

Customer Notes

The CounterCRM Notes section allows you to read and write notes on a per-customer basis that integrate back into the note system you already know from COUNTERPOINT.

Receiving Notes

Every night as part of the data processing procedure, a copy of all the notes from COUNTERPOINT are loaded into the Counterpoint Cloud Platform database. From here, we display the notes for a customer on both the dashboard portion, and the notes portion of the module in their original form. This includes the name of the person who creates the note, the time it was created at, and the contents of the note.

If a note is created in COUNTERPOINT in the middle of the day, it will appear on the Counterpoint Cloud Platform after the nightly data processing procedure has occurred.

Creating Notes

Creating notes can be done from the "New Note" button on the notes page of the CounterCRM module. Here you have a form to create a note with which is then passed back to Counterpoint, usually within 5 minutes.

To maintain compatibility with COUNTERPOINT, there are some limitations set on the length and style of the note you can create. When creating a note, keep the following in mind:

- Your note is limited to 3 lines
- Each line is limited to 72 characters
- If a line exceeds 72 characters, it is broken into 2 lines

While the Counterpoint Cloud Platform attempts to modify your note to fit these requirements, there are a few cases where it will be unable to do so, and you will receive an error while trying to create your note.

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