



# **Activities Summary**

## **for Microsoft 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.

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows the 'Activities Summary' for the account 'DPS UK'. A red box highlights the 'Preferences' button in the top right corner of the main window. A dialog box titled 'Activities Summary Settings' is open, allowing users to customize their view. The dialog box includes the following sections:

- View**
  - Number of activities per page: 50
  - Custom Filter: 30 days (selected) / activities
  - Preview Length: 2000
- Activities**
  - Task
  - Phone Call
  - Letter
  - Service Activity
  - Custom Activities
  - Fax
  - Email
  - Appointment
  - Campaign Response
- Status**
  - Include open
  - Include canceled

Buttons for 'OK' and 'Cancel' are located at the bottom of the dialog box.

Activities Summary:

- Setup preferences are kept per user to allow each person display information according to their needs
- Gives you possibility to show completed, cancelled and open activities in one list
- User can decide what activity types and statuses should be included
- Available for accounts, contacts, leads, cases, contracts, opportunities, quotes, orders and invoices