



Multi Search

For Dynamics CRM 2013



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.

Microsoft Dynamics CRM | DPS | Multi Search | Create | Adam McAma First

NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Search: Start

(Note: A red box highlights the 'New Search Definition' icon in the search bar area.)



Enter Name and Description for your search.

Select entities you want to search against.
What record statuses are you interested in?

Microsoft Dynamics CRM

NEW ACTIVITY | NEW RECORD | IMPORT DATA

Back to Search | Save | Save and New | Delete

Name: Products & Services
Description:

Entities and attributes:

- Account: Active Inactive
- Activity: Open Completed Canceled Scheduled
- Address
- Appointment: Open Completed Canceled Scheduled
- Article: Draft Unapproved Published
- Article Template
- Business Unit
- Campaign: Active Inactive
- Campaign Activity: Open Closed Canceled
- Campaign Response: Open Closed Canceled
- Case: Active Resolved Canceled
- Competitor
- Connection: Active Inactive
- Connection Role: Active Inactive
- Contact: Active Inactive
- Contract: Draft Invoiced Active On Hold Canceled Expired
- Contract Line: Existing Renewed Canceled Expired

Search columns | Options

- Inv...
 - Amount
 - Existing Product
 - Quantity
- Opportunity Product
 - Existing Product
- Order Product
 - Amount
 - Existing Product
 - Quantity
- Product
 - Currency
 - Current Cost
 - Default Unit
 - ID
 - Product Name
 - Product Type



Select search columns
or use Quick Find
settings.

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Multi Search

Back to Search | Save | Save and New | Delete

Name: Products & Services

Description:

Entities and attributes:

- Opportunity Relationship
- Order Active Submitted Canceled Fulfilled Invoiced
- Order Product**
- Phone Call Open Completed Canceled
- Post Configuration Active Inactive
- Post Rule Configuration Active Inactive
- Price List Active Inactive
- Process Draft Activated
- Product**
 - < Use quick find settings >
 - Created By
 - Created By (Delegate)
 - Created On
 - Currency
 - Current Cost
 - Current Cost (Base)
 - Decimals Supported

Search columns | Display columns | Options

Entity	Attribute	Selected
Invoice Product	Amount	<input checked="" type="checkbox"/>
	Existing Product	<input checked="" type="checkbox"/>
	Quantity	<input checked="" type="checkbox"/>
Opportunity Product	Existing Product	<input checked="" type="checkbox"/>
Order Product	Amount	<input checked="" type="checkbox"/>
	Existing Product	<input checked="" type="checkbox"/>
	Quantity	<input checked="" type="checkbox"/>
Product	Currency	<input checked="" type="checkbox"/>
	Current Cost	<input checked="" type="checkbox"/>
	Default Unit	<input checked="" type="checkbox"/>
	ID	<input checked="" type="checkbox"/>
	Product Name	<input checked="" type="checkbox"/>
	Product Type	<input checked="" type="checkbox"/>



Select display columns or use Quick Find settings.

Microsoft Dynamics CRM | DPS | Multi Search

Multi Search

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Search columns | **Display columns** | Options

Entity	Field	Filter	Sort	Remove
Invoice Product	Existing Product	<input type="text"/>	↑ ↓	×
	Amount	<input type="text"/>	↑ ↓	×
Opportunity Product	Existing Product	<input type="text"/>	↑ ↓	×
Order Product	Existing Product	<input type="text"/>	↑ ↓	×
	Amount	<input type="text"/>	↑ ↓	×
	Quantity	<input type="text"/>	↑ ↓	×
Product	ID	<input type="text"/>	↑ ↓	×
	Product Name	<input type="text"/>	↑ ↓	×
	Product Type	<input type="text"/>	↑ ↓	×
	Current Cost	<input type="text"/>	↑ ↓	×
	Currency	<input type="text"/>	↑ ↓	×
	Description	<input type="text"/>	↑ ↓	×



Change columns
sequence and default
width.

Microsoft Dynamics CRM | DPS | Create | Adam McAma First

Multi Search

Back to Search | Save | Save and New | Delete

Name: Products & Services

Description:

Entities and attributes:

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 - Created By (Delegate)
 - Created On
 - Currency
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 - Current Cost (Base)
 - Decimals Supported

Search columns | **Display column options** | Columns

Entity	Field	Width	Order	Remove
Invoice Product	Existing Product		↑ ↓	×
	Amount		↑ ↓	×
Opportunity Product	Existing Product		↑ ↓	×
Order Product	Existing Product		↑ ↓	×
	Amount		↑ ↓	×
	Quantity		↑ ↓	×
Product	ID		↑ ↓	×
	Product Name		↑ ↓	×
	Product Type		↑ ↓	×
	Current Cost		↑ ↓	×
	Currency		↑ ↓	×
	Description		↑ ↓	×



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

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NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Back to Search | Save | Save and New | Delete

Name: Products & Services

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- Post Rule Configuration Active Inactive
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- Product Active Inactive

< Use quick find settings >

- Created By
- Created By (Delegate)
- Created On
- Currency
- Current Cost
- Current Cost (Base)
- Decimals Supported

Search columns | Display columns | **Options**

- Global
- Append wildcard (*)
- Prepend wildcard (*)
- Max results per entity
- Owner My records Team records
- Page size

Export | Import



You can Export and Import search definitions.

Microsoft Dynamics CRM | DPS | Multi Search

NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Back to Search | Save | Save and New | Delete

Name: Products & Services

Description:

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- Order Product
- Phone Call Open Completed Canceled
- Post Configuration Active Inactive
- Post Rule Configuration Active Inactive
- Price List Active Inactive
- Process Draft Activated
- Product Active Inactive

< Use quick find settings >

- Created By
- Created By (Delegate)
- Created On
- Currency
- Current Cost
- Current Cost (Base)
- Decimals Supported

Search columns | Display columns | **Options**

- Global
- Append wildcard (*)
- Prepend wildcard (*)
- Max results per entity: 9999
- Owner: My records Team records
- Page size: 30

Export **Import**



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

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NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Back to Search | Save | Save and New | Delete

Name: Products & Services

Description:

Entities and attributes:

- Opportunity Relationship
- Order Active Submitted Canceled Fulfilled Invoiced
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- Phone Call Open Completed Canceled
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- Process Draft Activated
- Product**
 - < Use quick find settings >
 - Created By
 - Created By (Delegate)
 - Created On
 - Currency
 - Current Cost
 - Current Cost (Base)
 - Decimals Supported

Search columns | Display columns | Options

Global

Append wildcard (*)

Prepend wildcard (*)

Max results per entity 9999

Owner My records Team records

Page size 30

Export | Import



Select existing search definition.

Enter search terms in the search box and click Start

Microsoft Dynamics CRM

NEW ACTIVITY NEW RECORD IMP ADVANCED FIND

Products & Services

Search: DPS Start

Loading data...



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

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NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Products & Services | Search: DPS

Product Found all 18 matching records

ID	Product Name	Product Type	Current Cost	Currency	Description
COPY04	DPS Copy Tool (CRM 4)	Sales Inventory	£50.00	Pound Sterling	DPS Copy Tool for Dynamics CRM 4.0
COPY05	DPS Copy Tool (CRM 2011)	Sales Inventory	£50.00	Pound Sterling	DPS Copy Tool for Dynamics CRM 2011
COPY06	DPS Copy Tool (CRM 2013)	Sales Inventory	£50.00	Pound Sterling	DPS Copy Tool for Dynamics CRM 2013
PRLU03	DPS Price List Tool (CRM 3)	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 3.0
PRLU04	DPS Price List Tool for CRM 4)	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 4.0
PRLU05	DPS Price List Tool for (CRM 2011)	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 2011
PRLU06	DPS Price List Tool for (CRM 2013)	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 2013
ACSUM04	DPS Activities Summary (CRM 4)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Summary for Dynamics CRM 4.0
ACSUM05	DPS Activities Summary (CRM 2011)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Summary for Dynamics CRM 2011
ACSUM06	DPS Activities Summary (CRM 2013)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Summary for Dynamics CRM 2013
AMUP03	DPS Activities Mass Update (CRM 3)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 3.0
AMUP04	DPS Activities Mass Update (CRM 4)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 4.0
AMUP05	DPS Activities Mass Update (CRM 2011)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 2011
AMUP06	DPS Activities Mass Update (CRM 2013)	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 2013
IMP03	DPS Import Tool (CRM 3)	Sales Inventory	£50.00	Pound Sterling	DPS Import Tool for Dynamics CRM 3.0
IMP04	DPS Import Tool (CRM 4)	Sales Inventory	£50.00	Pound Sterling	DPS Import Tool for Dynamics CRM 4.0

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

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NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND

Products & Services | Search: DPS | Start

Product | Found all 18 matching records

ID	Product Type	Current Cost	Currency	Description
COPY0	Sales Inventory	£50.00	Pound Sterling	DPS Copy Tool for Dynamics CRM 4.0
COPY0	Sales Inventory	£50.00	Pound Sterling	DPS Copy Tool for Dynamics CRM 2011
COPY0	Sales Inventory	£50.00	Pound Sterling	DPS Copy Tool for Dynamics CRM 2013
PRLUC	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 3.0
PRLUC	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 4.0
PRLUC	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 2011
PRLUC	Sales Inventory	£50.00	Pound Sterling	DPS Price List Tool for Dynamics CRM 2013
ACSUM	Sales Inventory	£50.00	Pound Sterling	DPS Activities Summary for Dynamics CRM 4.0
ACSUM	Sales Inventory	£50.00	Pound Sterling	DPS Activities Summary for Dynamics CRM 2011
ACSUM	Sales Inventory	£50.00	Pound Sterling	DPS Activities Summary for Dynamics CRM 2013
AMUP	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 3.0
AMUP	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 4.0
AMUP	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 2011
AMUP	Sales Inventory	£50.00	Pound Sterling	DPS Activities Mass Update for Dynamics CRM 2013
IMPO3	Sales Inventory	£50.00	Pound Sterling	DPS Import Tool for Dynamics CRM 3.0
IMPO4	Sales Inventory	£50.00	Pound Sterling	DPS Import Tool for Dynamics CRM 4.0

Filter | Clear Filter

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 **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

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



Thank You!

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