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 July 2008 CRM tip:

Adding New Accounts, Contacts, and Opportunities to CRM

The obvious way to add a new account is to click on "Accounts" from the left menu bar, and then click "New" from the menu bar above the account list to open a blank record which you have to fill in. Once completed, you would "Save" the account record and add contacts and opportunities to that account.

Some users find that it is actually easier to add a new account, contact, and opportunity by starting it off as a "Lead." Here's how:

1. Click on "Leads" from the left menu bar under "Sales"
2. Click "New" from the menu bar above the lead list
3. This opens a new record
4. Fill in the account and primary contact information
5. Save
6. Click the green, diagonally oriented arrow on the top of the new record in order to "convert" the lead
7. Click the boxes to indicate that you want to convert the lead to an account, a contact, and an opportunity as well if that is appropriate
8. VERY IMPORTANT: Also click the box marked "Open newly created records"
9. Save the newly created account, contact, and opportunity records

You can then open that account record in the "Accounts" field if you need to add additional contacts, but you will have saved time by creating the first three records (account, contact, opportunity) in one fell swoop.

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

Yours,

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