Multi Search

For Dynamics CRM 2013

User Guide

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What's in this manual

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 crate 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.

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 multi Search tool.

Defining new search definition

Follow below steps to define personal or global search definitions:

1. Log in to Microsoft Dynamics CRM 2013

2. Navigate to DPS :

    a. Select 'DPS' functionality areas in Navigation Bar.
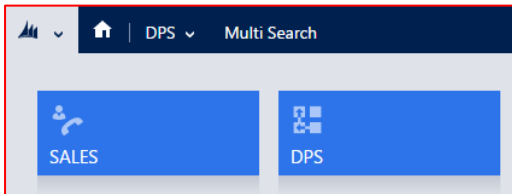
    b. Navigate to Multi Search.
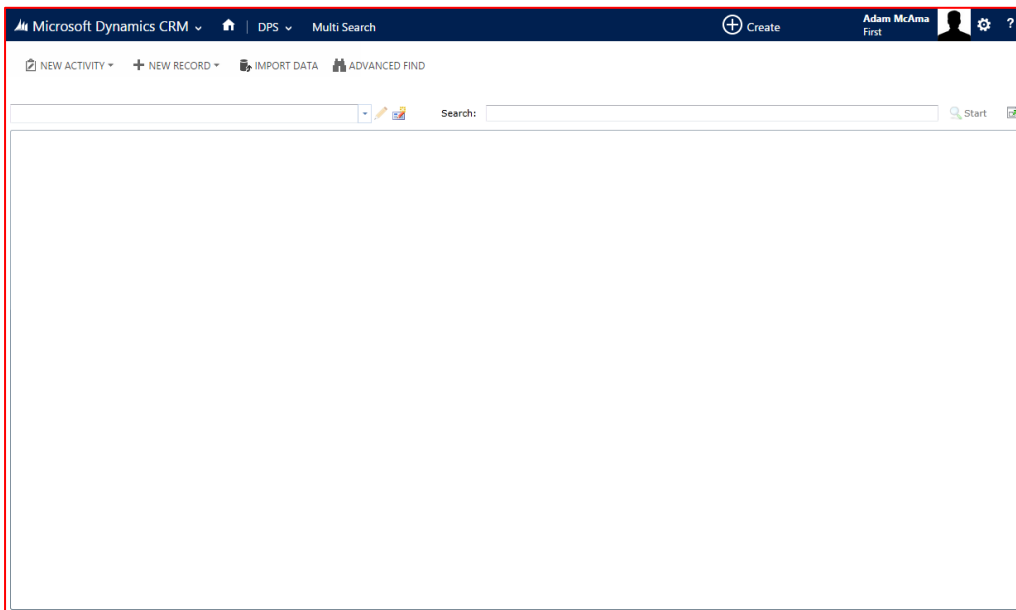
3. Click on "Define New Search" button to define new search definition.
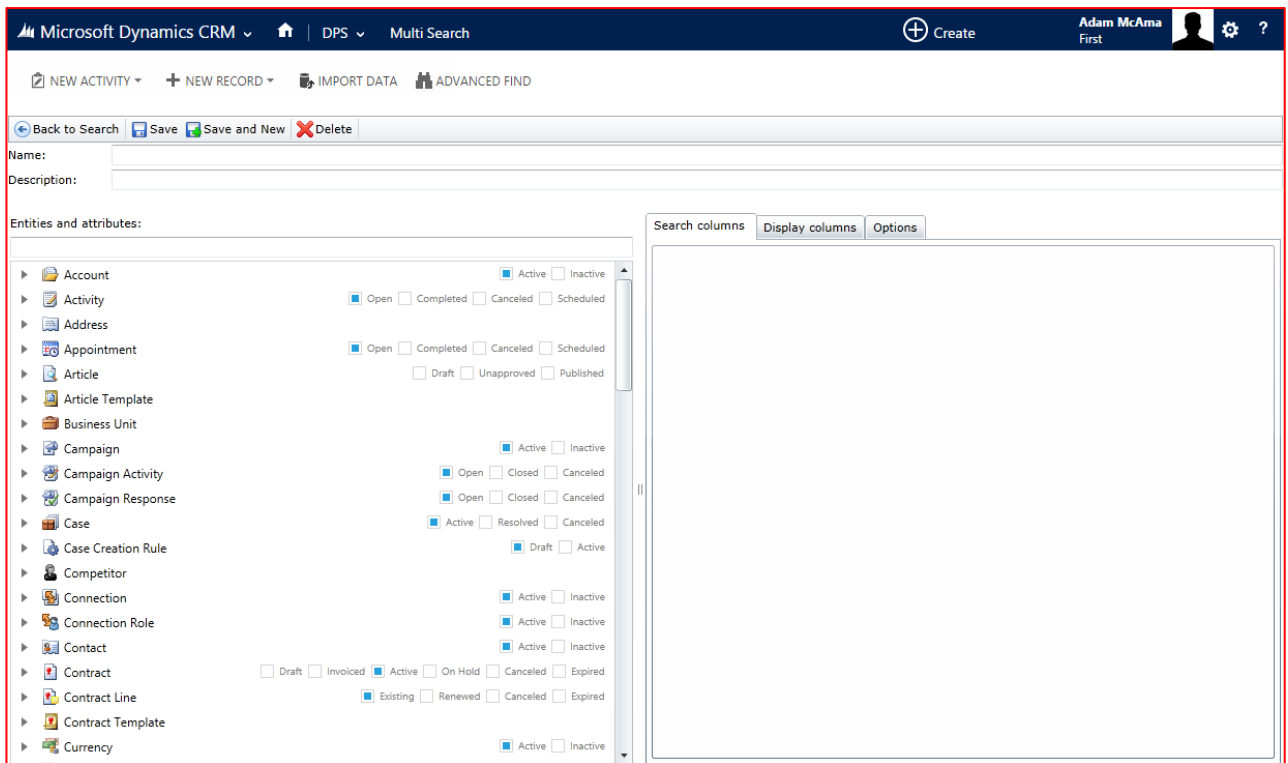
4. Enter Name and Description for your search.

5. Select entities you want to search against. Use search to locate all entities with particular field.
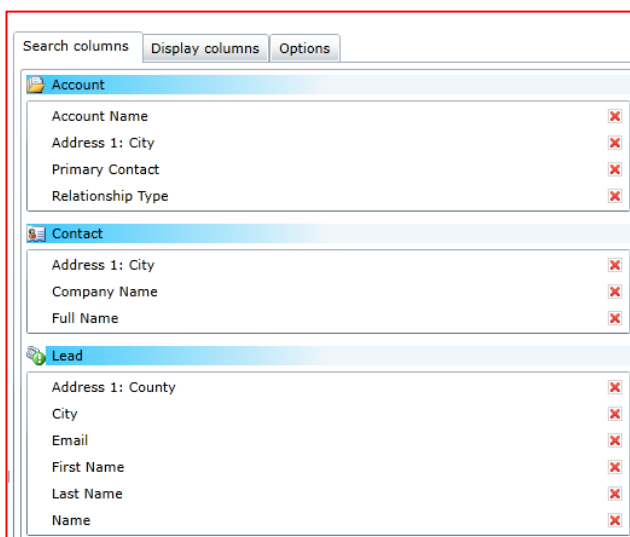
6. What record statuses are you interested in? Select appropriate statuses for each entity.
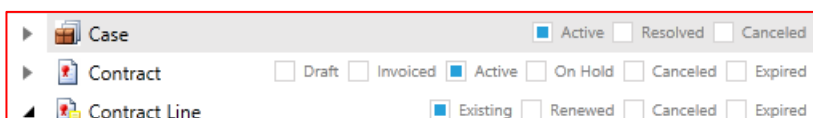
7. For each selected entity define what fields system should use to search. You have two options.

    a. Use Quick Find setting in Dynamics CRM
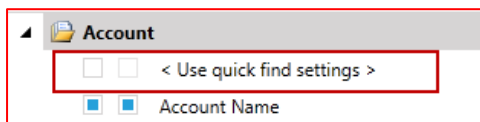
    b. Define your own search criteria for selected entity for each search definition.
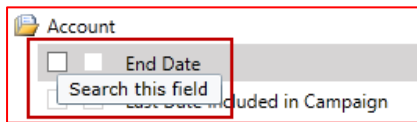
8. Use "Search Columns" Tab to verify all selected search columns.
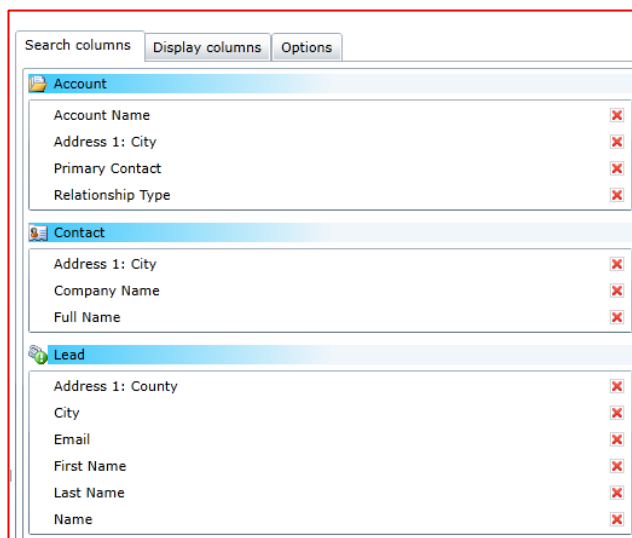
9. For each entity select details you want to see in search results. Select columns system will use to display you result.
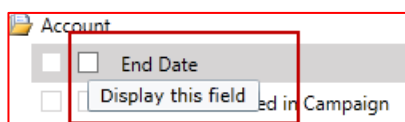
10. Use "Display Columns" Tab to:

    a.   Remove unwanted columns

    b.   Change columns sequence and

    c.   Change columns default width
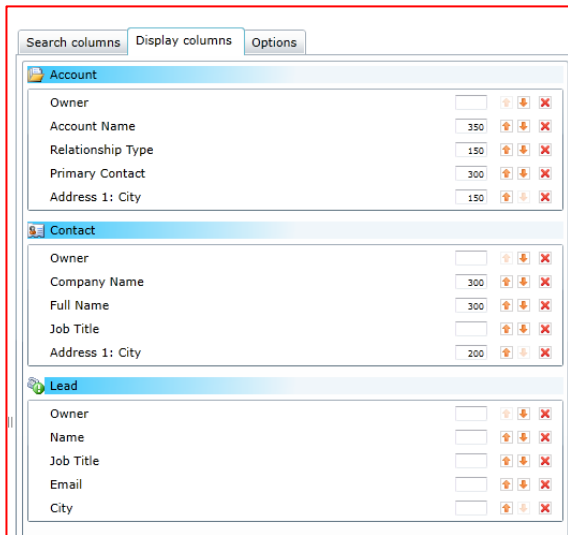
11. Switch to "Options" Tab to decide about other aspects of you search. In this screen you can:

    a.   Decide you ware building a global or personal search. When "Global" option sis selected view will be available to all users. Only users with appropriate permission sin their security role will be allowed to create global search definitions.

    b.   Append or/and Prepend wildcard (*****) to all you search terms.

    c.   Define how many results should be retrieved and how many records per page do you want do display.

    d.   By default system will display all records you are allowed to see that match your search criteria regardless who own them. If you prefer you can limit records just to these own by you or/and your Team.
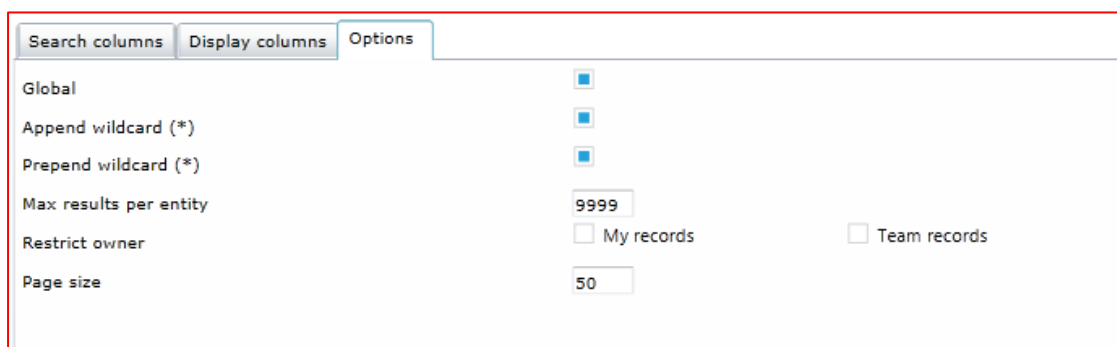
12. Save your search definition and click "Back to Search" button to start searching.

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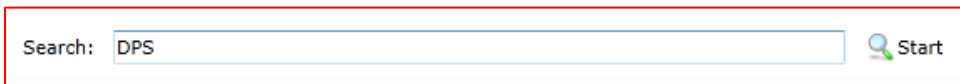
Using search definition

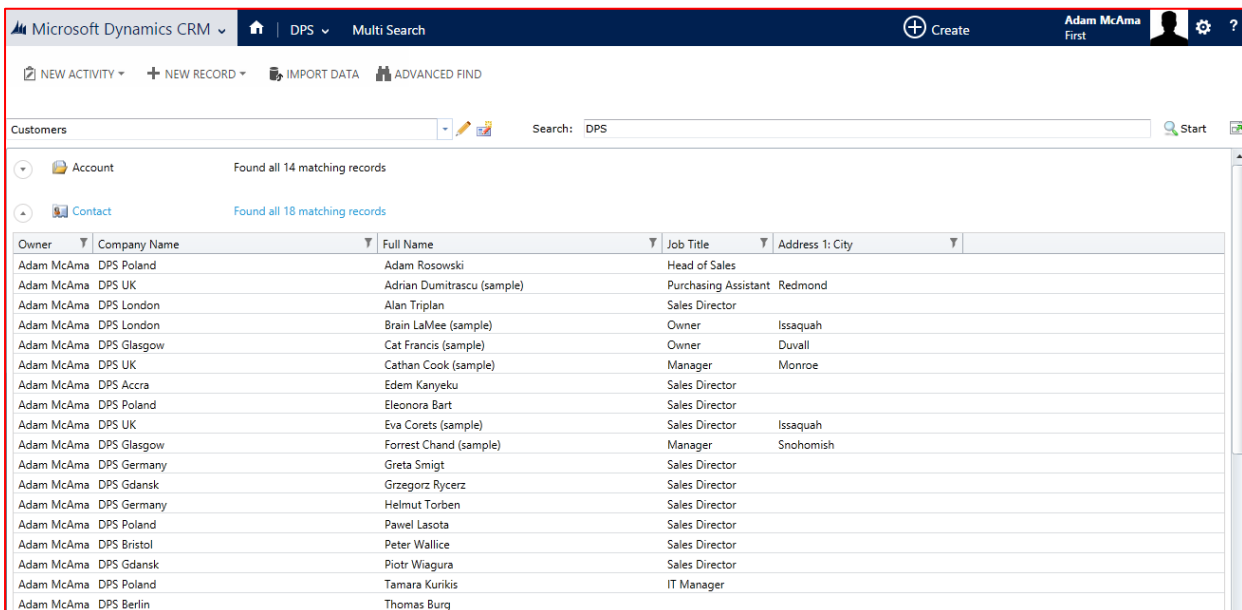Follow below steps to use personal or global search definitions:

1. If necessary log in to Microsoft Dynamics CRM 2013

2. Select existing search definition.
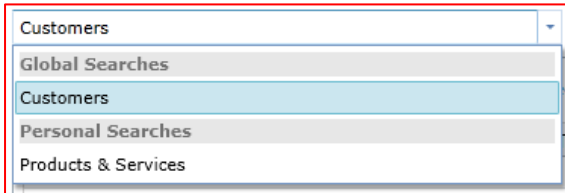
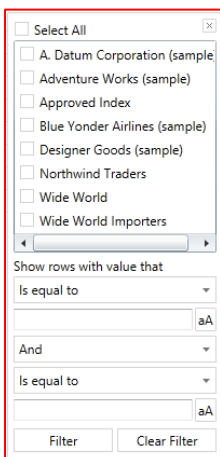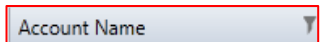3. Enter search terms in the search box and click Start

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

If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

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