

CRM Search

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Introduction

CRM Search stands as a powerful tool designed to enhance efficiency and accessibility within the system. This feature enables users to quickly locate and retrieve customer data, interactions, and relevant information from the CRM database. By providing a streamlined and intuitive search functionality, CRM Search empowers businesses to swiftly access customer profiles, communication history, and transaction details.

Business Process

In this business scenario, company exemplifies the transformative impact of CRM Search on customer support and sales processes. The efficient retrieval of customer data not only enables swift issue resolution but also empowers the sales team to proactively identify and pursue new business opportunities. CRM Search emerges as a pivotal tool in optimizing customer interactions, fostering client satisfaction, and driving business growth.

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Process - CRM Search

Home (37) CRM Search ✕




Name



Phone

Email

Search

BP Name	Contact Name	Type
Confident dental		Business Partner





Name : user have to mention the customer name in this field.

Phone : user have to mention the phone no in this field

Email : user have to mention the email in this field

while the user click on the "ok" button system will show the result.