



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 2008 CRM tip:

Entering Notes on the Activity Task Screen

If you use the Activity Task Screen extensively, you may have encountered this problem.

When you open a task, there are two tabs at the top of the screen. The screen you open to is the Task screen, but there is also a tab for a Notes screen. You can enter notes on the Task screen, BUT, there is a limit to the number of characters you can enter. If you exceed that limit, then when you try to save your task, a window pops up that says:

"You have exceeded the maximum number of 2000 characters in this field; it will be truncated."

Uh oh. You just spent a ton of time entering your notes. Are you going to lose everything beyond the first 2000 characters? Not if you respond correctly.

The pop up window gives you the option to say "OK" or "Cancel."

Click "Cancel," highlight your notes, and right click on the highlighted area
Select "Cut" (DO NOT SELECT COPY)

Open the "Notes" tab where you will be instructed to "Click here to enter a new note"

Click it and a flashing cursor appears on the area you just opened

Press "Control V" to paste all of your notes in that field

Not only have all of your notes been saved, but CRM automatically adds a heading that indicates when the note was created and by whom. Example: "Note created on 10/9/2008 at 5:06 PM by Marcia Doron."

If you click back to the Task tab, it is now empty. If you so desire, you can type in something like: See notes herein (just to remind yourself to look at the Notes tab). Alternatively, as soon as you open the Task, click immediately into the Notes tab and always enter your notes there. There is no limit on the Notes tab.

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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.

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