

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

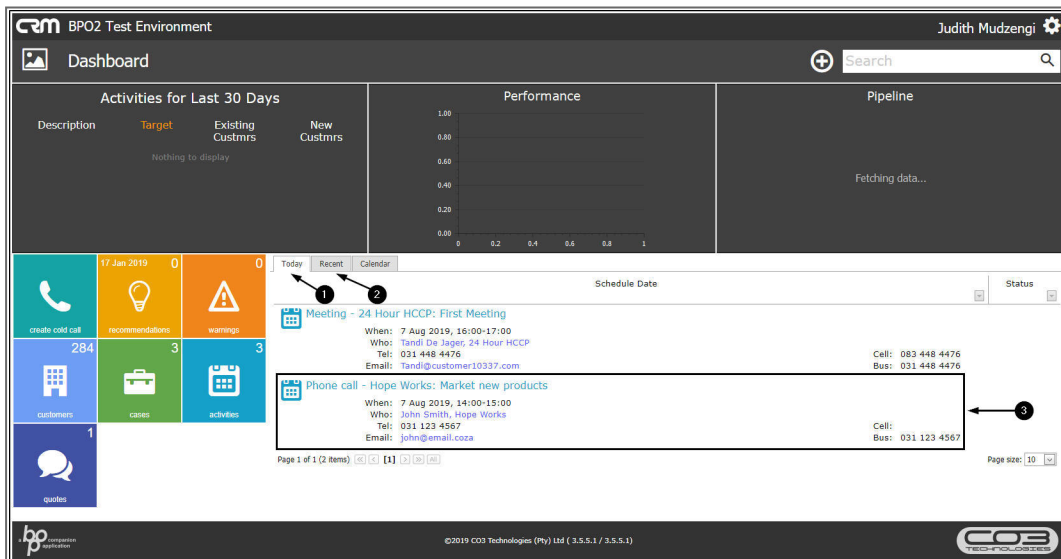
CRM CUSTOMERS

CUSTOMER NOTES

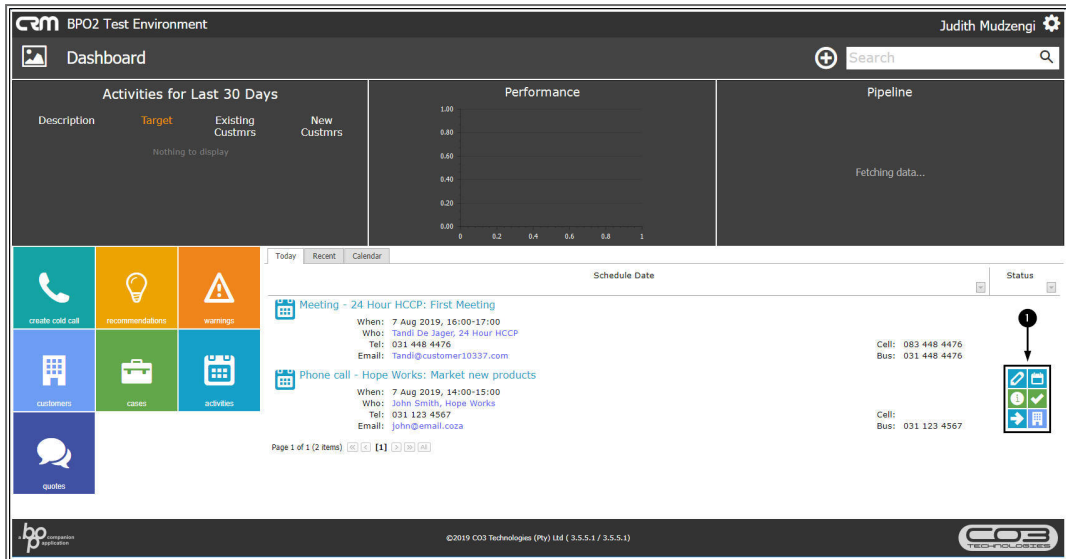
View Customer Notes will list all notes for the selected customer.

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

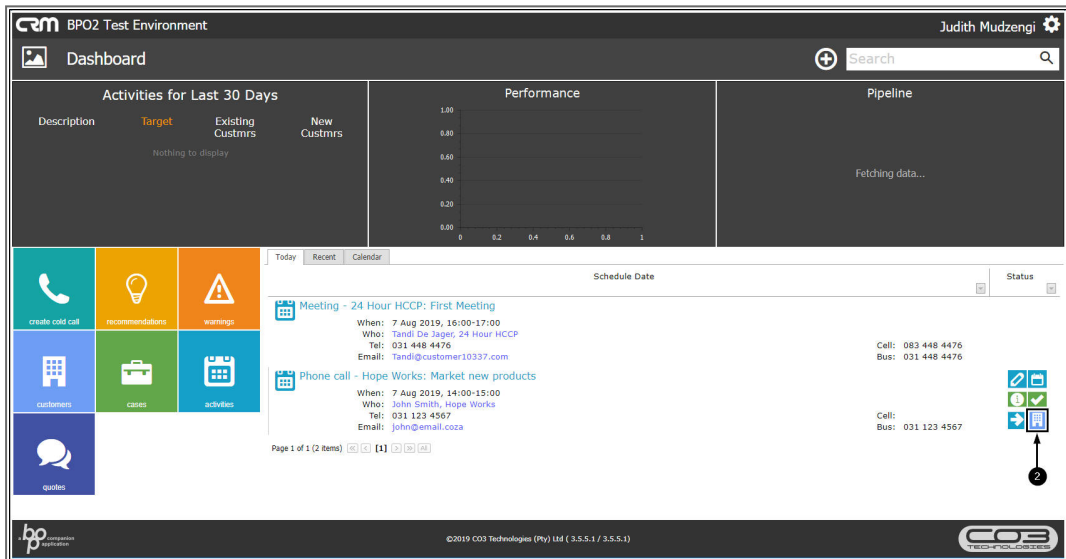
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view notes for.



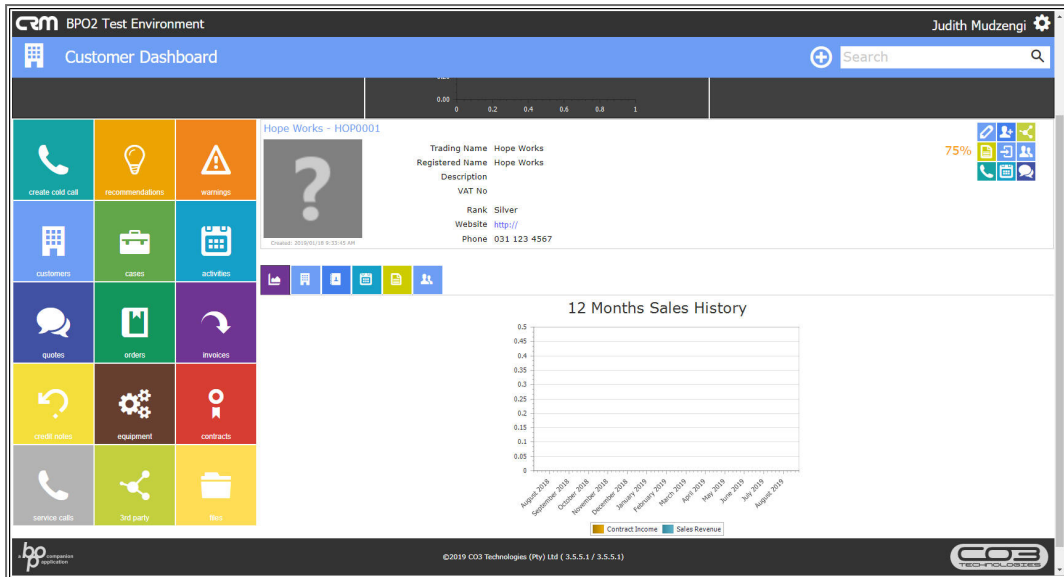
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



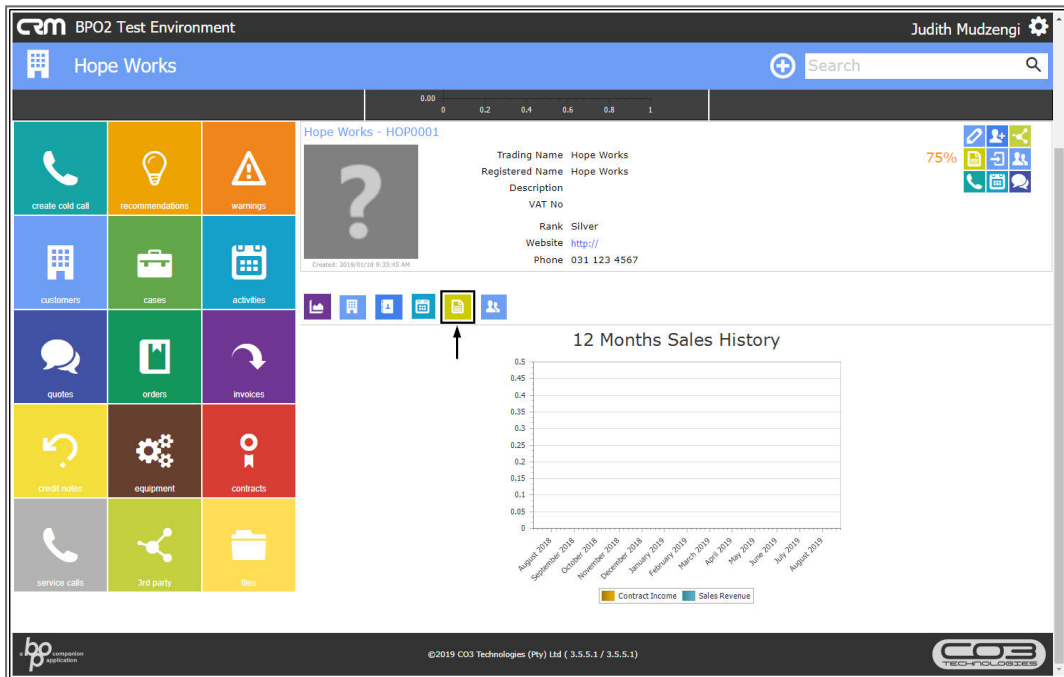
2. Click on the **View Customer** icon.



- 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 a CRM interface for a test environment. The top navigation bar includes the 'CRM BPO2 Test Environment' title, the user name 'Judith Mudzengi', and a search bar. The main content area is titled 'Hope Works' and features a dashboard with various functional tiles: 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. A central panel shows the customer details for 'Hope Works - HOP0001', including a 75% progress indicator and fields for Trading Name, Registered Name, Description, VAT No, Rank (Silver), Website, and Phone (031 123 4567). Below this, a list of notes is visible, 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 includes a footer with 'bp' logo, '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)', and the CO3 TECHNOLOGIES logo.

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