# 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*

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.
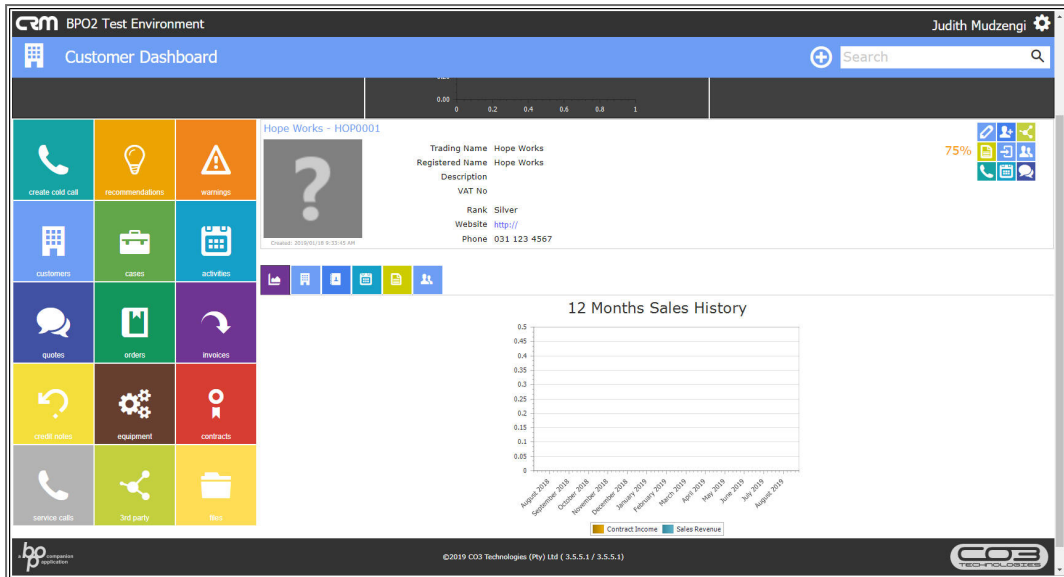3. Hover over an activity linked to the customer you wish to view notes for.
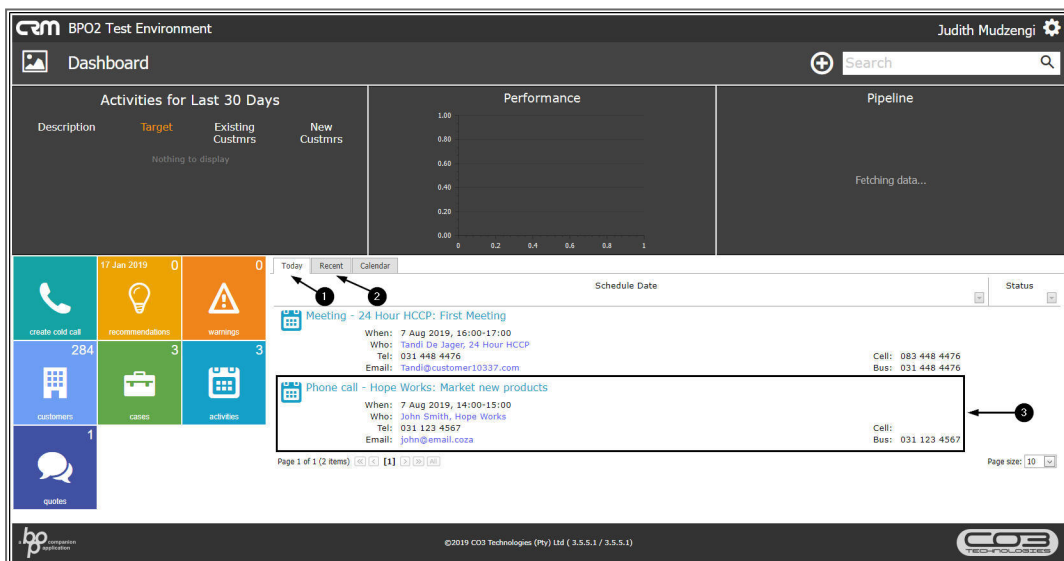
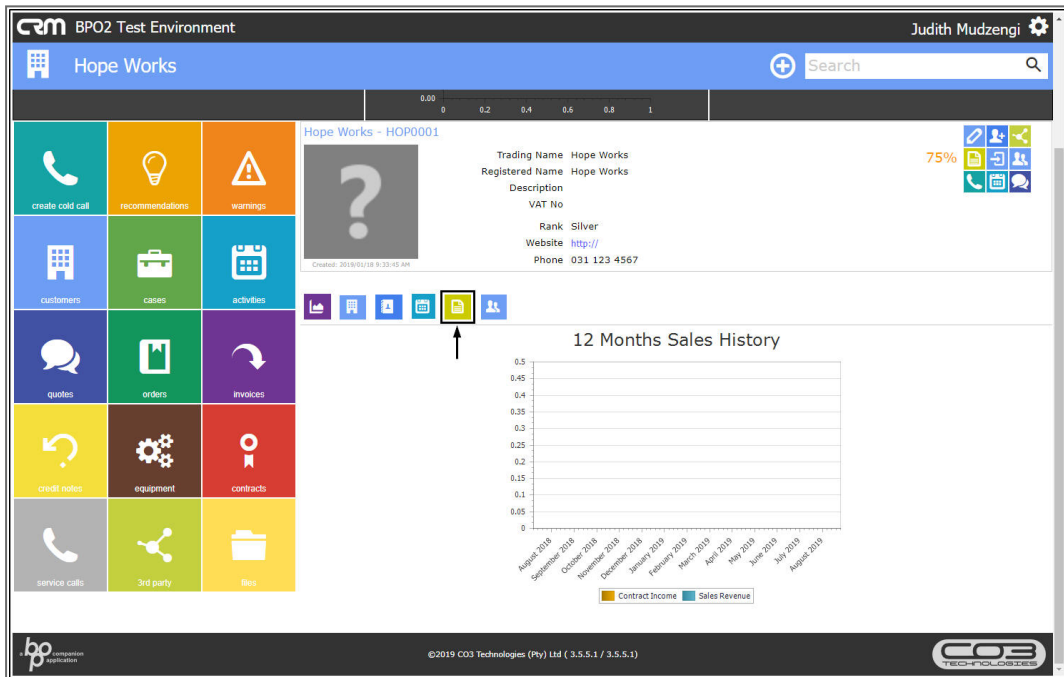1. *Action icons* will be displayed to the right of the customer activity you are hovering over.
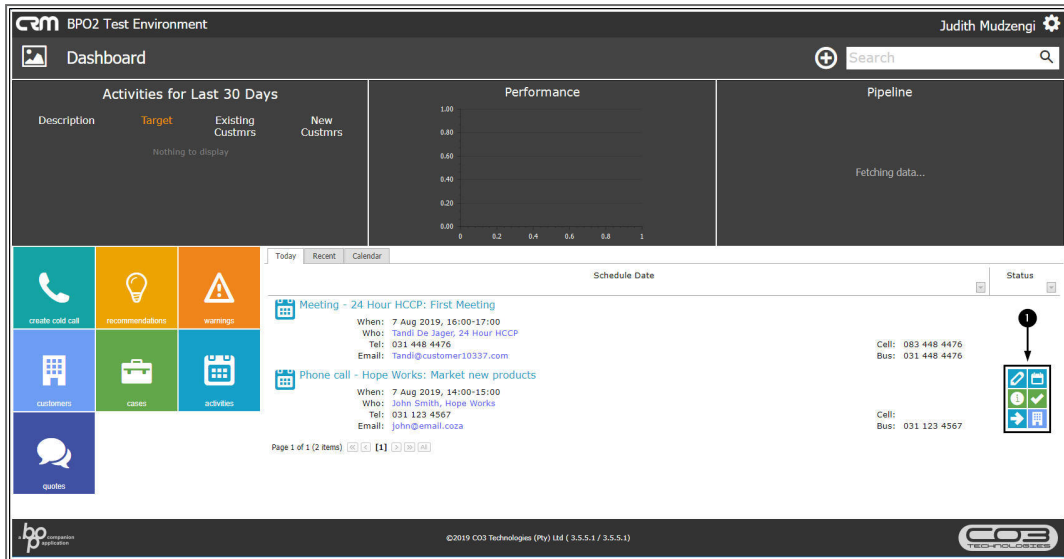
2. Click on the *View Customer* icon.
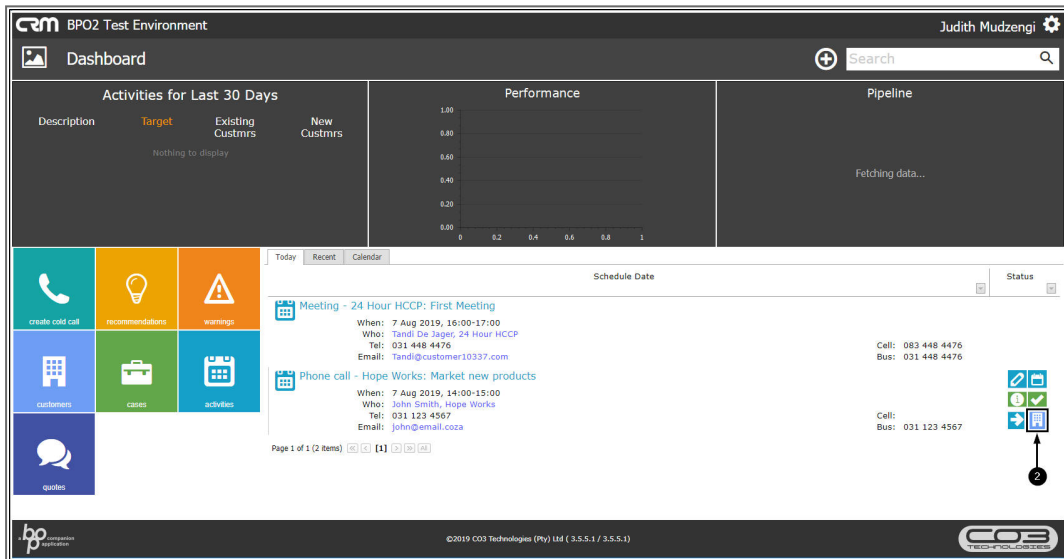
• The *Customer Dashboard* will be displayed.

- 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.

Customer Notes

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