



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.

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar shows 'Microsoft Dynamics CRM' with tabs for 'SALES', 'Accounts', and 'DPS Glasgow'. The 'ACTIVITIES SUMMARY' button is highlighted in the left-hand navigation pane. Below this, the 'Summary' page for 'DPS Glasgow' is visible, showing account information and a list of activities. A settings dialog box is overlaid on the screen, titled 'Activities Summary Settings'. This dialog allows users to configure the view and activities displayed in the summary.

Activities Summary Settings
Set your defaults for the Activities Summary.

View

- Number of activities per page: 10
- Custom Filter: 100 (radio buttons for days and activities, with 'activities' selected)
- Preview Length: 2000

Activities

- Task
- Phone Call
- Letter
- Service Activity
- Custom Activities
- Fax
- Email
- Appointment
- Campaign Response

Status

- Include open
- Include canceled

Buttons: OK, Cancel

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

