We are currently updating our site; thank you for your patience.

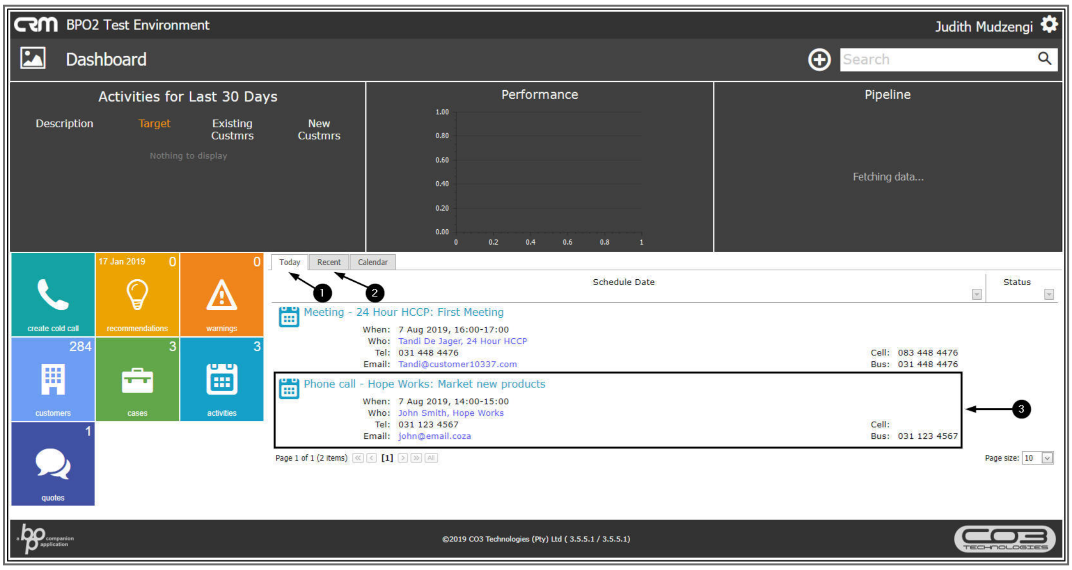
CRM CUSTOMERS

CUSTOMER NOTES

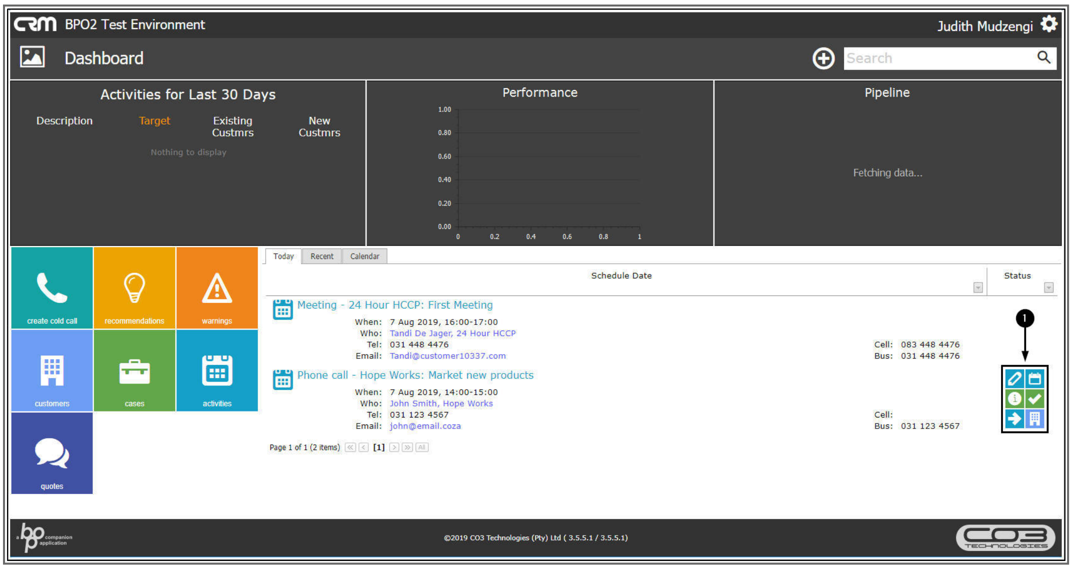
View Customer Notes will list all notes for the selected customer.

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

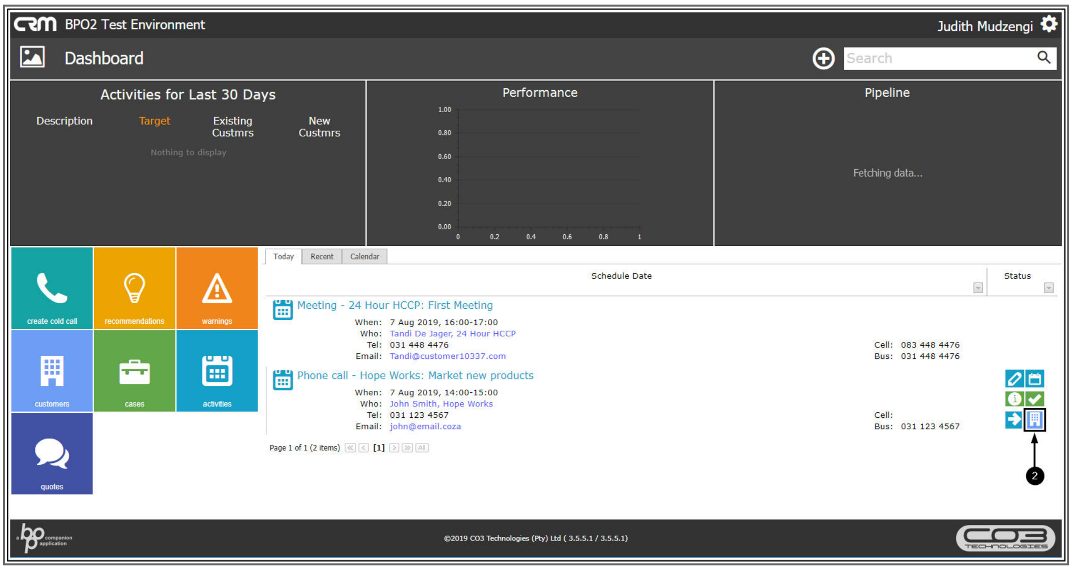
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view notes for.



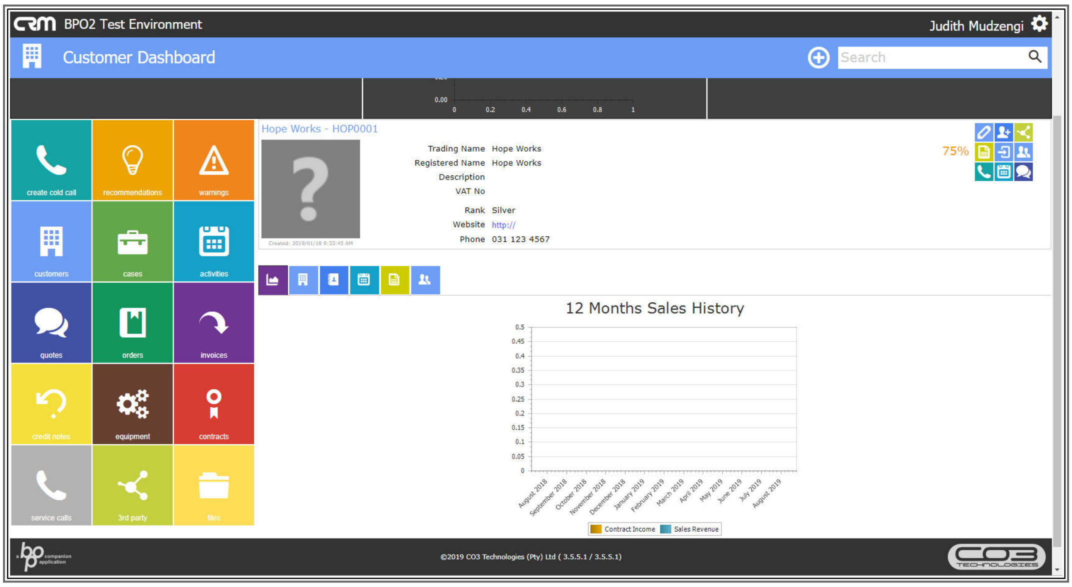
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



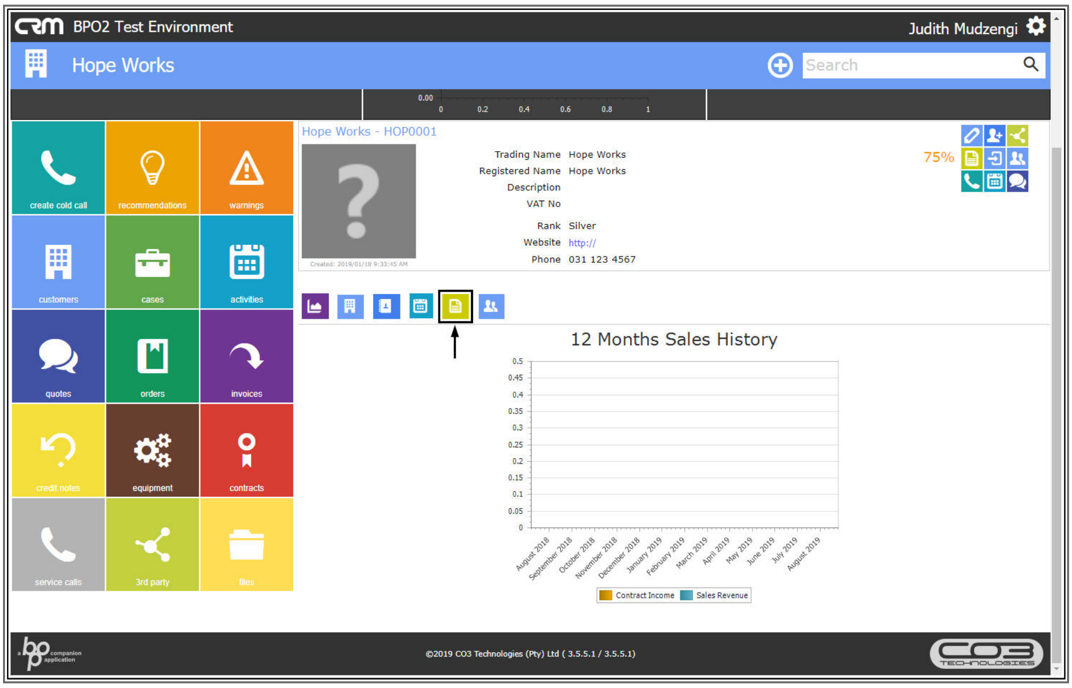
2. Click on the **View Customer** icon.



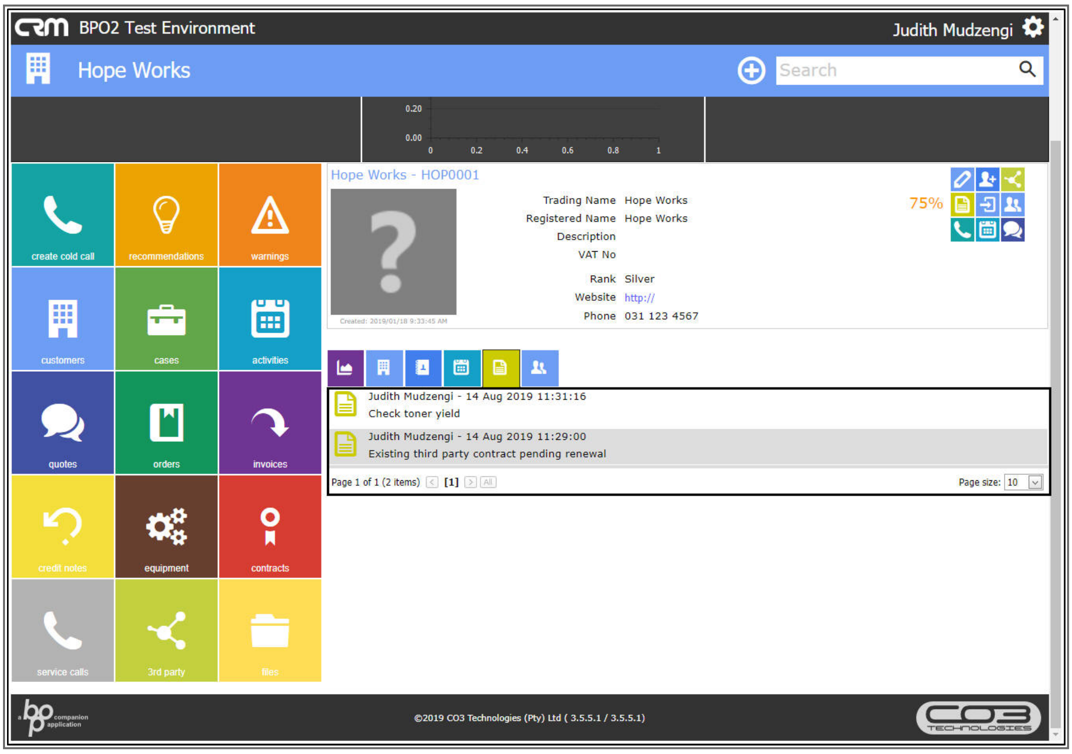
- The **Customer Dashboard** will be displayed.



- 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.


BPO2 Test Environment
Judith Mudzengi
Hope Works
Search
Hope Works - HOP0001
Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
Rank Silver
Website http://
Phone 031 123 4567
75%
create cold call
recommendations
warnings
customers
cases
activities
quotes
orders
invoices
credit notes
equipment
contracts
service calls
3rd party
files
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)
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