

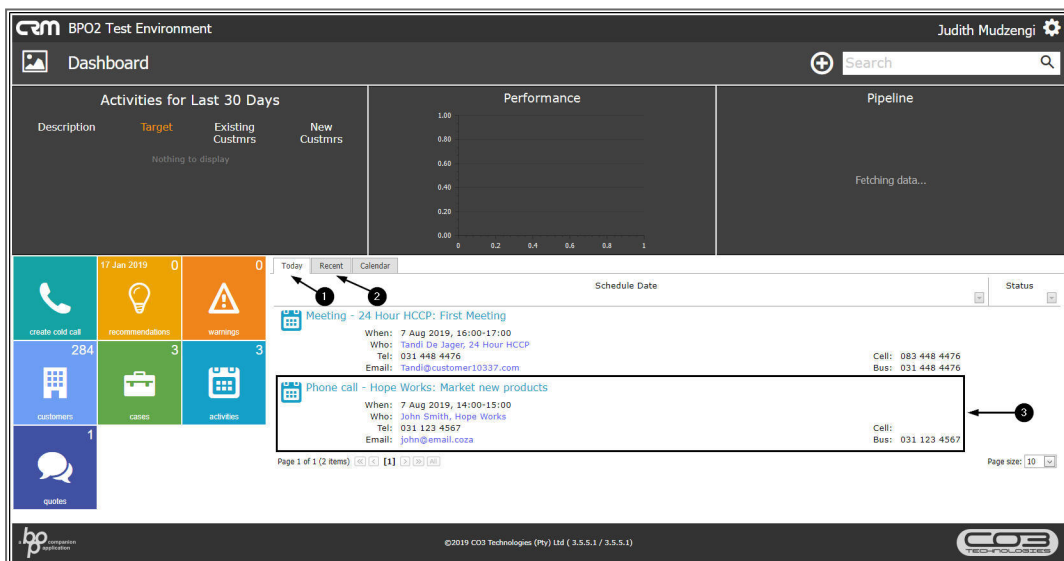
# CRM CUSTOMERS

## CUSTOMER NOTES

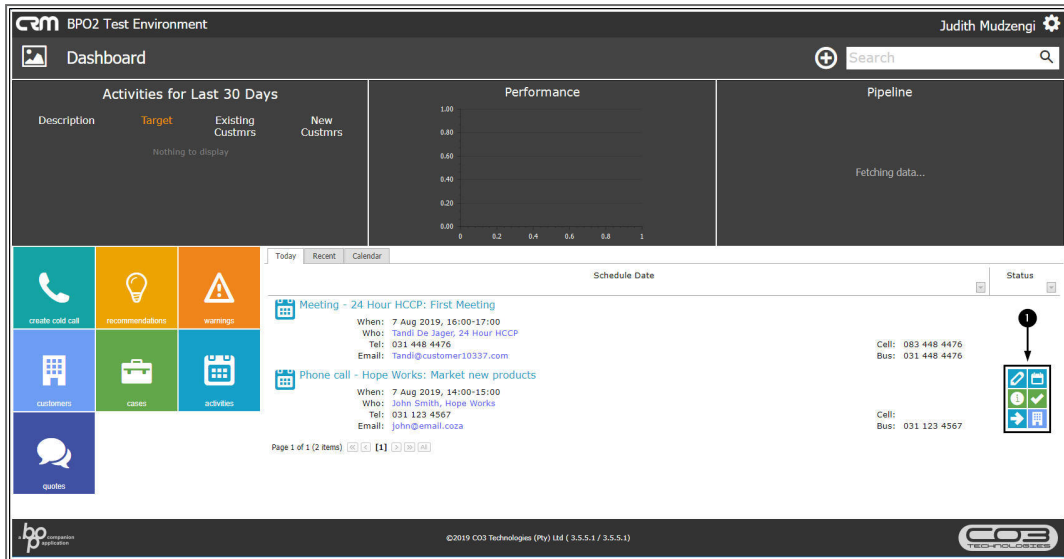
View Customer Notes will list all notes for the selected customer.

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

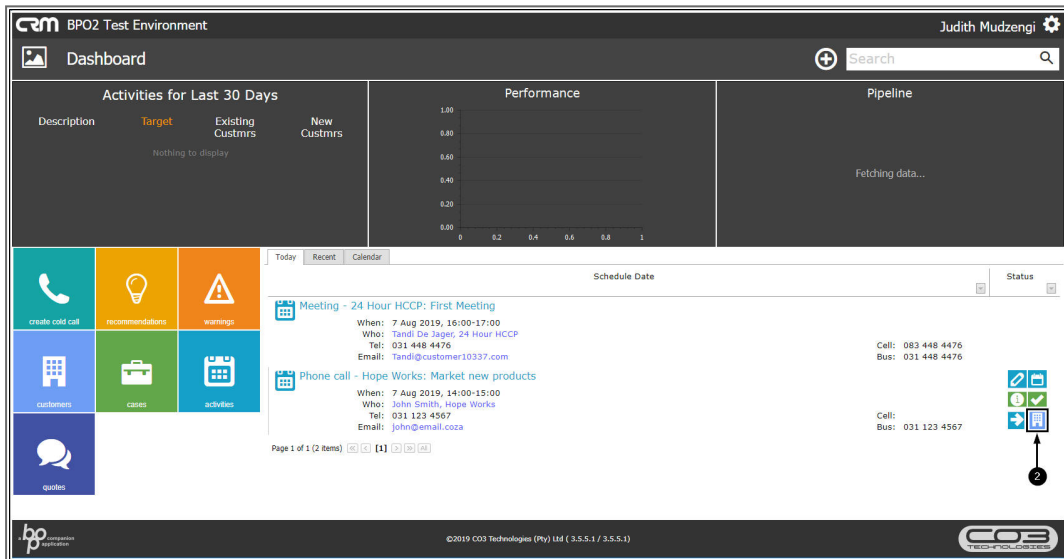
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view notes for.



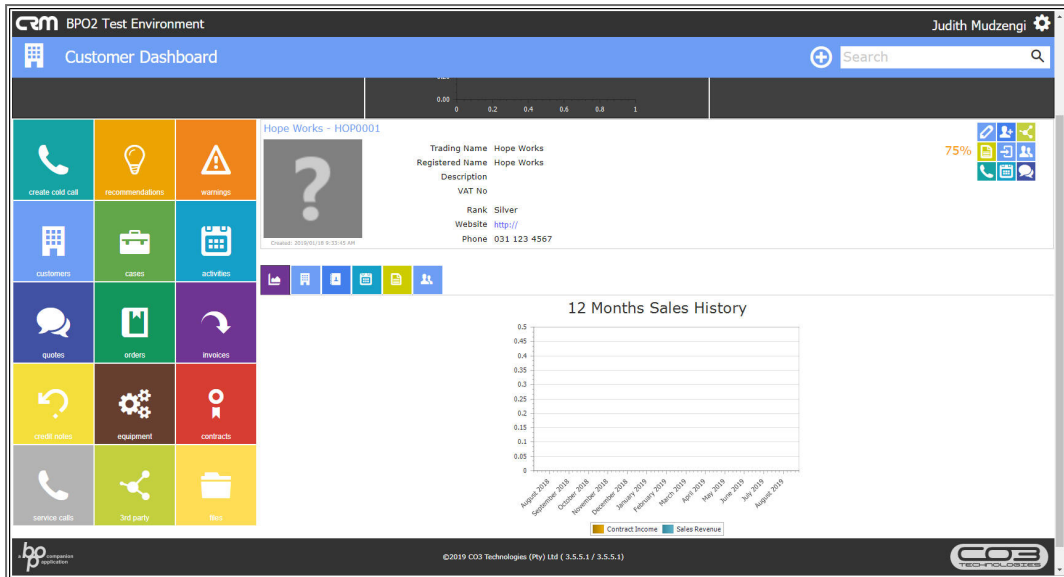
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



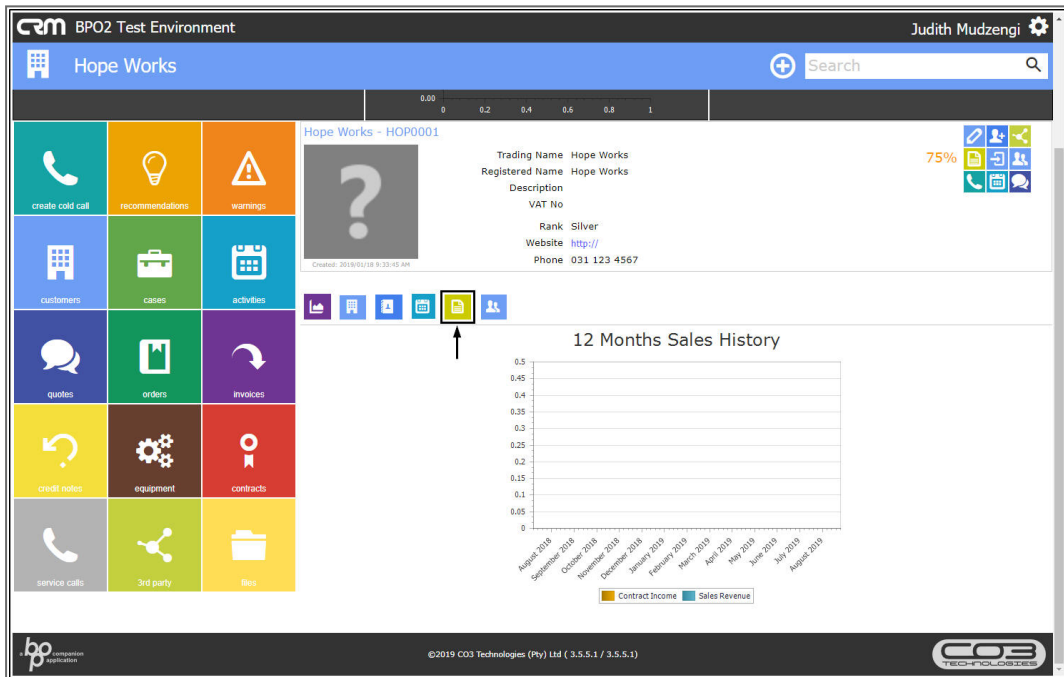
2. Click on the **View Customer** icon.



- 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**.

The screenshot displays the CRM BPO2 Test Environment interface. At the top, it shows 'CRM BPO2 Test Environment' and the user 'Judith Mudzengi'. The main header is 'Hope Works' with a search bar. A progress bar is visible at the top right. The left sidebar contains a grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The main content area shows the customer record for 'Hope Works - HOP0001'. The record details include: Trading Name: Hope Works, Registered Name: Hope Works, Description, VAT No, Rank: Silver, Website: http://, and Phone: 031 123 4567. Below the record, there is a list of activities: 'Judith Mudzengi - 14 Aug 2019 11:31:16 Check toner yield' and 'Judith Mudzengi - 14 Aug 2019 11:29:00 Existing third party contract pending renewal'. The page footer includes '©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)' and the CO3 TECHNOLOGIES logo.

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