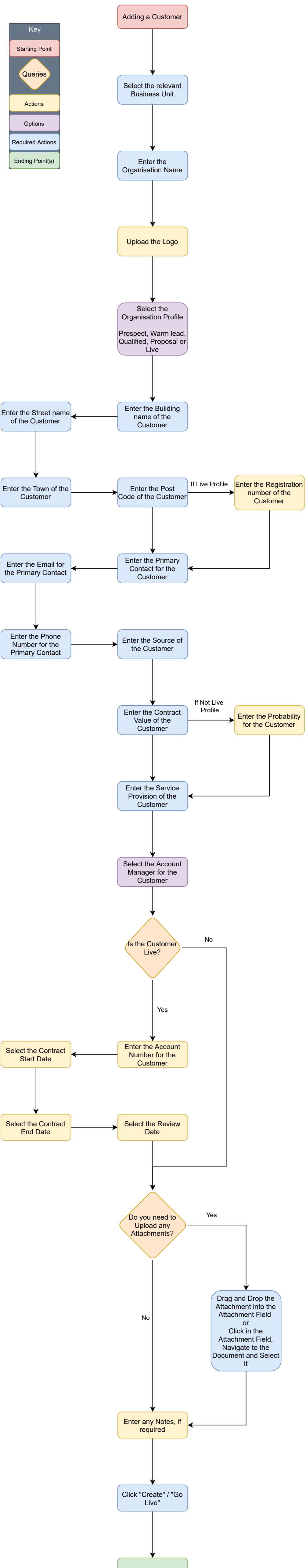
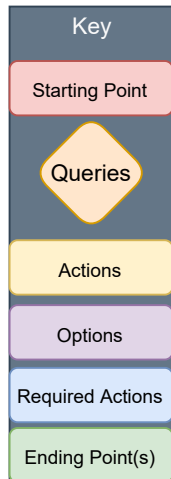


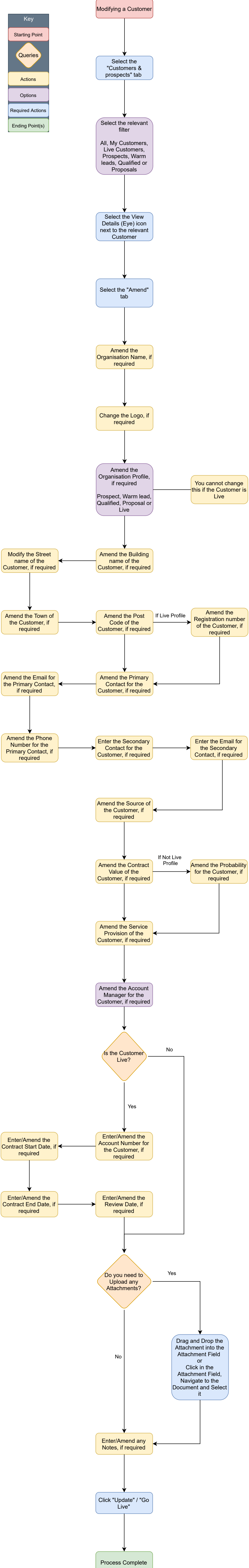
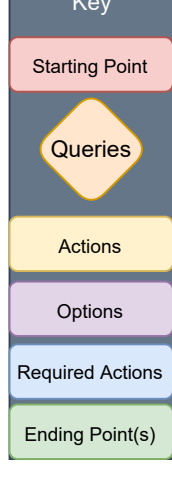


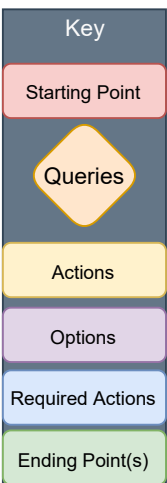
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CRM







Adding Interactions to a Customer

Select the
"Customers &
prospects" tab

Select the relevant
filter

All, My Customers,
Live Customers,
Prospects, Warm
leads, Qualified or
Proposals

Select the View
Details (Eye) icon
next to the relevant
Customer

Select the "Amend"
tab

Enter the New
Interaction

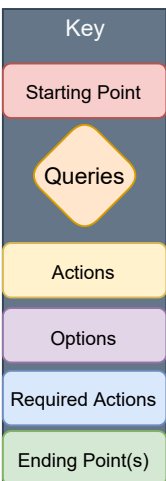
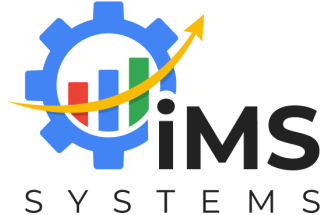
Click "Add"

Do you need to
add another
Interaction?

Yes

No

Process Complete



Deleting a Customer

Select the
"Customers &
prospects" tab

Select the relevant
filter
All, Prospects, Warm
leads, Qualified or
Proposals

Live Customers
cannot be deleted

Select the delete icon
next to the relevant
Customer

Click "Confirm"

Process Complete

