



## **c360 Summary User Guide**

Microsoft Dynamics CRM 2011 Compatible

Friday, April 15, 2011

c360 Solutions, Inc.  
Products@c360.com  
[www.c360.com](http://www.c360.com)



## Table of Contents

---

Overview .....	3
Summary .....	4
Accessing Summary .....	4
Working with Summary .....	4
My Summary .....	6
Configuring My/Summary: 'My Preferences' .....	7
General tab.....	7
My Summary tab .....	8
Summary tab .....	9
Record Filtering tab.....	10
Advanced tab .....	11
Quick Filter .....	12
Activity Type .....	12
Date Field .....	12
Condition .....	12



# Activity Summary

---

## Overview

c360 Solutions Microsoft CRM Activity Summary is a Microsoft CRM enhancement that provides Microsoft CRM users with an integrated, personalized screen displaying all open and closed activities and notes associated with all major Microsoft CRM entities. Activity Summary allows Microsoft CRM users to:

- Read emails in one screen with a preview section to see the main text of the email and if any attachments are associated
- Chronologically roll-up all open and closed Activities, Notes and CRM records (i.e. Opportunities, Cases) for all CRM record types including Lead, Contact, Account, Opportunity, Quote, Order, Invoice, Case, Contract, Campaign and Custom entities.
- Configure by user the columns to be displayed in the Summary and My Summary views
- Read the contents of activities and CRM records using Summary's optional, user-configurable auto-preview pane
- Quickly filter the information displayed by object type, activity type and date range
- See all Activities and Notes associated with the Originating Lead for Contact, Account and Opportunity records that have been converted from a Lead
- Immediately see which Email Activities and Notes have attached documents (paperclip icon appears) and immediately see the names of the documents
- See all Activities and Notes associated with the Originating Lead for Contact, Account and Opportunity records that have been converted from a Lead
- Immediately see which Notes and Activities have attached documents (paperclip icon)
- Quickly open attached documents directly from Summary screens
- Quickly add new Activities, Notes or Phone Activities (directly) from the Activity Summary screen
- Print the CRM summary page or export it to Microsoft Excel
- Sort ascending and descending by any column in the summary listing



## **Summary**

### **Accessing Summary**

Summary can be accessed from the left navigation bar of the entity form by clicking the 'Summary' icon.

### **Working with Summary**

#### ***CRM Entities***

Summary can be configured to work with the following CRM entities: Leads, Contacts, Accounts, Opportunities, Quotes, Orders, Invoices, Cases, Contracts, Custom entities.

#### ***Display Behavior***

All Summary roll-ups display all activities, notes and CRM records (opportunities, cases) associated with the current object. For example, the Summary on a Contact record lists all activities regardless of whether the activity is linked to the contact through the activity's 'Regarding' field or through the activity's 'Recipient', 'Attendee' or 'Organizer' fields.

#### ***Number of Records***

The number of records displayed per page in Summary is determined by the user's Records per Page CRM setting, which can be found by going to Tools>Options from CRM's main window.

#### ***Grid Resizing***

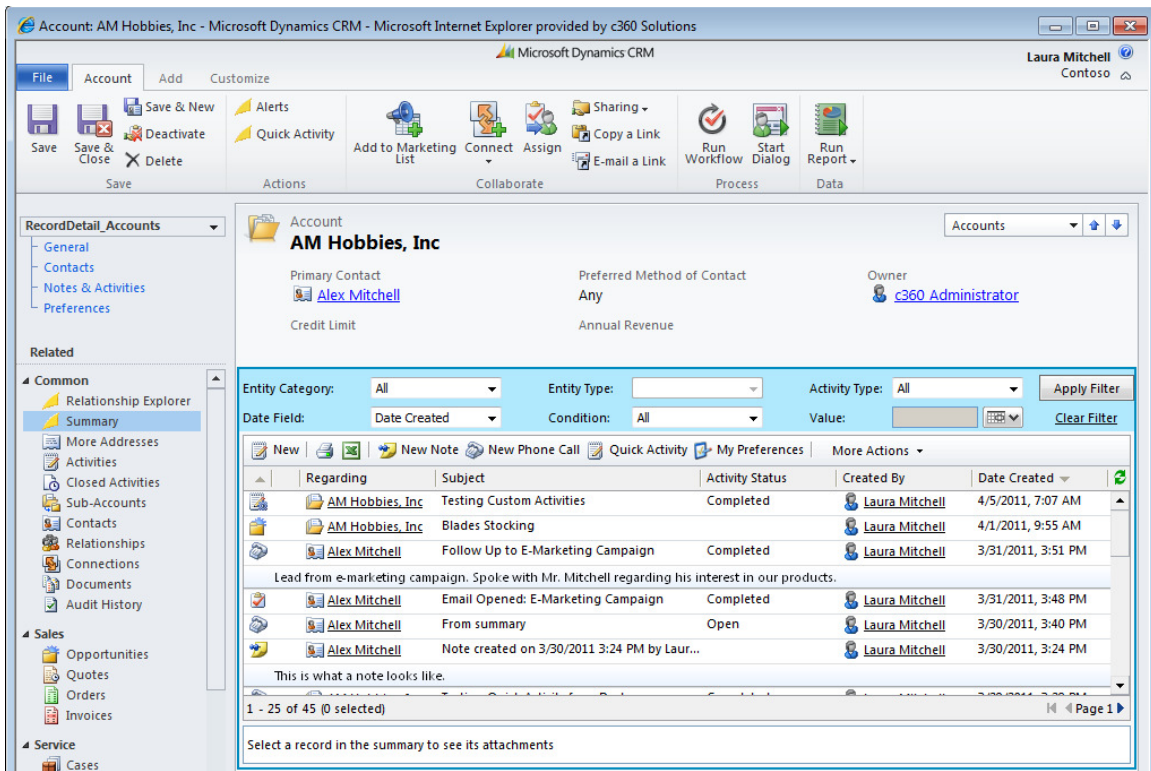
Columns in the Summary grid can be resized by simply dragging the mouse over the column borders.

#### ***My Preferences***

Summary can be personalized to display just the columns, sorting, and record types that suit individual needs. More details in the following sections

#### ***Attachment Indicator***

Activities and Notes with attached documents can be displayed with a paper clip icon. When the user selects a record with an attachment, the attachment pane in the bottom of the screen displays the file name. Users can launch the attachment by clicking on the filename.



The screenshot shows the Microsoft Dynamics CRM interface for the account "AM Hobbies, Inc". The left-hand navigation pane includes sections for "RecordDetail\_Accounts" (General, Contacts, Notes & Activities, Preferences), "Related" (Common, Summary, More Addresses, Activities, Closed Activities, Sub-Accounts, Contacts, Relationships, Connections, Documents, Audit History), "Sales" (Opportunities, Quotes, Orders, Invoices), and "Service" (Cases). The main content area displays the account details for "AM Hobbies, Inc", including the primary contact "Alex Mitchell", preferred method of contact "Any", owner "c360 Administrator", and fields for credit limit and annual revenue. Below the account details is a filter section with "Entity Category" set to "All", "Entity Type" as a dropdown, "Activity Type" set to "All", and "Date Field" set to "Date Created". The activity summary table below shows a list of activities:

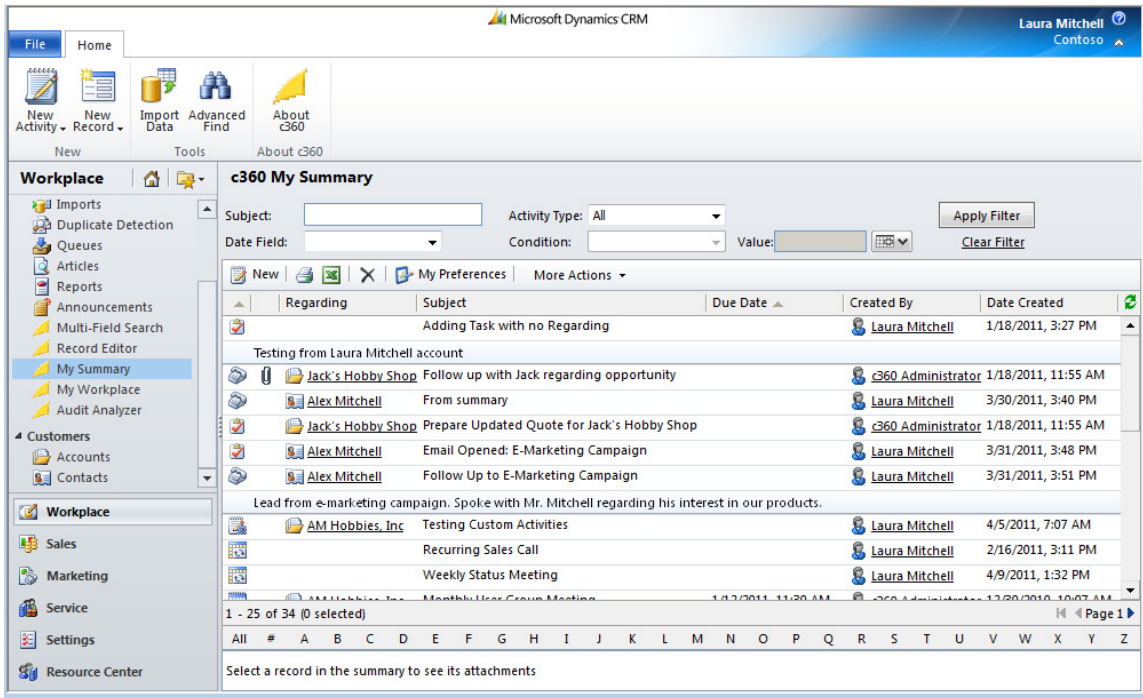
Regarding	Subject	Activity Status	Created By	Date Created
AM Hobbies, Inc	Testing Custom Activities	Completed	Laura Mitchell	4/5/2011, 7:07 AM
AM Hobbies, Inc	Blades Stocking		Laura Mitchell	4/1/2011, 9:55 AM
Alex Mitchell	Follow Up to E-Marketing Campaign	Completed	Laura Mitchell	3/31/2011, 3:51 PM
Lead from e-marketing campaign. Spoke with Mr. Mitchell regarding his interest in our products.				
Alex Mitchell	Email Opened: E-Marketing Campaign	Completed	Laura Mitchell	3/31/2011, 3:48 PM
Alex Mitchell	From summary	Open	Laura Mitchell	3/30/2011, 3:40 PM
Alex Mitchell	Note created on 3/30/2011 3:24 PM by Laur...		Laura Mitchell	3/30/2011, 3:24 PM

Below the table, there is a preview of a note: "This is what a note looks like." The page shows "1 - 25 of 45 (0 selected)" records and is on "Page 1".

**Figure 1:** The Activity Summary Screen for an Account object

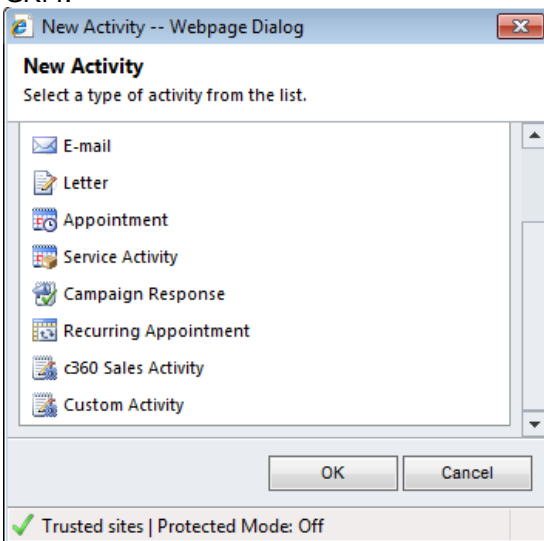
## My Summary

My Summary, which can be launched from the Microsoft CRM navigation bar, displays all open activities for the active user. My Summary also allows the user to 'Quick Filter' on activity types and activity date fields. (see below)



**Figure 2a:** My Summary displays open activities for active user

Users can also create new activities from the menu bar by clicking 'New' and selecting the activity type. Complete the form and click 'OK' to add the activity to CRM.



**Figure 2b:** New Activity options

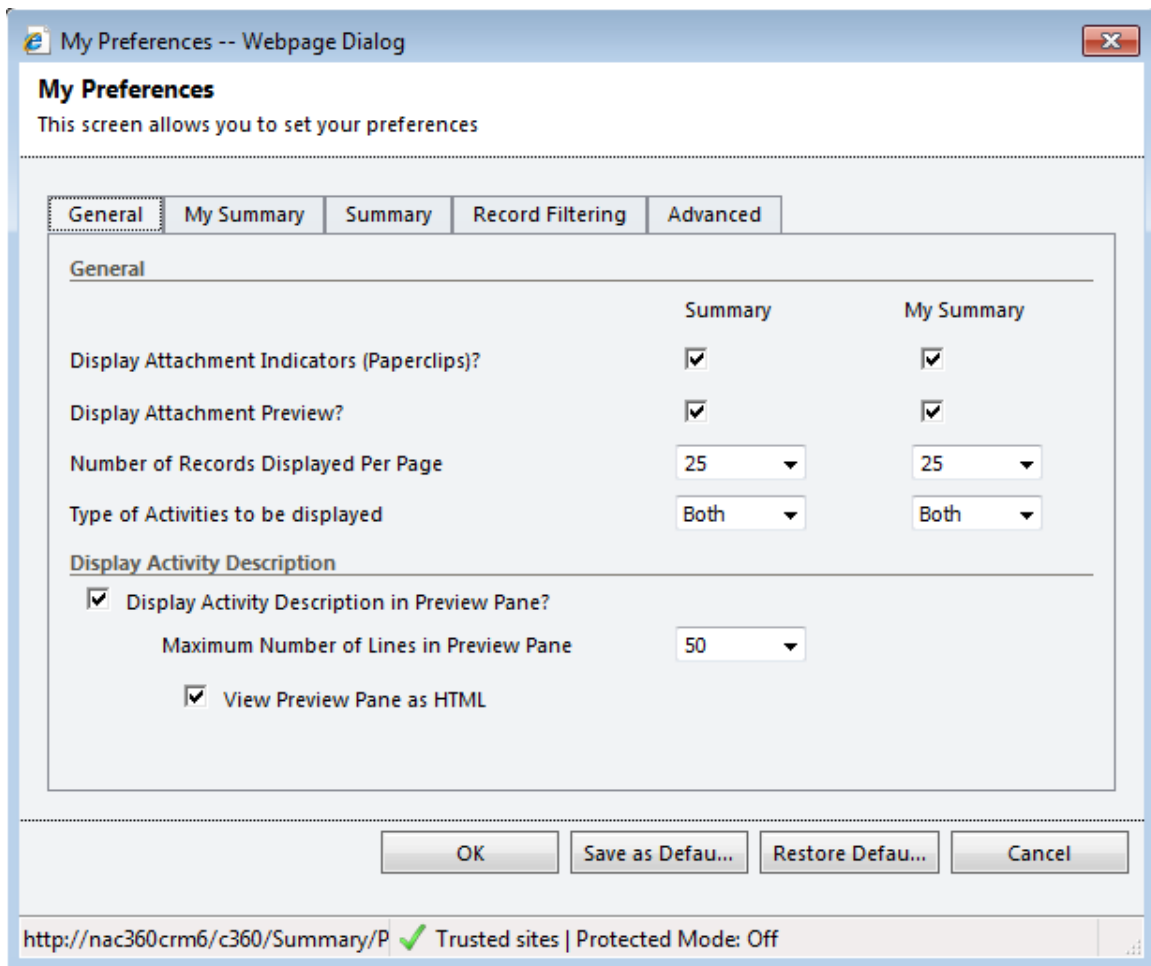
## Configuring My/Summary: 'My Preferences'

Summary preferences can be set by clicking the My Preferences button from Summary on any entity or from the My Summary screen. The preferences screen is shown below.

### General tab

Set attachment indicator preferences, as well as whether to display 'All entity categories' as the entity category filter list by default, on the General tab as displayed in Figure 3. The user can also set whether to view the activity description in the preview pane as well as the number of lines.

Also note, the user can set the Maximum Number of Lines in Description to 'Display All' by which the user can passively scroll through the entire activity description without having to open the actual activity.

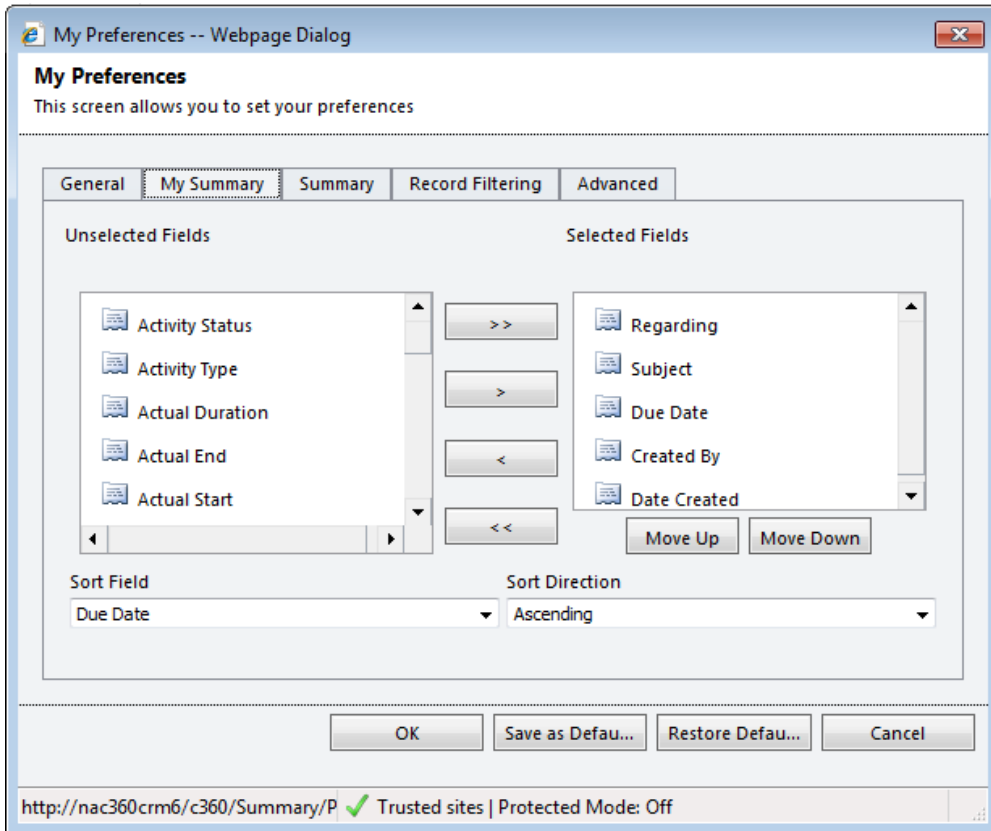


	Summary	My Summary
Display Attachment Indicators (Paperclips)?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Display Attachment Preview?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Number of Records Displayed Per Page	25	25
Type of Activities to be displayed	Both	Both
<b>Display Activity Description</b>		
<input checked="" type="checkbox"/> Display Activity Description in Preview Pane?		
Maximum Number of Lines in Preview Pane	50	
<input checked="" type="checkbox"/> View Preview Pane as HTML		

**Figure 3:** General preferences tab

## My Summary tab

Choose which fields are displayed on Activity Summary by using the arrow buttons, as shown in Figure 4.

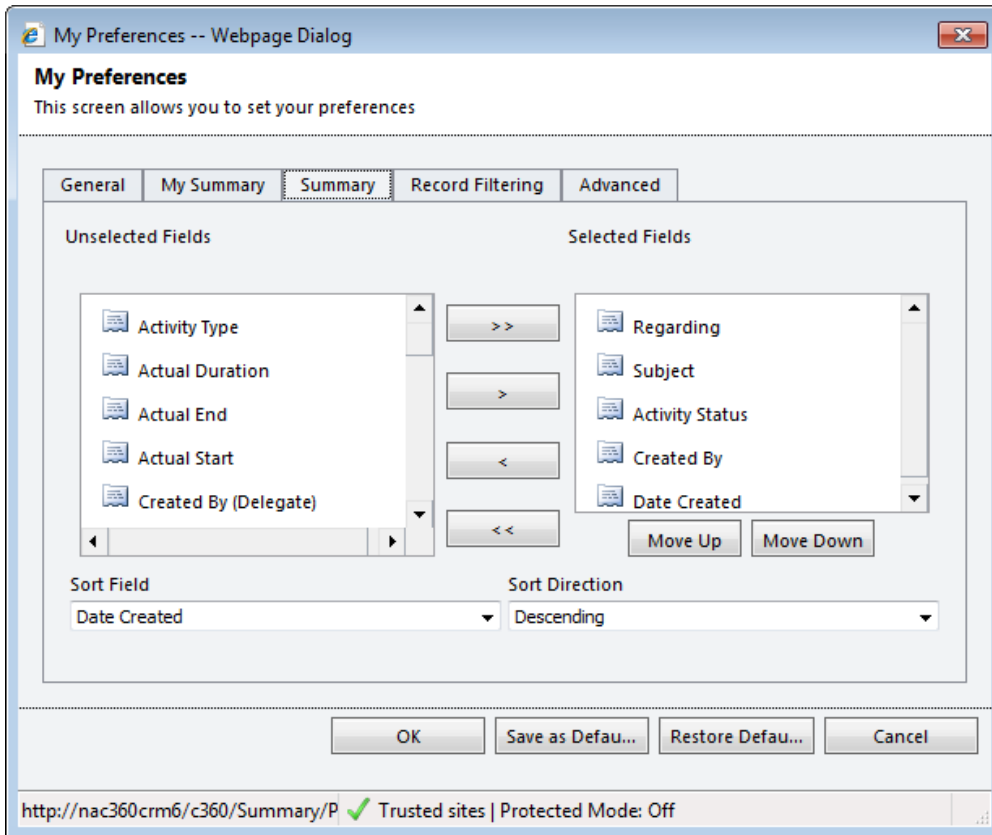


**Figure 4:** Activity Summary preferences tab



## Summary tab

Choose which columns are displayed in My Summary using the arrows, as displayed in Figure 5.



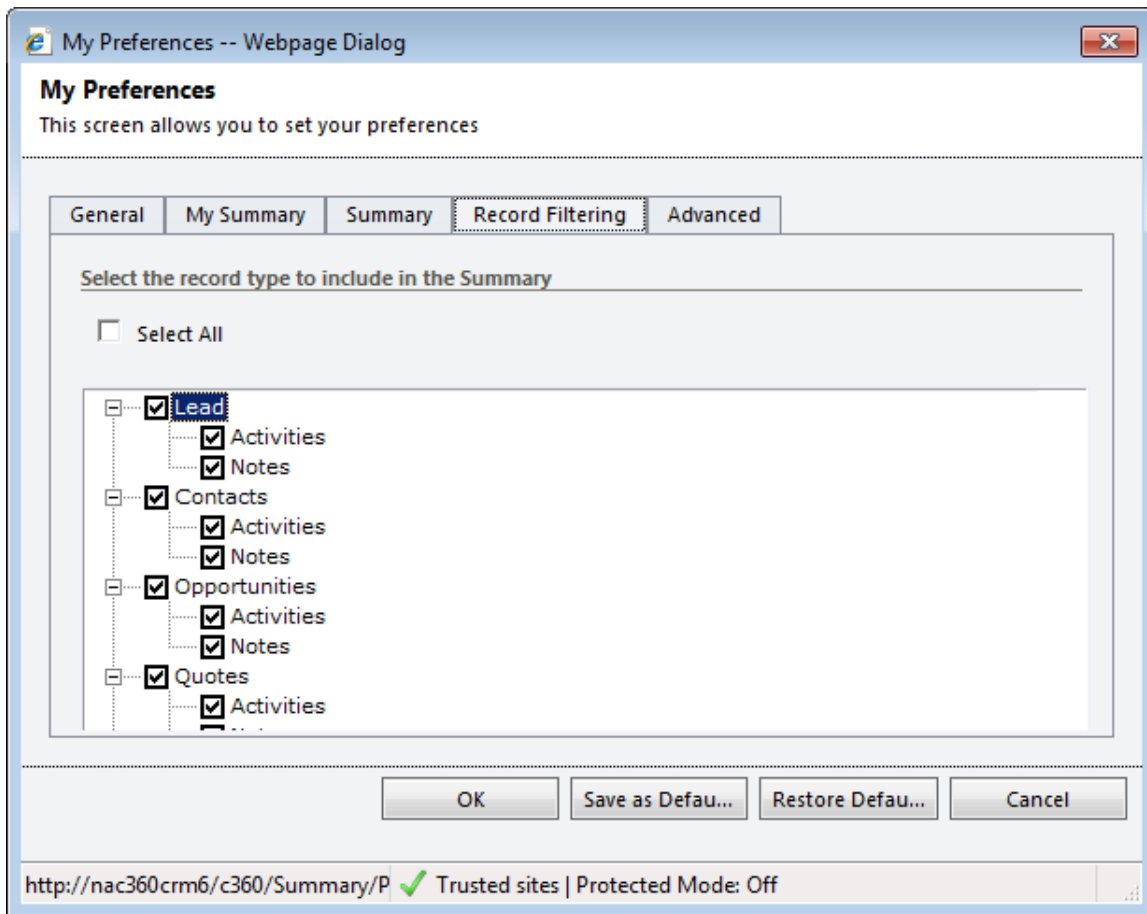
**Figure 5:** My Summary preferences tab

### Record Filtering tab

This tab allows the active user to configure what information is displayed in Summary as show in Figure 8. The user can choose to select which entities and associated activities and/or notes get rolled up in the Summary view. The user can also select any custom entities here. The user can also set specifically whether to roll up just the entity or the activities and/or the notes associated with it. So the user may choose to only see the Opportunity entity rolled up along with activities and notes whereas only the Quote entity activities.

**Note:**

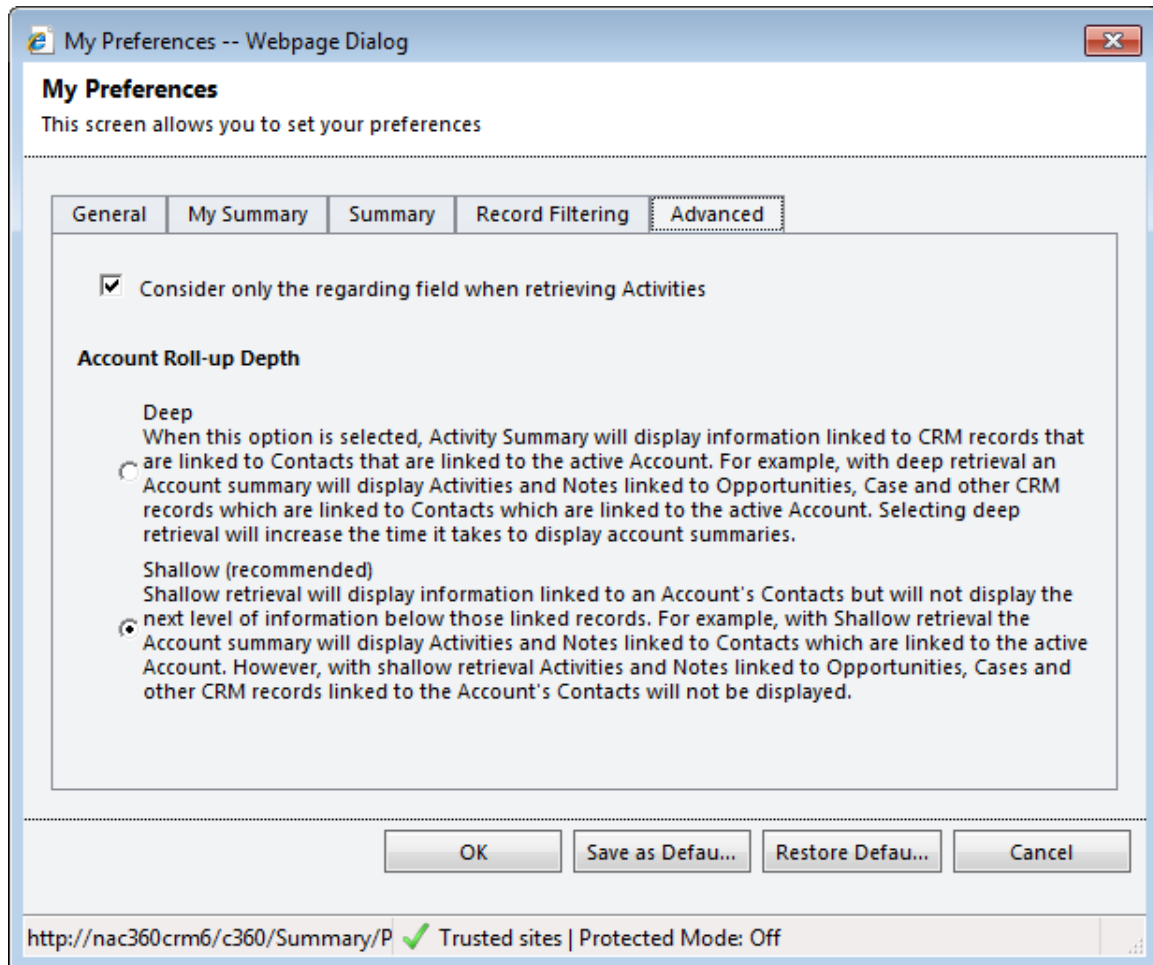
- The settings here will affect the Quick Filter 'Entity Category' and 'Entity Type' drop down list on the main summary page.
- These settings will NOT affect My Summary, only Summary



**Figure 6:** Record Filtering preferences tab

### Advanced tab

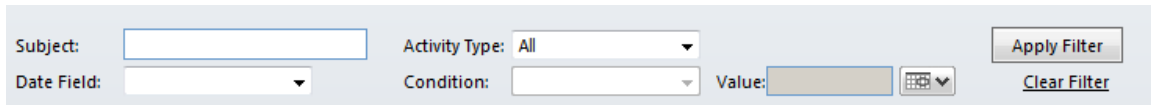
Specify whether to consider the regarding field with records other than activities on the Advanced tab as shown in Figure 7. Account roll-up depth can also be set to increase performance.



**Figure 7:** Advanced Preferences tab

## Quick Filter

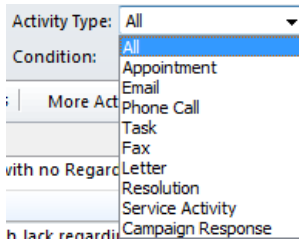
CRM users can quickly filter the summary result set using the 'Quick Filter' choices. Quick Filtering is possible on the entity category/type, activity type and various date fields. Figure 8 shows the Quick Filter area.



**Figure 8:** Quick Filter on the Summary results

## Activity Type

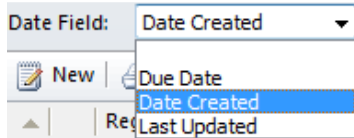
Users can filter the summary results to only display specific activity types. Table 2 shows the different activity types



**Figure 9:** Activity Type Filter

## Date Field

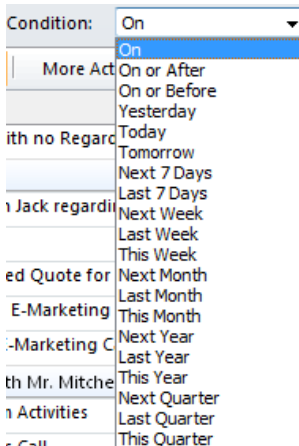
Users can filter on the created, updated or due dates of the activities.



**Figure 10:** Date Field Filter

## Condition

Based on the value selected in the Date field, the condition places parameters around the timeframe searched



**Figure 11:** Date Condition filter