



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 May 2009 CRM tip:

Count Your Leads and Other Records

Here's the scenario. You go to the Leads section of your WorkPlace in CRM and you just want to know how many total lead records you have. There are many, many pages and you know that there are 250 records on each page. Still, it would be time consuming to flip through the pages, see how many there are, multiply that by 250... You get the picture.

This may seem really simplistic, but a quick and easy way to count your records, **in any view**, is an export to Excel.

1. In any view, click the Export Data to Excel icon
2. Select "Static worksheet w/records from all pages in the current view"
3. Click Export
4. In the File Download dialog box, click Open.
5. Control (Ctrl) + the down arrow will automatically take you to the last line on the Excel spreadsheet that contains data
6. The number of that line minus one is the exact number of records you have in that view

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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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