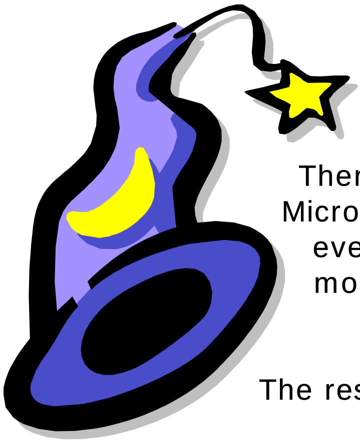

CRM Tips 'n' Tricks from Altico

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 October 2007 CRM tip:

Change the "Regarding" on an E-mail in History

Perhaps you've made this mistake. I know I have. I'm in a rush. An e-mail comes in that I want to track in CRM. I click "Track in CRM," then I click "Set Regarding." Assuming that that my smart computer has identified the right company, I just click okay without really paying attention. Later, I realize that the e-mail has been associated with the wrong account. Not to worry. This can be fixed. Here's how:

1. Simply go into the opportunity (case, account record, contact record, or whatever) and delete the e-mail from the history within CRM

2. Go back to outlook, highlight the e-mail (do not open) and then press the "Track in CRM" button. CRM will say that the e-mail is already being tracked in CRM and would you like to make another copy. Answer Yes.

3. Now when you double click the e-mail you will notice that the regarding field is cleared and you can re-associate it to the correct record.

* * *

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
www.alticoadvisors.com