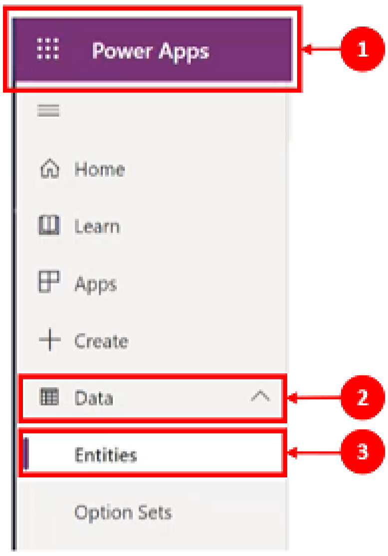
Configure Timeline

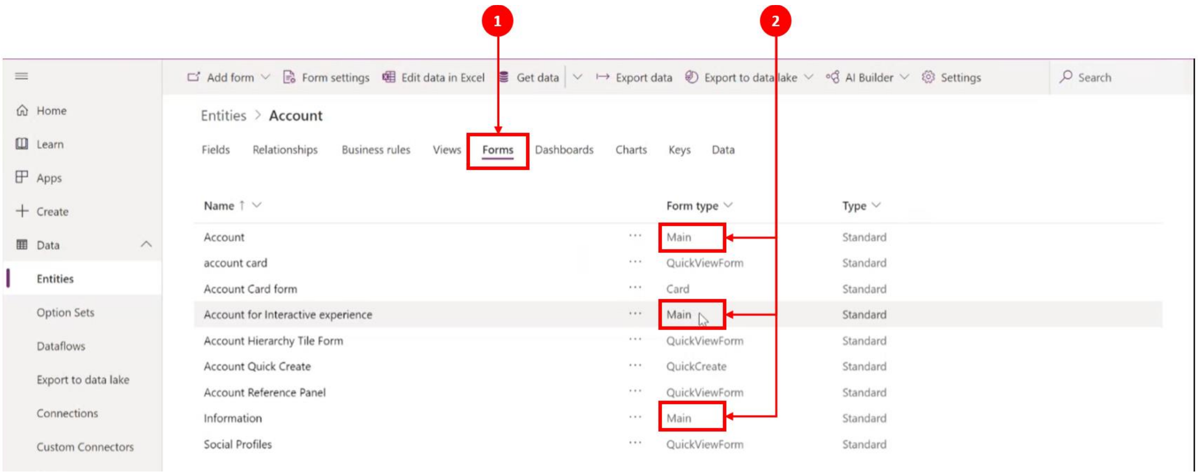
The ‘Timeline’ control is feature rich and can be configured differently for each entity form it is on by the system administrators to personalize and enhance the user experience.

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.

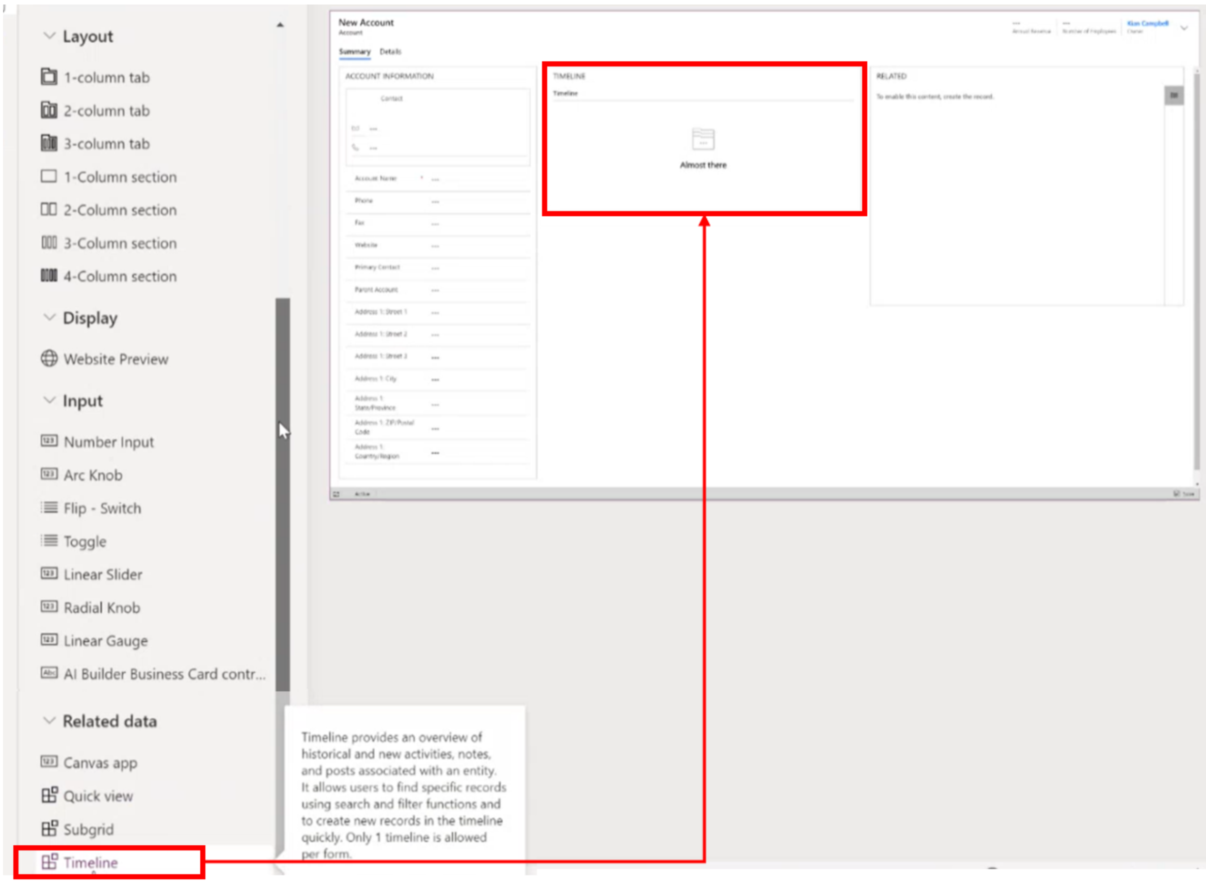


1. In this example we have selected the **Account** entity and then select the **Form** tab.
2. Timelines can only be added or configured on **Main** form types.

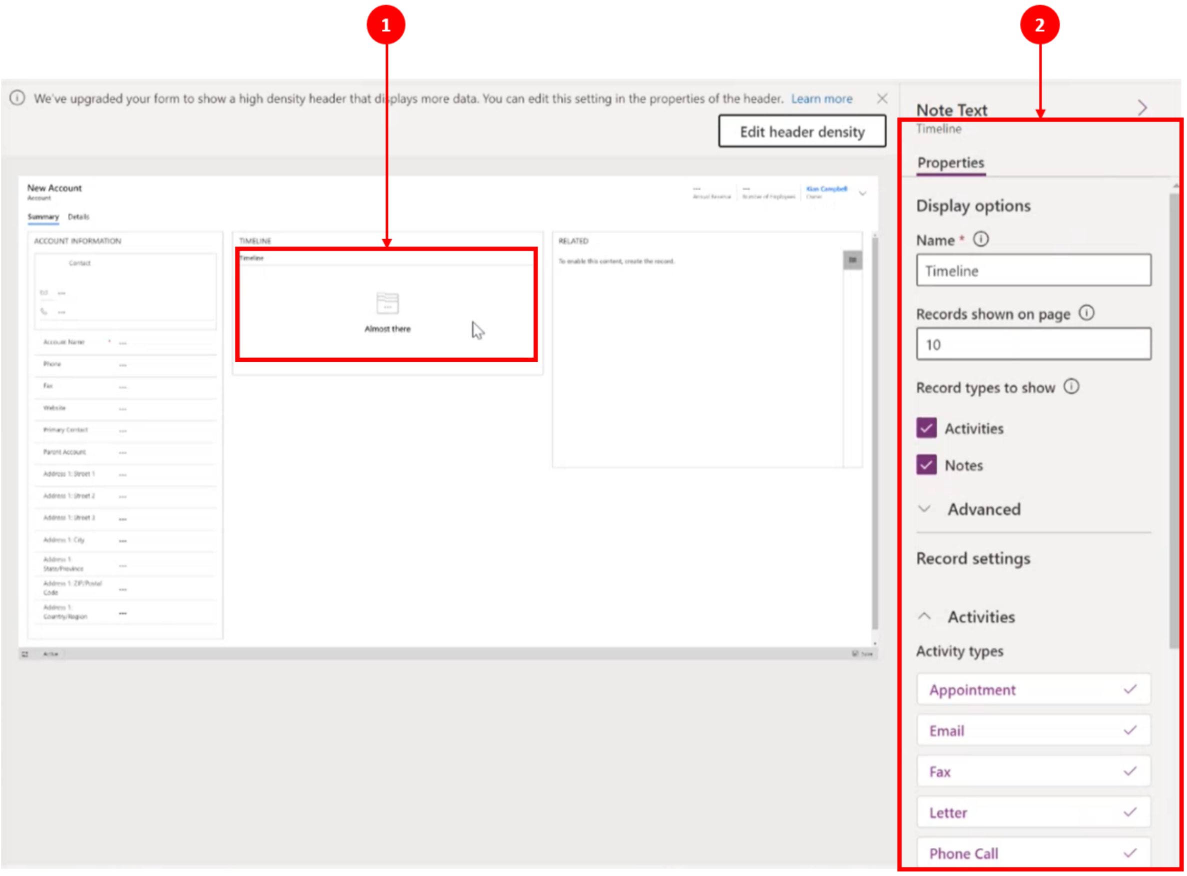
Add or remove a timeline from the form.

- 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**.



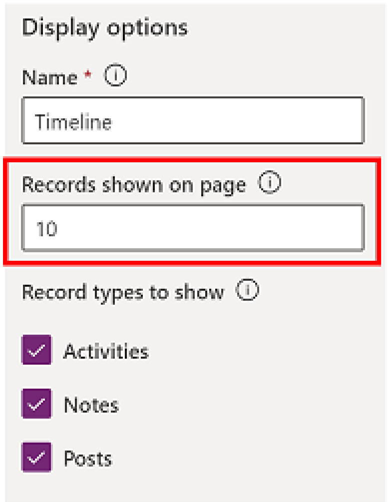
Configuring the Timeline component

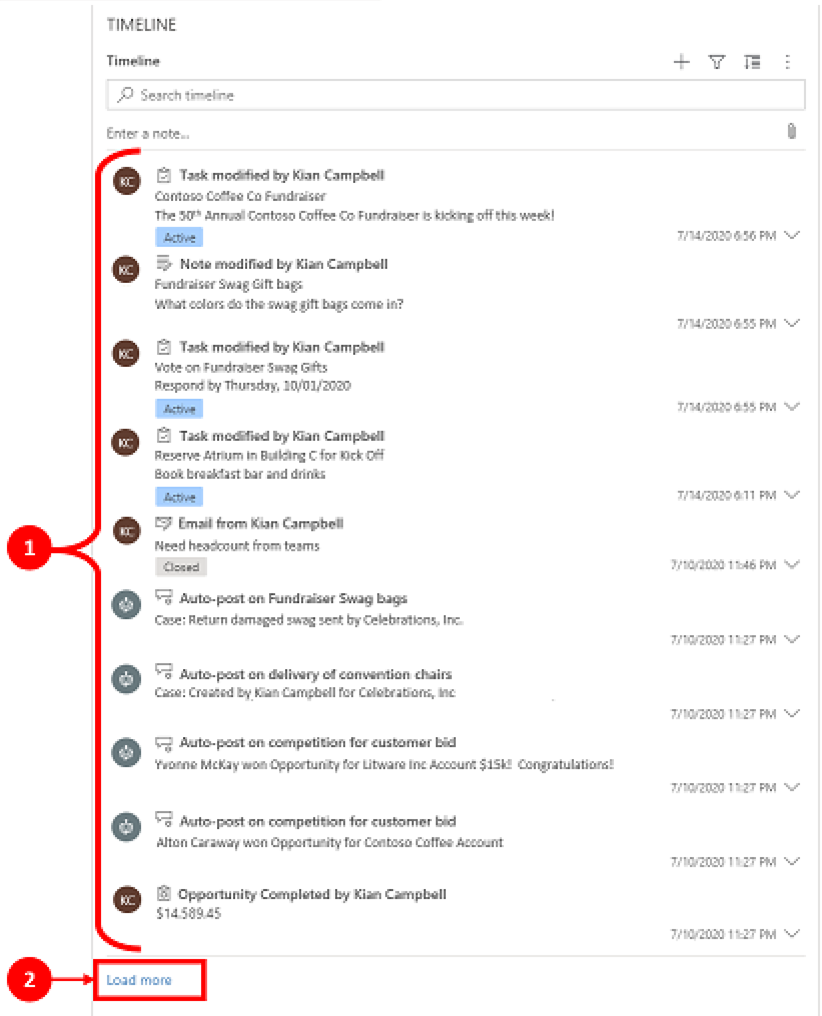


1. Inside the **TIMELINE** section is where the **Timeline** component is placed.
2. When the **Timeline** is selected, the **Display options** on the right of the customisation form show, this is where configurations changes are made.

Display Options

The records shown on the page can be altered.





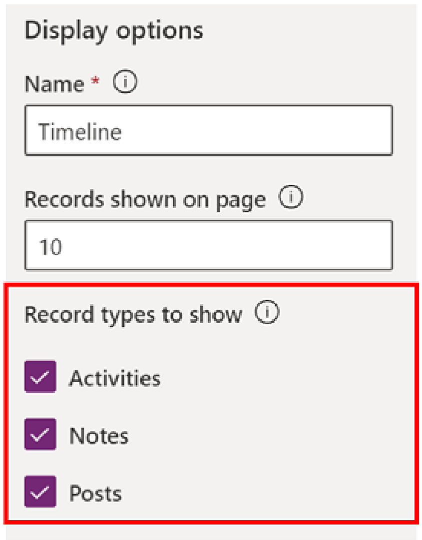
The default setting on the **Records shown on page** is set to 10, there is no limit to this.

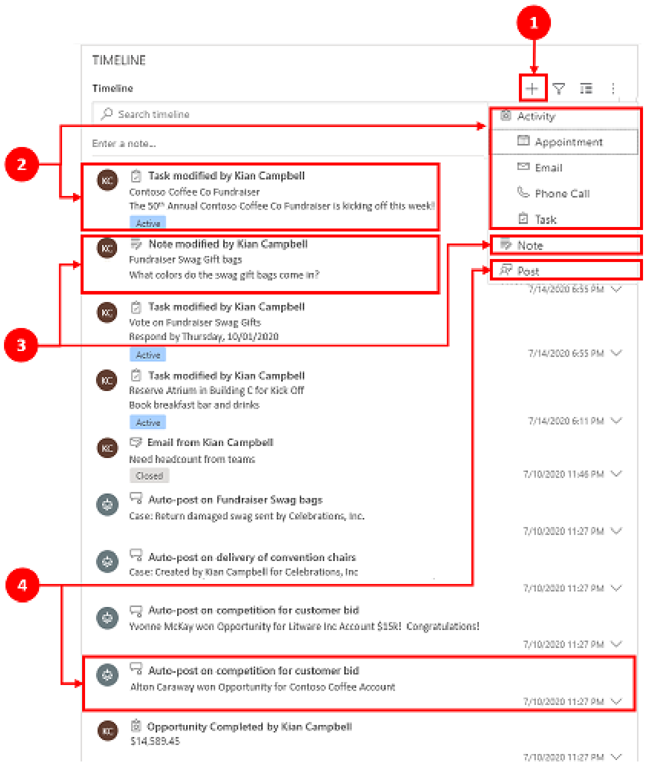
Record types shown

The prmairy record type are activities, notes and posts. These are enabled by default. **Activites** can have many customizable sub-activty 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.

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

Configuration View **Display View**





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** + (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.

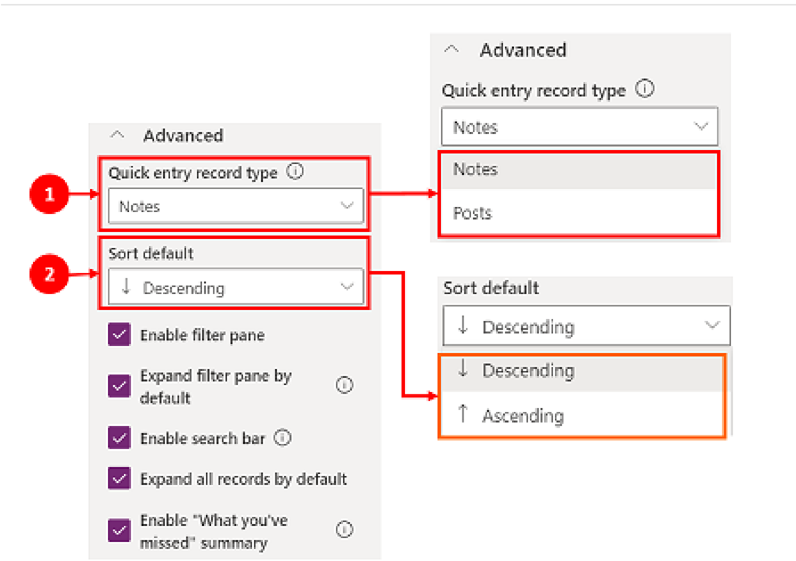
The **Timeline** shows a simple icon before the activity, post, note, and custom entity, making it easy for you to identify the record type. Dates and timestamps always appear on each record on the bottom right of the preview and can be viewed at all times.

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

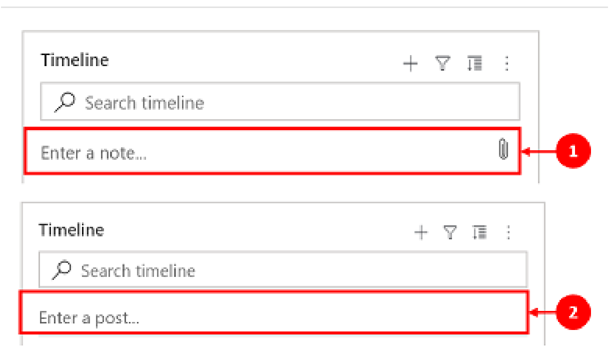
The following is a detailed overview of the **Advanced** configuration options starting with selecting your **quick entry record type**:

Configuration View



1. 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.

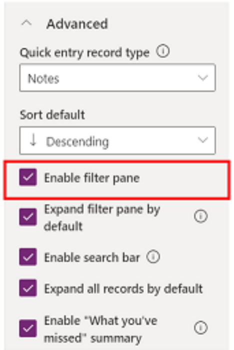
Display View

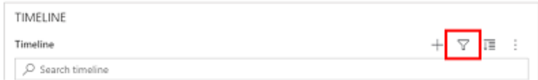


1. When you select **Notes** it will display under the **Search** bar in timeline. Also, you will see a paperclip icon which allows you to attach files. Note you can only attach files to **Notes**.
2. When you select **Posts** it also will display under the **Search** bar in timeline.

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

Configuration View | **Display View**





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 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** 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: -

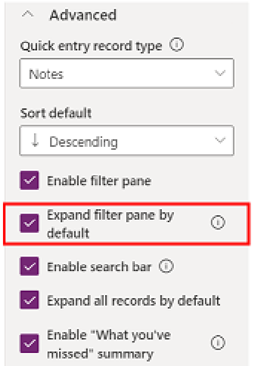
- Auto Post
- Users

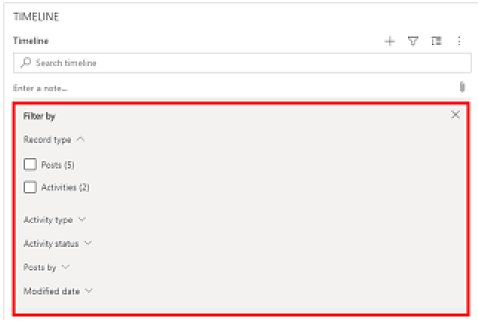
Modified Date: -

- 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

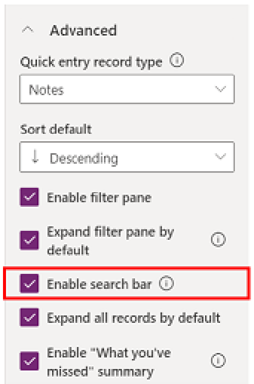




The **Expand filter pane by default** feature displays an expanded filter pane at the top of the form anytime it is opened and refreshed. It is disabled by default. Enable or disable it by checking or unchecking the box.

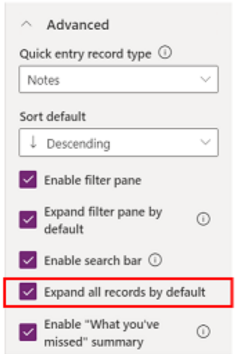
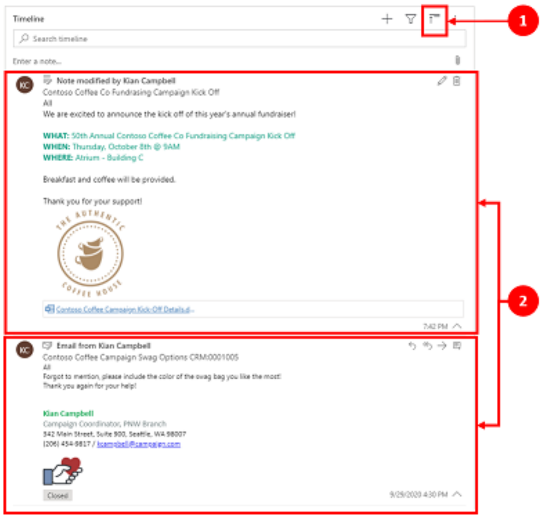
Enable search bar displays the Search bar in the timeline. It allows users the ability to easily search for records, it searches the title or body and description fields, then displays the record for you.

Configure View	Display View



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
	

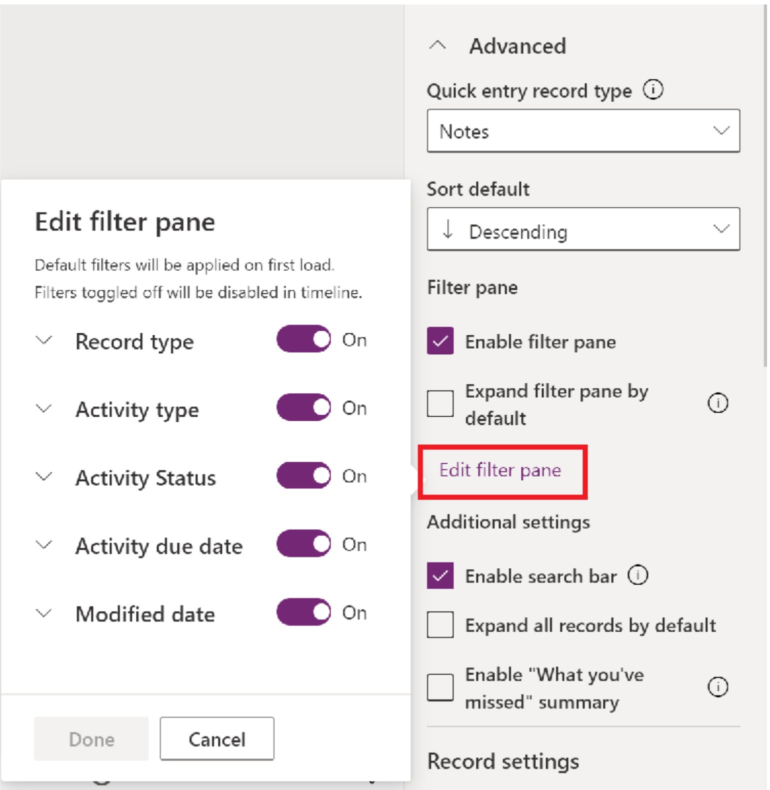
To enable the **Expand all records by default**, check the box (or uncheck to turn it off). This sets the default view to display all records in the expanded view format in the form each time the timeline is opened. The Expand all records is disabled by default.

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.

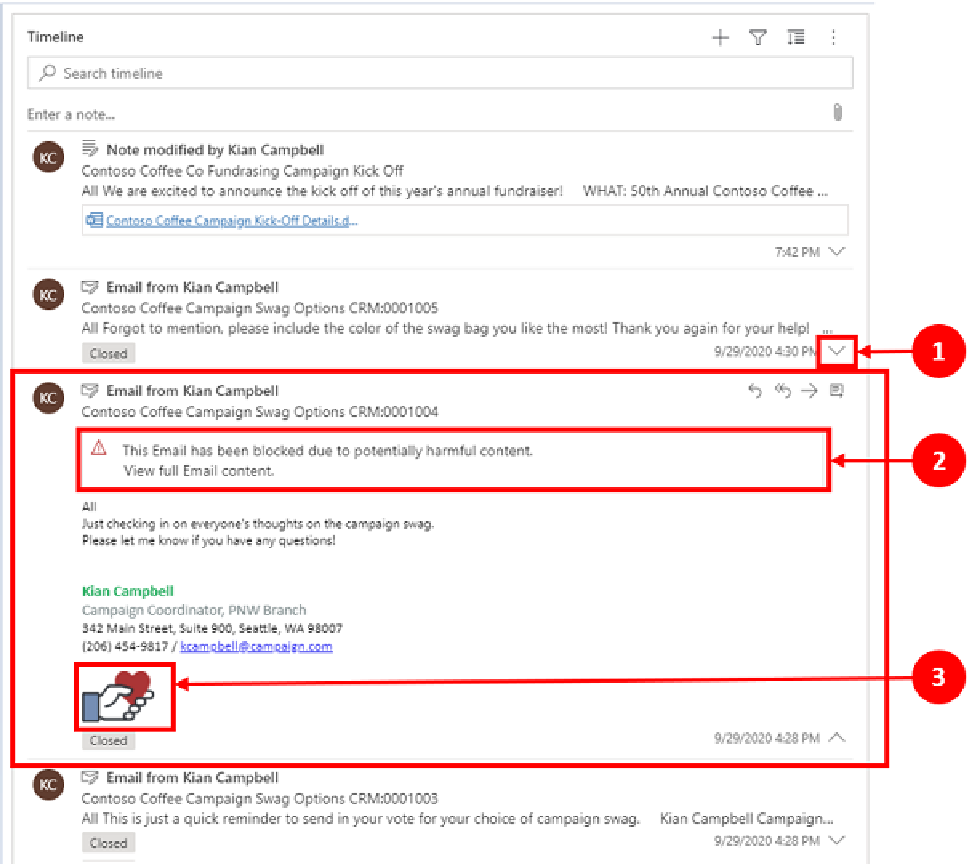
Edit filter pane

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.

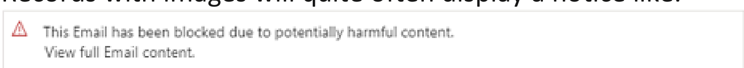


Expand records with images in timeline

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



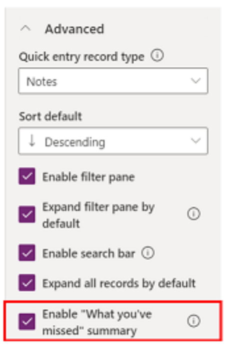
1. Records when collapsed provide a visual summary. To expand an individual record, click anywhere on the timeline record to expand and collapse a record view. In the bottom right corner of the record there is a caret. If the caret is facing down (˅) the record is collapsed, if it is facing up (^) the record is expanded.
2. Records with images will quite often display a notice like.



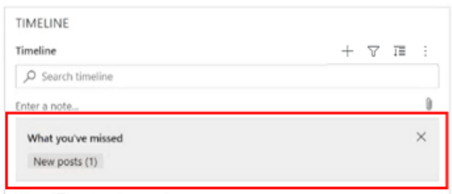
3. When the user clicks on the message the warning goes away and displays.

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

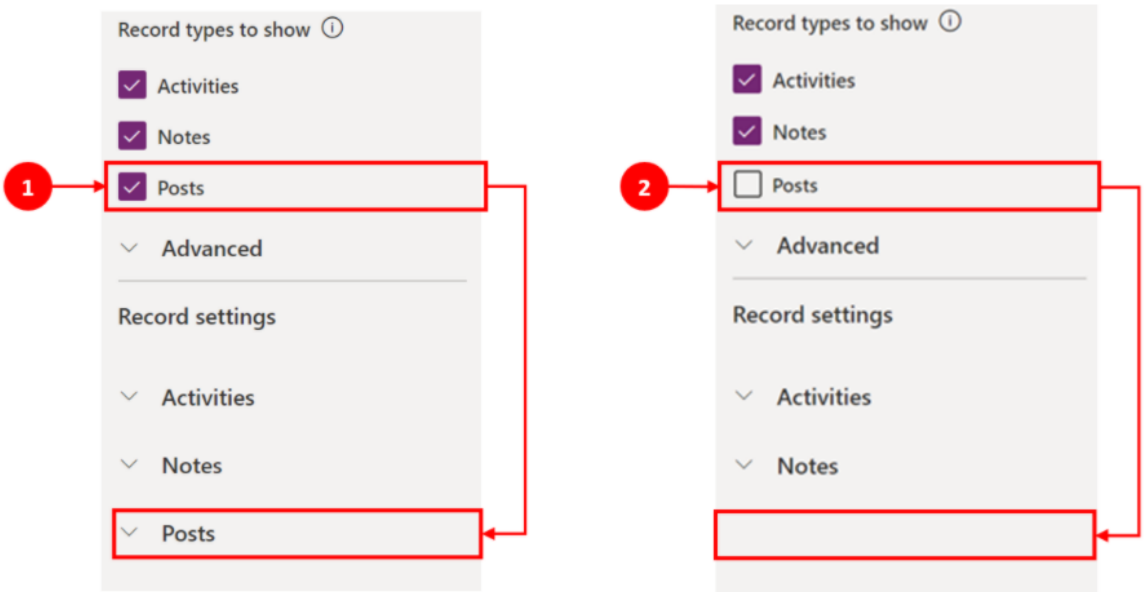


The **Record types to show** is tied to the **Record settings** which supports Activities, Notes, and Posts in the timeline.

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.



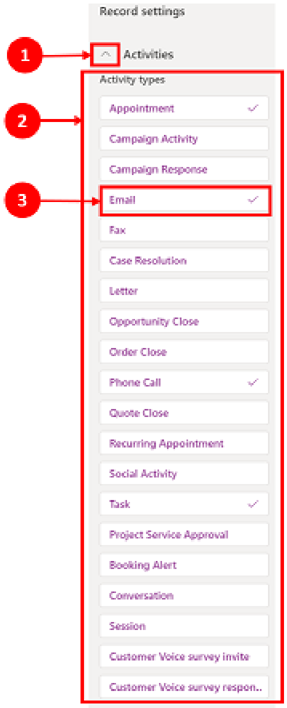
Hiding or showing the **Posts**.

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

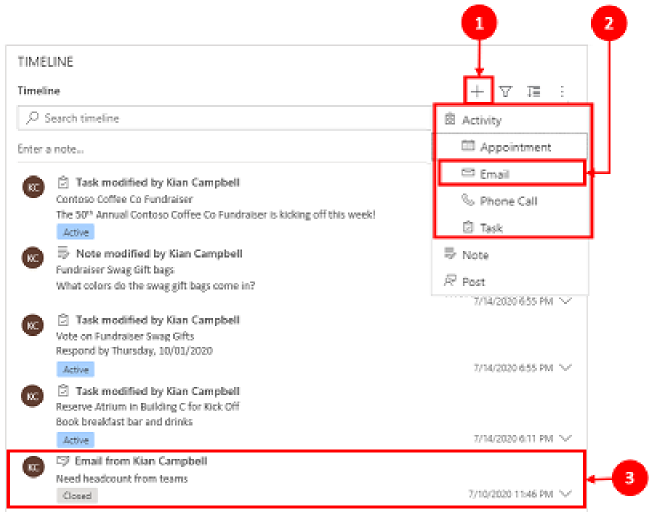


1. Expand and view **Activities** under the **Record settings** section using the caret (^).
2. A list of **Activity types** is displayed in the expanded view.
3. You can enable or disable activity by selecting an activity type. In this example we selected **Email**

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

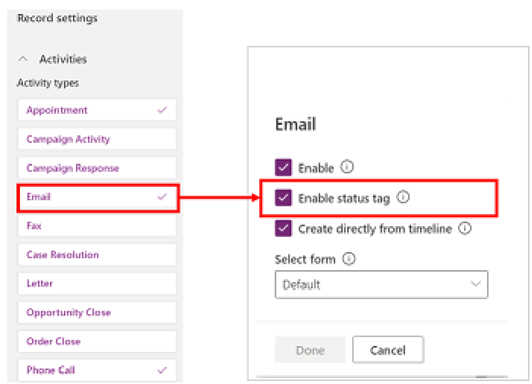


1. When enabled, an **Activity type** will appear under the **Create a timeline record** + .
2. The activity type will be displayed as an option the user can choose from the drop down.
3. Also, the **Activity type** record is displayed in the body of the timeline.

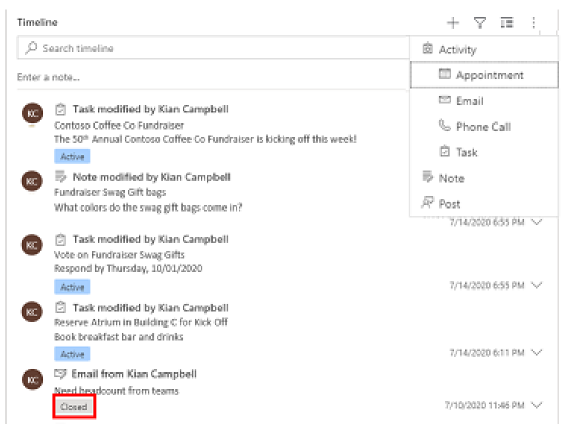
Enable status tags on activity record types

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.

Configuration View



Display View

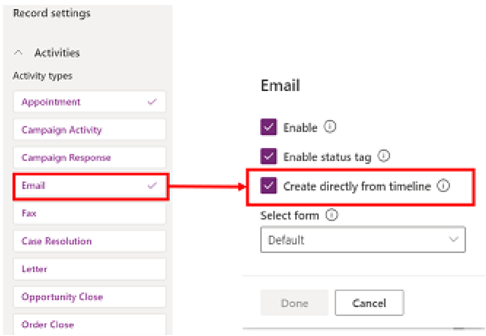


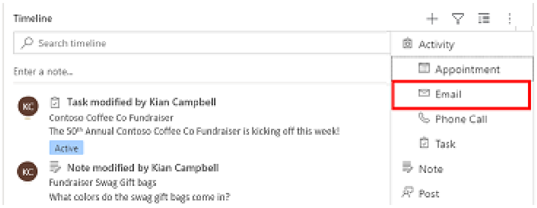
Check the box for **Enable status tag** to display email status tags. When enabled, status tags **Active**, **Overdue** or **Closed** will appear in the timeline next to that activity record.

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**



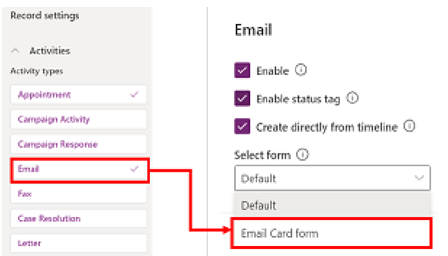


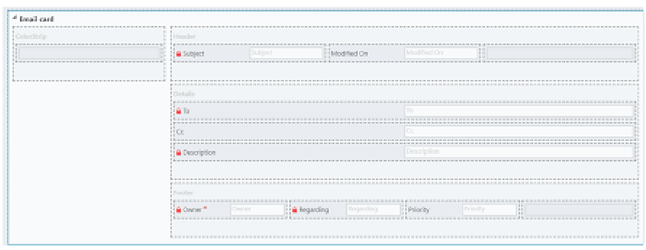
To enable this feature check the **Create directly from timeline** box. When enabled, the activity type will appear in a drop down box. Use the + icon in the top right to create the activity. The item to remember is to make sure the appropriate form (quick create / main form for that activity) is added 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**

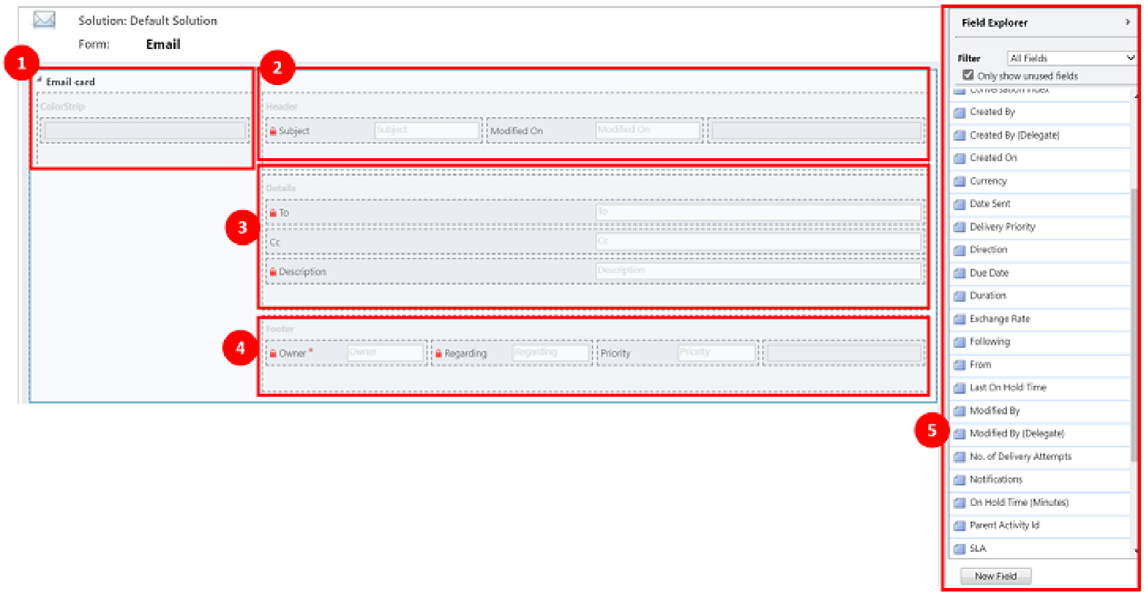




It is possible to change the default card settings to a different card form. If you create a new card form, you must go to the parent entity and add the new form of **card type** there before it will appear in the timeline list.

Customize a card from within the timeline

All card forms have 4 different sections.



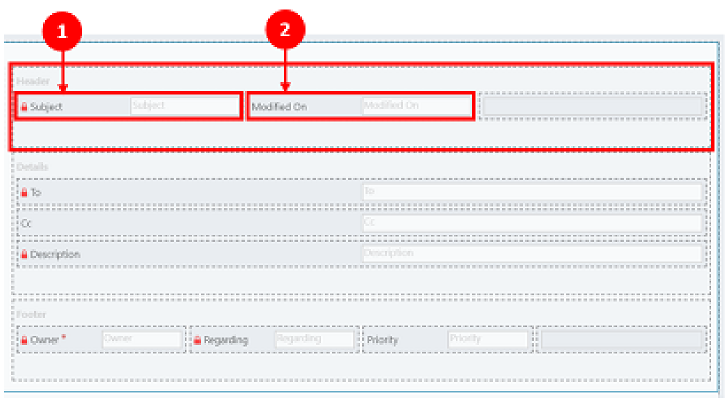
1. **ColorStrip Section** – does not show on the timeline record.
2. **Header Section** – is displayed on the timeline record, but only the first 2 fields are shown.
3. **Details Section** – is displayed on timeline record, but only the first 3 fields are shown.
4. **Footer Section** – does not show 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.

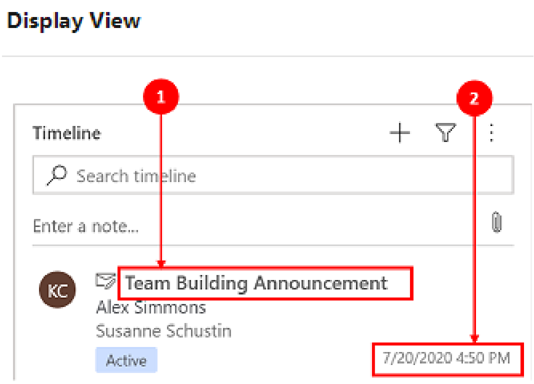
Header Section

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



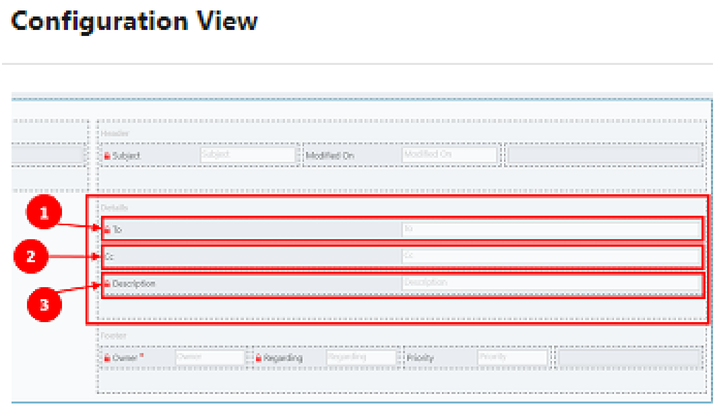
Field 1 – it will appear as bold header at the top of your timeline record. **Field 2** – this field will appear in the bottom right corner of the timeline record.



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

Details Section

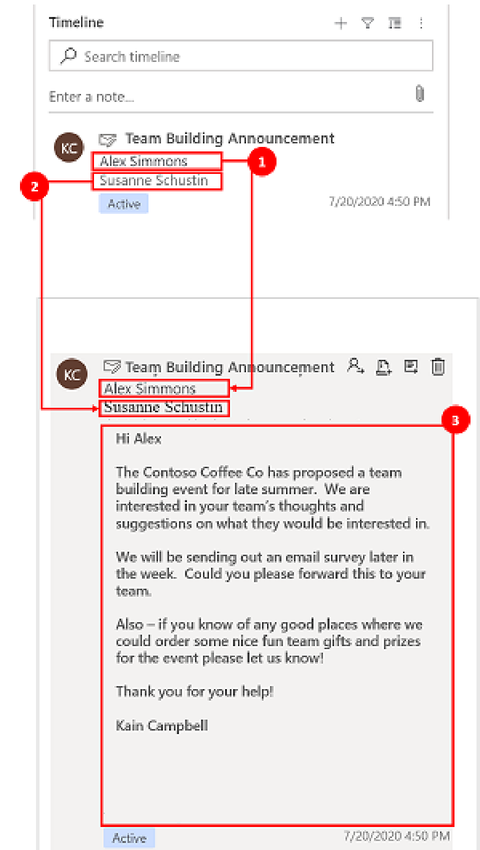
The card **Details** section displays in the body of your timeline email record. It is possible to add up to 4 fields in this section, only 3 will show in the timeline record.



The Card Details will appear below the Header field selected.

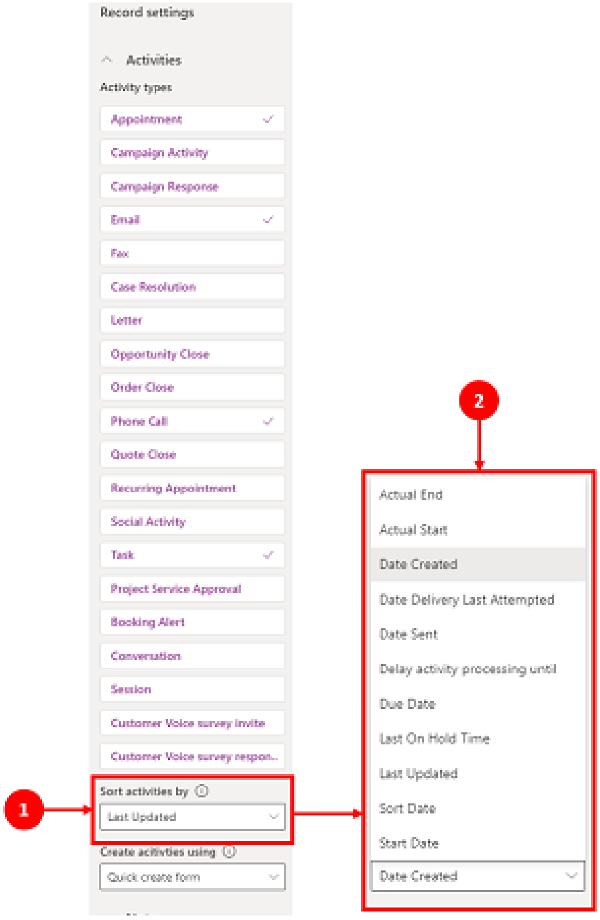
Field 1 – acts as a sub-header on the timeline record. **Field 2** – will only display one line of text in a summary view on the timeline record, but when you expand the timeline record you will see the full content of the field. **Field 3** – this will appear below **Field 2**, this will only show when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

Display View



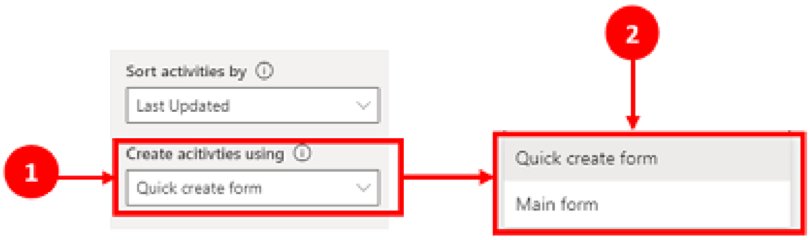
Set date in the Sort activities by section

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.

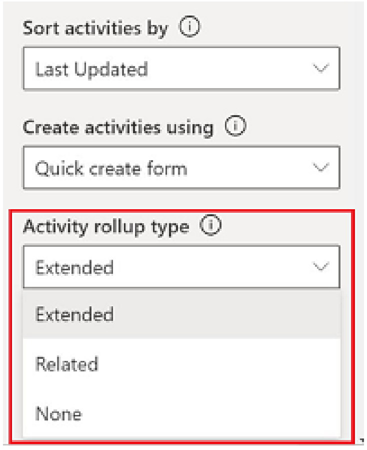
Set create activities form type in timeline



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.

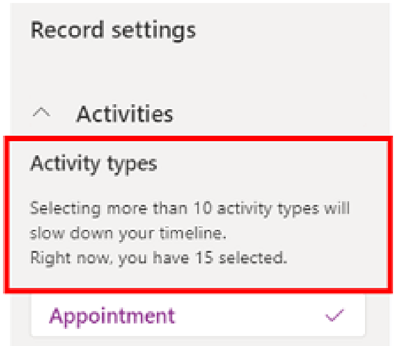
Set the activity rollup type in timeline

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**.

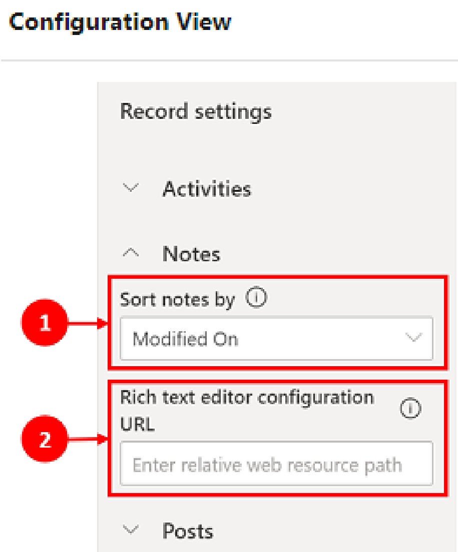


Timeline performance

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.



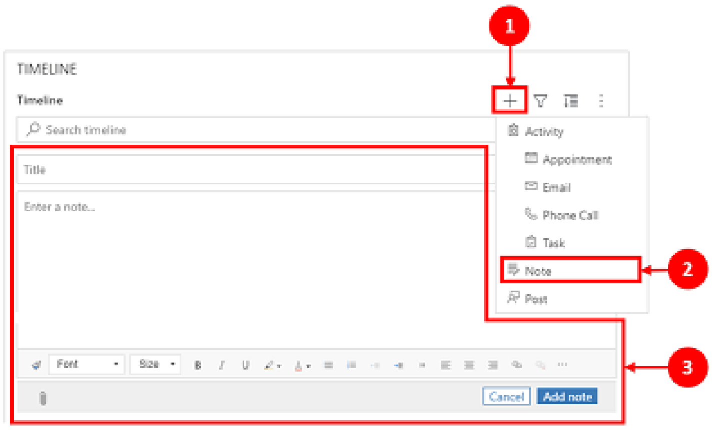
Notes on timeline



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.

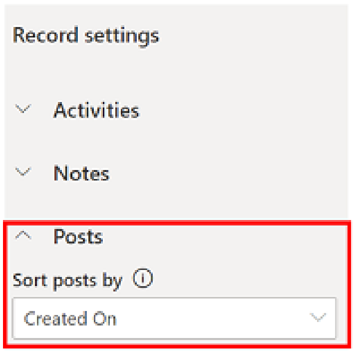
Display View



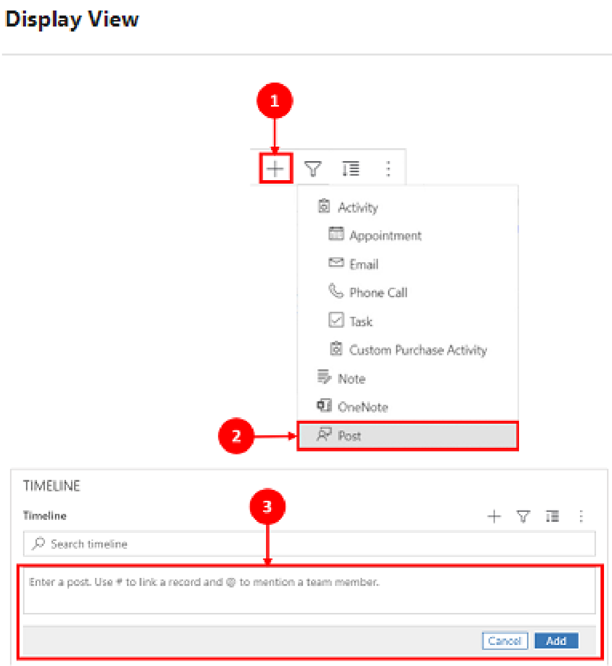
1. When enabled, notes can be added via the **Create a timeline record** + icon.
2. A dropdown will appear where you can access **Notes**.
3. Use the Notes feature to create a note to add to a record using rich text editing.

Posts on timeline

Configuration View



The **Posts** section expands when enabled and allows you to **Sort notes by** date created or date modified.



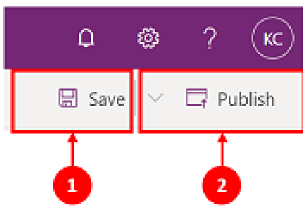
1. When enabled, posts can be added via the **Create a timeline record** icon.
2. A dropdown menu displays and you access Posts.
3. Use the Post feature to create a post to add to a record.

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.