



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 2009 CRM tip:

Set Due Date to Current Date

When you open most types of activities in CRM 4.0, the "Due" field is blank. It's easy enough to click on the calendar and enter the date you want, but it would be just as easy if the "Due" field was automatically populated with the current date. In many cases, especially if you're actually logging phone calls that you've already made or tasks that you've already completed, the current date is the correct one and all you then need to do is type in your notes, save, and complete.

Use the following script shell to set the "Due" date as the current date.

```
var CRM_FORM_TYPE_CREATE = 1;  
var CRM_FORM_TYPE_UPDATE = 2;  
switch (crmForm.FormType) { case CRM_FORM_TYPE_CREATE:  
crmForm.all.actualdurationminutes.DataValue = null;  
crmForm.all.scheduledend.DataValue = new Date(); break;  
case CRM_FORM_TYPE_UPDATE: // do nothing break; }
```

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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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