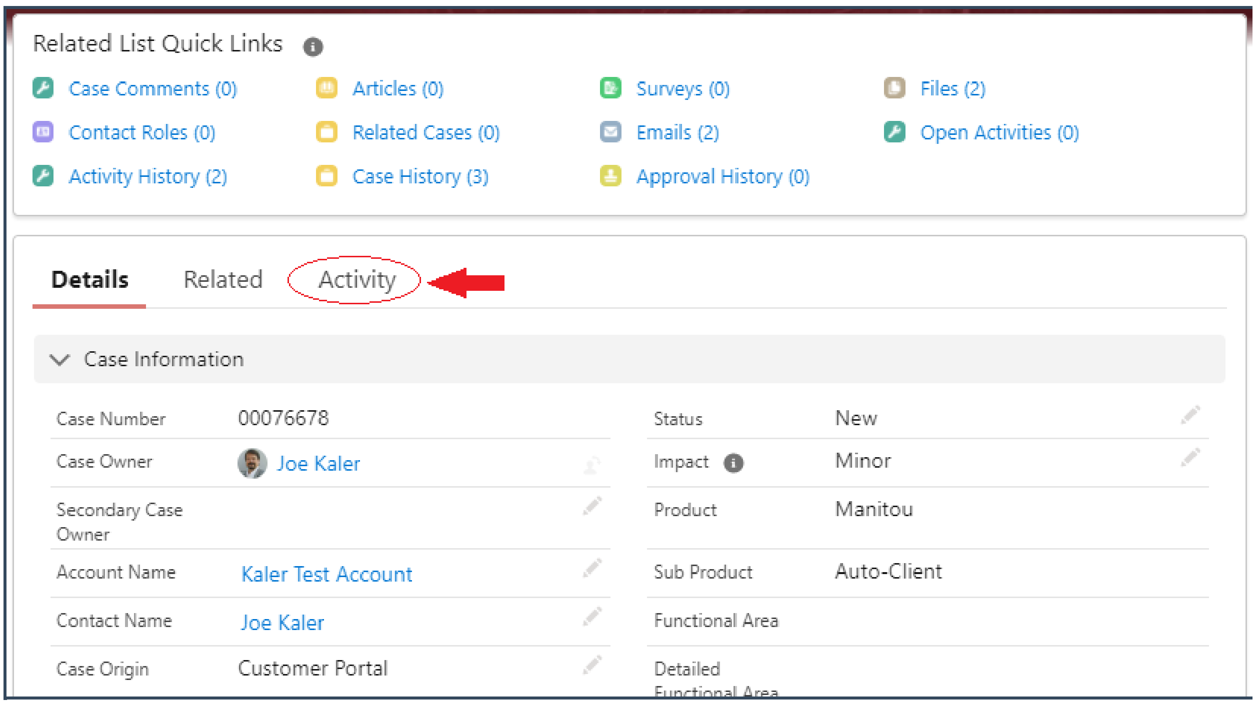
Salesforce - Sharing Files with Customers

01/09/2024 10:17 am EST

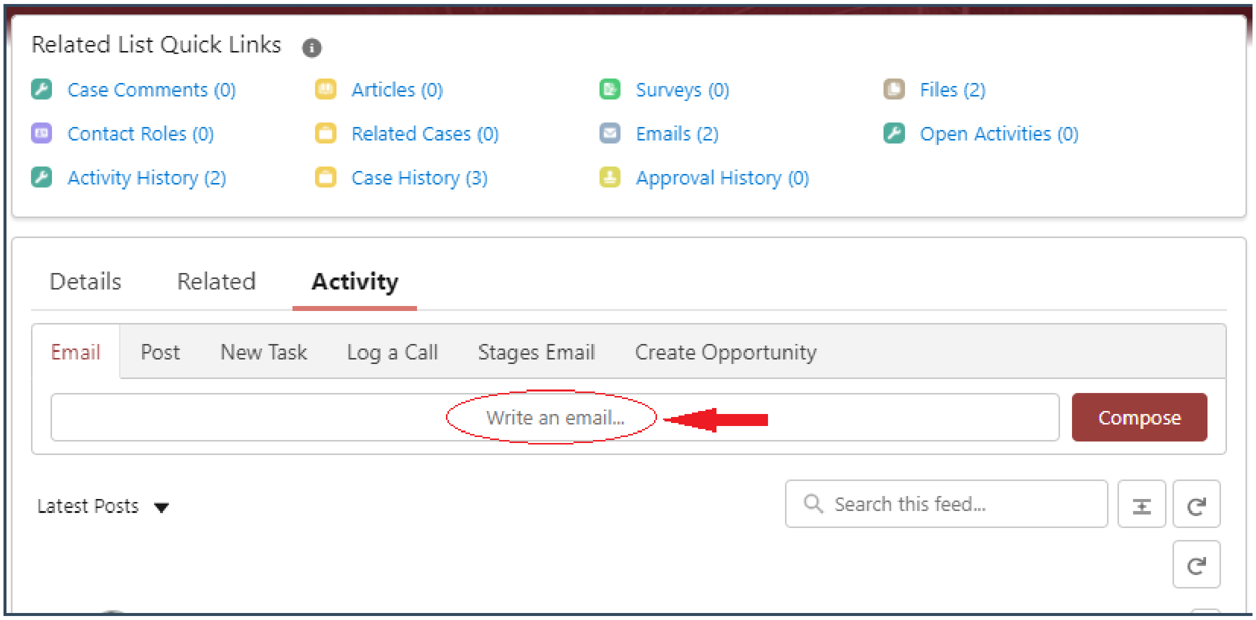
Sometimes we have files that we need to get to customers that are just too big to share via email.

Making large files accessible to customers is easiest and most appropriately done through case management options in Salesforce, specifically when communicating via the email function within the Salesforce case following these steps:

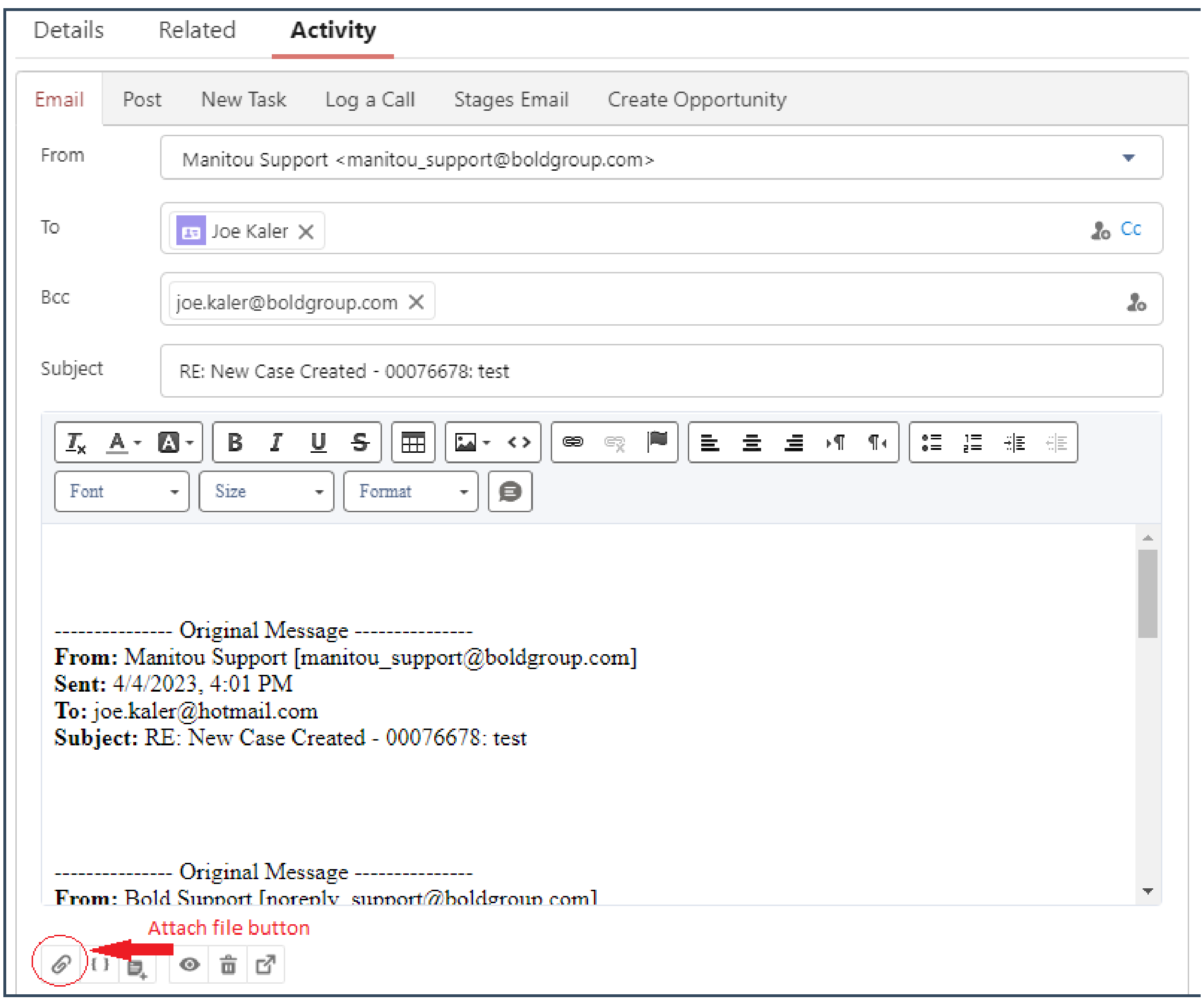
1. Open the relevant case and click on the 'Activity' tab



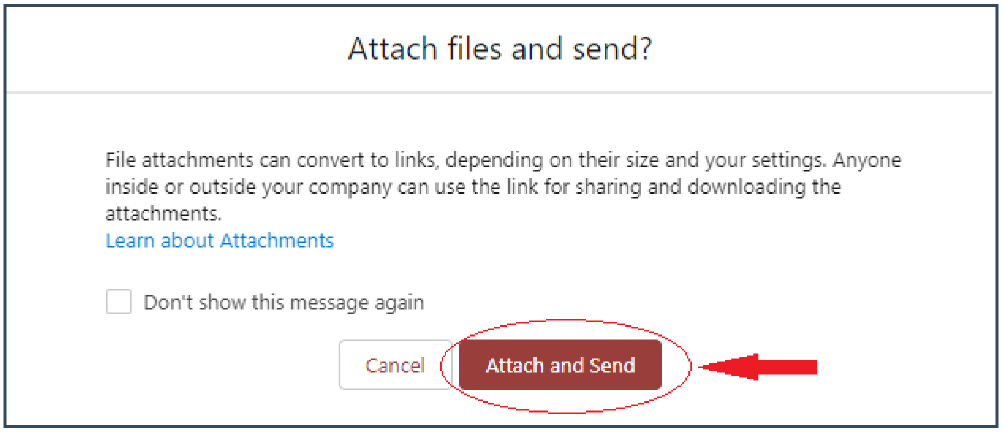
2. Click on 'Write an email...'



3. Either click on the Attach button at the bottom of the email composition window to select and attach the file, or simply drag the intended file from your system and drop it onto the email being composed

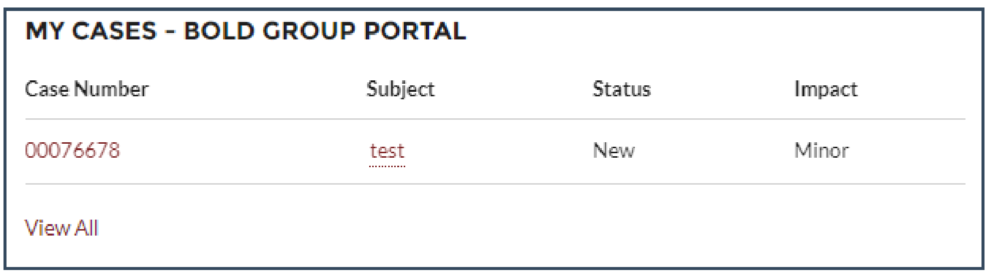


4. When you have completed composing the email, click Send. This may ask you if you want to attach and send the selected file – click the ‘Attach and Send button’



At this point, the email has been sent to the customer's email address. If the customer email system will not allow file attachments or delivery of large files, these files are still available for customers to download via the Bold Group Customer Support Portal.

5. Instruct the customer to log onto the Portal and select the case.

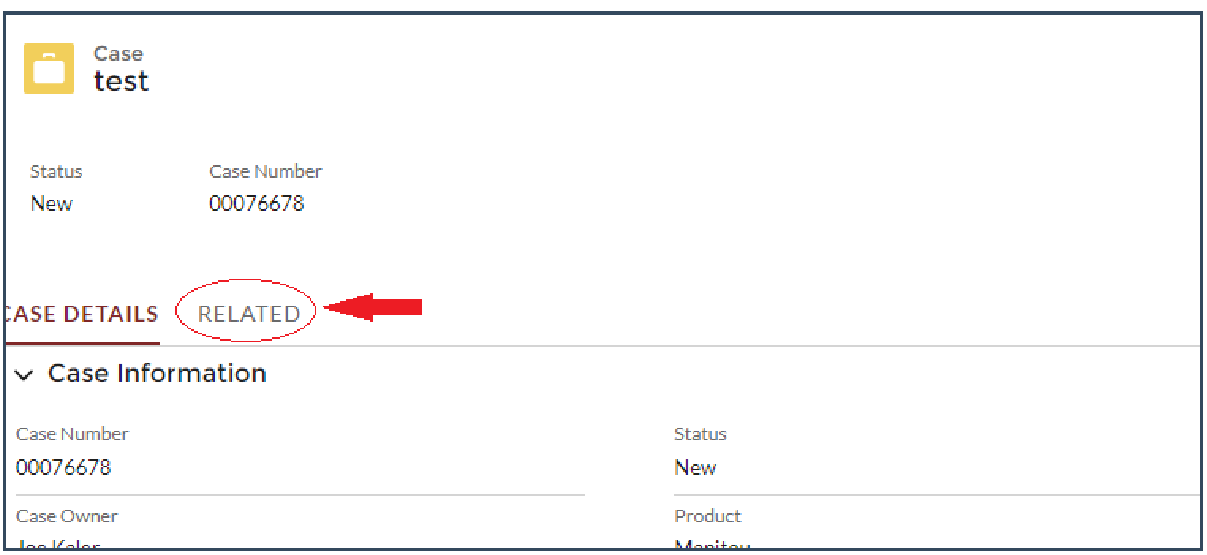


MY CASES - BOLD GROUP PORTAL

Case Number	Subject	Status	Impact
00076678	test	New	Minor

View All

When the case information is displayed, have the customer click on the ‘Related’ tab



6. All files available for viewing and downloading are listed in the ‘Files’ section