



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 August 2008 CRM tip:

Dating Your E-mail

When you send e-mail out of Microsoft Dynamics CRM, whether you're using the Outlook client or the Web client, your e-mail is automatically stored in history. BUT, unless you manually date your e-mails, they will not be dated in history. The result is that when you open history for someone you communicate with frequently, all you see is a long list of undated e-mail subject lines. This can be very cumbersome. Take, for example, a situation where a client or a prospect wants to refer you back to an e-mail that you sent on a specific date. And while they may be able to refer you to the subject line as well, this could be less helpful than having the date available to you.

Dating your e-mail takes around 2 seconds (no kidding). In the lower left area of the e-mail screen you'll see a field called "Due" with a drop down calendar next to it. Just click on the drop down arrow and click on today's date which is already, automatically highlighted. That's all there is to it!

Now when you go back to history you have a clear chronology of your e-mail communication.

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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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