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 March 2010 CRM tip:

How to Use the CRM Notification Accelerator

In a previous tip, I listed and briefly described the 13 free CRM Accelerators that have been released by Microsoft. This month's tip is a step-by-step guide to the Notification Accelerator. The process is very simple and the results are fantastic.

Before getting into the steps, it's worth mentioning a little bit about what the accelerator is all about. As the name suggestions, it will give CRM users notifications regarding chosen items in CRM. The Accelerator runs off RSS Feeds, similar to many news or blog Web sites on the internet today, and can be managed in a Web browser, dedicated RSS reader applications, or even in desktop gadgets for Windows. This accelerator is a great way to view data outside of CRM.

*Note: The Accelerator will still take CRM security into consideration so only data that you can view in CRM will be visible in the RSS feed.

Getting started…

- First, ensure you have a CRM view already created in whichever entity you've chosen to view from outside CRM (for example, My Open Leads in the Leads entity).
- On the top menu bar, select RSS and click Choose Subscription.
- This will open a dialog box allowing you to select the Entity and View (in this example, Lead and My Open Leads, respectively).
- Click the RSS red icon to the right. This opens a new Web browser page displaying the RSS feeds. Click "Subscribe to this Feed" and then hit Subscribe again.
- When you open your Favorites in Internet Explorer, you'll see a Feeds icon next to the Favorites icon. Click the icon to view the CRM data you've chosen.

The advantages of using Internet Explorer as your viewer are the ability to change the sort order of the records and the ease of searching the data. Further customization is possible if your organization has custom attributes in CRM. Simply add them to your view in CRM and then run through the steps above to have them included as well.

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I'm NOT the resident wizard, but feel free to channel your questions through me.

Yours,

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