



# Multi Search

For Dynamics CRM 2011



User Guide

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## ***What's in this manual***

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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). 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 settings already defined in your organization.

This manual is divided into the following chapters:

➤ **Defining personal or global searches**

This section will help you build personal and global search definitions.

➤ **Using personal or global searches**

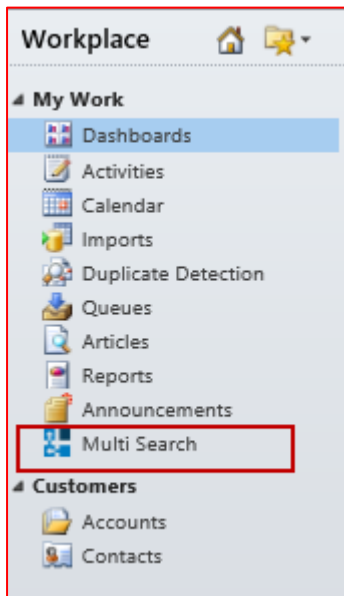
This section will guide you through the search process using the Multi Search tool.

## Defining new search definition

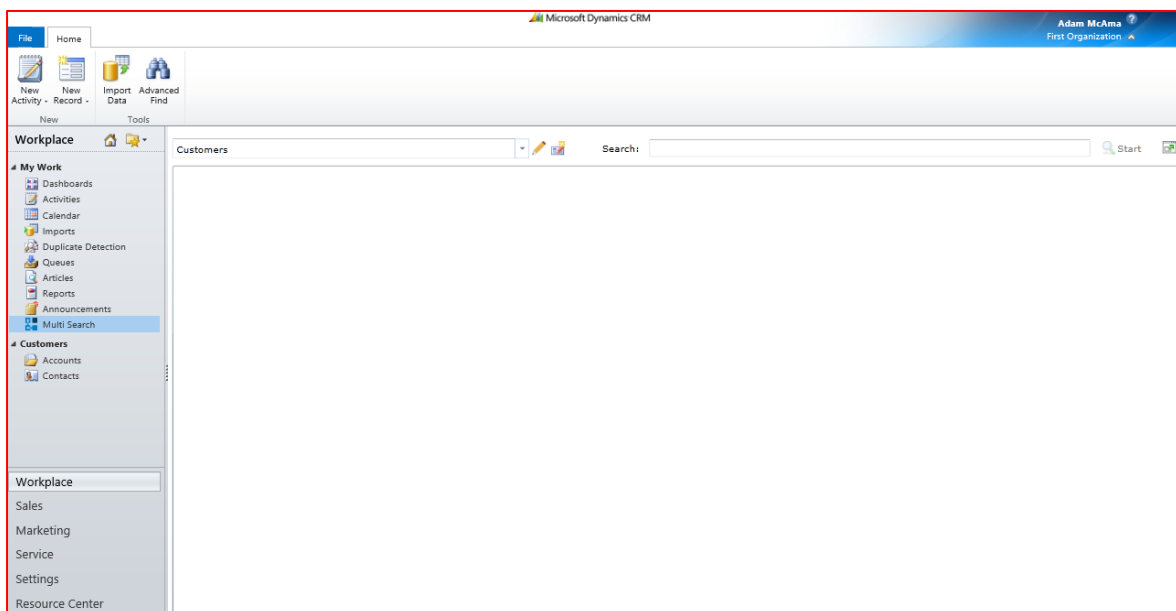
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Follow below steps to define personal or global search definitions:

1. Log in to Microsoft Dynamics CRM 2011
2. Navigate to DPS :
  - a. Select 'Multi Search' from Navigation Pane.



- b. Multi Search screen will open.





3. Click on “Define New Search” button to define new search definition.

The screenshot shows the 'Define New Search' interface. At the top, there are buttons for 'Back to Search', 'Save', 'Save and New', and 'Delete'. Below these are input fields for 'Name:' and 'Description:'. The main area is divided into two sections: 'Entities and attributes:' on the left and 'Search columns' on the right. The 'Entities and attributes' section lists various entities like Account, Activity, Address, Appointment, Article, etc., each with a set of checkboxes for different statuses. The 'Search columns' section has tabs for 'Search columns', 'Display columns', and 'Options'.

4. Enter Name and Description for your search.

The screenshot shows the 'Name' and 'Description' input fields. The 'Name' field contains the text 'Customers' and the 'Description' field contains the text 'Accounts, Contacts and Leads'.

5. Select entities you want to search against. Use search to locate all entities with particular field.

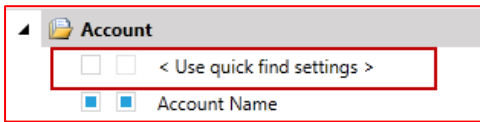
The screenshot shows the 'Entities and attributes' section. The 'Date' field is selected. The 'Account' entity is expanded to show 'Last Date Included in Campaign'. The 'Activity' entity is expanded to show 'Date Created', 'Due Date', 'Last Updated', and 'Start Date'. The 'Campaign' and 'Contract' entities are also visible with their respective status checkboxes.

6. What record statuses are you interested in? Select appropriate statuses for each entity.

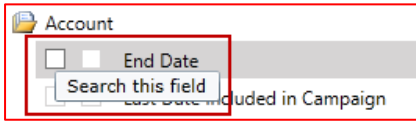
The screenshot shows the 'Case', 'Contract', and 'Contract Line' entities. The 'Case' entity has 'Active' selected. The 'Contract' entity has 'Active' selected. The 'Contract Line' entity has 'Existing' selected.

7. For each selected entity define what fields system should use to search. You have two options.

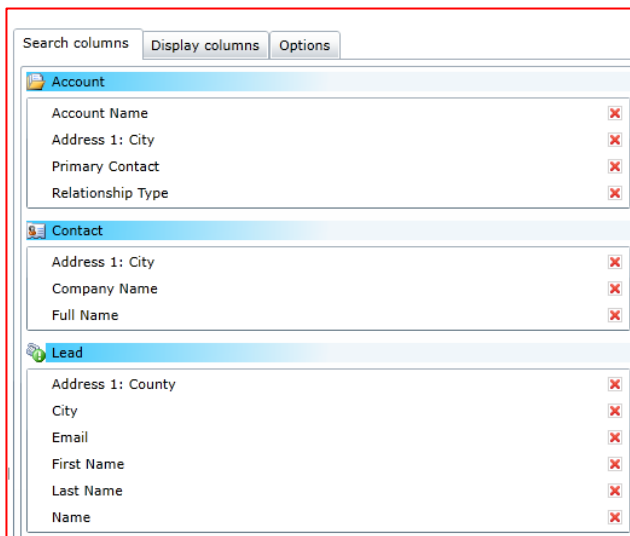
a. Use Quick Find setting in Dynamics CRM



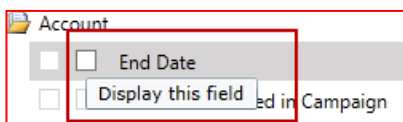
b. Define your own search criteria for selected entity for each search definition.



8. Use "Search Columns" Tab to verify all selected search columns.



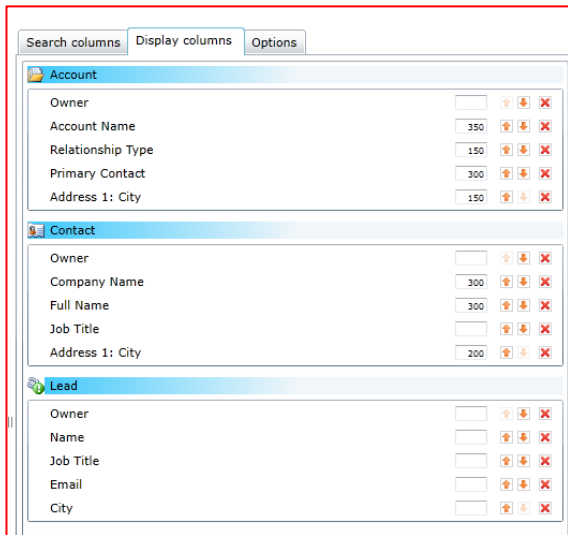
9. For each entity select details you want to see in search results. Select columns system will use to display you result.





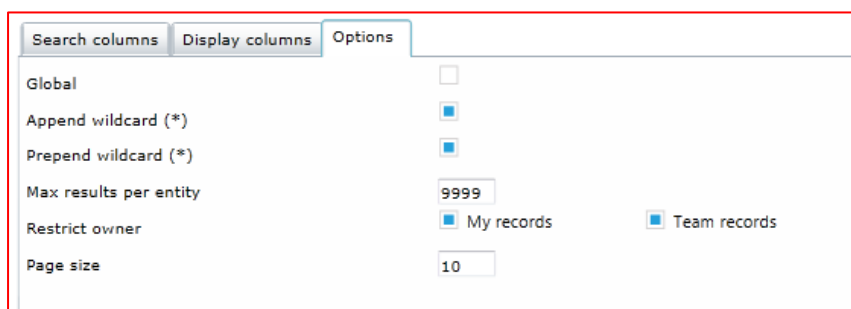
10. Use “Display Columns” Tab to:

- a. Remove unwanted columns
- b. Change columns sequence and
- c. Change columns default width



11. Switch to “Options” Tab to decide about other aspects of your search. In this screen you can:

- a. Decide you were building a global or personal search. When “Global” option is selected view will be available to all users. Only users with appropriate permission in their security role will be allowed to create global search definitions.
- b. Append or/and Prepend wildcard (\*) to all your search terms.
- c. Define how many results should be retrieved and how many records per page do you want to display.
- d. By default system will display all records you are allowed to see that match your search criteria regardless who owns them. If you prefer you can limit records just to those owned by you or/and your Team.



12. Save your search definition and click “Back to Search” button to start searching.

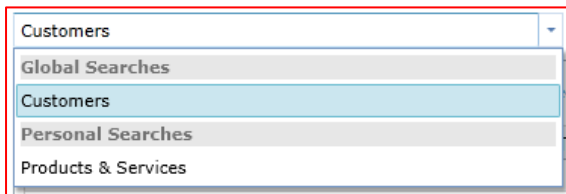


13. If you are building search definition in a test environment use Export and Import search definitions to move your work between organizations.

## Using search definition

Follow below steps to use personal or global search definitions:

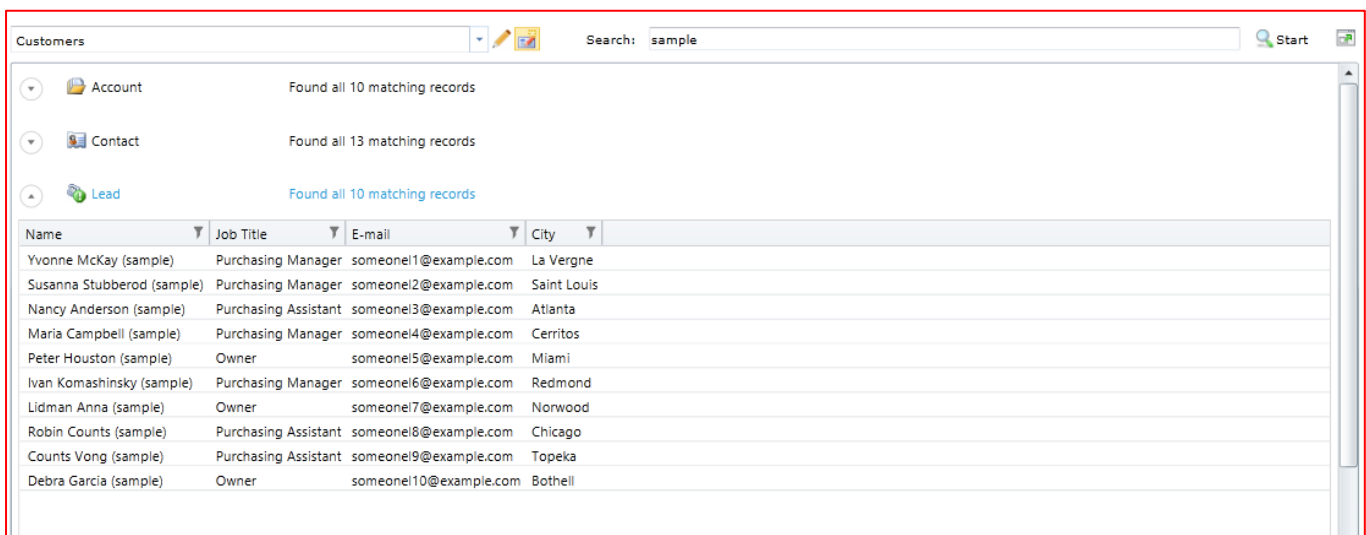
1. If necessary log in to Microsoft Dynamics CRM 2013
2. Select existing search definition.



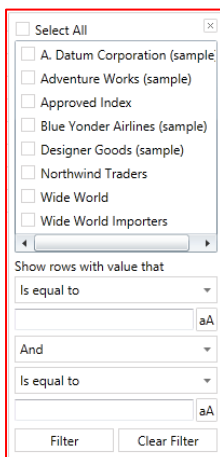
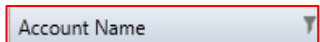
3. Enter search terms in the search box and click Start



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



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



## ***Support***

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