



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.

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

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mics Professional Solutions Ltd
Sign Out

Search: [] Start

[]



Enter Name and Description for your search.

Select entities you want to search against.

What record statuses are you interested in?

The screenshot shows the Dynamics CRM search interface. At the top, there is a ribbon with 'File' and 'Home' tabs. Below the ribbon are icons for 'New Activity', 'New Record', 'Import Data', and 'Advanced Find'. The main area is titled 'Workplace' and contains a search form. The search form has a 'Name' field with the text 'Products & Services' and an empty 'Description' field. Below the search form is a section titled 'Entities and attributes:' which lists various entities with checkboxes for their statuses. The entities listed are Case, Competitor, Contract Line, Invoice Product, Opportunity Product, Order Product, Product, and Quote Product. To the right of the search form is a 'Search columns' panel with tabs for 'Search columns', 'Display columns', and 'Options'. This panel shows a list of columns for each entity, with 'Existing Product' selected for each. The columns listed are ID, Product Name, and Product Type. The interface also includes a left-hand navigation pane with sections for 'My Work', 'Customers', 'Workplace', 'Sales & Marketing', 'Customers', and 'Settings'.



Select search columns
or use Quick Find
settings.

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Back to Search Save Save and New

Name: Products & Services

Description:

Entities and attributes:

Search columns Display columns Options

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

Quantity

Opportunity Product

Existing Product

Order Product

Amount

Existing Product

Quantity

Quote Product

Existing Product

Product

Currency

Current Cost



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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

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Change columns
sequence and default
width.

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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

Entity	Column	Width	Order	Remove
Invoice Product	Existing Product	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
	Amount	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
Opportunity Product	Existing Product	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
Order Product	Existing Product	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
	Amount	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
	Quantity	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
Quote Product	Existing Product	<input type="text"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>	<input type="button" value="X"/>
Product				



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

Microsoft Dynamics CRM

File Home

New Activity New Record Import Data Advanced Find

Workplace

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	<input checked="" type="checkbox"/>
Append wildcard (*)	<input checked="" type="checkbox"/>
Prepend wildcard (*)	<input type="checkbox"/>
Max results per entity	9999
Owner	<input type="checkbox"/> My records <input type="checkbox"/> Team records
Page size	10

Export Import



You can Export and Import search definitions.

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New Activity New Record Import Data Advanced Find

Workplace

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	<input checked="" type="checkbox"/>
Append wildcard (*)	<input checked="" type="checkbox"/>
Prepend wildcard (*)	<input type="checkbox"/>
Max results per entity	9999
Owner	<input type="checkbox"/> My records <input type="checkbox"/> My record
Page size	25

Export Import



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

Microsoft Dynamics CRM

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New Activity New Record Import Data Advanced Find

New Tools

Workplace Home

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 9999

Owner My records Team records

Page size 10

Export Import



Select existing search definition.

Enter search terms in the search box and click Start

File Home Dynamic

New Activity New Record Import Data Advanced Find

New Tools

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Products & Services Search: P Start

Loading data...

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

File Home

New Activity New Record Import Data Advanced Find

Workplace

Products & Services Search: P Start

Multi Search 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 \$
ORGS3	Organization Structure	Licence		Pound \$
IMP4CR	Import Tool for Microsoft Dynamics CRM 4.0 - Customer Records Module	Licence		Pound \$
WHUT4	Working Hours Utilities	Licence		Pound \$
MASS4	Activities Mass Update	Licence		Pound \$
IMP4AC	Import Tool for Microsoft Dynamics CRM 4.0 - Activities Module	Licence		Pound \$
IMP4MF	Import Tool for Microsoft Dynamics CRM 4.0 - Data Migration to Full Version Upgrade	Licence		Pound \$
IMP4DM	Import Tool for Microsoft Dynamics CRM 4.0 - Data Migration Version	Licence		Pound \$
IMP4FL	Import Tool for Microsoft Dynamics CRM 4.0 - Full Version	Licence		Pound \$
IMP4MC	Import Tool for Microsoft Dynamics CRM 4.0 - Marketing Campaign Module	Licence		Pound \$
IMP4SL	Import Tool for Microsoft Dynamics CRM 4.0 - Sales Module	Licence		Pound \$
IMP4SR	Import Tool for Microsoft Dynamics CRM 4.0 - Service Module	Licence		Pound \$

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

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Products & Services Search: P Start

3 matching records

28 matching records

ID	Product Type	Current Cost
IMP4SL	Licence	
IMP4SM	Licence	
IMP4SR	Licence	
MASS3	Licence	
MASS4	Licence	
ORGS3	Licence	
ORGS4	Licence	
PRLU3	Licence	
PRLU4	Licence	
WHUT3	Licence	
WHUT4	Licence	
IMP4CR	Microsoft Dynamics CRM 4.0 - Customer Records Module	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

Show rows with value that

Is equal to

And

Is equal to

Filter Clear Filter



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