



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 2010 CRM tip:

Yes, Virginia, There Is a Bulk Edit Feature in Dynamics CRM

This discovery absolutely bowled me over. As one who lives and breathes CRM all day, every day, I thought I knew most everything I needed to know as far as cool tricks and shortcuts in CRM. But once again, I was wrong, because I could have sworn that a bulk edit feature did not exist in CRM 4.0. Actually, it not only exists in 4.0, it's been around since 3.0 and had I known about it, honestly, I could have shaved days if not weeks off some of the more tedious tasks I perform in CRM.

There IS an easy way to update multiple records at once. For instance, if you have an account with 80 contacts, and the company moves, you do not have to change the address on each contact one at a time. Nor do you have to write your own app or get into unsupported territory in the SQL database.

Bulk editing is now a piece of cake. Simply perform an Advanced Find, select the records in question, and then on the "More Actions" tab, click the "Edit" option. This will open a blank contact form (or whichever entity you are searching on) where, in this example, you can enter the new address information. Whichever fields you make changes to will be updated in all of the selected records and any fields you leave alone will be left alone on all of the selected records.

Very simple, very handy. Thanks Microsoft!

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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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