



# Multi Search

For Dynamics CRM 2011



# Multi Search

- Multi Search enables you to perform one search that simultaneously looks across all of Dynamics CRM data or your own collection of record types (entities).
- The search results are presented in a single window and can be filtered and sorted as required.
- Users can define their own personal searches while administrators can create global search definitions.
- Decide what fields to search against, how results should be displayed or simply use Quick Find setting already defined in your organization



Start by defining new search definition.

FileHome

New Activity

New Record

Import Data

Advanced Find

NewTools

Workplace

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Search:

Start



Enter Name and Description for your search.

Select entities you want to search against.

What record statuses are you interested in?

FileHome

New Activity

New Record

Import Data

Advanced Find

NewTools

Workplace

My Work

Customers

Workplace

Sales & Marketing

Customers

Settings

Back to SearchSaveSave and NewDelete

Name:Products & Services

Description:

Entities and attributes:

Product

Case

Competitor

Contract Line

Invoice Product

Opportunity Product

Order Product

Product

Quote Product

ActiveResolvedCanceled

ExistingRenewedCanceledExpired

ActiveInactive

Search columnsDisplay columnsOptions

Invoice Product

Existing Product

Opportunity Product

Existing Product

Order Product

Existing Product

Product

ID

Product Name

Product Type

Quote Product

Existing Product



Select search columns  
or use Quick Find  
settings.

FileHome

New Activity

New Record

Import Data

Advanced Find

NewTools

Workplace

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Back to SearchSaveSave and New

Name:Products & Services

Description:

Entities and attributes:

Product

☐ < Use quick find settings >

☐ Created By

☐ Created By (Delegate)

☐ Created On

☒ Currency

☒ Current Cost

☐ Current Cost (Base)

☐ Decimals Supported

☐ Default Price List

☒ Default Unit

☐ Description

Search columns

Display columnsOptions

Quantity

Opportunity Product

Existing Product

Order Product

Amount

Existing Product

Quantity

Quote Product

Existing Product

Product

Currency

Current Cost



Microsoft Dynamics CRM

Adam McAma ?

Dynamics Professional Solutions Ltd

Sign Out ^

File

Home



New Activity



New Record



Import Data



Advanced Find

New

Tools

Workplace

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Back to Search

Save

Name:

Products & Services

Description:

Entities and attributes:

Product

☐ ☐ < Use quick find settings >

☐ ☐ Created By

☐ ☐ Created By (Delegate)

☐ ☐ Created On

☒ ☒ Currency

☒ ☒ Current Cost

☐ ☐ Current Cost (Base)

☐ ☐ Decimals Supported

☐ ☐ Default Price List

☒ ☐ Default Unit

☐ ☒ Description

Select display columns  
or use Quick Find  
settings.

Search columns

Display columns

Options

Invoice Product

Existing Product

Amount

Opportunity Product

Existing Product

Order Product

Existing Product

Amount

Quantity

Quote Product

Existing Product

Product



Microsoft Dynamics CRM

Adam McAma  
Dynamics Professional Solutions Ltd  
Sign Out

File Home

New Activity New Record Import Data Advanced Find

Workplace

- My Work
  - Multi Search
  - Activities
  - Queues
  - Dashboards
  - Reports
  - Imports
  - Duplicate Detection

- Customers
  - Accounts
  - Contacts

- Workplace
- Sales & Marketing
- Customers
- Settings

Name: Products & Services  
Description:

Entities and attributes:

- Product
  - < Use quick find settings >
  - Created By
  - Created By (Delegate)
  - Created On
  - Currency
  - Current Cost
  - Current Cost (Base)
  - Decimals Supported
  - Default Price List
  - Default Unit
  - Description

Change columns  
sequence and default  
width.

Search columns Display columns Options

Invoice Product	Existing Product				
	Amount				
Opportunity Product	Existing Product				
Order Product	Existing Product				
	Amount				
	Quantity				
Quote Product	Existing Product				
Product					





Define other options like number results per entity or ownership options.

File

Home

New Activity

New Record

Import Data

Advanced Find

New

Tools

Workplace

My Work

Customers

Workplace

Sales & Marketing

Customers

Settings

Back to Search

Save

Save and New

Delete

Name: Products & Services

Description:

Entities and attributes:

Product

< Use quick find settings >

Created By

Created By (Delegate)

Created On

Currency

Current Cost

Current Cost (Base)

Decimals Supported

Default Price List

Default Unit

Description

Search columns

Display columns

Options

Global

Append wildcard (\*)

Prepend wildcard (\*)

Max results per entity

Owner

Page size

☒

☒

☐

9999

☐ My records ☐ Team records

10

Export

Import





You can Export and Import search definitions.

File

Home

New Activity

New Record

Import Data

Advanced Find

New

Tools

Workplace

My Work

Customers

Workplace

Sales & Marketing

Customers

Settings

Back to Search

Save

Save and New

Delete

Name: Products & Services

Description:

Entities and attributes:

Account

Activity

Address

Appointment

Article

Article Template

Business Unit

Campaign

Campaign Activity

Campaign Response

Case

Competitor

Connection

Connection Role

Contact

Search columns

Display columns

Options

Global

Append wildcard (\*)

Prepend wildcard (\*)

Max results per entity

Owner

Page size

Export

Import



Save your search definition and click "Back to Search" button to start searching.

File

Home

New Activity

New Record

Import Data

Advanced Find

New

Tools

Workplace

Back to Search

Save

Save and New

Delete

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Name:

Products & Services

Description:

Entities and attributes:

Product

< Use quick find settings >

Created By

Created By (Delegate)

Created On

Currency

Current Cost

Current Cost (Base)

Decimals Supported

Default Price List

Default Unit

Description

Search columns

Display columns

Options

Global

Append wildcard (\*)

Prepend wildcard (\*)

Max results per entity

Owner

Page size

☒

☒

☐

9999

☐ My records

☐ Team recor

10

Export

Import



Select existing search definition.

Enter search terms in the search box and click Start

File

Home

New Activity

New Record

Import Data

Advanced Find

New

Tools

Workplace

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Products & Services

Search: P

Start

Loading data...





Review search results.  
Depending on number  
of results you may have  
several pages per  
entity.

FileHome

New Activity

New Record

Import Data

Advanced Find

NewTools

Workplace

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Products & Services

Search: P

Start

Invoice Product

Found all 3 matching records

Product

Found all 28 matching records

ID	Product Name	Product Type	Current Cost	Currenc
MASS3	Activities Mass Update	Licence		Pound S
ORGS3	Organization Structure	Licence		Pound S
IMP4CR	Import Tool for Microsoft Dynamics CRM 4.0 - Customer Records Module	Licence		Pound S
WHUT4	Working Hours Utilities	Licence		Pound S
MASS4	Activities Mass Update	Licence		Pound S
IMP4AC	Import Tool for Microsoft Dynamics CRM 4.0 - Activities Module	Licence		Pound S
IMP4MF	Import Tool for Microsoft Dynamics CRM 4.0 - Data Migration to Full Version Upgrade	Licence		Pound S
IMP4DM	Import Tool for Microsoft Dynamics CRM 4.0 - Data Migration Version	Licence		Pound S
IMP4FL	Import Tool for Microsoft Dynamics CRM 4.0 - Full Version	Licence		Pound S
IMP4MC	Import Tool for Microsoft Dynamics CRM 4.0 - Marketing Campaign Module	Licence		Pound S
IMP4SL	Import Tool for Microsoft Dynamics CRM 4.0 - Sales Module	Licence		Pound S
IMP4SR	Import Tool for Microsoft Dynamics CRM 4.0 - Service Module	Licence		Pound S

1

2

3

Page 1 of 3



When too many records have been retrieved use filters to narrow it down.

FileHome

New Activity

New Record

Import Data

Advanced Find

NewTools

Workplace

My Work

Multi Search

Activities

Queues

Dashboards

Reports

Imports

Duplicate Detection

Customers

Accounts

Contacts

Workplace

Sales & Marketing

Customers

Settings

Products & Services

Search: P

Start

Select All

IMP4SL

IMP4SM

IMP4SR

MASS3

MASS4

ORGS3

ORGS4

PRLU3

PRLU4

WHUT3

WHUT4

Show rows with value that

Is equal to

And

Is equal to

Filter

Clear Filter

3 matching records

28 matching records

ID	Product Type	Current Cost
MASS3	Licence	
ORGS3	Licence	
IMP4CR	Microsoft Dynamics CRM 4.0 - Customer Records Module	Licence
WHUT4	Licence	
MASS4	Licence	
IMP4AC	Microsoft Dynamics CRM 4.0 - Activities Module	Licence
IMP4MF	Microsoft Dynamics CRM 4.0 - Data Migration to Full Version Upgrade	Licence
IMP4DM	Microsoft Dynamics CRM 4.0 - Data Migration Version	Licence
IMP4FL	Microsoft Dynamics CRM 4.0 - Full Version	Licence
IMP4MC	Microsoft Dynamics CRM 4.0 - Marketing Campaign Module	Licence
IMP4SL	Microsoft Dynamics CRM 4.0 - Sales Module	Licence
IMP4SR	Microsoft Dynamics CRM 4.0 - Service Module	Licence

Page 1 of 3



**D Y N A M I C S**  
P R O F E S S I O N A L   S O L U T I O N S

**Download :** <http://download.dynamics-pros.com>

**Support:** <http://support.dynamics-pros.com>

The image features three stylized human figures. The central figure is red, and the two flanking figures are blue. They are positioned on a base composed of overlapping, wavy shapes in shades of red and yellow. The background is white.

# Thank You!

[www.dynamics-pros.com](http://www.dynamics-pros.com)