



Activities Summary for Dynamics CRM 2011



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.

A decorative header image featuring a close-up of interlocking puzzle pieces. The pieces are in shades of blue, green, and yellow, set against a dark background. The lighting creates a sense of depth and texture.

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



Microsoft Dynamics CRM

Adam McAma
Dynamics Professional Solutions Ltd

File Account Add Customize

Save Save & Close Save & New Deactivate Delete Add to Marketing List Connect Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Details
- Contacts
- Notes & Activities
- Preferences

Related

- Common
 - More Addresses
 - Activities
 - Closed Activities
 - Sub-Accounts
 - Contacts
 - Relationships
 - Activities Summary**
 - Connections
 - Documents
 - Audit History
- Sales
 - Opportunities
 - Quotes
 - Orders
 - Invoices
- Service
 - Cases
 - Contracts
- Marketing
 - Campaigns
 - Marketing Lists
- Processes
 - Workflows
 - Dialog Sessions

Account **DPS Europe** Accounts

Primary Contact Preferred Method of Contact Owner
Any Adam McAma

Credit Limit Annual Revenue

General

Account Name * DPS Europe Main Phone

Primary Contact Other Phone

Account Number Fax

Parent Account Web Site

E-mail

Address

Address Type City

Address Name State/Province

Street 1 ZIP/Postal Code

Street 2 Country/Region

Street 3 Phone

Shipping Method Freight Terms

Description

Status **Active**



Activities Summary is available for accounts, contacts, leads, cases, contracts, opportunities, quotes, orders and invoices .



Microsoft Dynamics CRM

Adam McAma
Dynamics Professional Solutions Ltd

File Account Add Customize Activities

Add New Activity Add Existing Activity Edit Bulk Delete Mark Complete Cancel Set Regarding Include Connect Add to Queue Assign Activities Share Copy a Link E-mail a Link Filter Chart Pane Run Workflow Start Dialog Run Report Export Activities

Records Actions Collaborate Current View View Process Data

Information
General
Details
Contacts
Notes & Activities
Preferences

Related

Common
More Addresses
Activities
Closed Activities
Sub-Accounts
Contacts
Relationships
Activities Summary
Connections
Documents
Audit History

Sales
Opportunities
Quotes
Orders
Invoices

Service
Cases
Contracts

Marketing
Campaigns
Marketing Lists

Processes
Workflows
Dialog Sessions

Account
DPS Europe

Primary Contact Preferred Method of Contact Owner
Any Adam McAma

Credit Limit Annual Revenue

Search for records Filter On: Today Include: Related "Regarding" Records Preferences

Actual Start	Actual End	Subject	Time management
04/07/2011 20:24		Regarding	DPS UK

From Wikipedia, the free encyclopedia

Time management is the act or process of exercising conscious control over the amount of time spent on specific activities, especially to increase efficiency or productivity. Time management may be aided by a range of skills, tools, and techniques used to manage time when accomplishing specific tasks, projects and goals. This set encompasses a wide scope of activities, and these include planning, allocating, setting goals, delegation, analysis of time spent, monitoring, organizing, scheduling, and prioritizing. Initially, time management referred to just business or work activities, but eventually the term broadened to include personal activities as well. A time management system is a designed combination of processes, tools, techniques, and methods. Usually time management is a necessity in any project development as it determines the project completion time and scope.

Actual Start	Actual End	Subject	Task list organization
04/07/2011 20:26		Regarding	6 orders of Product SKU JJ202 (sample)

Task lists are often tiered. The simplest tiered system includes a general to-do list (or task-holding file) to record all the tasks the person needs to accomplish, and a daily to-do list which is created each day by transferring tasks from the general to-do list.[8]

Task lists are often prioritized:

An early advocate of "ABC" prioritization was Alan Lakein. In his system "A" items were the most important ("A-1" the most important within that group), "B" next most important, "C" least important.[10]

A particular method of applying the ABC method[11] assigns "A" to tasks to be done within a day, "B" a week, and "C" a month.

To prioritize a daily task list, one either records the tasks in the order of highest priority, or assigns them a number after they are listed ("1" for highest priority, "2" for second highest priority, etc.) which indicates in which order to execute the tasks. The latter method is generally faster, allowing the tasks to be recorded more quickly.[8]

A completely different approach which argues against prioritising altogether was put forward by British author Mark Forster in his book "Do It Tomorrow and Other Secrets of Time Management". This is based on the idea of operating "closed" to-do lists, instead of the traditional "open" to-do list. He argues that the traditional open to-do list actually guarantees that some of your most important tasks will be left undone. This approach does not require setting all your most important tasks to be done within a specific time frame.

Status: Active

View all important activities in one screen, add new activities and print information displayed on a screen. Each user can setup their preferences to modify displayed according to their needs





Activities Summary Settings

Set your defaults for the Activities Summary.

View

Number of activities per page
Custom Filter days activities
Preview Length

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 checked="" type="checkbox"/> Service Activity | <input checked="" type="checkbox"/> Campaign Response |
| <input checked="" type="checkbox"/> Custom Activities | |

Status

- | | |
|--|--|
| <input checked="" type="checkbox"/> Include open | <input checked="" type="checkbox"/> Include canceled |
|--|--|

OK

Cancel

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





www.Dynamics-pros.com
