Understanding the Related Tab

Customer Activity

This tab is very important as it gives a view of the customer relationship and past activities.

1. This video shows how you can use the related tab on a record (lead, opportunity, account, etc) to access to all the related items that have been created and associated to that record. For example:
   - quotes and orders which are related to an opportunity
   - activities which are related to a lead
   - vehicles, opportunities and quotes that are associated to a customer account

Click on the video to start