c360 Console User Guide

Microsoft Dynamics CRM 2011 compatible

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Overview

CRM users require the ability consolidate pertinent data in dashboard views to better access, analyze and act upon captured customer information. Microsoft CRM 2011's new Dashboards provide great summary information from views and graphs, but multiple clicks are often required to "dig down" to detailed information relevant to the user.

c360 Console cells for the Dashboard give users information at their fingertips, providing search cells and c360 products that drive content to other subscriber cells in the dashboard. c360 Console Cells used within Miscrosoft CRM 2011's Dashboards allow users to mix the following types of content:

- Microsoft CRM Views
- Microsoft CRM Advanced Find Views
- Associated Entity Lists
- Configurable search cells
- CRM record details
- c360 Products, if in use by the organization
    - Relationship Explorer
    - Summary/Quick Activity
    - Multi-field Search
- Associated Entity Lists

Adding Console Components to Dashboards

c360 Console is tightly integrated with normal dashboard editing so you can add c360 components from the same interface where CRM content is added.

1. Create a new dashboard or edit an existing dashboard from one of two locations:
    a. **Administrators** can add Console cells to a dashboard from the 'Dashboards' creator in the solution. This allows them to publish c360 content to users in the System dashboards.

    Click **'New'** to create a new dashboard or double click on an existing dashboard to enter the editor

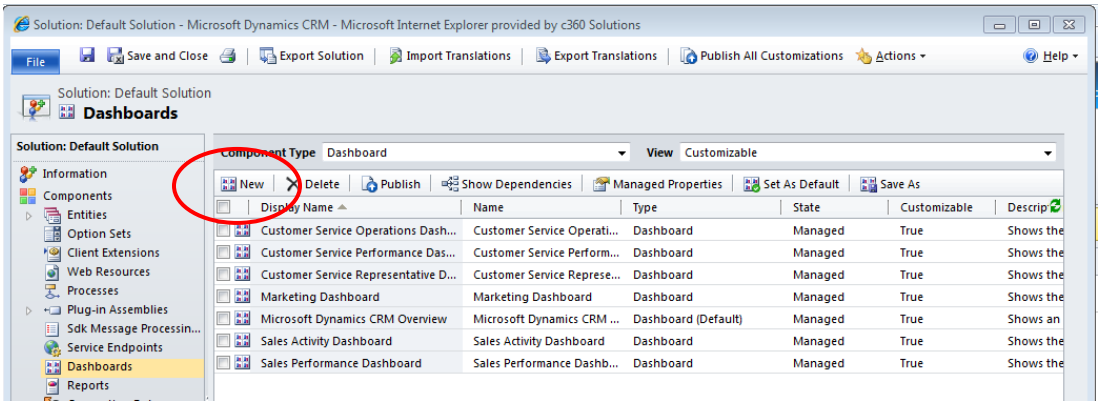


Figure 1: Creating or editing a new dashboard from the solution

    b. **End Users** can also add c360 Console content to their personal dashboards when they create a new dashboard or Edit an existing personal dashboard.

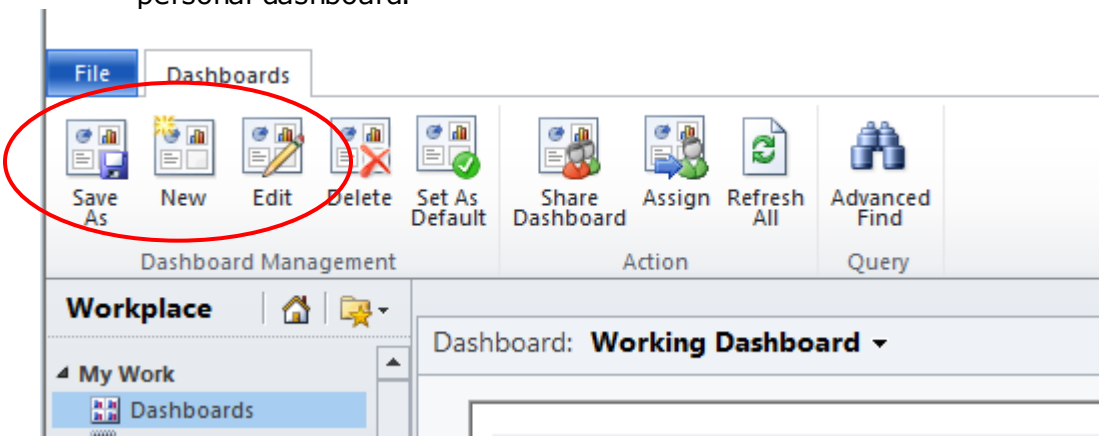


Figure 2: Creating or editing a dsbhoard from My Work>Dashboards

2. Once in the dashboard editing interface, click **'c360 Console'** to access the different c360 Content you can add to the Console.

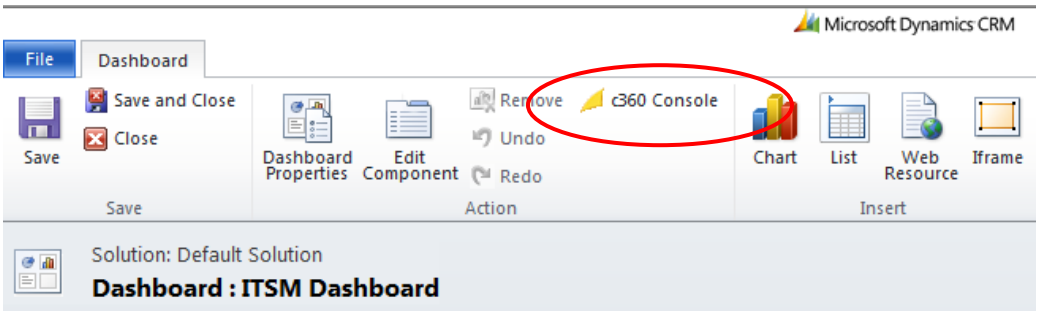


Figure 3: Edit Dashboard ribbon with link to c360 Console components

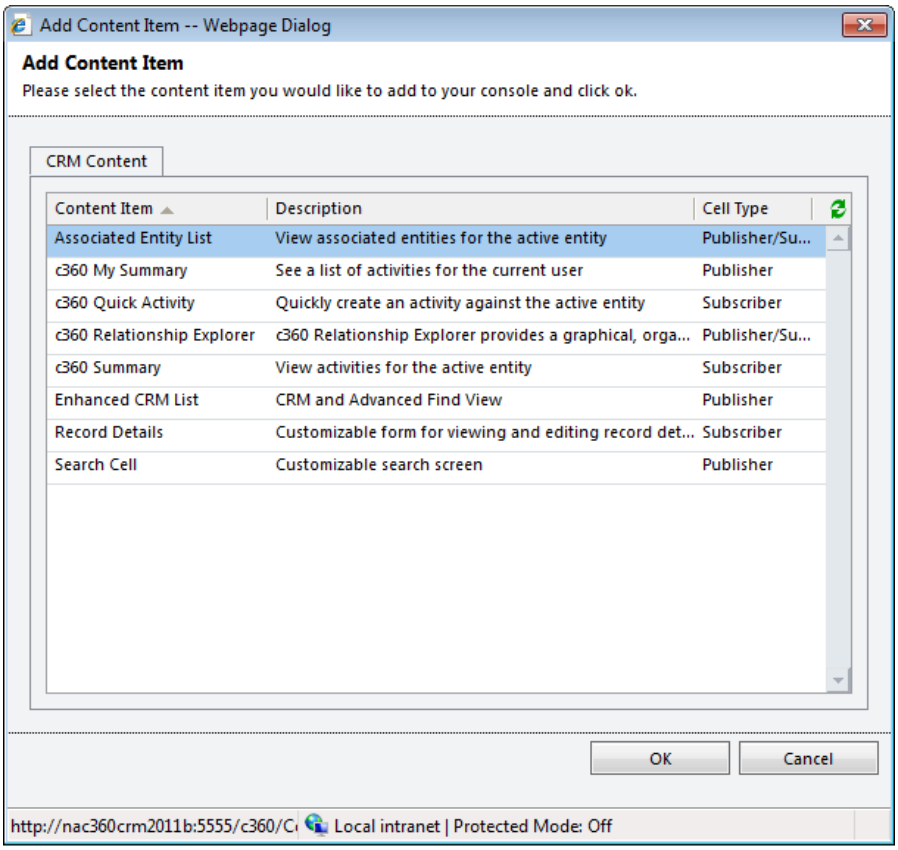
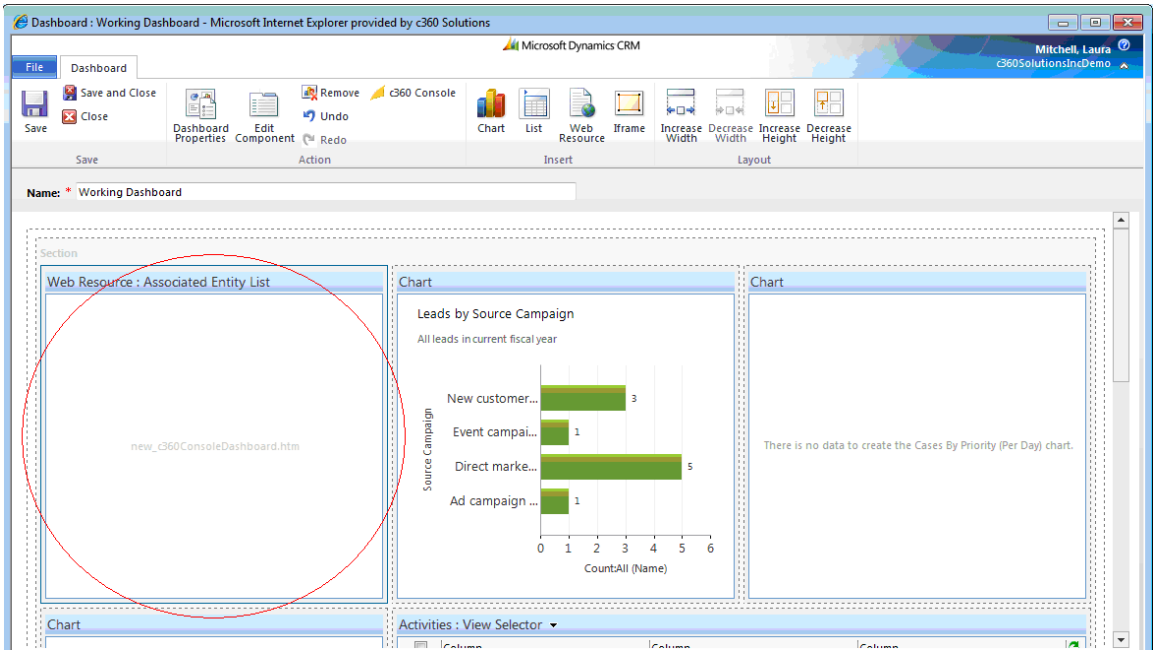


Figure 4: Select content from the list to appear on the dashboard.

3. Select the content to be added and click **'OK'**.

4. From the dashboard, adjust the height, width and placement of the component with the standard CRM controls in the ribbon.

Figure 5: c360 Console component added to a dashboard



Configuring Content

There are several content options when configuring a new Console, pictured in Figure 6. Content cells can be Publisher and/or Subscriber cells.

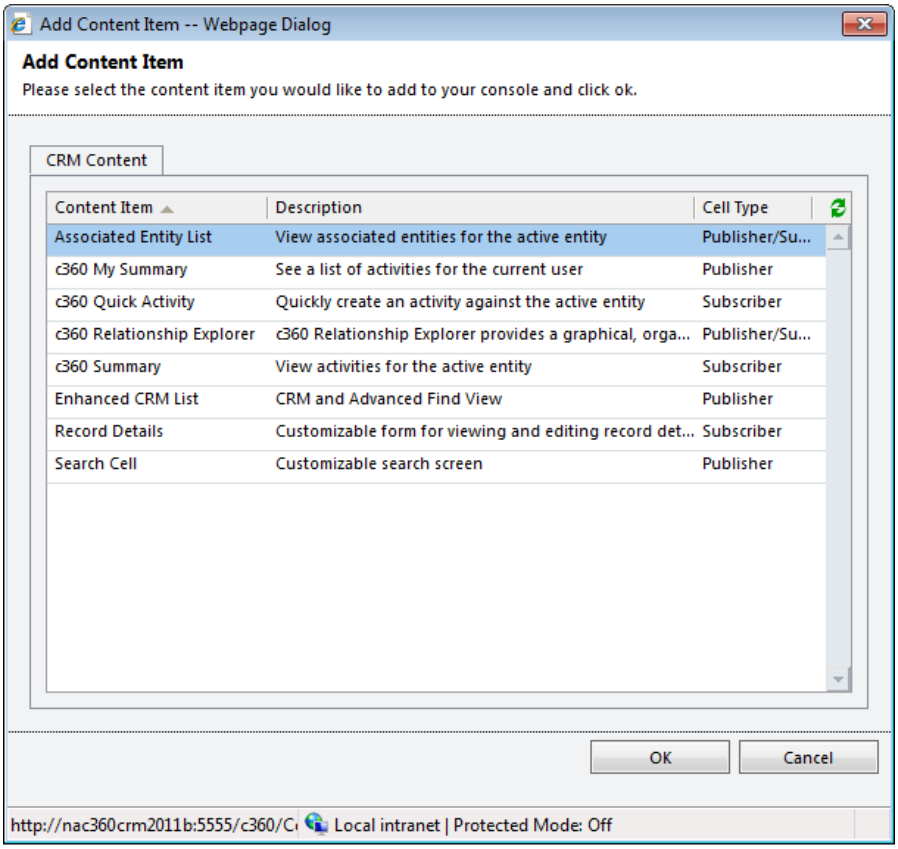


Figure 6: List of available content types

Publisher, Subscriber, and Context Defined

Publisher cells push data to subscriber cells. Clicking on a record in a publisher cell causes the subscriber cells to display data related to the selected record in the publisher cell. For example, clicking on an Account record in a publisher cell can cause a list of that Account's contacts to be displayed in a associated entity subscriber cell. In this example, the selected Account is said to be 'in context.' Figure 7 illustrates how publisher and subscriber cells work together.

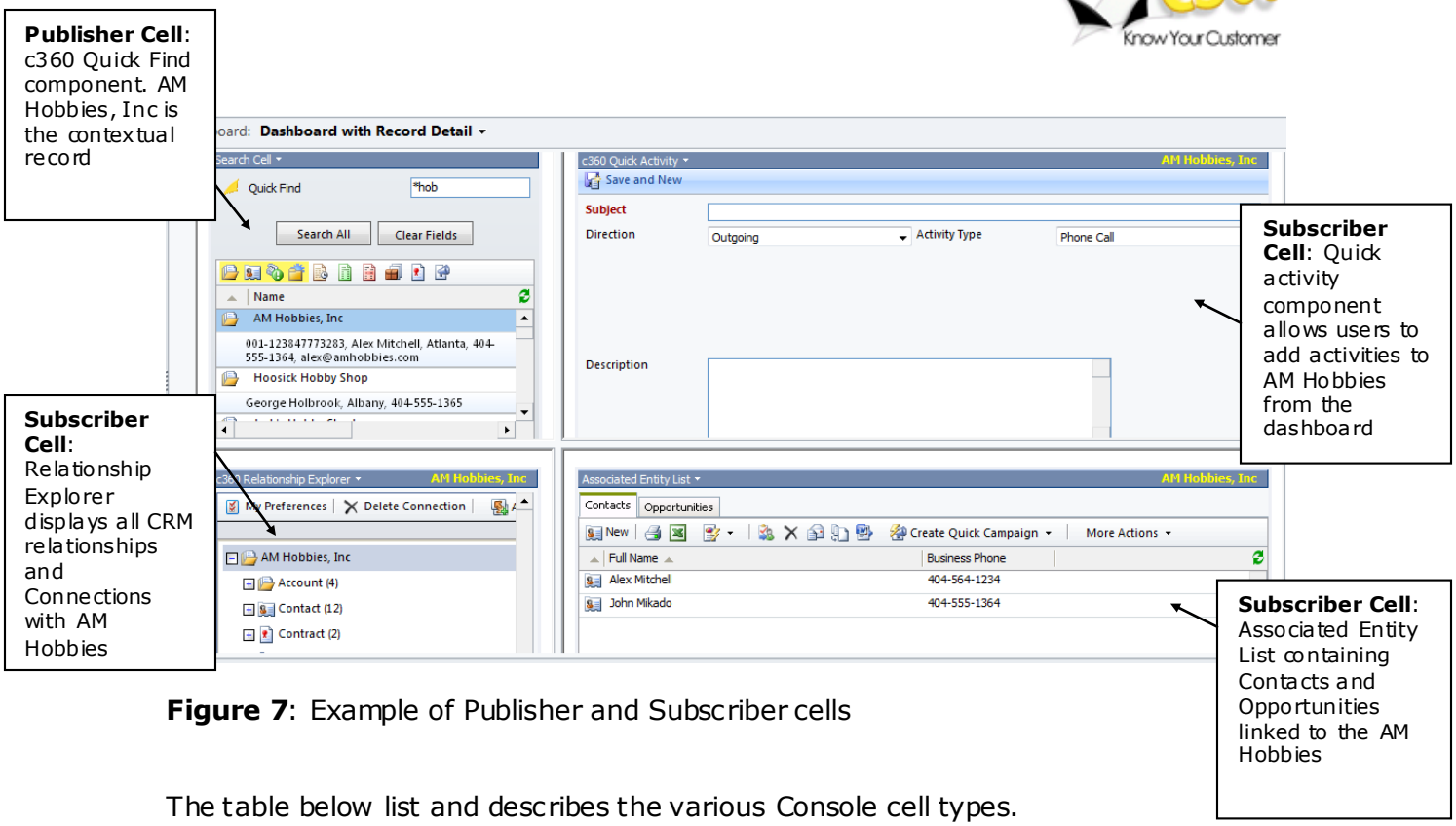


Figure 7: Example of Publisher and Subscriber cells

The table below list and describes the various Console cell types.

Type	Description
Publisher and Subscriber Cells	
Associated Entity List	Displays a list of related records based on the parent record in context
c360 Relationship Explorer	Discovers and displays all entities related to the record in context
Publisher Cells	
CRM Entity Lists	Add a a standard CRM entity lists to the Dashboards and the Console subscriber components will display information from selected records on the list
Search Cell	Choose which fields you wish to search by. Will display search results below search fields
Enhanced CRM List	Allows you to select from a list of saved views for a particular entity.
c360 My Summary	Displays the c360 My Summary with all current user's open Activities
Subscriber Cells	
Record Details	Displays details about the record in context
c360 Summary	Displays c360 Summary for the record in context
c360 Quick Activity	Displays the Quick Activity window when a record is in context

Search Cell

The Search Cell is a publisher cell that allows users to configure which entities and fields by which they wish to search. As shown in Figure 8, to configure a Search Cell, click '**Search Cell > Configure**'.

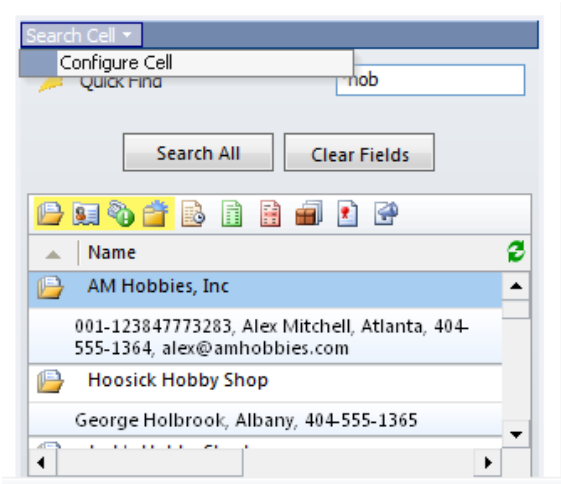


Figure 8: Configuring a Search Cell

The configuration page contains a tab for every searchable entity as pictured in Figure 9. You can search across multiple entities all in one cell. Use the arrow buttons to choose which entities and fields you wish to do searches on.

Click '**OK**' to return to the dashboard and view the search cells displayed, as well as the search buttons for all the entities your security rights give you access to.

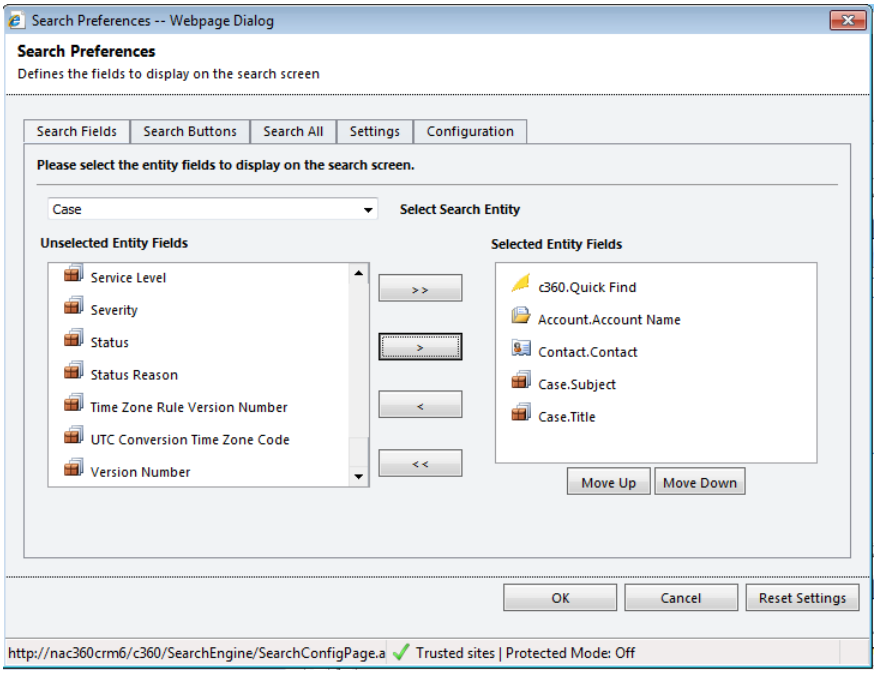


Figure 9: Configuring the Console Search Cell

Console determines which buttons to add based on what search fields are chosen. In Figure 9, fields from the Account, Contact, and Case are added. By default, the buttons that are displayed are not only the Search Accounts, Contacts, and Cases, but the search buttons for records types related to those objects that the user has rights to. Add or remove buttons on the **'Search Buttons'** tab.

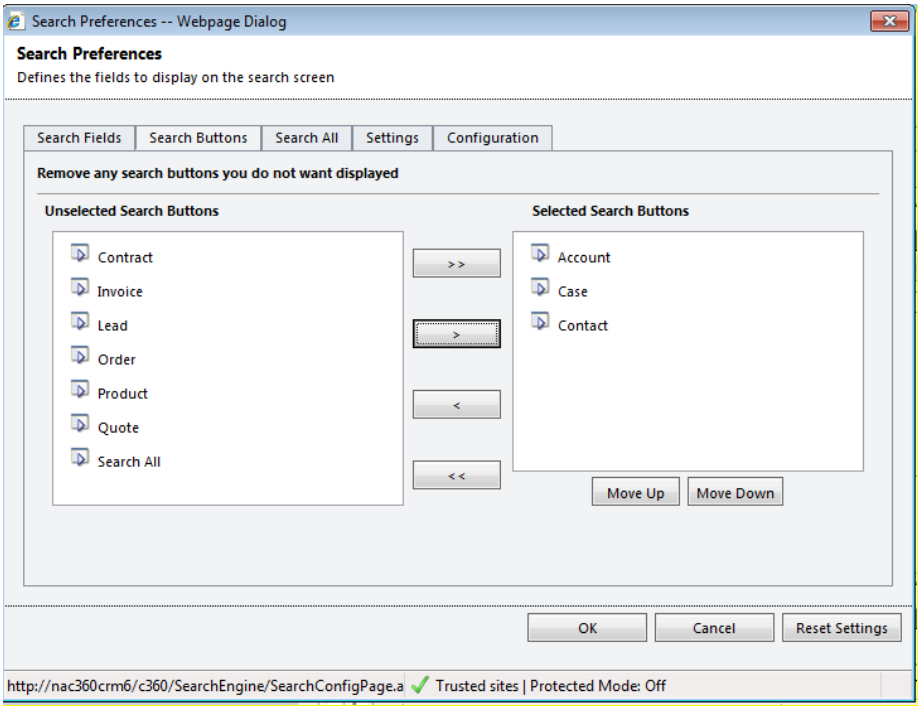


Figure 10: Select buttons to appear in the Search Component

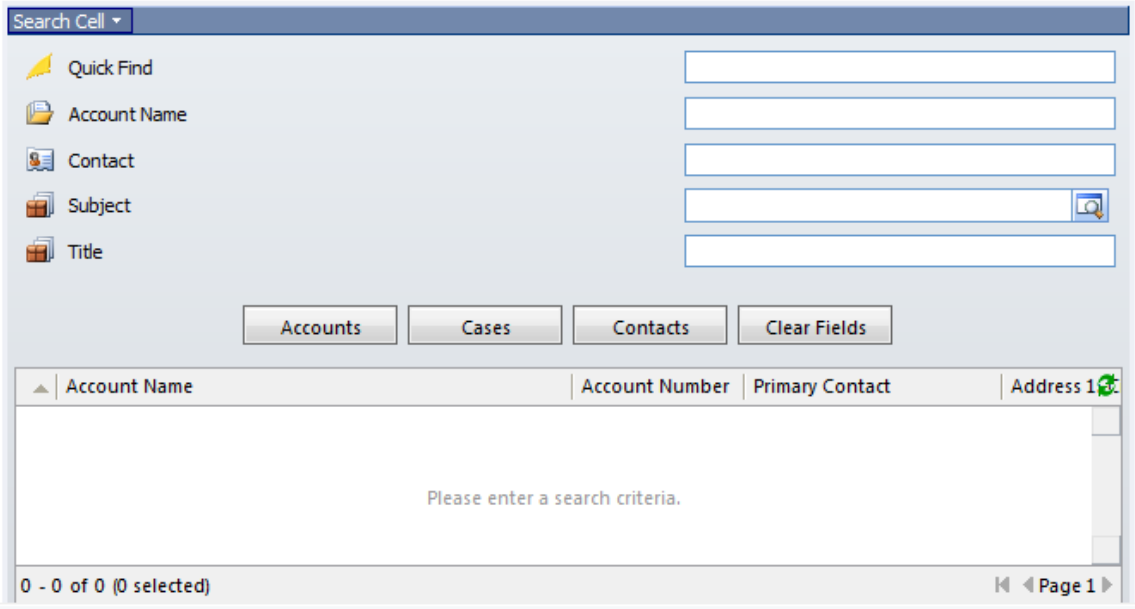


Figure 11: Search cell example

Enhanced CRM List

The CRM View cell is a publisher cell that displays standard CRM views as well as Advanced Find views for a particular entity.

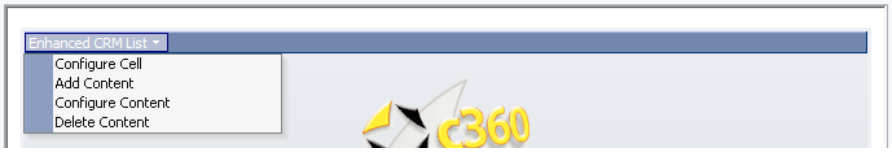


Figure 12: Enhanced CRM List Configuration selections

Configure Cell

To change the appearance of the CRM View cell choose **'Configure Cell'** from the cell's menu. The configuration screen of the CRM View cell, shown in Figure 13, is described in the following table.

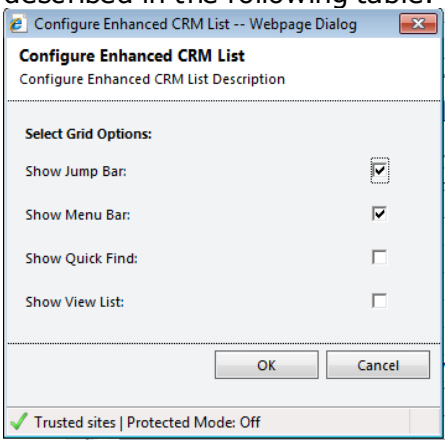


Figure 13: Configure Content options

Option	Description
Show Jump Bar	Will show or hide the CRM jump bar which allows user to click a letter in the alphabet to quickly show only those records beginning that letter All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Show Menu Bar	Contains CRM's standard Actions menu, as well as a New button for creating a new record, if the user has create rights New Create Quick Campaign More Actions
Show Quick Find	Displays the quick find functionality for the CRM view Look for: Find
View List	Determines whether the drop-down list of views for the active entity is displayed. The screen shot below illustrates the view list that can be displayed with this option View: Expired Maintenance Accounts System Views Accounts: Influenced Deals That We Won Accounts: No Campaign Activities in Last 3 Months Accounts: Responded to Campaigns in Last 6 Months Active Accounts Inactive Accounts My Active Accounts My Connections My Views Expired Maintenance Accounts

Add Content

Choose **'Add Content'** from the cell's menu to select an entity and view to be displayed in the cell. You may add multiple views to this cell by continuing to use the **'Add Content'** option. Each new view will show up as a separate tab.

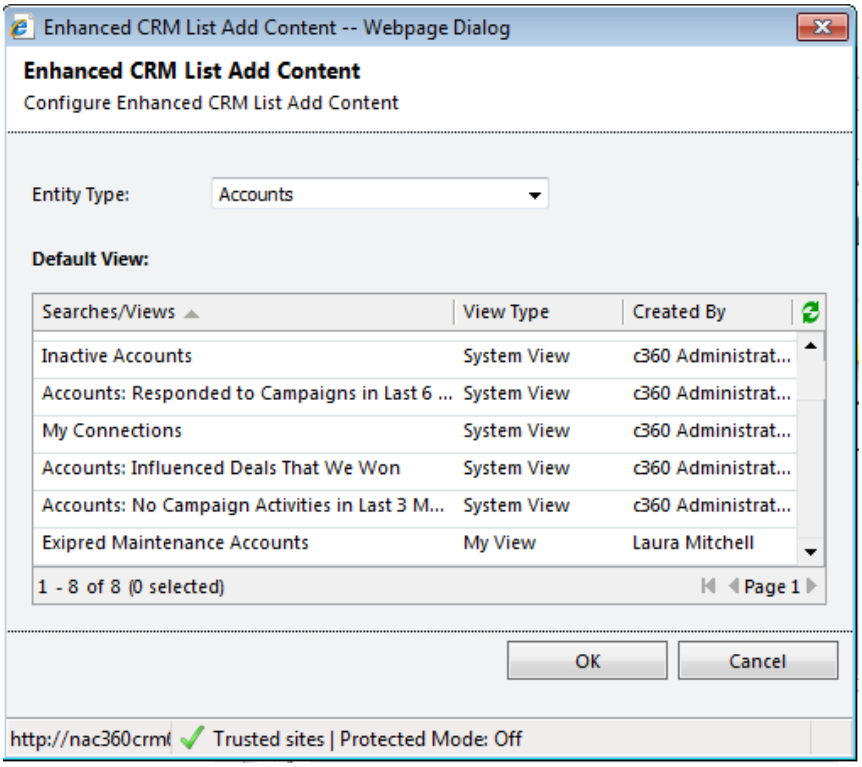


Figure 14: Add Content options for Enhanced CRM Lists

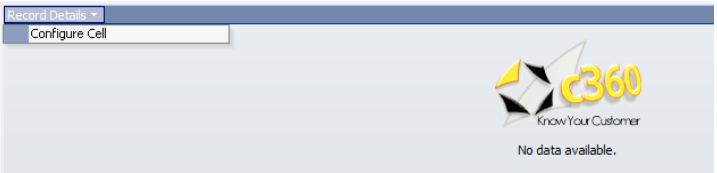
Option	Description
Entity Type	The entity for which this grid will display data
Searches/Views	Lists all available views and saved queries available for the chosen entity type

To change the content of a view in the cell choose the **'Configure Content'** menu option.

To delete a view, click **'Delete Content'**.

Record Details Cell

The Record Detail cell is a subscriber cell that can be configured to display a record form for active record in context. Create a specialized form for the dashboard via Customizations. This allows administrators to streamline information they would like to display on the form for easy data entry.



Add the form by clicking on **'Configure Cell'**.

Figure 15: Record Detail 'Configure Cell' option

In the example below, a custom form for the Account entity has been created called 'Record Detail_Accounts'.

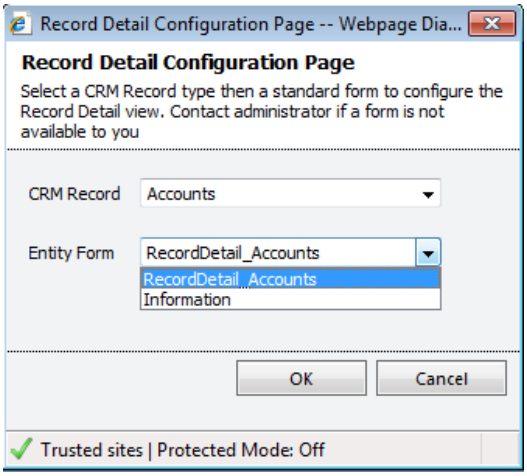


Figure 16: All available forms for the entitiy display in the 'Entity Form' dropdown

NOTE: CRM security applies to the available forms.

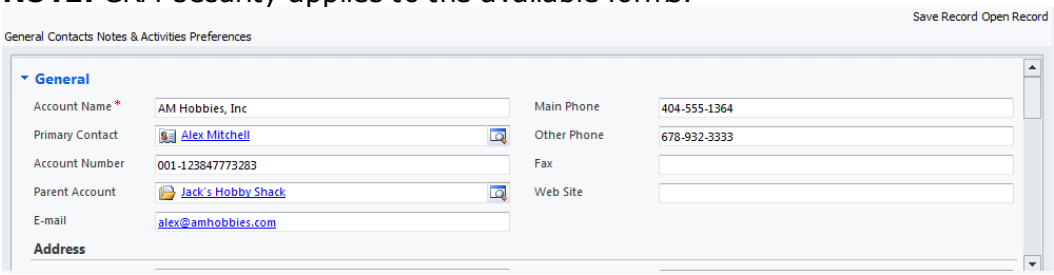


Figure 17: Form Added to the dashboard

Edits can be made to that form within the dashboard. Jump to any section of the form by clicking on **'General', 'Contacts', 'Notes & Activities'** or 'Preferences'.

Save any changes by clickin on **'Save Record'** or choose to open the CRM record by clicking **'Open Record'**.

Associated Entity List

The Associated Entity List cell displays a list of records associated with (i.e. linked to) the record in context.

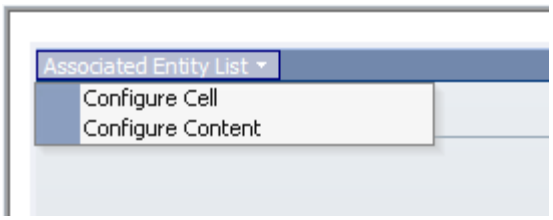


Figure 18: Configuration menu for the Associated Entity List

Configure Cell

The configuration screen of this content type, shown in Figure 19, is described in the following table.

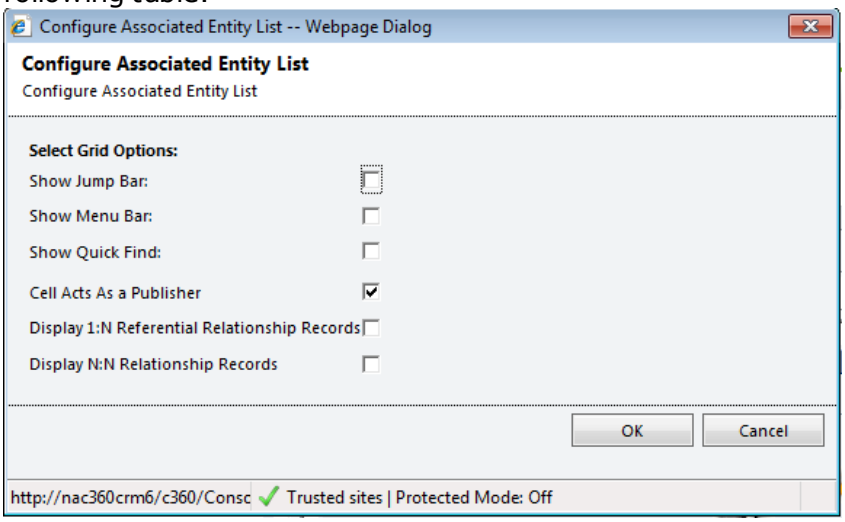


Figure 19: Configure Cell options

Option	Description
Show Jump Bar	Will show or hide the CRM jump bar which allows user to click a letter to quickly show only those records beginning with a certain letter
Show Menu Bar	Contains CRM's standard Actions menu as well as a New button for creating a new record.
Cell Acts As a Publisher	Checking this option will allow this cell to act as a publisher. So when you click on an item (Contact record for example), the other subscriber cells will update accordingly
Display 1:N Referential Relationship Records	Checking this option will also display all 1:N Referential Relationship Records (New Custom 1:N referential relationships that have been created). **NOTE: you must check this box if you want custom entity records to display in the Associated Entity list.**
Display 1:N Referential Relationship Records	Checking this option will also display all N:N Referential Relationship Records (New Custom N:N referential relationships that have been created)

Configure Content

Select all entities to appear in the dashboard. Each entity list will appear as a tab within the component.

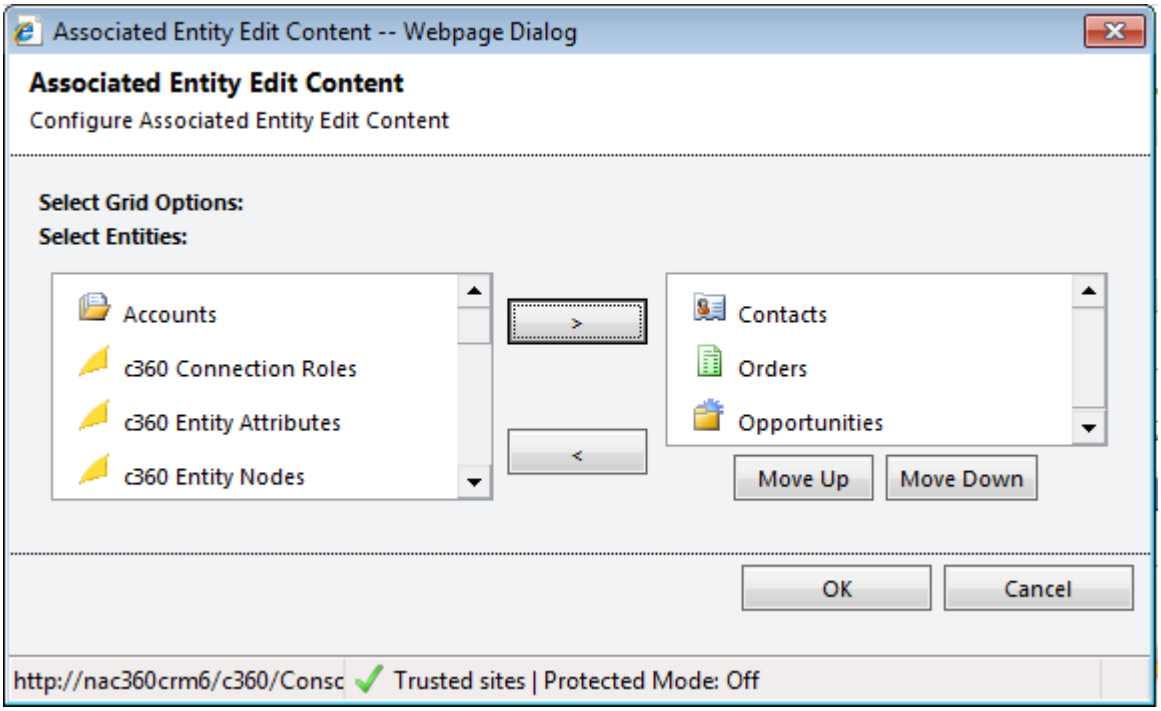


Figure 20: Configuring the Associated Entity List

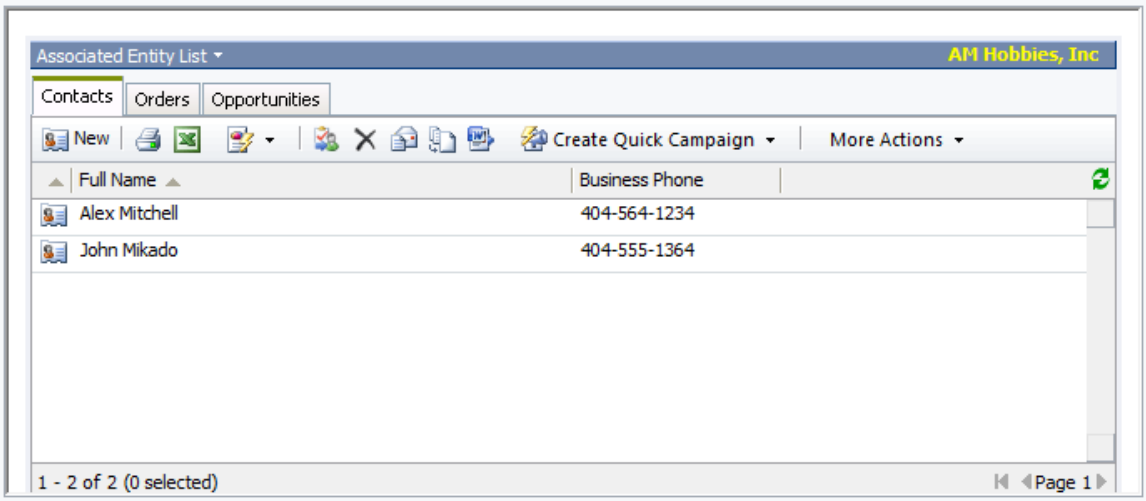
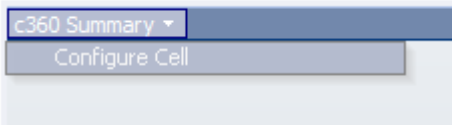


Figure 21: All selected entities from Figure 20 appear in tabbed format

c360 My/Summary

The c360 Summary component displays the c360 Summary screen for the record in context. Summary displays all open and closed activities, notes and CRM entities linked to or affiliated with the active record. The c360 My Summary component displays the same information for the CRM user. If you do not own the Summary product, this option will not be available.

Click **'Configure Cell'** to determine how information will display.



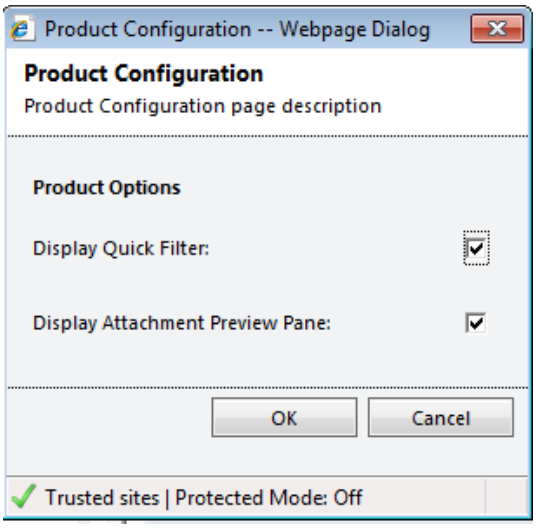


Figure 22 and 23: Configuration options for Summary

Click **'OK'** to reture to the dashboard. Both the Quick Filter (in blue) and the menu bar display.

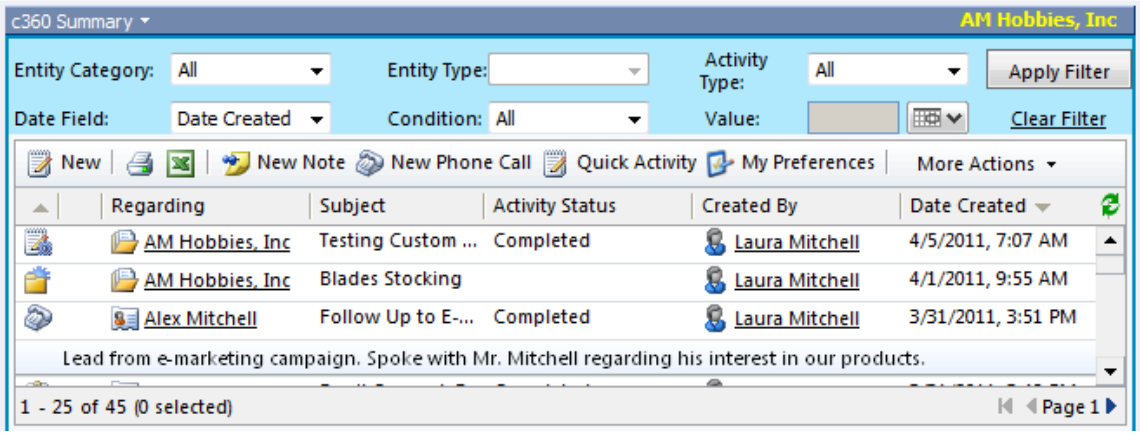


Figure 24: Summary for the account in context

Quick Activity

The Quick Activity functionality in c360 Summary can be utilized within Console. As illustrated in Figure 26, the user can click on record in a publisher cell and the Quick Activity cell will display.

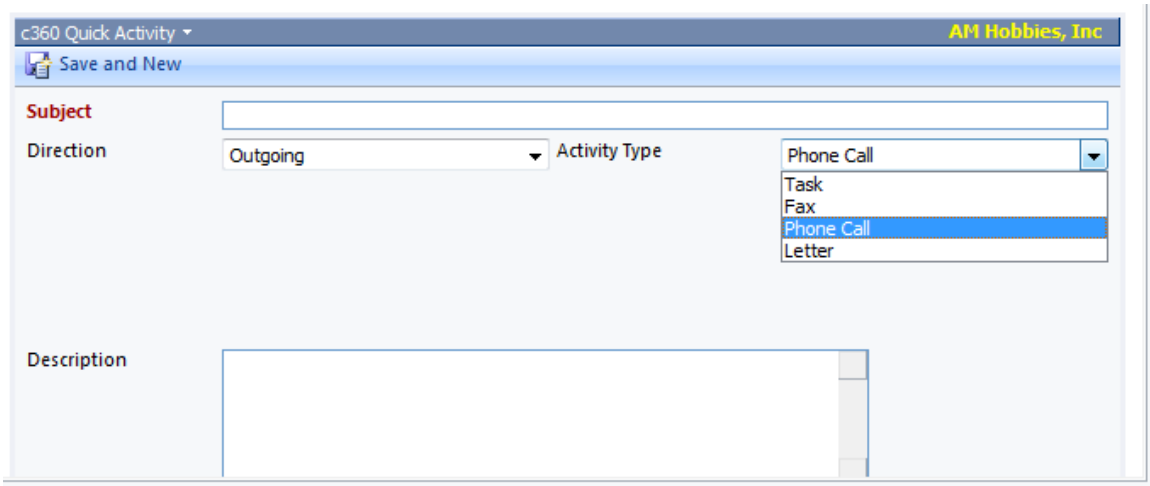


Figure 26: Quick Activity functionality can be used as a component in the dashboard

c360 Relationship Explorer

The c360 Relationship Explorer content cell discovers all related CRM records and displays them in a hierarchical tree view. Figure 25 demonstrates the relationships for an account in context. The user can determine how records are displayed by click **'My Preferences'**.

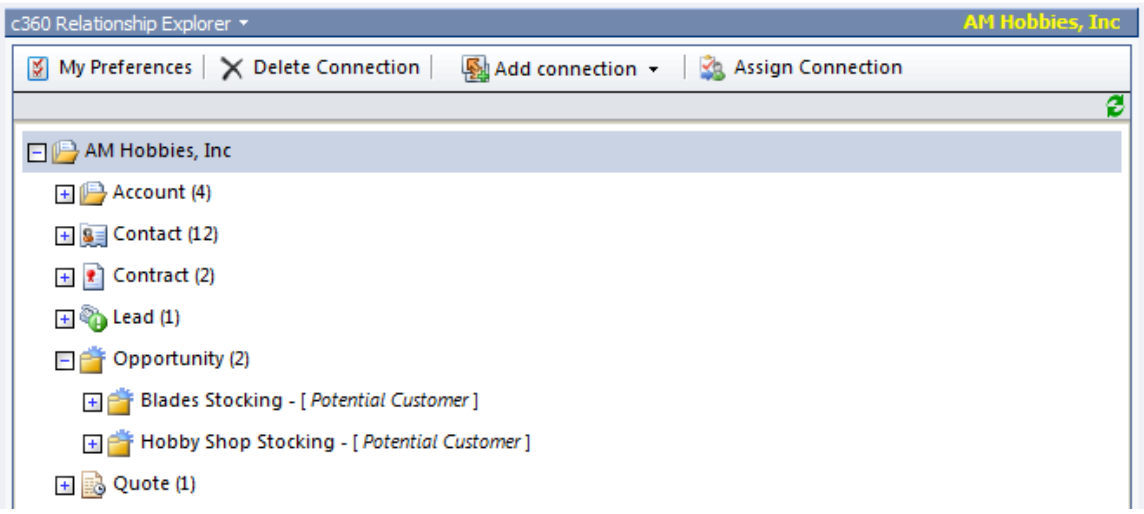


Figure 25: Relationship Explorer cell in a c360 Console

Edit Record in c360 Console Cell

The c360 Edit Record Functionality in Sytem/User Dashboard for c360 Console Cell is available for

- Enhanced CRM List
- Associated Entity List
- Search Cell

By default the user will be in Read in Grid Mode. On Clicking Edit in Grid Button, User will be able to Edit the Records in the Grid.

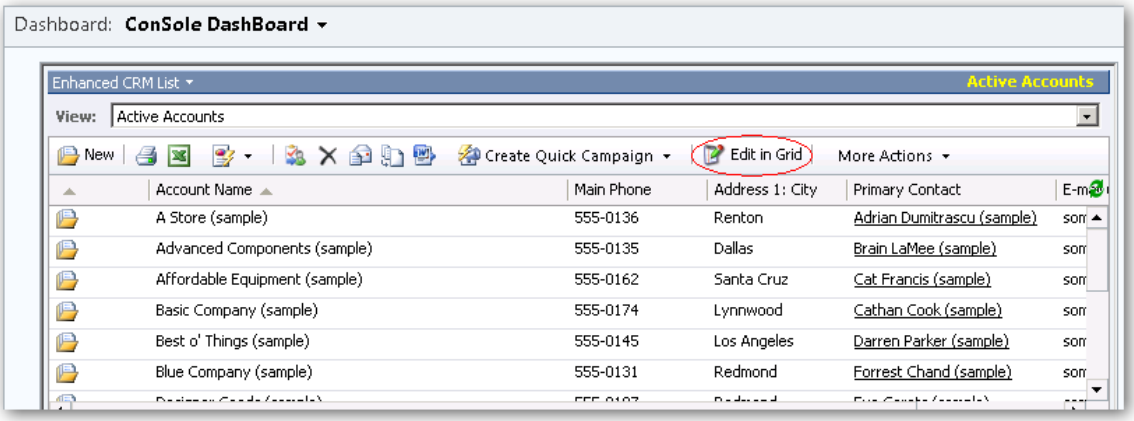


Figure 26: Enhanced CRM List Read in Grid .

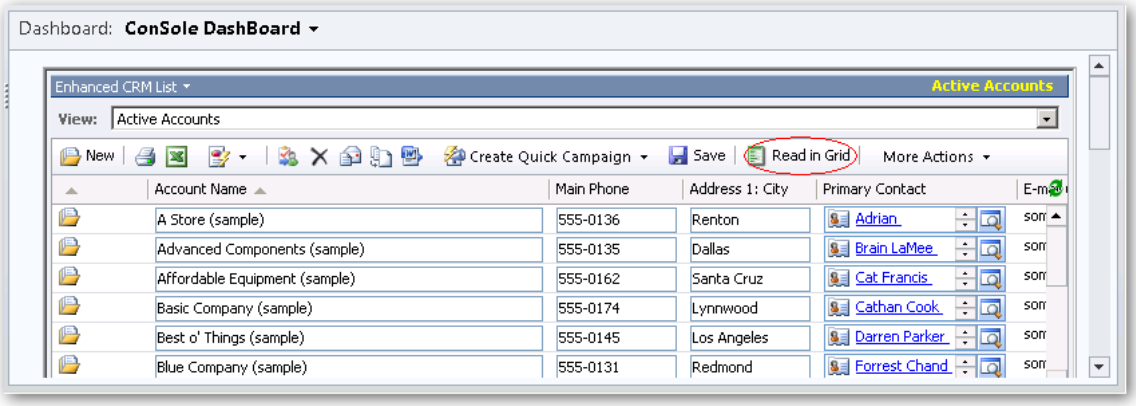


Figure 27: Enhanced CRM List Edit in Grid

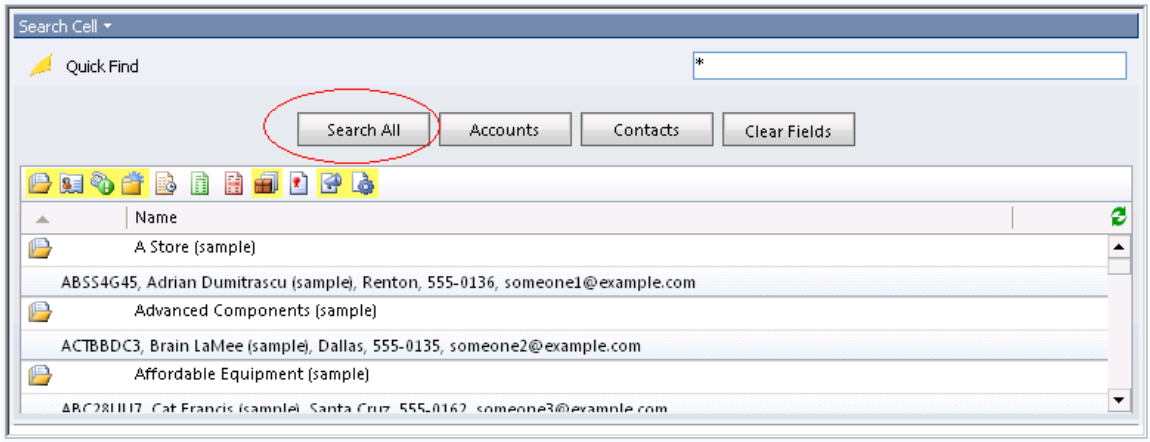


Figure 28: Read/Edit in Grid Button will not get displayed for Search All .