

## CRM Tips 'n' Tricks from Altico



There are dozens of little tips and tricks for using your Microsoft Dynamics CRM application that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your November 2009 CRM tip:

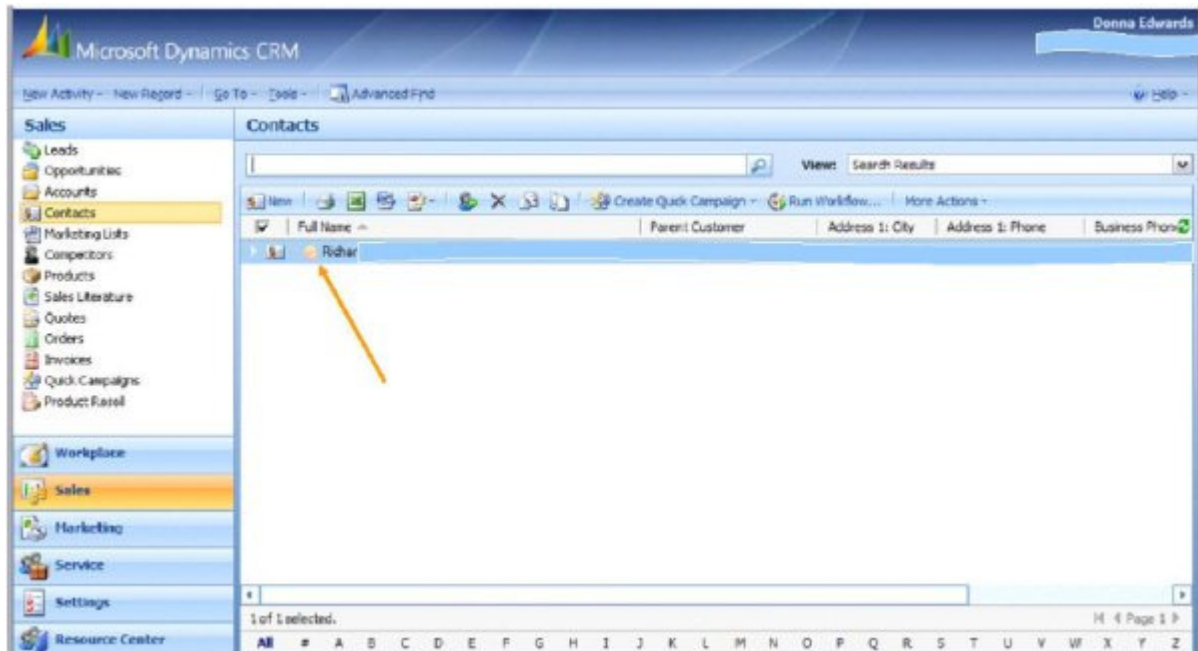
### Access Instant Messaging from Dynamics CRM

This looks like a really long tip, but actually it's very simple and just appears lengthy because of the screen shots. I'm not the most technically savvy person I know but I tried it and it works like a charm!

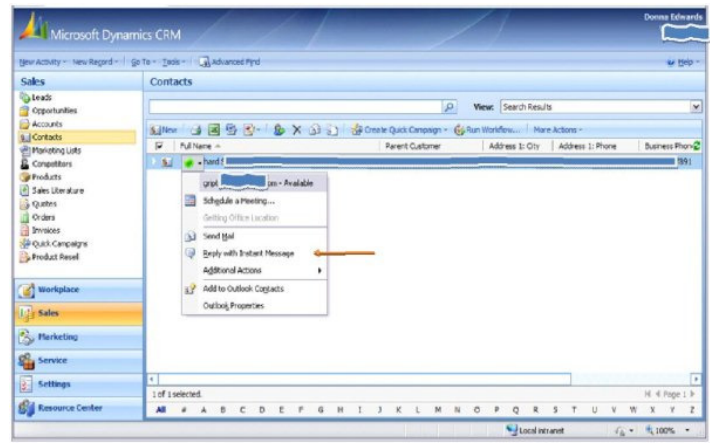
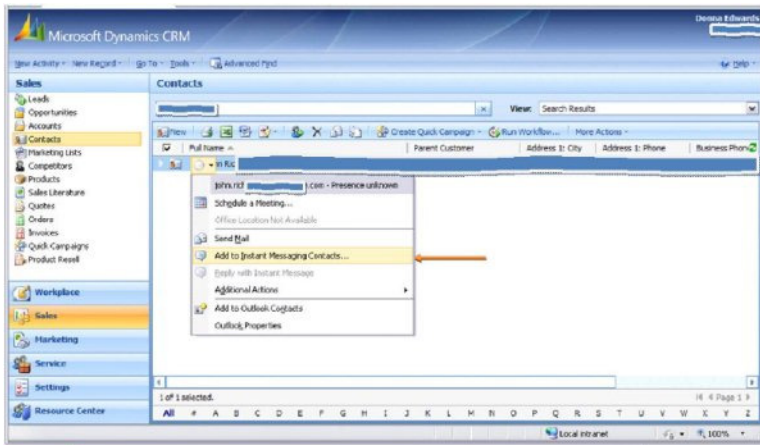
Are you having trouble contacting a customer to arrange a meeting, respond to a service request, or obtain some critical information to move forward on a request? You've probably tried phone calls, and e-mail with little to no success.

Here is another trick that you can pull from your hat if you have Microsoft Dynamics CRM 4 installed. Of course, whenever using this or other methods of communication with your customer and vendor base, you will always want to follow your company's communication guidelines and business protocol.

Open a Contact view like Active Contacts in CRM. Find the Contact you would like to speak with but don't open the Contact record.



Notice the small circle icon in front of the Contact name. Right click the circle icon and you will see several options. One of the options is to add the Contact to your Instant Messaging (IM) program.



When you select this option the Windows Live wizard will open to allow you to add the contact to Windows Live Messenger and will send the Contact an invite to install Windows Live Messenger if they do not have the application installed. Again, please follow your company's business rules for the installation and use of Messaging protocols. You may also want to contact the Customer prior to adding them to your Windows Live Account.

After you've completed the wizard and selected the circle icon next to the Contact Name, the "Reply with Instant Message" option will be available and you can now send this contact an instant message so that you can move the business critical items forward. Additionally, the circle icon will turn green if this contact is online and available.

This feature can really come in handy for those mission critical, customer satisfaction items like the tee-times and directions for the round of golf you are sponsoring or where to meet before the sporting event that you are going to enjoy with your customer.

\* \* \*

I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

Marcia Nita Doron  
Marketing Director  
**Altico Advisors**  
2 Mount Royal Avenue, Suite 410  
Marlborough, MA 01752  
508-485-5588 x107  
[mdoron@AlticoAdvisors.com](mailto:mdoron@AlticoAdvisors.com)  
[www.AlticoAdvisors.com](http://www.AlticoAdvisors.com)