



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 April 2010 CRM tip:

Choose the Entity, THEN Create the Activity

Here's a tip that I wish I had known about for the last 3 plus years! Once again I must tell you that I consider myself a CRM power user and yet I obviously have a LOT to learn.

This amazingly simple tip means that I will no longer have to flip back and forth from the Activity record to the Contact record. It's just a question of the chicken before the egg.

All you have to do is choose the Entity **FIRST**, and **THEN** create the Activity. For Example: When you select a Contact and then create a phone call Activity, the phone number from the Contact will auto-populate in the Activity screen. How elegant is that?

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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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