c360 Summary User Guide

Microsoft CRM 3.0 Compatible

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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 <u>all</u> major Microsoft CRM entities. Activity Summary allows Microsoft CRM users to:

- 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

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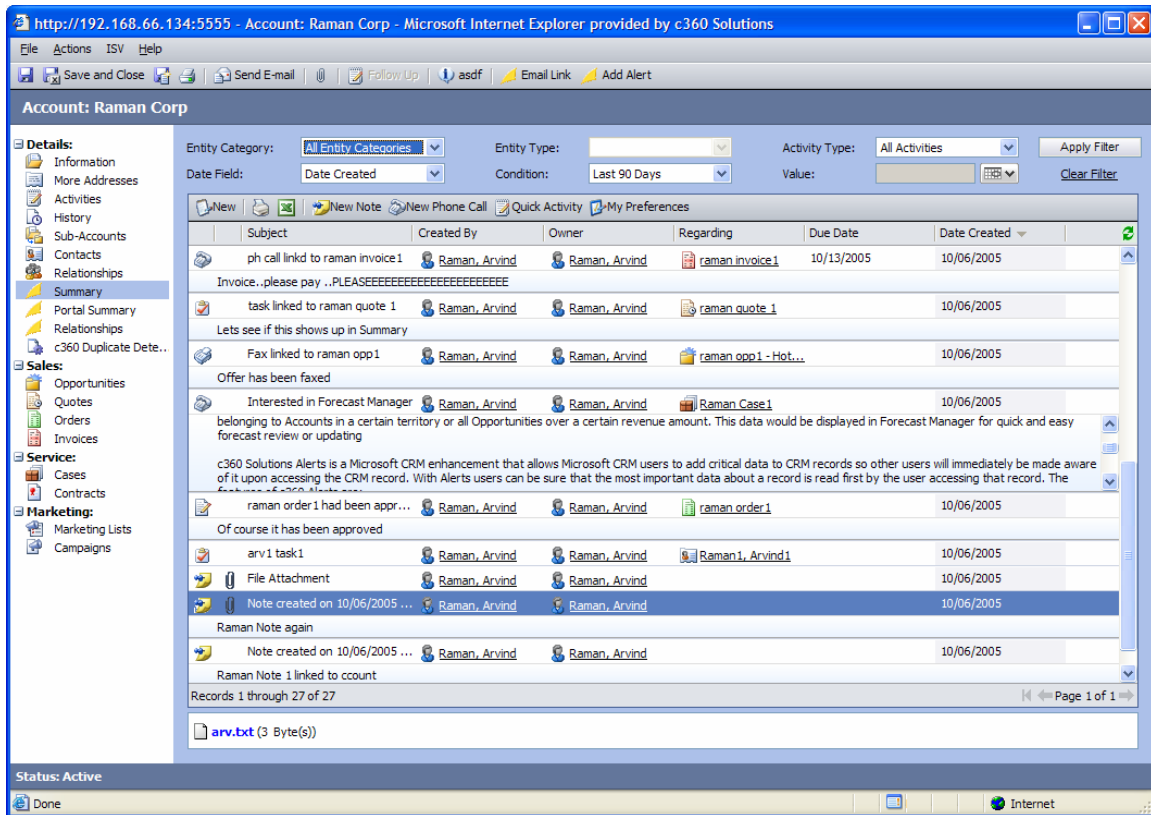
Accessing Summary

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

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

My Preferences
Activity 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 as shows in figure 1.0. 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.

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 Figure 2.

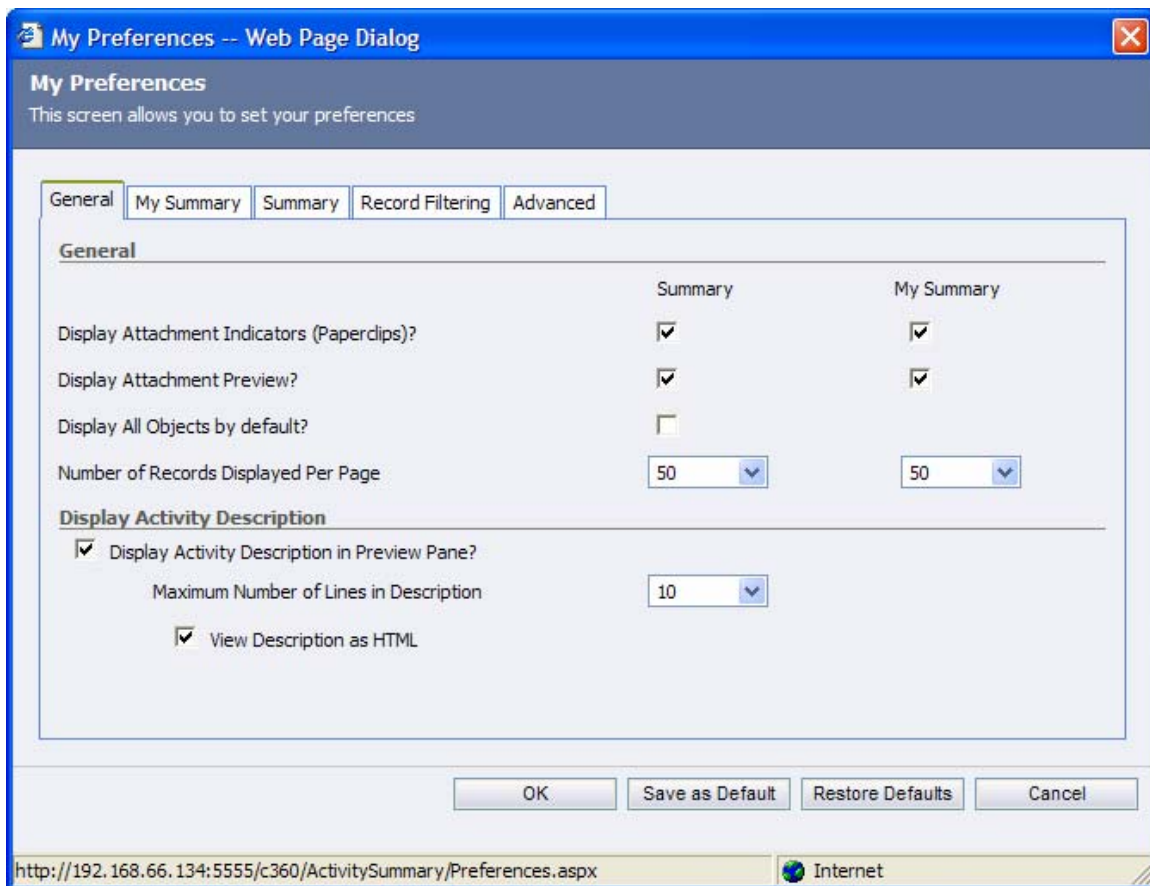**Figure 2**: My Summary displays open activities for active user

Configuring 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 in Figure 5.

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.

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.
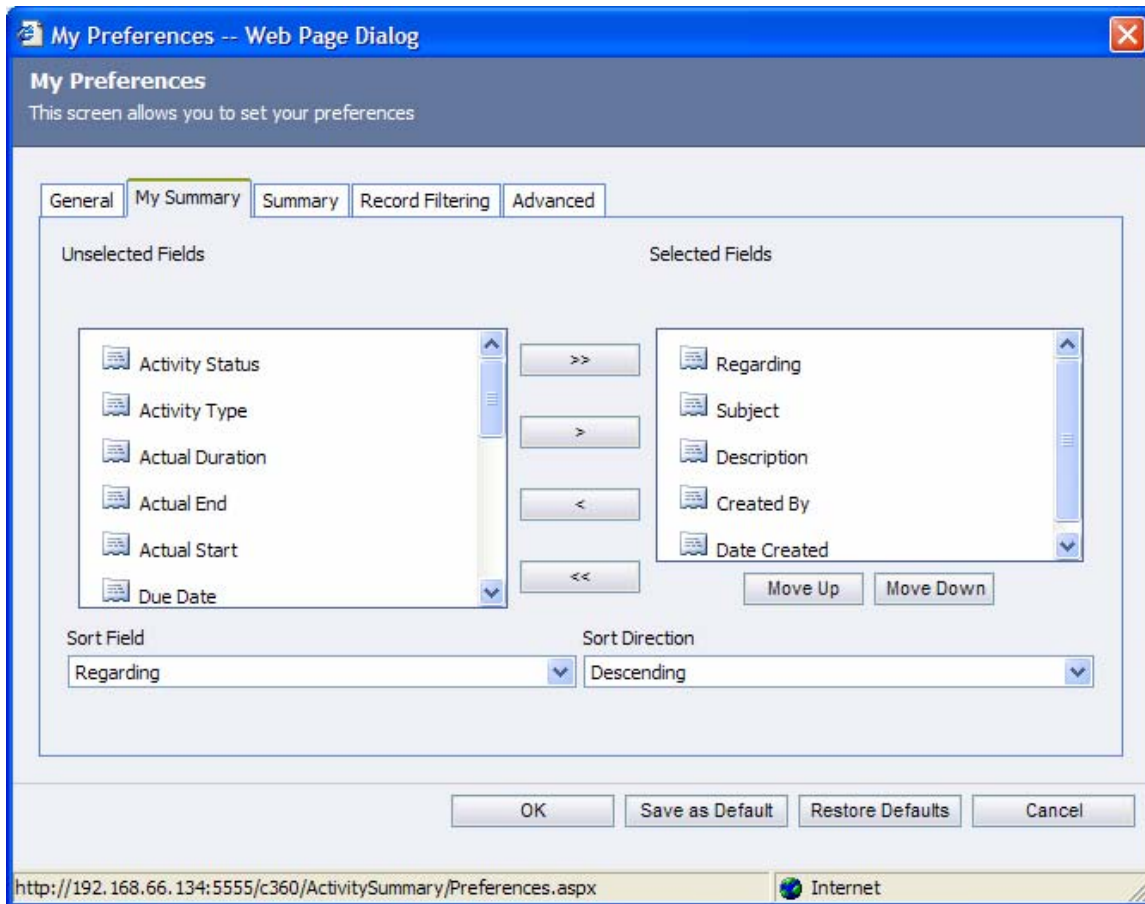
Figure 4: Activity Summary preferences tab

Summary tab

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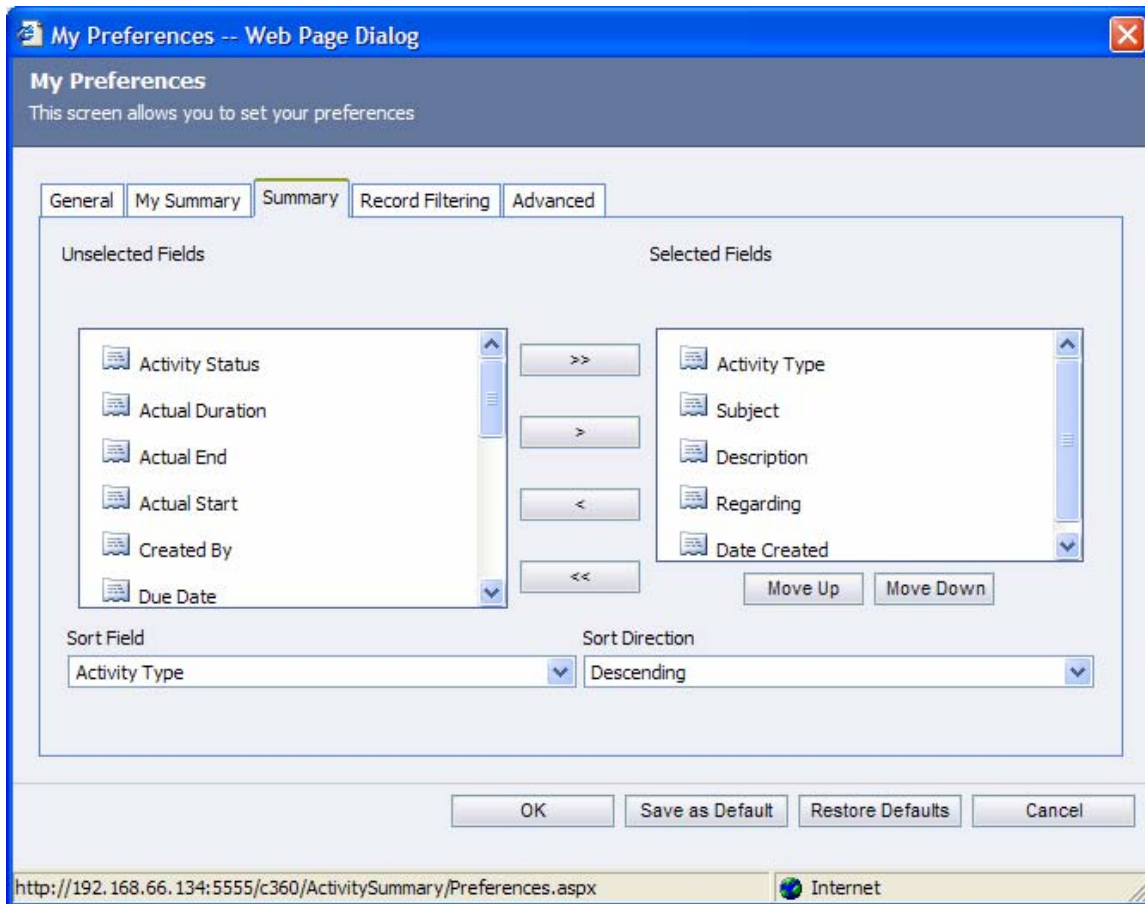

Figure 5: My Summary preferences tab

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.
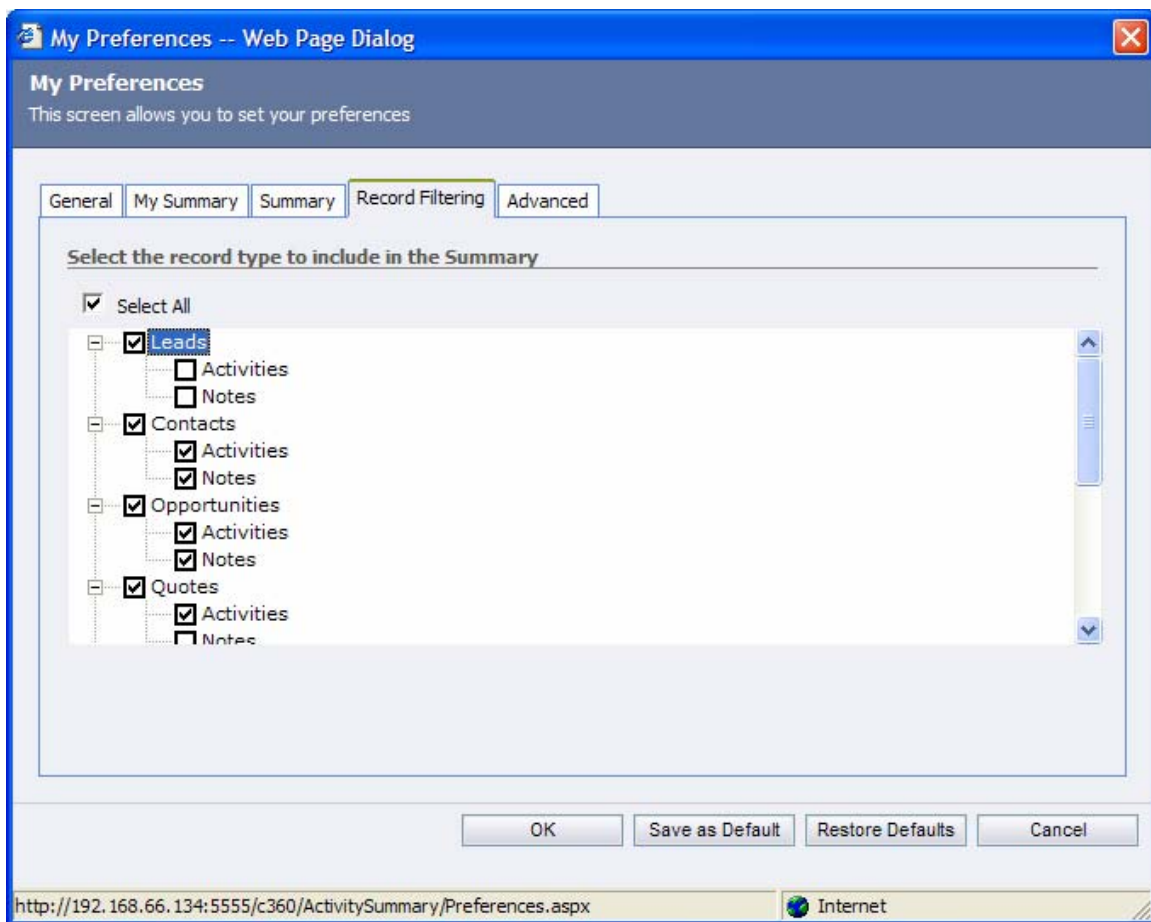
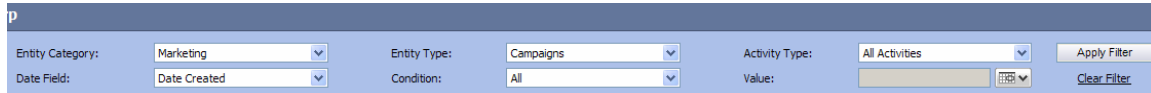**Figure 6**: Record Filtering preferences tab

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.
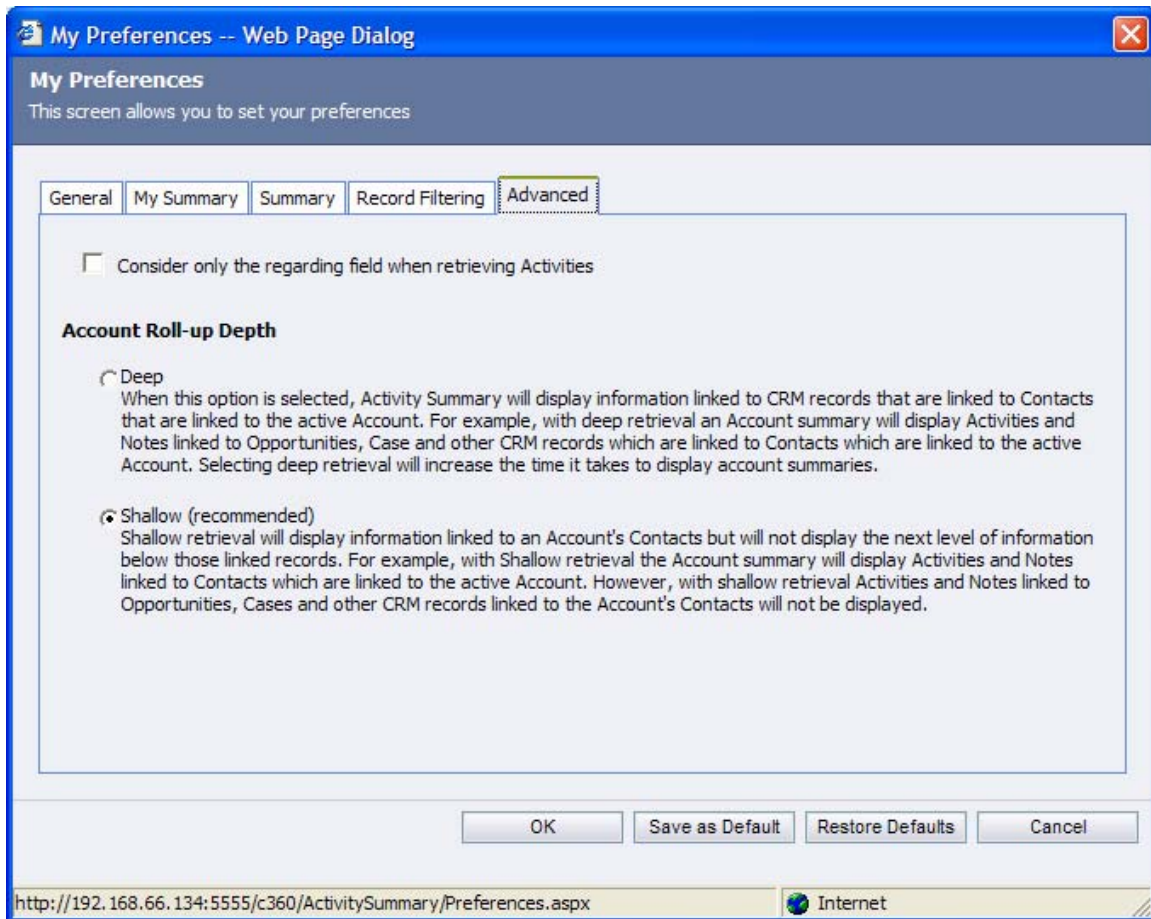
Figure 7: Advanced preferences tab

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

Entity Category
Filter to only display specific entity category (Sales objects, Service objects). Details in Table 1

Entity Type
Sub-Filter to only display specific entity types (Quotes, Opportunities) based on the entity category. Details in Table 1

Note the entity type drop down choices is sensitive to the values set in Preferences. So if a User has not selected the Opportunity entity to be displayed in Summary will not have 'Opportunities' in the drop down list.

Entity Category	Entity Type	Information Displayed
<Object Name>	N/A	Displays all activities and notes associated with the current object. This includes all activities associated with the object through the regarding, recipient, attendee and organizer fields.
Originating Lead	N/A	Account, Contact, and Opportunity entity only. Displays all activities and notes associated with the object's originating lead. Contact, Account and Opportunity records may be linked to Leads. When these objects are not linked to an Originating Lead, this choice will not be displayed.
Sales	Opportunities Quotes Invoices Orders	Account and Contact entity only. Displays all activities and notes associated with the sales objects (Opportunities, Quotes, Orders and Invoices) that are associated with the current Contact or Account.
Service	Cases Contracts	Account and Contact entity only. Displays all activities and notes associated with the service objects (Cases and Contracts) that are associated with the current object.
Contacts	N/A	Account entity only. Displays all activities and notes associated with Contacts that are associated with the current Account.
Contacts – Sales	Opportunities Quotes Invoices Orders	Account entity Only. Displays all activities and notes associated with sales objects (Opportunities, Quotes, Orders and Invoices) that are associated with Contacts that are associated with the current Account.
Contacts –	Cases	Account entity Only. Displays all activities

Service	Contracts	and notes associated with service objects (Cases and Contracts) that are associated with Contacts that are associated with the current object.
Sub-Accounts	N/A	Account entity Only. Displays all activities and notes associated with the Sub-Accounts that are associated with the current Account
Related	N/A	Account, Contact, and Opportunity entity only. Only available if Relationship Explorer is also installed. Shows activities, notes and CRM records linked to records which have been linked to the active record using c360's Relationship Explorer custom relationships.
Marketing	Campaigns	Account and Contact entity only. Displays all activities and notes associated with Marketing objects (Campaigns) that are associated with the current Contact or Account
Custom Entities	List of custom entities	All entities that have a parental relationship with a custom entity. Displays all activities and notes associated with a custom entity that is associated with the current entity

Table 1: Entity Category/Type Quick Filter list

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

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

Example of a Quick Filter
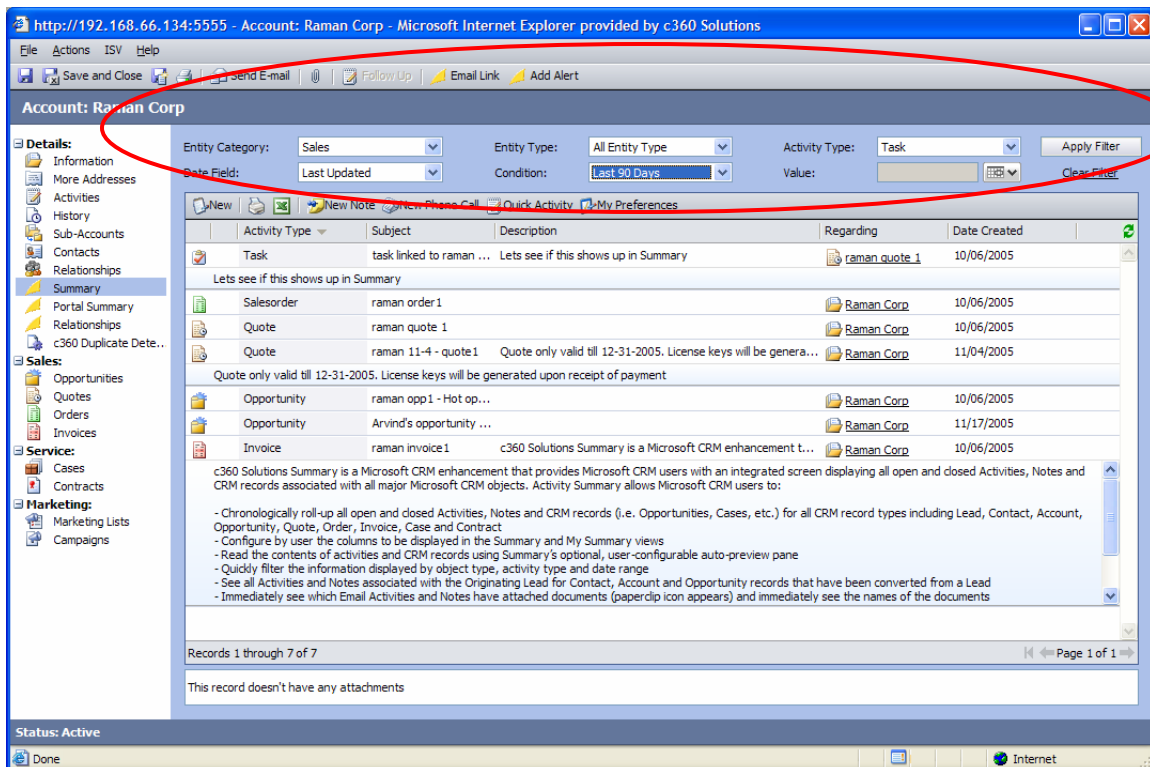Figure 9 shows the Summary screen where he Quick Filters values have been set as below.
Entity Category: 'Sales'
Entity Type: 'All Entity Type'
Activity Type: 'Task'
Date Field: 'Last Updated'
Condition: 'Last 90 days'

Figure 9: Summary result of Account entity with Quick Filter

The Summary display is a list of all activities and notes that have been updated in the last 90 days associated with the sales objects (Opportunities, Quotes, Orders and Invoices) that are associated with the current Account.

Troubleshooting

Question 1: I cannot see the 'Summary' or 'My Summary' button in CRM?

Answer: Microsoft CRM 3.0 has introduced a new security privilege named 'ISV Extensions'. This privilege determines whether a user can see certain ISV screens, menus and buttons (such as c360 products) when these screens, menus and buttons are linked to entity forms. Several of the standard Microsoft CRM security roles have this privilege turned off by default. All c360 Installation, Configuration and User Guides explain how to turn this privilege is turned on. That information is also included below:

Setting the 'ISV Extensions' Security Privilege
Microsoft CRM 3.0 has introduced a new security privilege named 'ISV Extensions'. This privilege, illustrated in the screen shot below, can be found in the 'Miscellaneous Privileges' section of the 'Customization' tab of any security role form. In several of the standard roles, this value is set to the 'None Selected' (a red circle with a blank center is displayed) by default. <u>This privilege must be set to the 'Organization' value</u> (a solid green circle is displayed) in order for users to see c360 tabs and screens that are linked to entity forms.
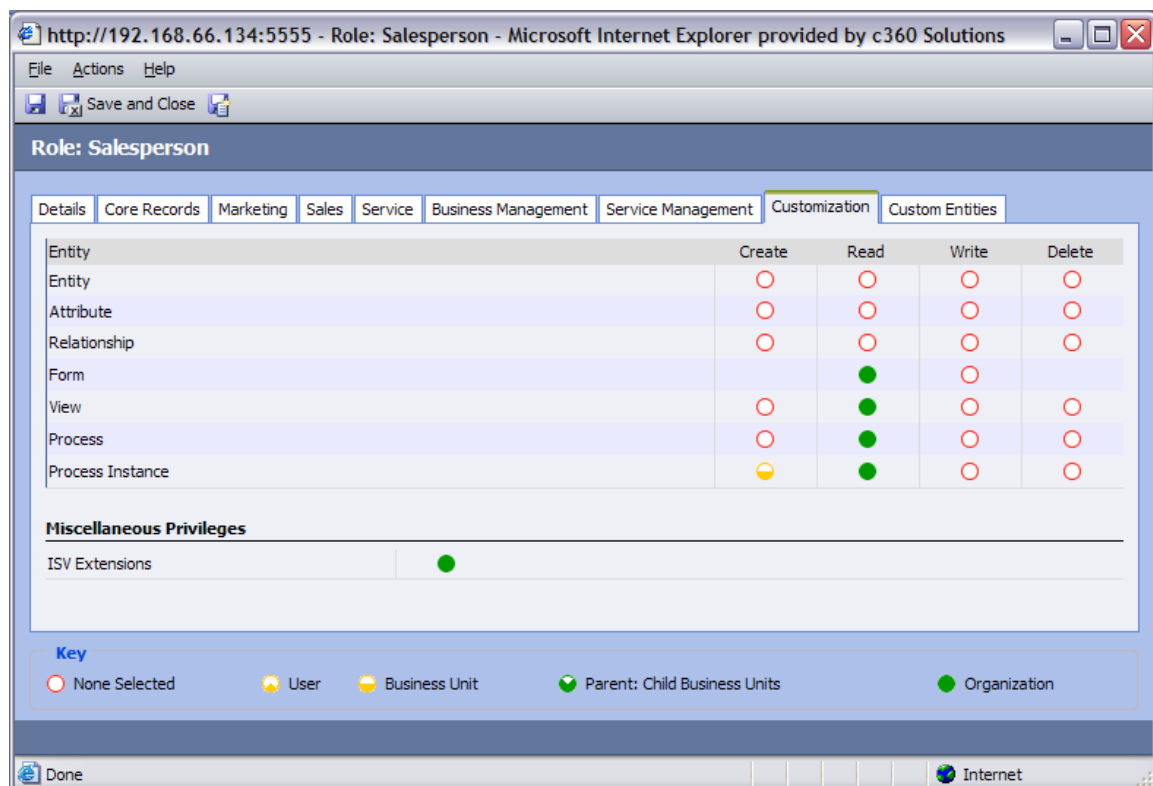
Figure 10: The security privilege titled 'ISV Extensions' must be set to 'Organization' for users to see c360 screens at the entity level

Question 2: My Entity Type Quick Filter list is missing entities?

Answer: The entity type Quick Filter list is sensitive to what is selected in My Preferences. So for example, if a User has turned off Opportunity in My Preferences, then the 'Opportunities' drop down WILL NOT appear in the entity type drop down choices