



Manage your time and activities with help from reminders

Pop-up reminders—similar to those in Microsoft Office Outlook—are one of the most requested features for Microsoft Dynamics CRM 3.0. Although reminders are not available in Microsoft CRM, you can take advantage of the integration between Outlook and Microsoft CRM client for Outlook to display Outlook reminders for some activities, including tasks, e-mail messages, appointments, and service activities. In addition, you can create an appointment in Microsoft CRM to display an Outlook reminder in reference to faxes, phone calls, letters, and campaign responses, which cannot display reminders automatically.



Display pop-up reminders automatically

To display Outlook pop-up reminders automatically, create the task, e-mail, or appointment in Outlook with Microsoft CRM client for Outlook installed. Set the reminder, and then save the activity as a Microsoft CRM activity. (In Outlook, on the activity form, on the **CRM** toolbar, click **Track in CRM**, and then click **Regarding** to select a parent record.)

When Microsoft CRM synchronises with Outlook through Microsoft CRM client for Outlook, appointments and service activities that you created in Microsoft CRM have 15-minute reminders set automatically by Outlook based on the due date. You cannot change these reminders or update them, even if you update the due date. In contrast, tasks and e-mail messages that you create directly in Microsoft CRM never have Outlook reminders.

Create appointments for activities that don't have reminders

For other activities that won't work with the previous procedure, such as phone calls, you can create a follow-up appointment in Microsoft CRM that refers to completing the activity. After you synchronize with Outlook, the appointment appears in Outlook with a 15-minute reminder set. The new appointment is associated automatically with the original activity.

Follow these steps to create a follow-up appointment with an Outlook reminder:

1. In Microsoft CRM, in the open activity, on the **Actions** toolbar, click **Follow Up**. The Form Assistant pane opens.
2. In the **Activity List**, select **Appointment**.
3. Enter a **Subject**.
4. With the calendar controls, select the start time and end time you want.
5. In the **Assign To** list, select the person to receive the reminder, and then complete the related activity.
6. Click **Save**. Microsoft CRM creates a follow-up appointment for the owner of the original activity. After synchronisation, Outlook will display a reminder for the appointment.