

Microsoft Dynamics 365 - Using Advanced Find

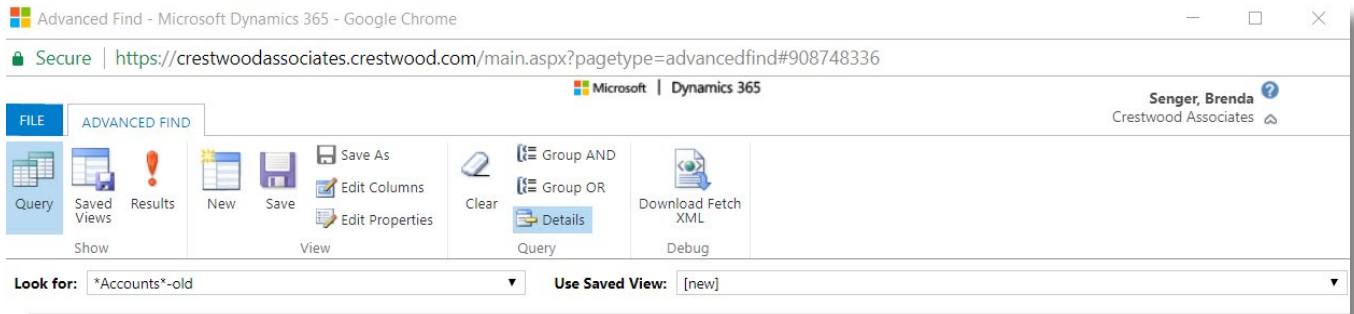
Advanced find is a powerful tool within your Dynamics 365 (CRM) system. Knowing how to use it will help you to find lists of data with specific criteria, edit that data, export, review, and so much more.

Where is the advanced find?

In Dynamics 365 it sits in your navigation bar to the right side (appears as a filter icon)



Once you open Advanced Find this is the main landing page

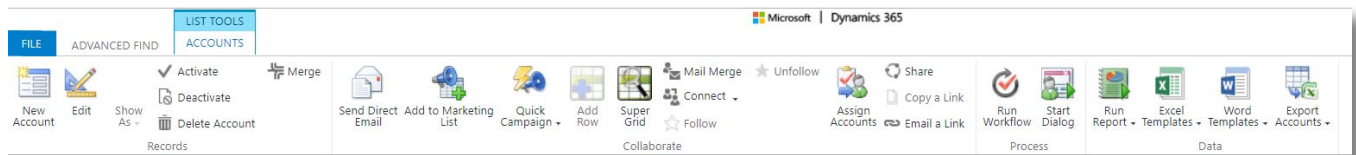


The key areas within advanced find are the following icons or selectors:

- **Results:** Once you build the logic or criteria for what you are searching for, hit the results icon to see what data it returns
- **Edit Columns:** This feature allows you to choose the columns (fields from the form) you want to see in your results
- **Clear:** This clears the logic you built, for you to start your search over
- **Group AND:** This groups data together, in your statement both pieces of logic need to be true when they are grouped together using AND (e.g. you might want to search for Accounts that have an email address listed AND a phone number listed)
- **Group OR:** This groups data together, in your statement one part of logic needs to be true when they are grouped together using OR (e.g. you might want to search for Accounts that are listed as current customers OR prospects)
- **Details:** When you click the details button it allows you to create logic (notice the select statement is blue and ready to be picked under the “Look For” section) pressing the details icon allows you to select logic
- **Look For:** This is where you choose the entity you are looking for data in (e.g. Account section or Contact section)
- **Use Saved View:** This allows you to bring in a view that already exists and the logic that was used to create it. You can then build off of it if you are drilling down on even more specific data
- **Select:** This is where you can choose a field and begin to build your select statement

Results Section

After running an advanced find, a new set of tools appear with your results:



- **New [Entity]:** Create a new record
- **Edit:** Edit a single record or bulk edit the same field in multiple records at once
- **Activate:** Make the record active (able to make changes to the record when active)
- **Deactivate:** Deactivate record (make the record read only)
- **Delete:** Delete record(s)
- **Merge:** Merge records (duplicates) together
- **Send Direct Email:** Send an email to that particular record (from a template)
- **Add to Marketing List:** Add this record to a Marketing List (only pertains to Accounts, Contacts, and Leads)
- **Quick Campaign:** Begin a quick campaign (type of phone, email, or task activity created for records)
- **Add Row:** Add a new record within the view
- **Super Grid:** Allows you to edit information in current records through an editable grid
- **Mail Merge:** Allows you send emails, create form letters, or mailing labels
- **Connect:** Create a new connection between specific records (so they have a relationship)
- **Follow:** Have this record show up in your “What’s New” section of your dashboard as something you follow or are updated on.
- **Unfollow:** Do you allow this record to show up in your “What’s New” section
- **Assign:** Assign ownership of this record to another user
- **Share:** Share information with other users or people
- **Run a Workflow:** If a workflow was created for this entity then you can run it from advance find
- **Start Dialog:** If a dialog was created for this entity then you can run it from advanced find
- **Run Report:** Run a report on the records you queried
- **Excel Template:** Create a template for excel and bring your selected data in
- **Word Template:** Create a template for word and bring your selected data in
- **Export [Entity]:** Export this data to excel

We recommend you play around a little bit. Think of a data set you’d like to see, then build it. Try it out. If you run into questions, email us at support@crestwood.com.