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 May 2008 CRM tip:

Tracking work associated with a Project

One of the most frequently requested items when it comes to minor enhancements to CRM is the ability to track activities and associated time to a specific client project.

To do this you can configure Dynamics CRM using the “modify” functionality. You do not have to write custom extensions or .NET or JAVA code to do this.

Utilizing the "Customize" menu in Dynamics CRM create a new Project Entity (this is a new database table and entity).

Add appropriate attributes to the project entity (the data you want to capture on the head project record such as the project name, project budget, and timeline).

Create a relationship between Activities and Project: For any given project you can have many activities (unlimited actually).

Create a relationship between Account and Project (For any given account you can have unlimited projects).

Presto! You can now track activity records to a specific project in addition to the Account, Contact, Ticket, User and more. Within the ACTIVITY RECORD is the ability to capture a start time, end time, duration and more.

* * *

I’m NOT the resident wizard, but be that as it may, you’re welcome to channel your questions through me.

Yours,

Marcia Nita Doron, Marketing Director
Altico Advisors
2 Mount Royal Avenue, Suite 410
Marlborough, MA 01752
508-485-5588 x107
mdoron@AlticoAdvisors.com
www.AlticoAdvisors.com