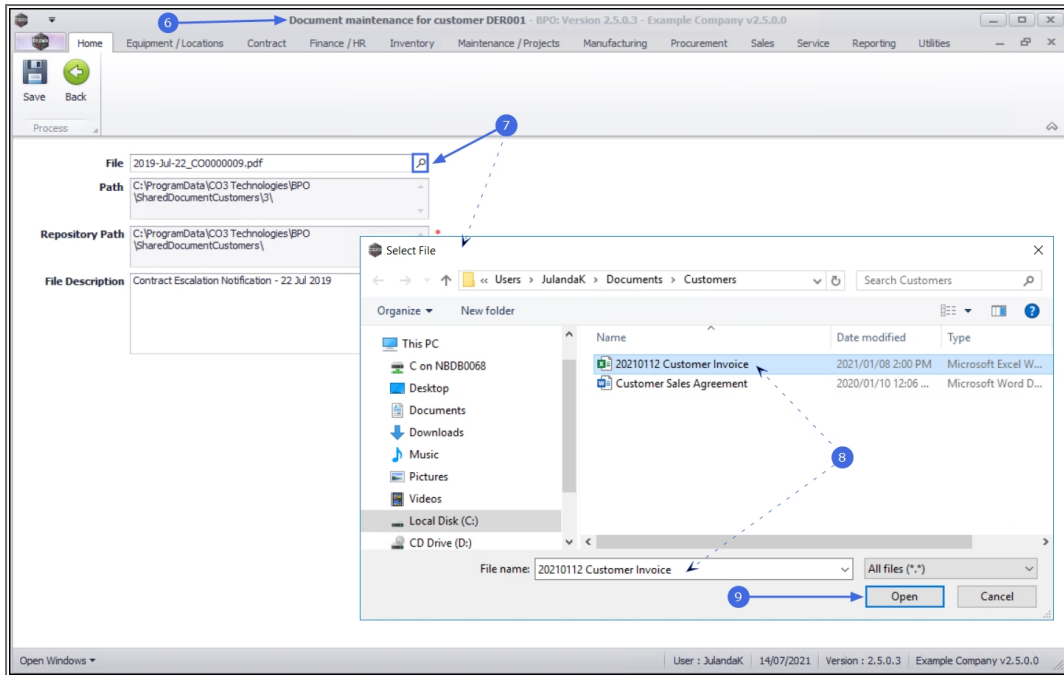


6. The **Document maintenance for customer** [*customer code*] screen will be displayed with the selected file information populating the fields.
7. To edit the document currently linked to the customer, click on the **search** button in the **File** field to display the **Select File** screen.
8. Locate the **file** you wish to replace the current file with, on your **server / computer**.

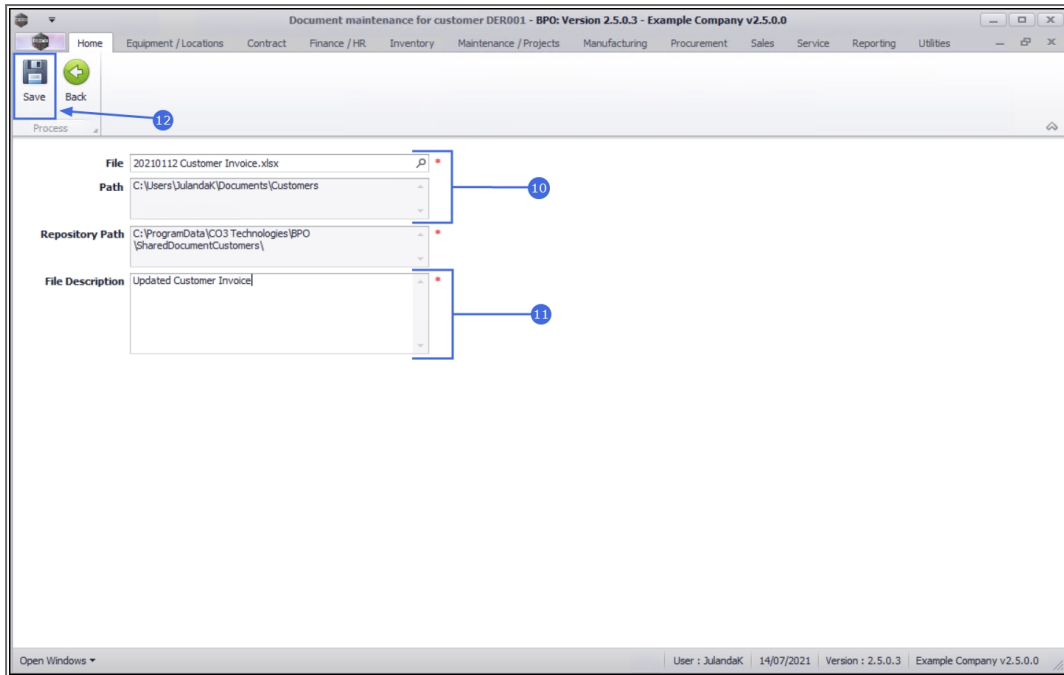


Ensure that the document name appear in the **File name:** field by clicking on the document to select it.

9. Click on **Open**.



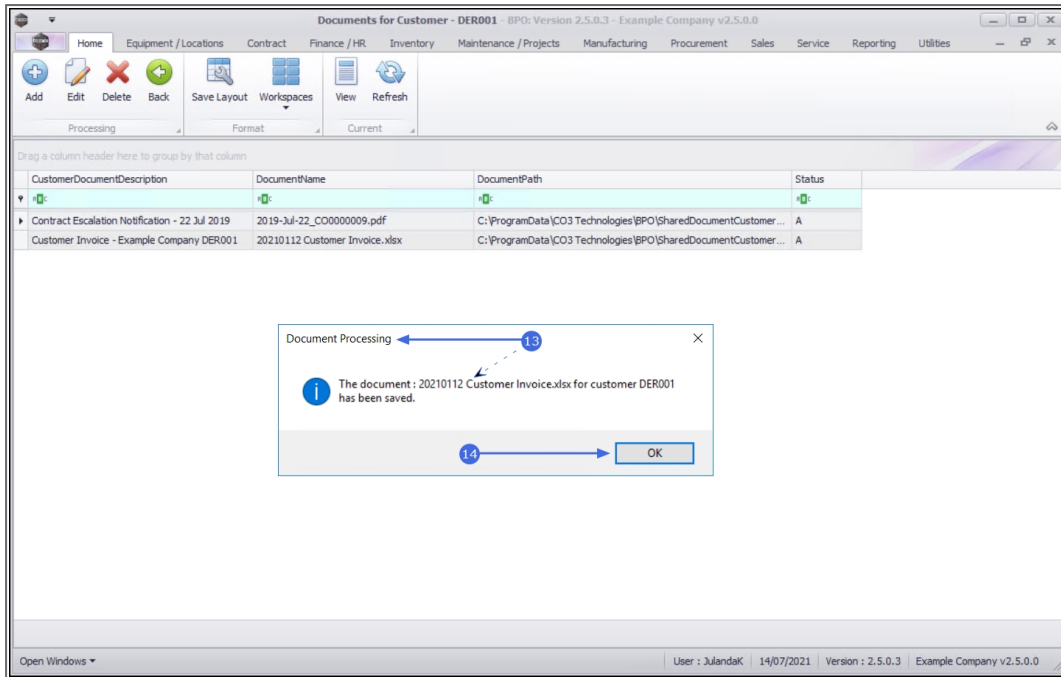
10. The **File** and **Path** fields will be populated with the new document details you have selected.
11. Type a **description** of the document in the **File Description** field, if required.
12. Click on **Save** to save the link.



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**.



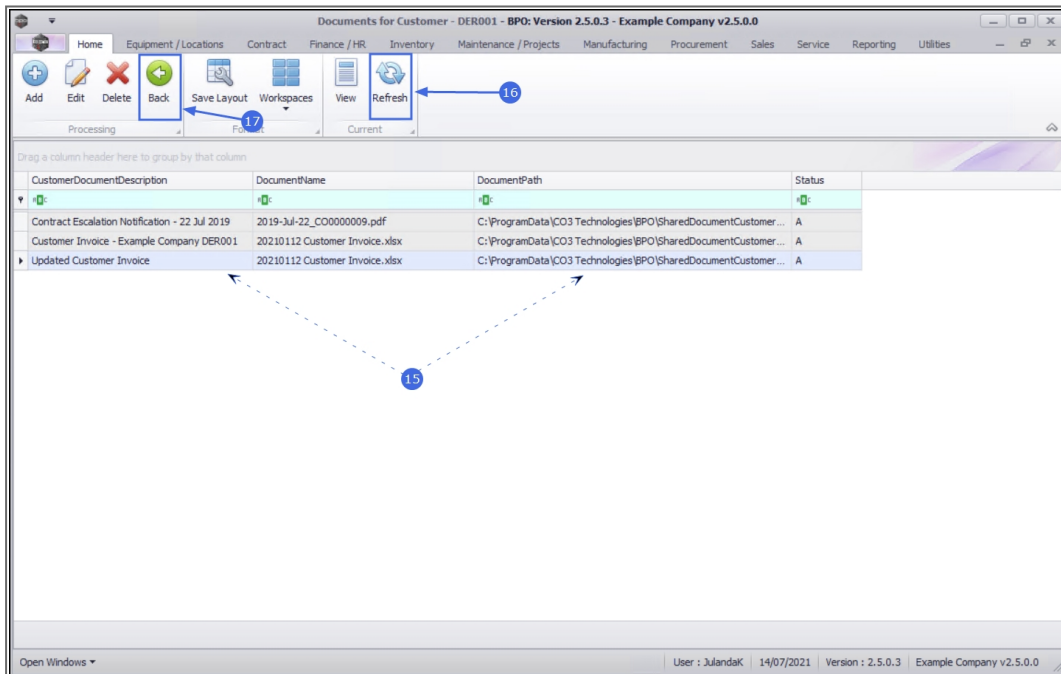
Note that BPO does not save the physical document, but a link to where the document has been saved.



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.

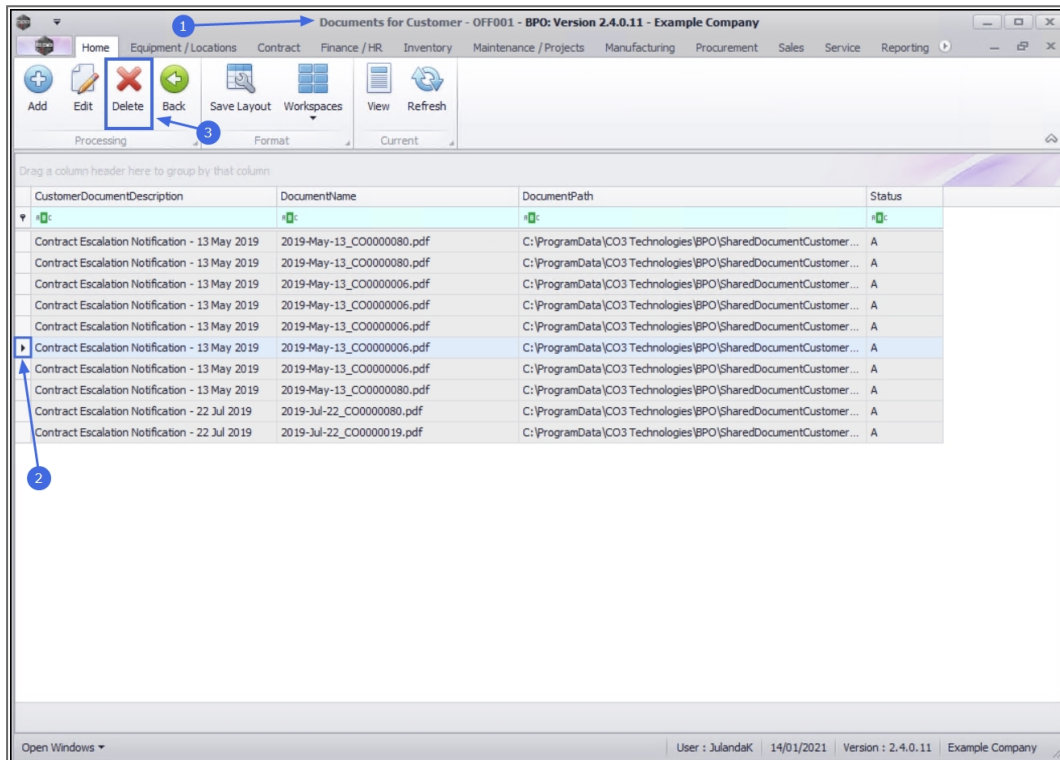


DELETE DOCUMENT

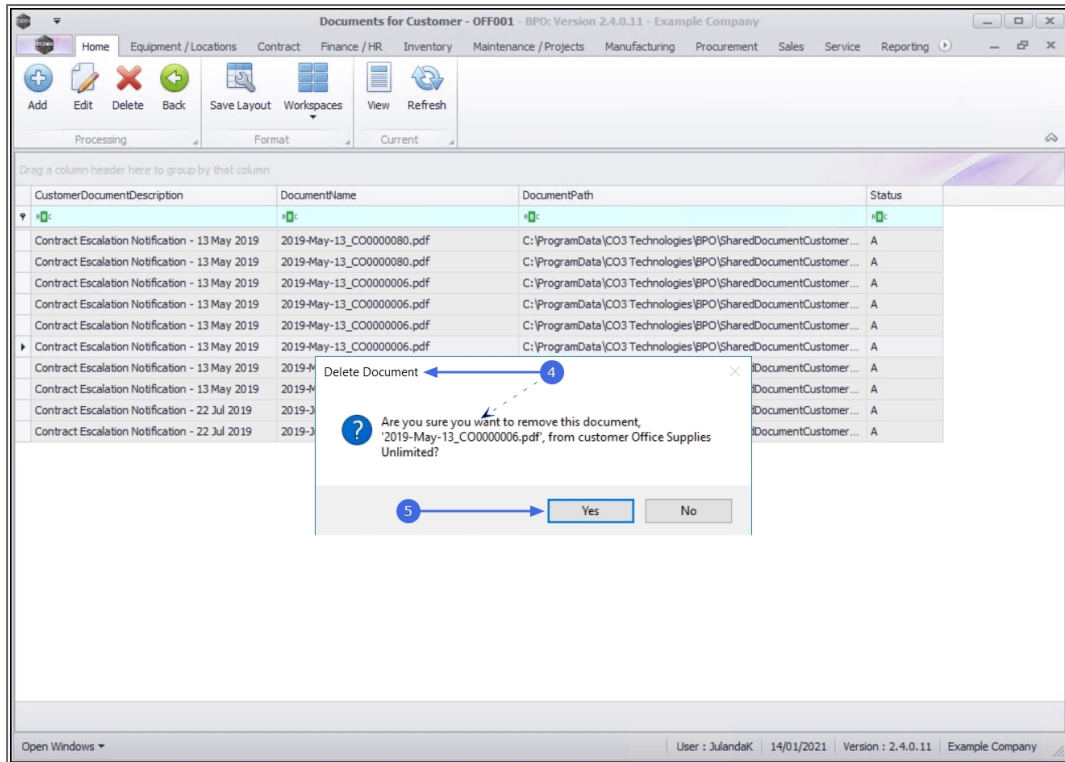
1. From the **Documents for Customer - [customer code]** screen,
2. Select the **row** of the **document** you wish to remove.
3. Click on **Delete**.



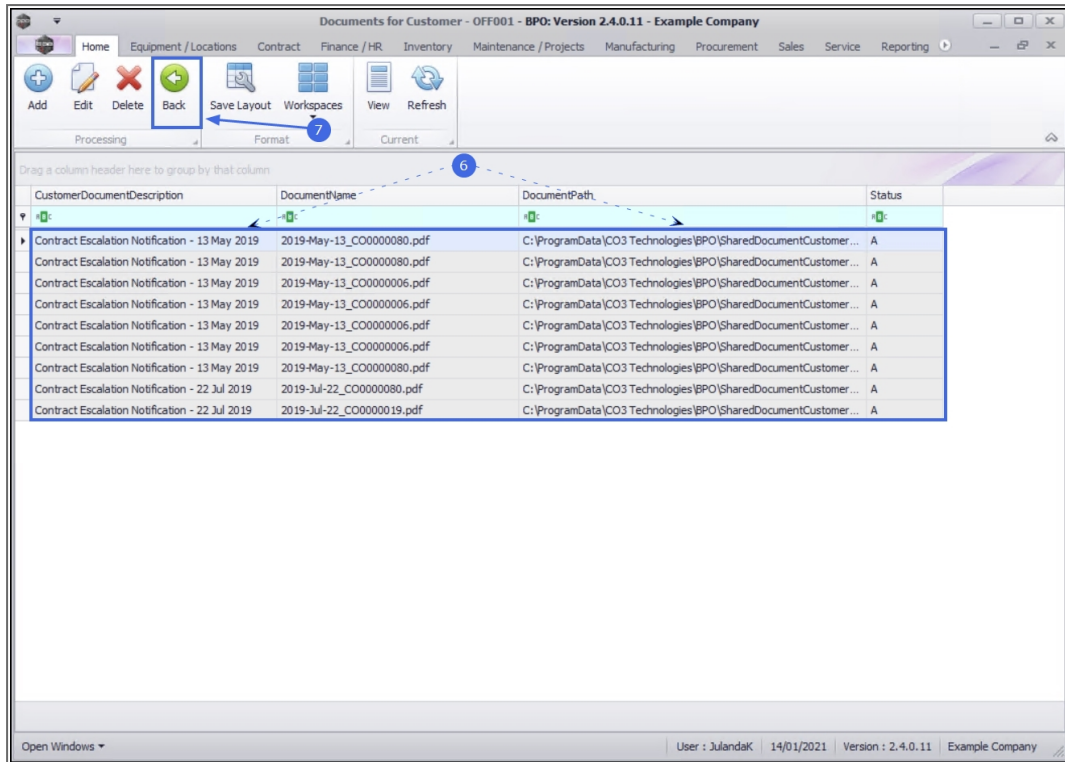
Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.



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.

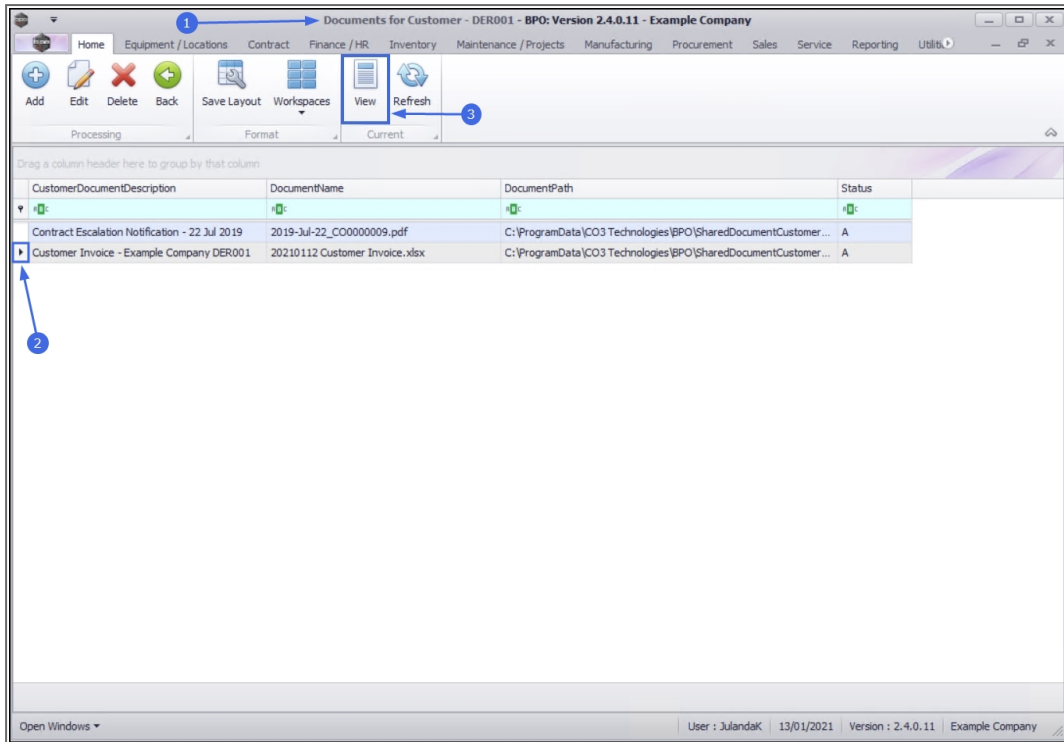


6. The document has now been **deleted** from the **Documents for Customer** screen.
7. Click on **Back** to return to the **Customer Listing** Screen.

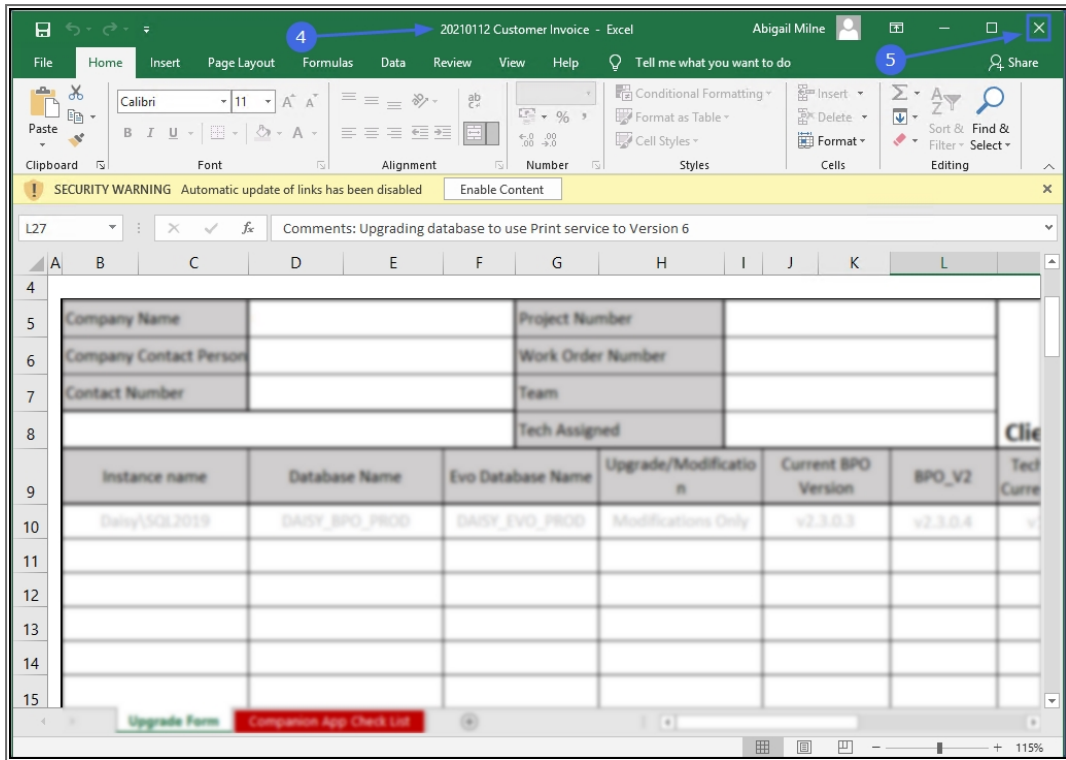


VIEW DOCUMENT

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.



MNU.061.005