**Demo EOD new Process - January 2024 Release**

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5m 53s

 **Beatriz Perez** started transcription

 **Beatriz Perez** 0:23  
In this video I am going to show you the new process for sending the evidence of delivery.  
So the access for deliveries is the same as currently.  
You can either access from the deliveries entities over here, or you can access from your won opportunities, in which case you just need to go to your opportunity and click on related deliveries and you will have the deliveries here.  
Then your process is actually really simple.  
The only thing that you need to do is to upload the correct evidence of delivery file to the right delivery record.  
Everything else that you did today will be taking care of automatically.  
So in here I have 3 deliveries.  
For this demo I will show you how to upload the delivery file with this one.  
So you have to select the delivery on your delivery entities will work the same.  
You select the delivery.  
And you want to upload the file to and you click upload files no.  
As you can see, uh SharePoint is open for you, you click on upload and select your evidence of delivery, or you can also drag and drop.  
And the file uploads for you.  
You go back to your opportunity.  
And you hit refresh until the this uh to uh columns are populated.  
You will need to click refresh for a while now.  
I have one evidence of delivery here, so I will be using this to show you what happens.  
As you can see, I uploaded the file in the same way I did just now and I have here that my evidence of delivery has been submitted as my status and the name of the file has been automatically populated for me and the same for the evidence documentation URL.  
So if I go to my post opportunity change request you will see that an evidence of delivery.  
Submission post opportunity change requests have been created for me and this will be what finance will see to approve it.  
If I go back to my related deliveries, you see that my second that I was uploading first has been already there.  
The POCR has not been yet created automatically because it's not evidence of submitted the moment it is, you will see that delivery status goes to evidence of delivery submitted.  
What happens if I made a mistake and this is not my evidence of delivery?  
What do you need to do is to click on the delivery where you upload it in the wrong way and as you can see here you have recalled evidence of delivery submission.  
I click here.  
And in the moment I do that, my delivery status changes to evidence of delivery recalled and my evidence of delivery, file name and evidence of delivery documentation URL go plank so and the post opportunity change requests will go reject it automatically for you.  
What else do you can do which is very useful?  
For example, imagine that for my old deliveries I have the same evidence of delivery.  
What I can do is I select the one that I want to use.  
So you will have to upload first one and then once you have it there you can click on all the deliveries that you want to have the same evidence of delivery and you can click set bulk value the system as you can see here will automatically put the same file for all your deliveries and it will trigger a post opportunity change request for evidence of delivery automatically for all of the deliveries.  
So it's very, very easy.  
One last thing, you can do everything that I showed in here.  
You can do it as well from the delivery stab, and if by any chance you had all deliveries, it may happen that the SharePoint is not created.  
So what you need to do is to upload as well from the delivery.  
So you open the delivery itself and in here you can see that you have your files ohm top.  
Here you will be able to upload the file using the umm the upload documents place.  
Everything else will be the same.  
The status of the delivery will be there for you.  
As you can see here, the ones that I was submitting in bulk are there.  
I have the one that I recall this as well and I can see the status and the documentation URL.  
Very simple.  
In the table, either from here or from the opportunities.  
I hope this video is helpful for you and just as a reminder, the only thing important in this new process is to upload the correct evidence of delivery file to the right delivery record.  
Everything else is taking care automatically from the system.  
Thank you.

 **Beatriz Perez** stopped transcription