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| **Jira ID:**  NEXG-2275 | **JIRA Ticket Description:**   * Create an option (radio button or checkbox) that would allow a User to select a Note to be added to a new Contact Summary or perhaps Note Summary?? (refer to Classic for ideas) * Contact Summary would pull in the related and selected Notes * Advanced View would have this field as a selection on the dropdown to include for reporting purposes - Field = Contact Summary * Export would include this new field * Note Created bubble on Timeline would need an indicator to show that it has been included in the Contact Summary/Note Summary (whatever we decide to name it)   **Considerations:**   * display of the Contact Summary in the application and on Export - can Export be done? * display of the Contact Summary or Note Summary on the Contact Details screen as a new Tab where we currently show other items such as Contact Info, Custom Fields, etc. |
| Resource | Siva |
| Revision Version | V.1 |
| Last Revised Date | 04/26/2016 |

Impact analysis

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| --- | --- |
| **Module Name** | **Impact Score – 1-10** |
| Contacts Search | 1 |
| Advance Search | 1 |

Database Design

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| **Object – SP/Table/View/Function etc** | **Impact** |
| New column in Notes table: AddToContactSummary(bit). Default to false. |  |
| New view to have ContactSummary with the following columns   * 1. ContactID   2. ContactSummary   3. LastNoteDate   4. LastNote   5. LastNoteCreatedBy | We will get this data from Notes table and contactnotemap table. This will always have the updated note. This will help us in avoiding duplicate data instead of creating two new fields in contacts table. We can use the same data for advance search and export. |

Application Design

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| **New Objects – View/Controller/Attribute etc** | **Impact** |
| NoteViewModel, Note and NotesDb objects will have new field **AddToContactSummary** | No impact |
| On clicking the Notes Summary tab in contact page we will query the NewView and will get the required data. | No impact |
| PersonViewModel and CompanyViewModel will have the following new fields for indexing.   1. LastNoteDate 2. LastNote 3. LastNoteCreatedBy |  |

Entitlements

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| --- | --- |
| **Module/View/Requirement** |  |
| None | None |

Comments

Contact Summary field will be added as one of the contact field in AdvanceSearch fields. This will be exported as DateTime: Note 1 <Delimiter> DateTime: Note 2 <Delimiter> ………DateTime: Note n <Delimiter>

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| Approved By | <Name> |
| Approved On | <Date> |