



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 September 2008 CRM tip:

Adding Values to a Drop-Down Pick List

Drop-down pick lists are a convenient feature in Microsoft Dynamics CRM 4.0. Using a pick list helps standardize categories (not to mention spelling) and provides an easy source of options for filling in "business required" or "business optional" data. When your CRM system is initially set up, you will likely have made a list of the values that should be available on each pick list.

But the nature of business is such that things change, and the values on a given pick list may need to be updated periodically or even frequently. If, for example, you have a "Lead Source" field on the Account screen and you run a new campaign or promotion every month, you might want to add a new lead source once a month to the pick list.

It's not difficult, but it does involve carefully following multiple steps. Here's how:

- 1-Click "Settings" on the left menu bar toward the bottom
- 2-Click "Customization" on the left menu bar toward the top
- 3-Choose "Customize Entities" from the main page
- 4-Double click on the name of the screen where the pick list resides (ex. Account)
- 5-Select "Attributes" from the left menu bar
- 6-Double click on the pick list to which you want to add a value (ex. Lead Source)
- 7-Click "Add"
- 8-A window appears where you can type the new value (ex. Back to School Promo)
- 9-Click "OK"
- 10-Click "Sort Ascending" so that the new item will appear in alphabetical order
- 11-Click "Save and Close" on the top menu bar
- 12-Click "Save and Close" on the top menu bar again on the next screen
- 13-Click "Publish" on the top menu bar. Now you're done!

Granted, this seems like a LOT of steps. But take it from one who does it all the time...once you've done it 3 or 4 times, it's as easy as tying your shoes.

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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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