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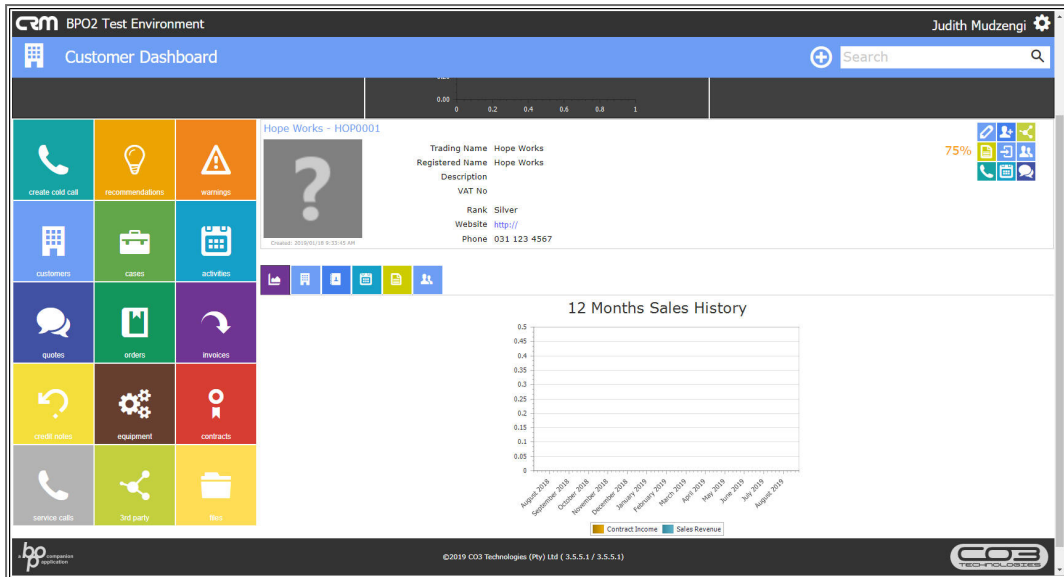3. Hover over an activity linked to the customer you wish to view notes for.
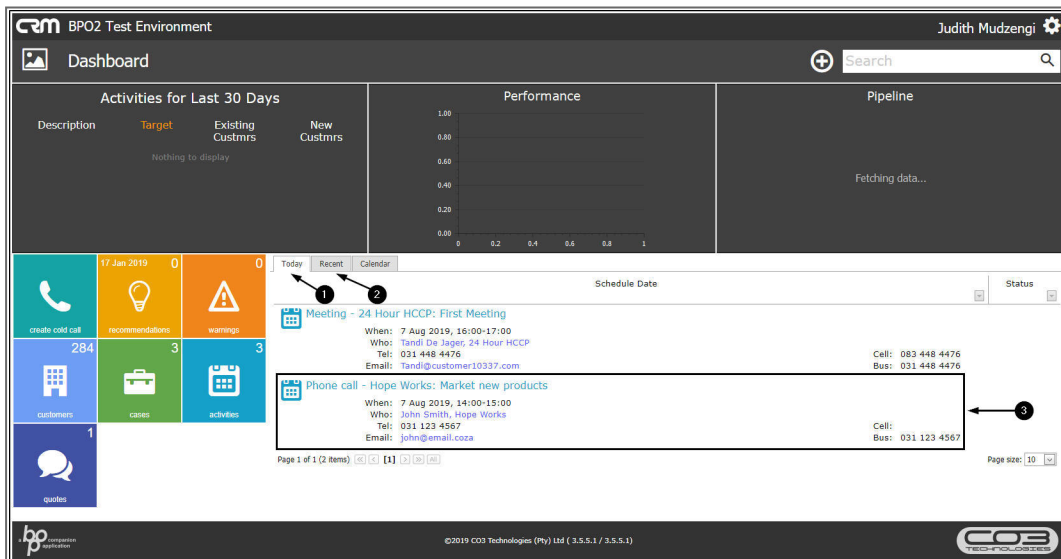
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.
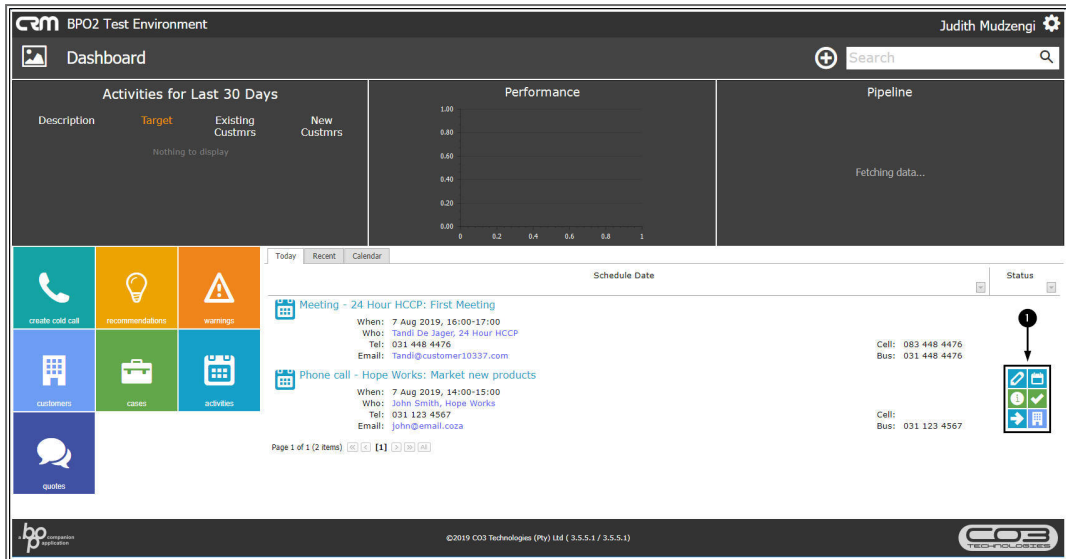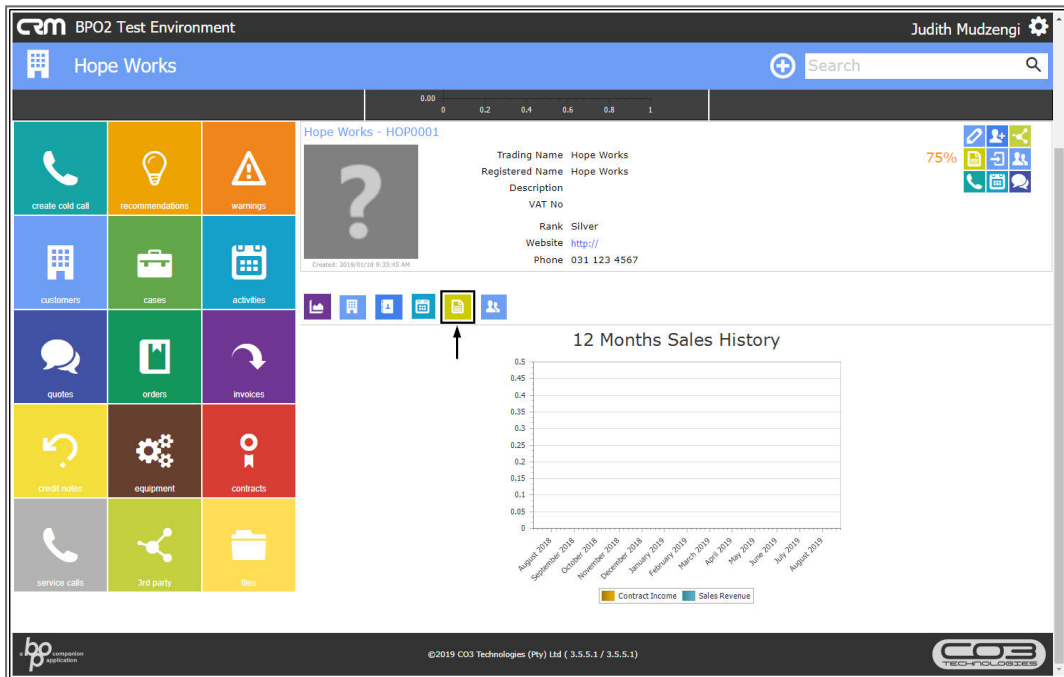
2. Click on the **View Customer** icon.
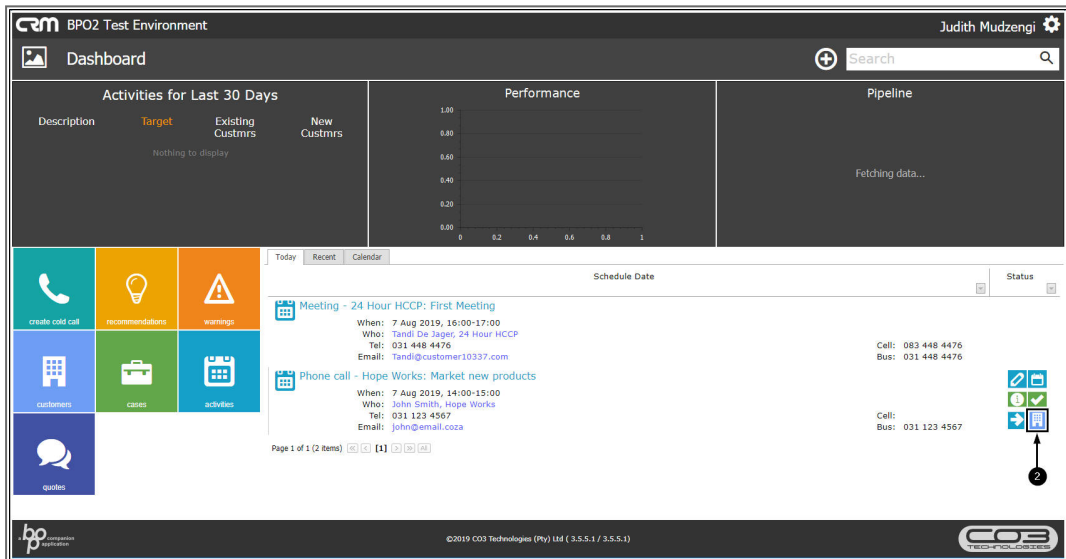
- The **Customer Dashboard** will be displayed.

- 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.

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