



## 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 September 2010 CRM tip:

### Setting the order of pick list items

Generally, you want the most frequently used options to be available at the top of a pick list. However, if the number of options is long or there isn't any particular option that is used more frequently, you may want to sort them alphabetically. Here's how:

- Navigate to the pick list attribute
- In the Navigation Pane, click System Settings, click Customization, and then click Customize Entities.
- Open the entity you want to edit.
- Under Details, click Attributes.
- Click the Type column to sort and group attributes by type.
- Locate the picklist attribute and double-click it to open it.
- To position options individually, in the Type column, select the option and click Move Up or Move Down.
- To sort all options alphabetically, in the Type column, click Sort Ascending or Sort Descending.
- Click Save and Close to close the attribute form.
- Click Publish

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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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