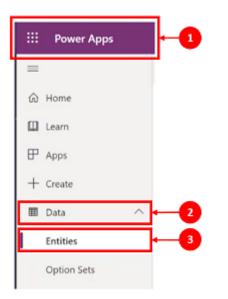


## **Configure Timeline**

The 'Timeline' control is feature rich and can be configured differently for each entity form it is on by the system administrators to personalize and enhance the user experience.

## Navigate to new customisation area via Power Apps.

- 1. Go to PowerApps URL: make.powerapps.com
- 2. Go to Data
- 3. Then Entities



## Now select the entity of the timeline you wish to configure.

	•		2	
-	다 Add form \vee 🗟 Form settings 🍕 Edit data in Excel 🛢 Get data	$\lor \mapsto$ Export data $\textcircled{O}$	Export to data lake $\checkmark$ of Al Builder $\checkmark$ :	Settings $ ho$ Search
命 Home	Entities > Account			
🛄 Learn	Fields Relationships Business rules Views Forms Dashb	oards Charts Keys	Data	
IP Apps				
+ Create	Name † $\vee$	Form ty	уре ∨ Туре ∨	
🖩 Data 🔨	Account	··· Main	Standard	
Entities	account card	··· QuickVi	iewForm Standard	
entities	Account Card form	··· Card	Standard	
Option Sets	Account for Interactive experience	··· Main	Standard	
Dataflows	Account Hierarchy Tile Form	··· QuickVi	iewForm Standard	
	Account Quick Create	··· QuickCr	reate Standard	
Export to data lake	Account Reference Panel	··· QuickVi	iewForm Standard	
Connections	Information	··· Main	Standard	
Custom Connectors	Social Profiles	··· QuickVi	iewForm Standard	

- 1. In this example we have selected the **Account** entity and then select the **Form** tab.
- 2. Timelines can only be added or configured on Main form types.

## Add or remove a timeline from the form.

- The **Timeline** is a component, so you need to access **Components** in PowerApps to make these timeline configurations.
- Once the Main form type has been selected the form customisation layout will appear.



- Scroll down to **Timeline** component on the left-hand navigation window, then drag and drop it into a section on the form. If the Timeline component is greyed out, it means the timeline is already on the form.
- To remove a **Timeline** component highlight it, then press **Delete**.

~ Layout	New Account Account		ana Archaid faointe	a Transfor of Engloyees Carear
Layout	Summary Details			
🗋 1-column tab	ACCOUNT INFORMATION	TIMEUNE	RELATED	- 1
2-column tab	Contact.	Tension	To enable this content, snate the record.	× 1
3-column tab	0 m. 6 m			
1-Column section	Account Name *	Almost there		
0 2-Column section	Pone			
000 3-Column section	Fac	↑ <b>1</b>		
	Primary (priac)			
4-Column section	Parint Account			
√ Display	Address 1: Street 1			
	Address 1: Street 2			
Website Preview	Adden 1 City			
✓ Input	Adview 1 StatutProvince			
	Address 1.2F/Postal			
In Number Input	Address 1. Coantry/Region			
I Arc Knob	2 414			R tow
🗐 Flip - Switch	12 km			£ 54
i≣ Toggle				
u Linear Slider				
💷 Radial Knob				
💷 Linear Gauge				
Al Builder Business Card contr				
$^{\vee}$ Related data	Timeline provides an overview of			
💷 Canvas app	historical and new activities, notes, and posts associated with an entity.			
🗄 Quick view	It allows users to find specific records using search and filter functions and			
🗄 Subgrid	to create new records in the timeline quickly. Only 1 timeline is allowed			
🗄 Timeline	per form.		-	



## Configuring the Timeline component

				Edit header	density	Timeline Properties	
Account				na Armai kenena - Manber of Poplegaes - D	n Compbell	Display options	
OUNT INFORMATION	TIMELINE		RELATED			Name * ①	
Contact	Traveline		To enable this content, create the record.				
						Timeline	
						Records shown on page	e 🛈
count Name 1	Aim	ost there				10	
ore							
-						Record types to show	0
etatie							
imary Contact						<ul> <li>Activities</li> </ul>	
Pont Account						✓ Notes	
Adress 1: Skroet 1							
Sdress 1: Street 3						<ul> <li>Advanced</li> </ul>	
Mense 1: Devet 3							
Idens 1						Record settings	
atz/Province **** Idress 1. ZIP/Postal							
ide ***							
antry/Region						Activities	
1.e.					Ri ton	Activity types	
						Appointment	
						Email	
						Linai	

- 1. Inside the **TIMELINE** section is where the **Timeline** component is placed.
- 2. When the **Timeline** is selected, the **Display options** on the right of the customisation form show, this is where configurations changes are made.



## **Display Options**

The records shown on the page can be altered.

Display	options	
Name *	0	
Timelin		
Limelin	ie	
Records	shown on page ①	
10		
L.o.		
Record t	types to show ①	
🗸 Acti	ivities	
Not	tes	
🗸 Post	ts	
	TIMELINE	
	Timeline	+ 🏾 🗉 :
	Enter a note	0
	Contoso Coffee Co Fundraiser	
	The 50th Annual Contoso Coffee Co Fundraiser is kicking off this week!	
	Active	7/14/2020 656 PM V
	Fundraiser Swag Gift bags	
	What colors do the swag gift bags come in?	7/14/2020 6:55 PM 🗸
	Task modified by Kian Campbell Vote on Fundraiser Swag Gifts	
	Respond by Thursday, 10/01/2020	7/14/2020 6:55 PM 🗸
	Active	17 MU2020 035 PM
	Reserve Atrium in Building C for Kick Off Book breadfast bar and drinks	
	Active	7/14/2020 6:11 PM 🗸
	Email from Kian Campbell	
UK	Need headcount from teams Closed	7/10/2020 11:46 PM 🗸
	👩 🗟 Auto-post on Fundraiser Swag bags	
	<ul> <li>Case: Return damaged swag sent by Celebrations, Inc.</li> </ul>	7/10/2020 11:27 PM V
	👩 🗟 Auto-post on delivery of convention chairs	
	Case: Created by Kian Campbell for Celebrations, Inc	
	Auto-post on competition for customer bid	7/10/2020 11:27 PM 🗸
	Wonne McKay won Opportunity for Litware Inc Account \$15k! Congratulation	6!
		7/10/2020 11:27 PM 🗸
	Auto-post on competition for customer bid Alton Caraway won Opportunity for Contoso Coffee Account	
		7/10/2020 11:27 PM 🗸
	Opportunity Completed by Kian Campbell     S14.589.45	
	- 514.009.45	7/10/2020 11:27 PM 🗸

The default setting on the **Records shown on page** is set to 10, there is no limit to this.



## **Record types shown**

The prmairy record type are activities, notes and posts. These are enabled by default. **Activites** can have many customizable sub-activity record types, these can be further customized under the Activity section of the drop-down menu on the **Timeline**. **Notes** allow users to capture information related to the entity record. There are two types of **Posts**, auto posts that are system generated that notify you of account acitvity that has happend and user posts which allow users to leave a message for another user on a record.

#### **Configuration View Display View Display options** TIMELINE Name \* 🛈 TH. Timeline +Ŷ Q Sea Timeline Acco Enter a note. 🖾 Email 🗇 Task modified by Kian Camp Records shown on page ① Contoso Coffee Co Fundraiser The 50<sup>th</sup> Annual Contoso Coffee Co Fi 6 Phone Call 🖄 Task Pote modified by Kian Campbell Fundraiser Swag Gift bags What colors do the swag gift bags come in? 10 57 Pas 🔁 Task modified by Kian Campbell Record types to show ① NC. iespond by Thursday, 10/01/2020 7/14/2020 6:55 PM 😒 Activities Task modified by Kian Campbell Reserve Atrium in Building C for Kick Off Book breakfast bar and drinks R 7/14/2020 6:11 PM V Notes 🖙 Email from Kian Campbell Need headcount from tear Closed 7/10/2020 11:46 PM 🗸 Posts 🗟 Auto-post on Fundraiser Swag bags Case: Return damaged swag sent by Celebrations, Inc. 7/10/2020 11:27 PM V S Auto-post on delivery of convention chairs Case: Created by Rian Campbell for Celebrations, In 0 7/10/2020 11:27 PM 🖓 Auto-post on competition for customer bid 0 nne McKay won Opportunity for Litware Inc Account \$15k! Congratulations! 7/10/2020 11:27 PM 😒 S Auto-post on competition for customer bid Alton Caraway won Opportunity for Contoso Coffee Account Opportunity Completed by Kian Campbell \$14,589,45 7/10/2020 11:27 PM V

## Enable or disable these record types to be displayed in the Timeline

To enable the **Record types to show** for **Activities**, **Notes** and **Posts** on a form, check the box next to the record type.

1. To confirm the record type is displaying on the form, click on the Create a timeline

**record**  $\top$  (Create a timeline record icon) icon in the top right nav in the timeline and a drop down menu will appear displaying the list of enabled record types.

- 2. When **Activities** are enabled you will see **Activity** record types for appointments, email, phone calls, and tasks.
- 3. When **Notes** are enabled, you will see the Note record types on the form.
- 4. When **Posts** are enabled, you will also see the Post record types on the form.

The **Timeline** shows a simple icon before the activity, post, note, and custom entity, making it easy for you to identify the record type. Dates and timestamps always appear on each record on the bottom right of the preview and can be viewed at all times.



The **Advanced** feature works across and is independent of all record types and is collapsed by default. When enabling and disabling **Advanced** features you will not be able to view updates until you save and publish your configuration updates and refresh the entity form.

## Quick entry record type and sort order default

The following is a detailed overview of the **Advanced** configuration options starting with selecting your **quick entry record type**:

## **Configuration View**

**Display View** 

Advanced     Notes       Quick entry record type ①     Notes       Quick entry record type ①     Notes       Notes     Y       Sort default     Sort default	
Quick entry record type  Notes Posts Sort default	
Notes Posts	~
Sort default	
Descending V Sort default	
v Descending	
✓ Enable filter pane	~
Expand filter pane by default	
Enable search bar ①	
Expand all records by default	
Enable "What you've O missed" summary	

- Select Advanced to expand this feature in the configuration view. The Quick entry record type provides you with quick access to create either a Note or a Post. The default setting for this feature is set to Notes.
- 2. The **Sort order default** feature controls the order of how all data is sorted on the timeline. The default setting for this feature is set to Descending.

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			Û	┝	-
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+	Y	ī≣	:		
				ኈ	
				Û	+ \(\nabla \) II : + \(\nabla \) II : + \(\nabla \) II :

- 1. When you select **Notes** it will display under the **Search** bar in timeline. Also, you will see a paperclip icon which allows you to attach files. Note you can only attach files to **Notes**.
- 2. When you select **Posts** it also will display under the **Search** bar in timeline.



The filter pane provides a quick option to sort and search for data quickly.

Configuration View	Display View	
<ul> <li>Advanced</li> <li>Quick entry record type ⊙</li> <li>Notes </li> </ul>	TIMELINE Timeline Search timeline	+ 7 = :
Sort default       J     Descending       Enable filter pane		
<ul> <li>Expand filter pane by default</li> <li>Enable search bar </li> <li>Expand all records by default</li> </ul>		
Enable "What you've missed" summary		

The **Enable filter pane** is enabled by default. To disable uncheck the box.

## Filter activity types on timeline

It is possible to personalise and quickly filter activities, posts, and notes with multiple options. As well as being able to filter standard activities, notes and posts, you can also filter custom activities that are in the timeline.

When you select filters based on an activity status then those activities, notes, and posts are displayed in your timeline. You can customize data using data filters and either choose to keep filters in place or clear them when you are done.

- When the **Filter** icon is transparent <sup>¬</sup> on the entity form, it means no items have been selected, therefore the filter pane is empty.
- When the **Filter** icon is dark **▼**, it means filters have been set. To view which filters have been selected, click on the **▼ Filter** icon and the filter pane will display showing which filters have been set.
- You can select how you want to filter data by checking the box next to the filter.
- You can clear filters by using the **Clear all filters**  $\overline{V}$  icon on the filter pane.

# It is possible to filter be **Record Type**, **Activity Type**, **Activity Status**, **Activity Due Date**, **Posts By** and **Modified Date**.

## Record Type: -

- Notes
- Posts
- Activities

## Activity Type: -

- Appointment
- Campaign Activity
- Campaign Response
- Email
- Fax
- Case Resolution



- Letter
- Opportunity Case
- Order Case
- Phone Call
- Quote Close
- Recurring Appointment
- Social Activity
- Task
- Project Service Approval
- Booking Alert
- Conversation
- Session
- Customer Voice survey invite
- Customer Voice survey response

+ Custom activities (as configured by your administrator)

## Activity Status: -

- Active
- Overdue
- Closed

## Activity due date: -

- Next 30 days
- Next 7 days
- Next 24 hours
- Last 24 hours
- Last 7 days
- Last 30 days

## Post By: -

- Auto Post
- Users

## Modified Date: -

- Last 24 hours
- Last 7 days
- Last 30 days



## **Expand filter pane by default** provides quick access to sorting options within the timeline.

Configure View	Display View	
^ Advanced	TIMEUNE	
Quick entry record type ①	Timeline /D <sup>2</sup> Search timeline	+ V TH :
Sort default	Enter a note Filter by	×
Descending     Cable filter pane	Record type ^	
Expand filter pane by O	Activity type $$	
Enable search bar	Activity status $\vee$ Posts by $\sim$ Modified date $\vee$	
Expand all records by default     Enable "What you've     missed" summary		

The **Expand filter pane by default** feature displays an expanded filter pane at the top of the form anytime it is opened and refreshed. It is disabled by default. Enable or disable it by checking or unchecking the box.

**Enable search bar** displays the Search bar in the timeline. It allows users the ability to easily search for records, it searches the title or body and description fields, then displays the record for you.

#### **Configure View**

**Display View** 

<ul> <li>Advanced</li> </ul>	
Quick entry record type ①	
Notes	~
Sort default	
↓ Descending	$\sim$
<ul> <li>Enable filter pane</li> </ul>	
Expand filter pane by	0
default	_
Enable search bar ①	
Expand all records by defa	nult
Enable "What you've	~
missed" summary	0

Enable or disable the feature by checking or unchecking the box.



**Expand all records by default** displays all activities in an expanded view in timeline.

Configure View	Display View
<ul> <li>Advanced</li> <li>Quick entry record type <sup>(*)</sup></li> <li>Notes <sup>(*)</sup></li> <li>Sort default</li> <li>Descending <sup>(*)</sup></li> <li>Enable filter pane <sup>(*)</sup></li> <li>Expand filter pane <sup>(*)</sup></li> <li>Expane <sup>(*)</sup></li> <li>Expand filter pane <sup>(*)</sup></li> <li>Expane <sup>(*)</sup></li> <li>Expand filter pane <sup>(*)</sup></li> &lt;</ul>	Image: Image
missed" summary	② Erata Hom Kan Cangdel Control Canguages Savag Options CMA00001005 Canton Canguages Savag Options CMA00001005 For part in netrico, large studies to call of the savag bag you like the neurit Therky as gain for your hegt.

To enable the **Expand all records by default**, check the box (or uncheck to turn it off). This sets the default view to display all records in the expanded view format in the form each time the timeline is opened. The Expand all records is disabled by default.

- 1. When enabled, the **Expand all records** icon is displayed in the top right corner of the timeline nav.
- 2. Records can be expanded or collapsed by using the **Expand all records** icon. When expanded, all records are displayed in the expanded view in the form each time it is opened. When you clear the box next to the **Expand all records** feature it will no longer display activities in an expanded view.

When disabled, the **Expand all records** icon will not display in the top right nav of the timeline. Records will always be displayed in a collapsed view.



## Edit filter pane

You can configure the default filters that are applied when a form loads or is refreshed using **Edit filter pane**. You can remove filter groups by toggling the setting to **Off**. Users can remove the default filters to see all the records unless **Enable filter pane** is disabled.

	^ Advanced
	Quick entry record type 🛈
	Notes ~
	Sort default
Edit filter pane	$\downarrow$ Descending $\checkmark$
Default filters will be applied on first load. Filters toggled off will be disabled in timeline.	Filter pane
✓ Record type On	Enable filter pane
<ul> <li>Activity type</li> <li>On</li> </ul>	Expand filter pane by default
<ul> <li>Activity Status</li> <li>On</li> </ul>	Edit filter pane
✓ Activity due date On On	Additional settings
	Enable search bar 🕕
V Modified date On	Expand all records by default
	Enable "What you've missed" summary
Done Cancel	Record settings

## Expand records with images in timeline

It is possible to send and receive records with images, but they will now show when the record is collapsed, they must be expanded.



Timeli	ne	+ '	7	ī≣	:	
<u>ب</u>	iearch timeline					
Enter a	a note				0	
KC	Note modified by Kian Campbell Contoso Coffee Co Fundrasing Campaign Kick Off All We are excited to announce the kick off of this year's annual fundraiser! WHAT: 50th Annual	Conto	so C	offee		
	每 Contoso Coffee Campaign Kick-Off Details.d					
			7	7:42 PM	$\sim$	
KC	Email from Kian Campbell           Contoso Coffee Campaign Swag Options CRM:0001005         All Forgot to mention, please include the color of the swag bag you like the most! Thank you again           Closed         Closed	n for y 9/29/2				1
KC	Email from Kian Campbell Contoso Coffee Campaign Swag Options CRM:0001004		5 <	% →	P)	] ¯
	This Email has been blocked due to potentially harmful content. View full Email content.				┝─	-2
	All Just checking in on everyone's thoughts on the campaign swag. Please let me know if you have any questions!					
	Kian Campbell Campaign Coordinator, PNW Branch 342 Main Street, Suite 900, Seattle, WA 98007 (206) 454-9817 / <u>kcampbell@campaign.com</u>					
	Closed	9/29/2	020 4	1:28 PM	~	-3
KC	Email from Kian Campbell           Contoso Coffee Campaign Swag Options CRM:0001003         All This is just a quick reminder to send in your vote for your choice of campaign swag.         Kian Car           Closed         Interval         Interval         Interval         Interval			npaigr 1:28 PM		-

- Records when collapsed provide a visual summary. To expand an individual record, click anywhere on the timeline record to expand and collapse a record view. In the bottom right corner of the record there is a caret. If the caret is facing down (<sup>V</sup>) the record is collapsed, if it is facing up (<sup>^</sup>) the record is expanded.
- Records with images will quite often display a notice like.
   ▲ This Email has been blocked due to potentially harmful content. View full Email content.
- 3. When the user clicks on the message the warning goes away and displays.

It is possible to Enable **"What you've missed"** summary in the timeline. It can help users stay on top of updates and changes made to records by displaying the updates at the top of the timeline when the record is opened.

Configure View	Display View	
∧ Advanced	TIMELINE	
Quick entry record type ①	Timeline	+ 7 13 :
Notes		
Sort default	Enter a note	0
↓ Descending ~	What you've missed	×
Enable filter pane	New posts (1)	
Expand filter pane by default		
Enable search bar ①		
Expand all records by default		
Enable "What you've missed" summary		



The **Record types to show** is tied to the **Record settings** which supports Activities, Notes, and Posts in the timeline.

The **Record settings** allows you manage the settings within the record types.

- The Activities record type is tied to Activities in record settings.
- Notes record type is tied to Notes in record settings.
- **Posts** record type is tied to **Posts** in record settings.

To enable or disable a record type simply check or uncheck the box and that record type will either display or no longer appear in the **Record settings** section.

Record types to show ①	Record types to show $$
Activities	Activities
Votes	Votes
Posts 2	Posts
<ul> <li>✓ Advanced</li> </ul>	✓ Advanced
Record settings	Record settings
$\checkmark$ Activities	$^{\vee}$ Activities
✓ Notes	✓ Notes
✓ Posts	

Hiding or showing the **Posts**.

- 1. When **Posts** is checked in the Record types to show section, it is enabled in Record settings section.
- 2. When **Posts** is unchecked it will be disabled.



## Configure activity record types

When you expand the **Activities record settings** on the timeline component section a list will display showing all the activity types that can be either enabled or disabled on the entity form.

#### **Configuration View**

	Record settings	
	Activities	_
-	Activity types	1
	Appointment 🗸	
<b>-</b>	Campaign Activity	
_	Campaign Response	
3	🕨 Email 🗸	
- I	Fax	
	Case Resolution	
	Letter	
	Opportunity Close	
	Order Close	
	Phone Call 🗸	
	Quote Close	
	Recurring Appointment	
	Social Activity	
	Task 🗸	
	Project Service Approval	
	Booking Alert	
	Conversation	
	Session	
	Customer Voice survey invite	
L	Customer Voice survey respon	

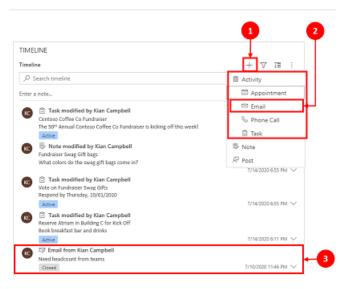
- 1. Expand and view Activities under the Record settings section using the caret (^).
- 2. A list of **Activity types** is displayed in the expanded view.
- 3. You can enable or disable activity by selecting an activity type. In this example we selected **Email**

To enable an **Activity type**, check the box next to **Enable** and select **Done**.

To disable an **Activity type**, uncheck the box next to **Enable** and select **Done**. This will grey out all other items in the box and disable the activity type from displaying on the timeline. This also disables the activity type from being created or viewed in the timeline.



#### **Display View**



- 1. When enabled, an **Activity type** will appear under the **Create a timeline record** +.
- 2. The activity type will be displayed as an option the user can choose from the drop down.
- 3. Also, the Activity type record is displayed in the body of the timeline.

#### Enable status tags on activity record types

Status tags match the status filter that display in the timeline to help users see at a glance the state of an activity record whether it be **Active**, **Overdue**, or **Closed** on a task, appointment or email. Admin can enable or disable status tags for any **Activity type** in the **Record settings**. Status tags are enabled by default.

**Display View** 

#### **Configuration View**

rcord settings		Timeline	+ 7 18
Activities			创 Activity
tivity types		Enter a note	C Appointment
Appointment V Campaign Activity	Email	Task modified by Kian Campbell Contoso Coffee Co Fundraiser The 50 <sup>4</sup> Annual Contoso Coffee Co Fundraiser is kicking off this week!	Email Phone Call
Campaign Response	Enable 🛈	😨 🗟 Note modified by Klan Campbell	₩ Note
imail 🗸	Enable status tag ①	Fundraiser Swag Gift bags What colors do the swag gift bags come in?	R Post
Fax Case Resolution	Create directly from timeline ① Select form ③	Task modified by Klan Campbell Vote on Fundralizer Swag Gifts Respond by Thursday, 10/01/2020	7/14/2020 6:35 PM
Letter	Default $\checkmark$	Active	7/14/2020 6:55 PM
Dpportunity Close		Task modified by Kian Campbell Reserve Atrium in Building C for Kick Off Book breakfast bar and drinks	
Phone Call 🗸	Done Cancel	Active	7/14/2020 6:11 PM
		Need headcount from teams Cosed	7/10/2020 11:46 PM

Check the box for **Enable status tag** to display email status tags. When enabled, status tags **Active**, **Overdue** or **Closed** will appear in the timeline next to that activity record.



## Enable the feature to create directly from timeline

A way of streamlining productivity is to enable the ability to create activity types directly from the timeline.

Configuration View		Display View	
Record settings    Activities  Activity types  Appointment Campaign Activity Campaign Activity  Email Fax Case Resolution Letter Opportunity Close	Email  Enable ③ Enable status tag ④  Create directly from timeline ④ Select form ③ Default ✓  Done Cancel	Timeline         Enter a note         Image: Search timeline         Enter a note         Image: Search timeline         Image: Search timeline	+ V III : Appointment Email Phone Call Task Note R Post
Order Close			

To enable this feature check the Create directly from timeline box. When enabled, the activity type

will appear in a drop down box. Use the + icon in the top right to create the activity. The item to remember is to make sure the appropriate form (quick create / main form for that activity) is added to the PowerApp that is used.

## Create and use card forms in timeline

Records are displayed using the default setting for each activity type. However, if you want to display record information for an appointment or email, for example, you can either edit the existing card form, use a different card form from record settings, or customize your own.

#### **Configure View**

**Display View** 

Record settings	Email	* Inail and					
	Email	Coloritrip					
<ul> <li>Activities</li> </ul>		8	Subject		Modified On		
Activity types	Enable ①						
Appointment 🗸	Enable status tag ①						
Campaign Activity	Create directly from timeline		🔒 Ta				
Campaign Response	Select form ①		C:				
Email 🗸	Default						
Fax	Default						
Case Resolution	Delaut		Owner" Own	🔒 Regardi	g tegarding	Pilorby his	
Letter	Email Card form		L				

It is possible to change the default card settings to a different card form. If you create a new card form, you must go to the parent entity and add the new form of **card type** there before it will appear in the timeline list.



## Customize a card from within the timeline

All card forms have 4 different sections.

Solution: Default Solution Form: Email		Field Explorer Filter All Fields
4 Email card		Chily show unused fields
ColorStrip	Header	Created By
	Subject Subject Modified On Modified On	Created By (Delegate)
		Created On
	(Datala	Currency
		Date Sent
(	3	🔤 Delivery Priority
	Cr Cr	Direction
	Description     Description	Due Date
		Duration
	Franker	Exchange Rate
(	4 Income Internetic Develop Internetic	Following
	Owner     O	i From
		Last On Hold Time
		Modified By
		5 🔄 Modified By (Delegate)
		No. of Delivery Attempts
		Notifications
		On Hold Time (Minutes)
		Parent Activity Id
		SLA.
		New Field

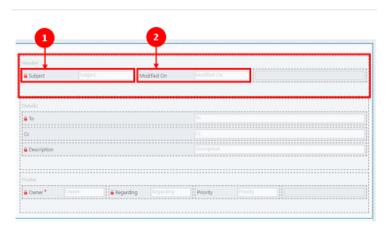
- 1. **ColorStrip Section** does not show on the timeline record.
- 2. Header Section is displayed on the timeline record, but only the first 2 fields are shown.
- 3. **Details Section** is displayed on timeline record, but only the first 3 fields are shown.
- 4. Footer Section does not show on the timeline record.
- 5. Entity Fields it is possible to drag fields from here into any of the 4 sections.

Each individual card form can be customised for each activity record.

#### **Header Section**

The card **Header** displays the title/subject in your timeline email form. It is possible to add up to 6 fields in this section, only the first 2 show in the timeline record. Useful to remember all empty fields will be ignored by the form in all sections.

#### **Configuration View**



**Field 1** – it will appear as bold header at the top of your timeline record. **Field 2** – this field will appear in the bottom right corner of the timeline record.



**Display View** 

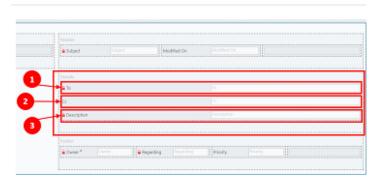
Timeline	-0			+	7	-
,⊅ Searc	h tim <mark>e</mark> line					
Enter a not	:e					Û
Ale	Team Buildi		incemen	t		
	sanne Schustir ctive	1	[	7/20/	2020 4:5	50 PI

Field 1 from the card header is always displayed in this section. Field 2 will show here.

## **Details Section**

The card **Details** section displays in the body of your timeline email record. It is possible to add up to 4 fields in this section, only 3 will show in the timeline record.

## **Configuration View**



The Card Details will appear below the Header field selected.

**Field 1** – acts as a sub-header on the timeline record. **Field 2** – will only display one line of text in a summary view on the timeline record, but when you expand the timeline record you will see the full content of the field. **Field 3** – this will appear below **Field 2**, this will only show when the timeline record is expanded.



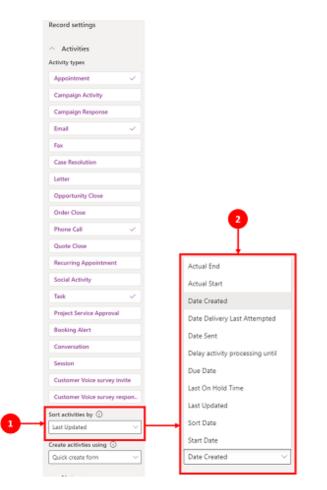
#### **Display View**

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## Set date in the Sort activities by section

The order you see your data in is important, it is possible to set a default date sort setting for **Activity types in Record settings**. The default is **Last Updated** in ascending order.





- 1. The **Sort activities by** allows you to control how data is sorted in the timeline.
- 2. This shows a lists of fields you can choose to sort your data by.

## Set create activities form type in timeline



- 1. The **Create activities using** feature allows you to choose which type of form you want to open.
- 2. Quick create form appears in a model on the right. Some activities do not support quick create. Main form navigates you to the activity entity main form.

## Set the activity rollup type in timeline

The activity rollup type can be configured for timelines on forms for the **Account, Contact and Opportunity** entity. The available types of rollups are **Extended**, **Related**, and **None**. Activity rollup

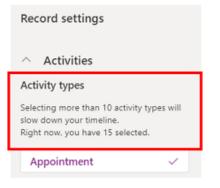


only affects accounts and contacts in CRM applications. To only show activities that are directly related to the entity in timeline, select **None**.

Sort activities by 🛈	
Last Updated	$\sim$
Create activities using 🛈	
Quick create form	$\sim$
Activity rollup type 🛈	
Extended	$\sim$
Extended	
Related	
None	

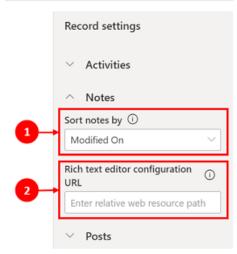
#### **Timeline performance**

Only enable the activities that you need on this form. If you select more than 10 **Activity types**, a warning notice displays to let you know that the number of activity types you have selected impacts the performance speed on your timeline. To improve timeline performance speed, consider limiting activity types to 10 or less.



## Notes on timeline

#### **Configuration View**





The Notes section expands when enabled and allows you to:

- 1. Sort notes by date created or date modified.
- 2. It is possible to add a relative web resource path in Rich text **editor configuration URL** field for customized note capability.

#### **Display View**

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,○ Search timeline	B Activity
Title	Appointment
	🖾 Email
Enter a note	% Phone Call
	🖄 Task
	⇒ Note ← 2
	R <sup>2</sup> Post
	s & q +
a [	Cancel Add note

- 1. When enabled, notes can be added via the Create a timeline record + icon.
- 2. A dropdown will appear where you can access Notes.
- 3. Use the Notes feature to create a note to add to a record using rich text editing.

## Posts on timeline

## **Configuration View**

Rec	ord settings
~	Activities
~	Notes
^	Posts
Sor	t posts by 🛈
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The **Posts** section expands when enabled and allows you to **Sort notes by** date created or date modified.



#### **Display View**

3	
±	▼ IE       :         Ø Activity
TIMELINE Timeline Search timeline	+ 7 1 :
Enter a post. Use # to link a record and @ to mention a team member. Cancel Add	

- 1. When enabled, posts can be added via the **Create a timeline record** + icon.
- 2. A dropdown menu displays and you access Posts.
- 3. Use the Post feature to create a post to add to a record.

When date **Created On** is used to sort posts on the timeline, the location in the timeline remains constant even when there are responses to that post.

When date **Modified On** is used to sort posts on the timeline, the location in the timeline adjusts to the top when there are responses to that post.

#### Save and publish timeline updates and changes

Before you can view any configuration changes on the entity form, you must save and publish your updates first on the timeline component.



- 1. Before you can publish, you must **Save** any changes made in the timeline component.
- 2. Once your configuration changes are saved, you can **Publish**. Timeline updates are now live in your timeline environment and can be viewed.