



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 February 2008 CRM tip:

Save as Completed

This tip is especially useful for logging an activity that you've already completed - like a phone call that wasn't already an open item on your activity list because you hadn't planned to make it.

There is no need to create a new activity, save it, click the Actions button, and then click Close Task, then Completed. That's a lot of steps.

In fact, there's an easier way. All you really have to do is start a new activity, go to the file menu and select "save as completed." Fewer clicks, much less cumbersome.

Try it, you'll like it.

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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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