



## 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 June 2010 CRM tip:

### Checking for "Stuck" E-mails in Dynamics CRM

This falls under the heading of "better safe than sorry." Hopefully, this will never happen to you, but it has happened to me. As a daily user of Microsoft Dynamics CRM, I send most of my e-mails out of CRM because then I automatically have a "paper" trail in History.

On a rare occasion, e-mails don't go out properly. It could be due to a problem on the server, an inadvertent change in the way the relay is set up, or a failure of the "connector service."

But consider this. You've sent out important information, something that's perhaps time sensitive, like an RFP that must be submitted by a given deadline, no exceptions. And you're not aware that in fact the email "got stuck." This could mean a significant lost opportunity for your company.

Here's what I did. I had our CRM specialist set up a special view that I check every single day. At the top of the Activity screen, select "E-mail" from the Type drop down menu. On the View drop down menu, have your IT staff create a view called "All Pending E-mails."

It only takes a few seconds to check that view every morning, but it's worth the time for the peace of mind it provides.

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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,

Marcia Nita Doron, Marketing Director

**Altico Advisors**

225 Cedar Hill Street, Suite 331

Marlborough, MA 01752

508-485-5588 x107

[mdoron@AlticoAdvisors.com](mailto:mdoron@AlticoAdvisors.com)

[www.AlticoAdvisors.com](http://www.AlticoAdvisors.com)