



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 June 2008 CRM tip:

Don't lose customers when a salesperson leaves

When a salesperson leaves your organization make sure that no activities are left undone.

To reassign the work to someone else:

1. On the Actions menu, click Reassign Records and then click Assign to another user.
2. Click the Lookup icon, type a part of the other employee's name and click Find.
3. In the results list, double-click the employee's name and then click OK.

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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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