




RG Connect 2009
Extend Your Reach

 **The Resource Group**
2009INNERCIRCLE
for Microsoft Dynamics

Microsoft Dynamics CRM Tips & Tricks

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General Productivity

- Auto – Fill
- Grid Views : Number of Records
- Grid Views : Resize Columns
- Advanced Find: Cross Entity Queries
- Advanced Find: Sharing
- Quick Find : Change Default Columns

Sales

- Account – Alternate Name Lookup Field
- Relationships - Contact on Opportunity
- Relationships - CPA to Account



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Outlook Client

- Outlook – Lookup by Company
- Synchronization Options
- Build Local Data Group



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Administrative

- Reporting – Excel Export Options
- Security – Hiding Entities
- Data Import – Start with Template



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