

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

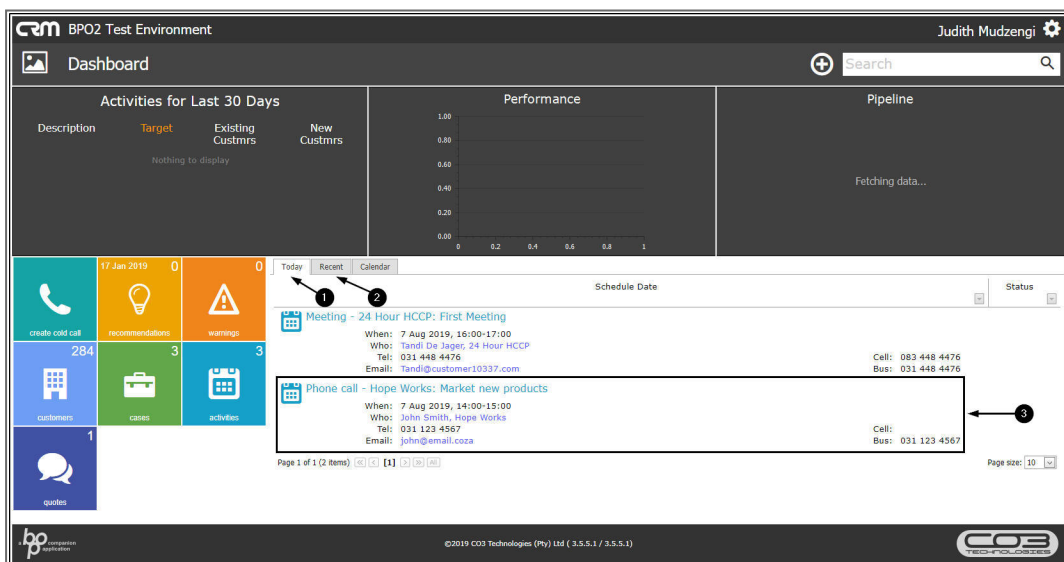
## CRM CUSTOMERS

### CUSTOMER NOTES

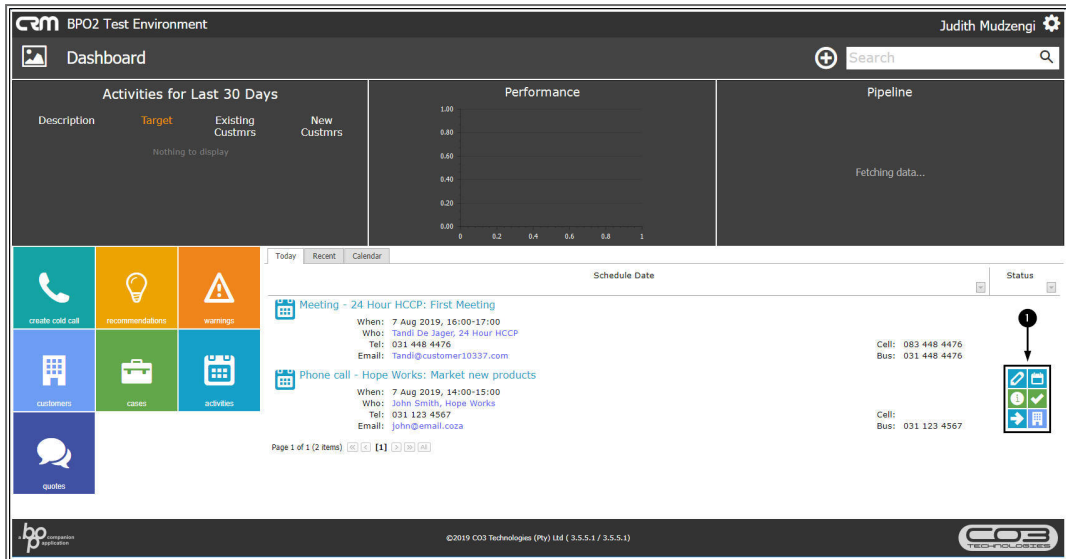
View Customer Notes will list all notes for the selected customer.

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

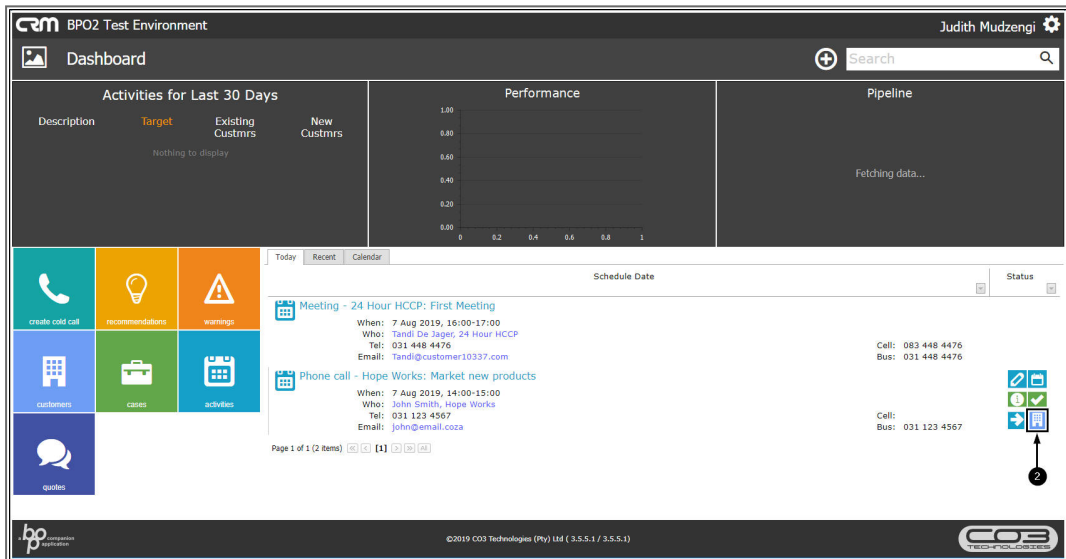
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view notes for.



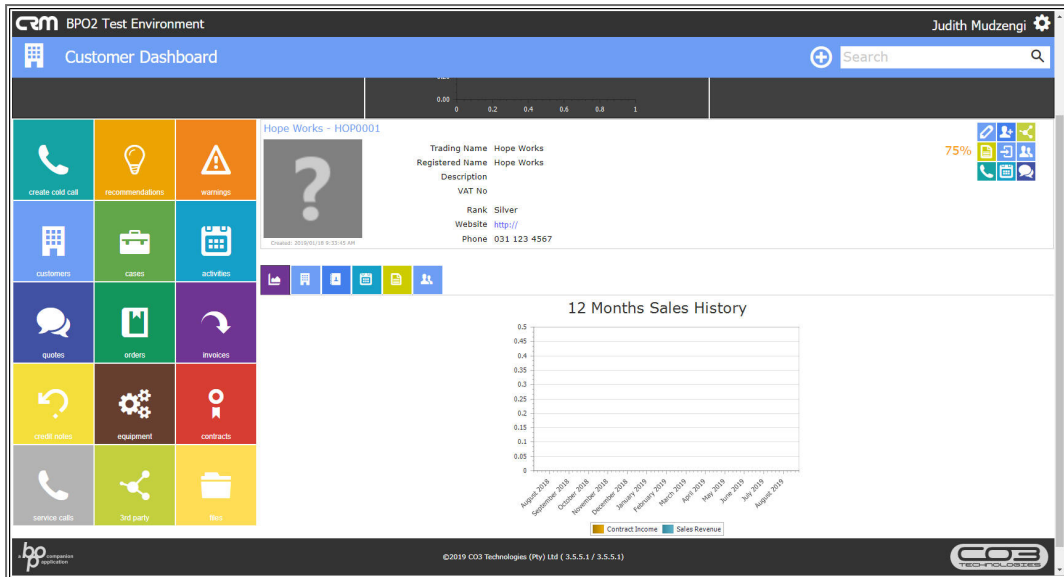
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



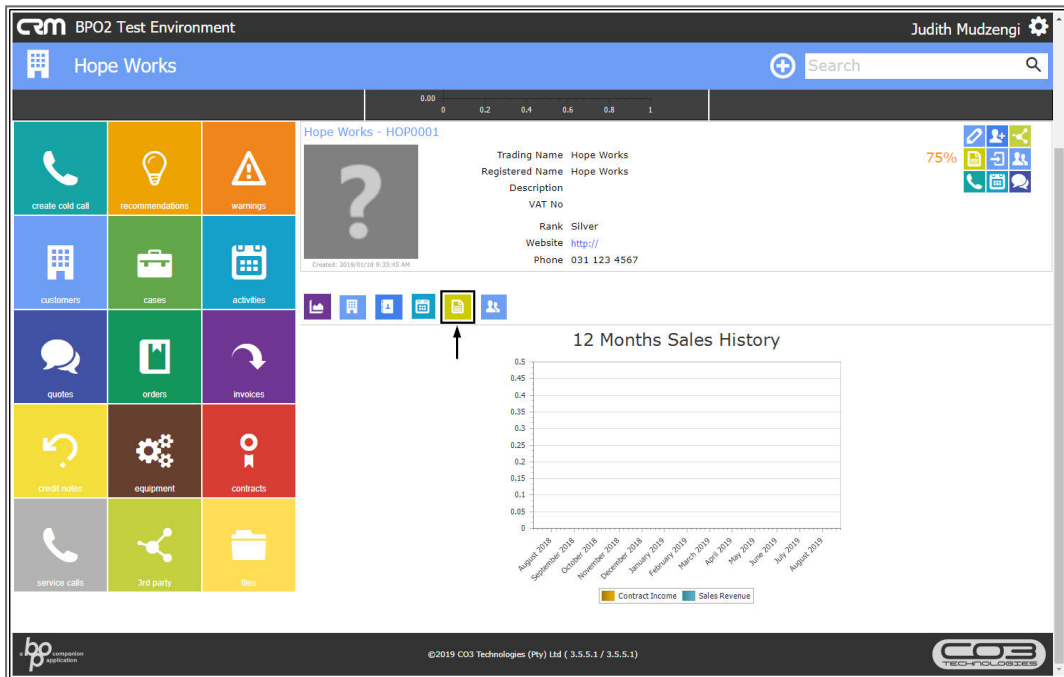
2. Click on the **View Customer** icon.



- 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 interface for a BPO2 Test Environment. The user is Judith Mudzengi. The main view is for a customer named 'Hope Works' (HOP0001). The interface includes a navigation grid on the left with icons for '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's details: Trading Name: Hope Works, Registered Name: Hope Works, Description, VAT No, Rank: Silver, Website: http://, and Phone: 031 123 4567. Below this, there is a list of notes with two entries: '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 interface also features a search bar, a progress indicator at the top, and a footer with the CO3 logo and copyright information.

CRM.002.017