



Activities Summary

For Dynamics CRM 2013



Activities Summary

- **Activities Summary is a complete view of customer history.**
- **It allows you to view completed, cancelled and open activities in one screen.**
- **Viewing all relevant information in one place helps to perform daily tasks even more quickly and efficiently.**



Activities Summary

- **Setup preferences are kept per user to allow each person display information according to their needs**
- **User can decide what activity types and statuses should be included**
- **Available for accounts, contacts, leads, cases, contracts, opportunities, quotes, orders and invoices**



- Modify what and how to display information in Activities Summary screen using preferences screen.

Microsoft Dynamics CRM | SERVICE | Accounts | DPS Europe | Create | Adam McAma | First

ACCOUNT | DPS Europe | Annual Revenue -- | No. of Employees -- | Owner* Adam McAma

Activities Summary Settings

Set your defaults for the Activities Summary.

View

Number of activities per page: 10

Custom Filter: 100 days activities

Preview Length: 2000

Activities

<input checked="" type="checkbox"/> Task	<input checked="" type="checkbox"/> Fax
<input checked="" type="checkbox"/> Phone Call	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Letter	<input checked="" type="checkbox"/> Appointment
<input type="checkbox"/> Service Activity	<input checked="" type="checkbox"/> Campaign Response
<input checked="" type="checkbox"/> Custom Activities	

Status

Include open Include canceled

OK Cancel

Active



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