

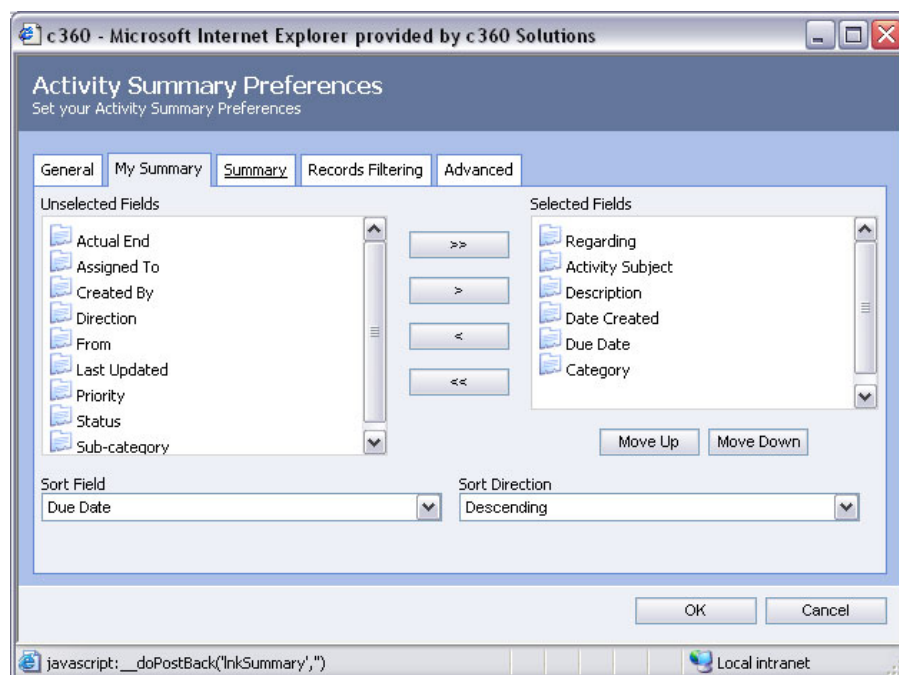


## c360 Solutions Summary for Microsoft CRM 3.0

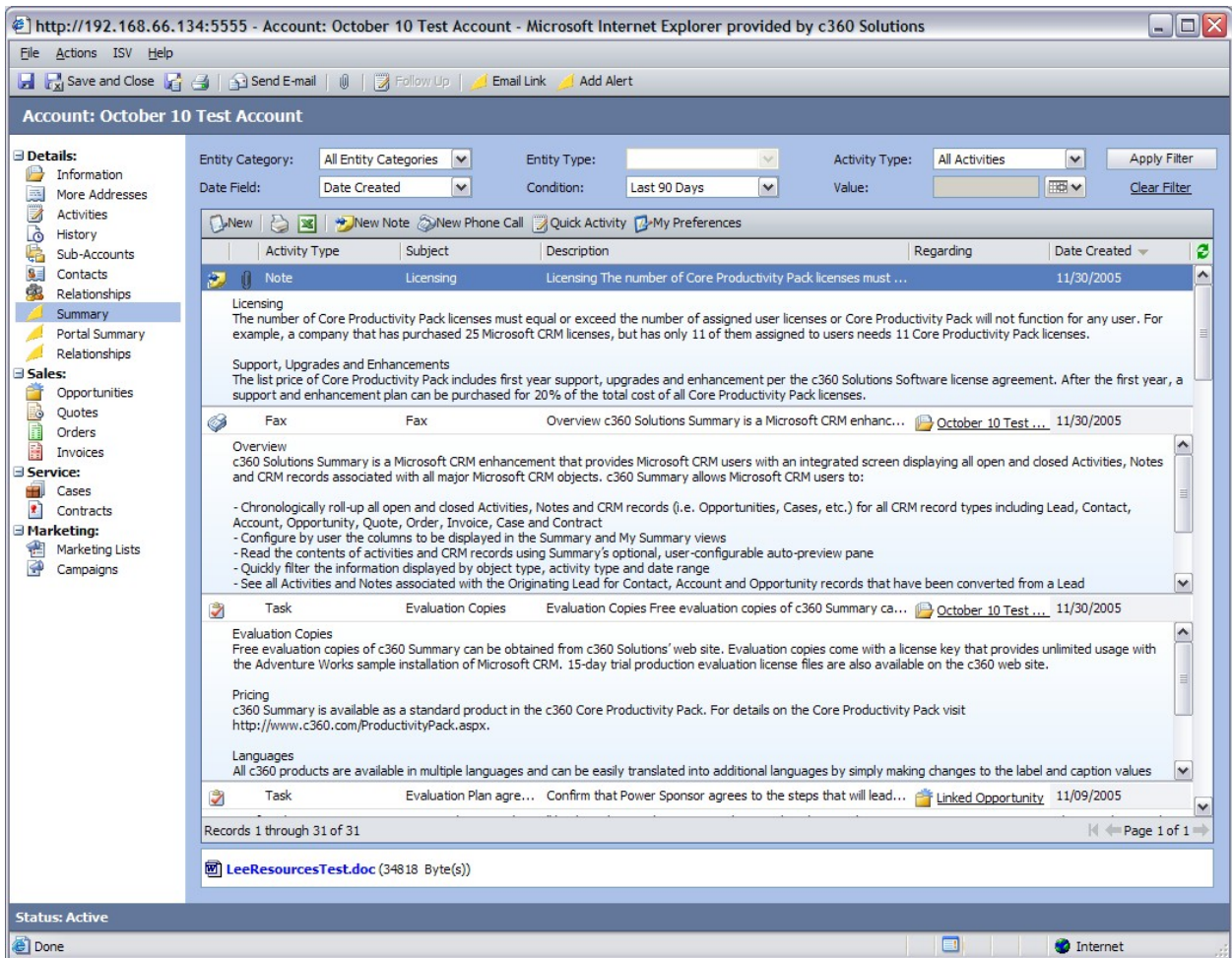
### Overview

c360 Solutions Summary is a Microsoft CRM enhancement that provides Microsoft CRM users with an integrated screen displaying all open and closed Activities, Notes and CRM records associated with all major Microsoft CRM objects. c360 Summary allows Microsoft CRM users to:

- Chronologically roll-up all open and closed Activities, Notes and CRM records (i.e. Opportunities, Cases, etc.) for all CRM record types including Lead, Contact, Account, Opportunity, Quote, Order, Invoice, Case and Contract
- Configure by user the columns to be displayed in the Summary and My Summary views
- Read the contents of activities and CRM records using Summary's optional, user-configurable auto-preview pane
- Quickly filter the information displayed by object type, activity type and date range
- See all Activities and Notes associated with the Originating Lead for Contact, Account and Opportunity records that have been converted from a Lead
- Immediately see which Email Activities and Notes have attached documents (paperclip icon appears) and immediately see the names of the documents
- Quickly open attached documents directly from Summary screens
- Quickly add new Activities, Notes or Phone Activities (directly) from the c360 Summary screens
- Print the summary page or export it to Microsoft Excel
- Sort ascending and descending by any column in the summary listing



*c360 Summary allows each user to select the fields they would like to see displayed*



*The c360 Summary screen appears on all CRM records and displays a chronological roll-up of all Activities (Open and Closed), Notes and CRM records for the active record.*

## Languages

All c360 products are available in multiple languages and can be easily translated into additional languages by simply making changes to the label and caption values found in a separate .XML document. Each product's Installation and Configuration guide provides detail on making language modifications. All product downloads include language files for multiple languages.



### **Licensing**

The number of Core Productivity Pack licenses must equal or exceed the number of assigned user licenses or Core Productivity Pack will not function for any user. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Core Productivity Pack licenses.

### **Support, Upgrades and Enhancements**

The list price of Core Productivity Pack includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchased for 20% of the total cost of all Core Productivity Pack licenses.

### **Information**

For more information on c360 Summary and the Core Productivity Pack, contact [your c360 reseller:](#)

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