

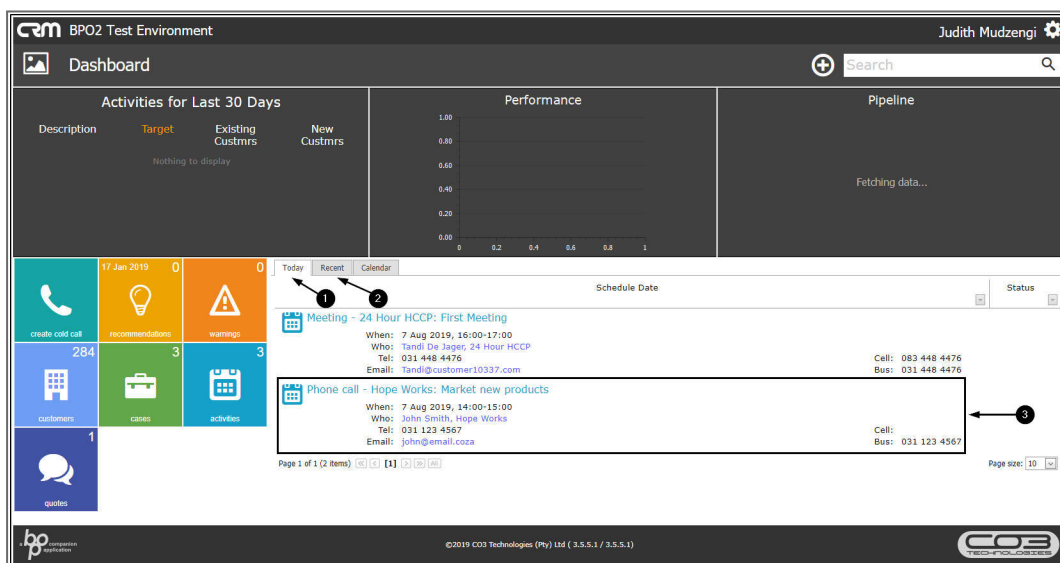
CRM CUSTOMERS

CUSTOMER NOTES

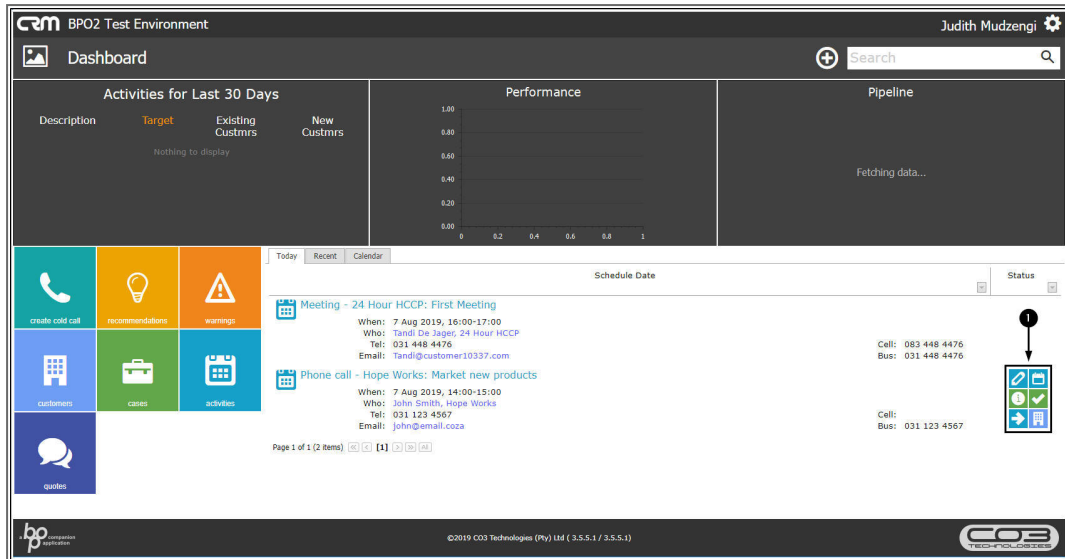
View Customer Notes will list all notes for the selected customer.

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

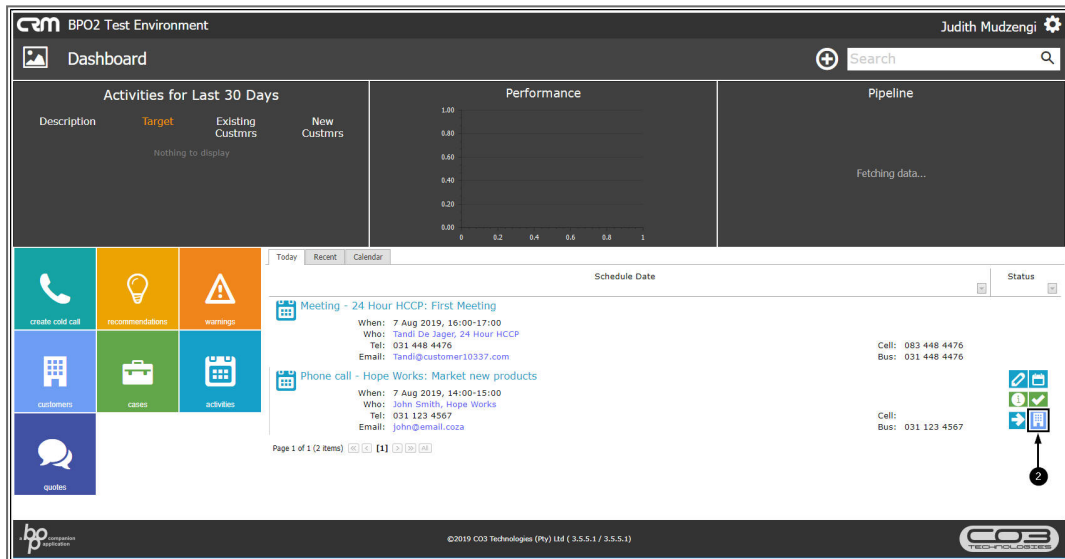
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view notes for.



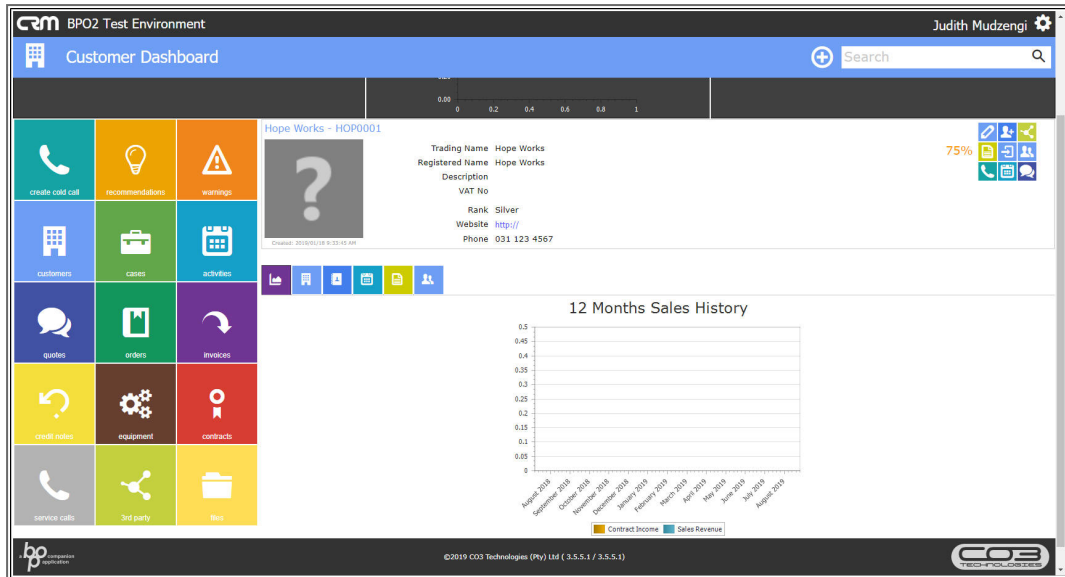
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



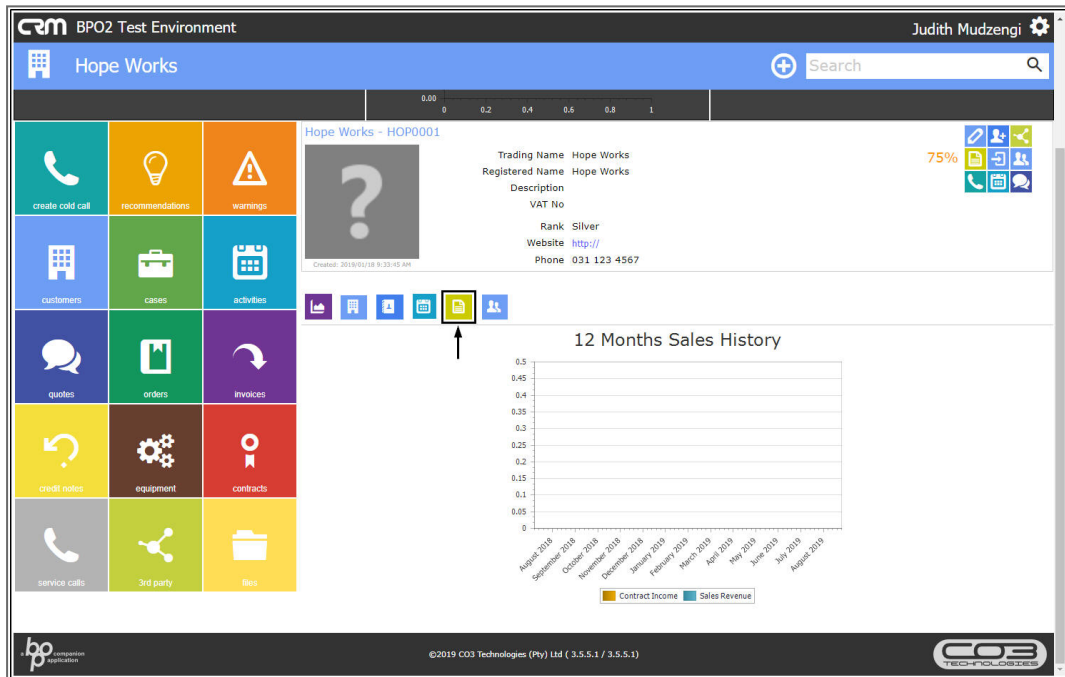
2. Click on the **View Customer** icon.



- The **Customer Dashboard** will be displayed.



- Click on the **Notes** icon.



- You can now view notes linked to the selected customer. If you want to add notes, refer to Customer Details - **Add Notes**.

CRM

BPO2 Test Environment

Judith Mudzengi

Hope Works

Search

0.20

0.00 0 0.2 0.4 0.6 0.8 1

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

Registered Name Hope Works

Description

VAT No

Rank Silver

Website [http://](#)

Phone 031 123 4567

75%

edit

share

add

delete

print

Created: 2019/01/18 9:33:45 AM

Judith Mudzengi - 14 Aug 2019 11:31:16

Check toner yield

Judith Mudzengi - 14 Aug 2019 11:29:00

Existing third party contract pending renewal

Page 1 of 1 (2 items)

1

2

Alt

Page size: 10

bp

business process

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TECHNOLOGIES

CRM.002.017

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