



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.

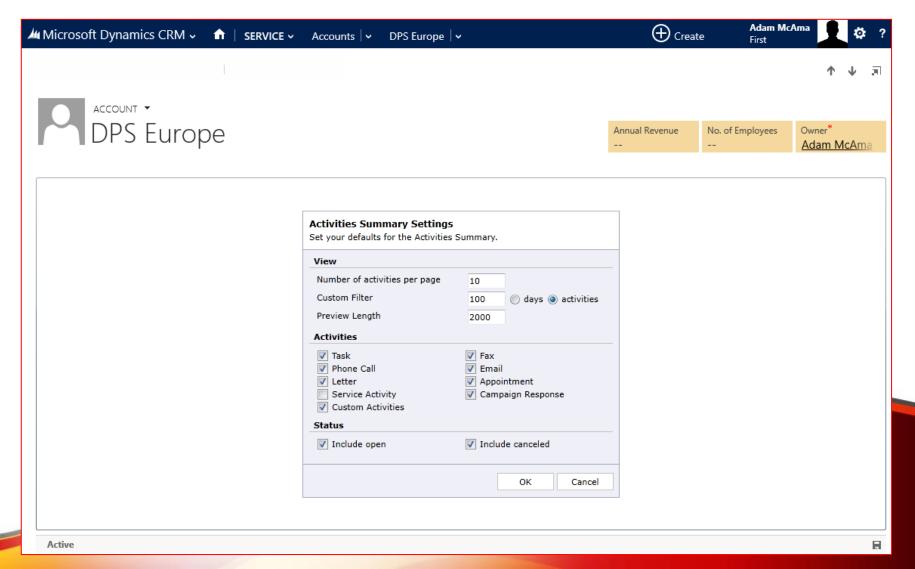


Activities Summary

- 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.





PROFESSIONAL SOLUTIONS

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