



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 2009 CRM tip:

Missing E-mails in CRM Mail Merge – Case Study

A mail merge quick campaign has been created which should send out approximately 1500 emails. When the quick campaign was completed, only 43 e-mails had been sent and no failures had been noted. How could that be true?

Research showed that only 800 contacts had an e-mail address specified, so that had caused half of the issue! The second half was harder to find, especially because there was no error message anywhere.

The root cause of this issue appeared to be that the bit field for "donotsendmm" had been set to NULL. Although the default is 'yes,' the field had no value because the records were created in an import program instead of the UI. In this import program the default values were not set for the "allow marketing" attribute. After setting "allow marketing" to true, the e-mails were sent out.

Hint: To update all the records in bulk in a supported way, create a workflow rule which updates that field and sets it to "true." Then perform an advanced find to select the records for which the field has not been set to false and run the workflow on all the records on the page. You will then update 250 records in each run. You can also set the record amount visible by going to your personal options in CRM.

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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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