OLIVIA CLARE LIMITED

Microsoft Dynamics 365
User Training Modules
Searching for Data

Clare Struggles

Contents

TRAINING MODULES
SEARCHING FOR DATA

Searching for Data

In each entity of the database you can search for data. There are various ways to carry out searches but the most important thing to remember is that global searches do interrogate the entire database and will therefore always take longer than a specific entity search. If you know which entity the value that you are looking for resides within then always search the entity itself as a priority.

Global Searches

### When would I use the Global Search Option

The Global Search option is most suitable when you are unsure where the value that you are searching for has been entered in the database. For example, when you are looking for a person but are unsure as to whether they have been entered as a Lead or a Contact into the program. The global search function will interrogate up to nine entities to find the value specified and these entities will have been pre-set by your database administrator.

Using Global Search Functionality

To search for a value using the global search option, type the value that you wish to search for in the global search field that sits in the top right hand corner of the screen. When carrying out any search in the system always make sure that you encase the value that you are looking for in *asterisks*. In the example below we have searched for the word test:

To run the search, select the magnifying glass or alternatively hit enter on your keyboard. The search result will be presented in the format displayed below. Each time the value is found it will be listed under the header of the entity it was found within and a tile representing the entity will also appear alongside the search result data:
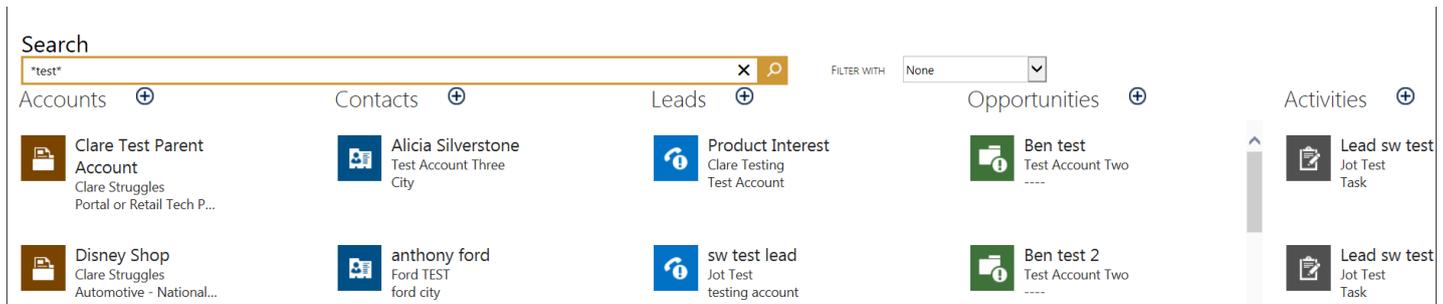
Once the search result is active on screen, you can then filter further using the **Filter With** option, use the dropdown list alongside the filter with field, and select the specific entity that you wish to base your search upon.
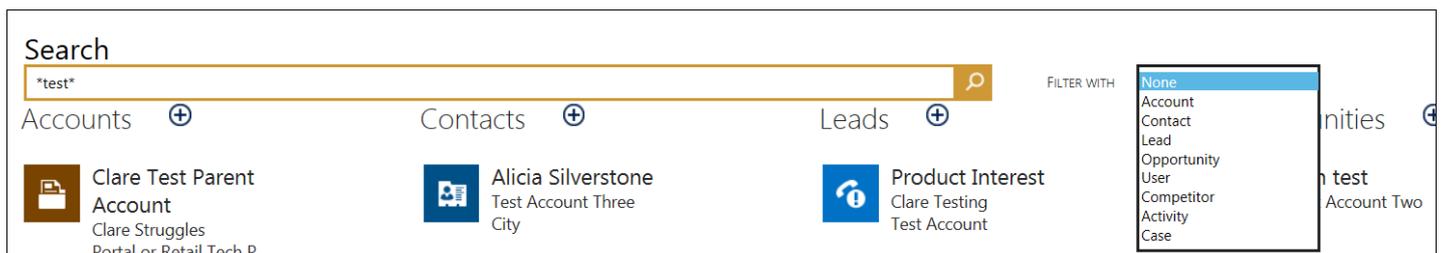
Searching within a Specific Entity

If you are certain that the data that you are searching for is within a specific entity, it is much more effective to activate the view of the entity itself and then search directly within the entity. In the example below we have used the Accounts entity for our example:

In the top right hand corner of the view, you will see that there is a search field, click in this field and enter the value that you wish to search for making sure that you enclose it in asterisks in the example below we have used *olivia*
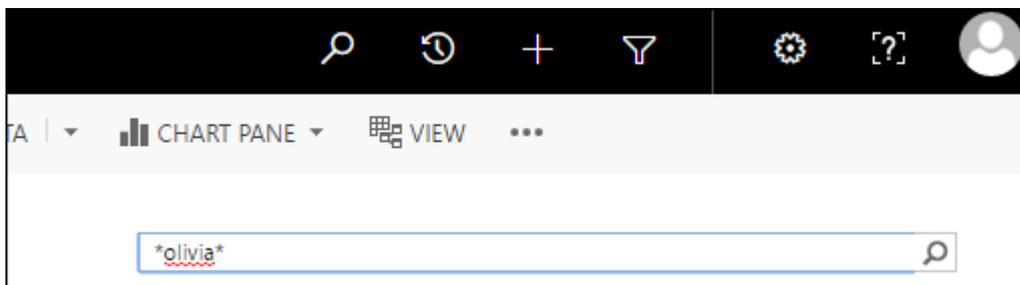
Press enter on the keyboard or alternatively select the magnifying glass to run the search. Notice that the view name has changed to the words Search Results rather than the original view name that you started your search within:
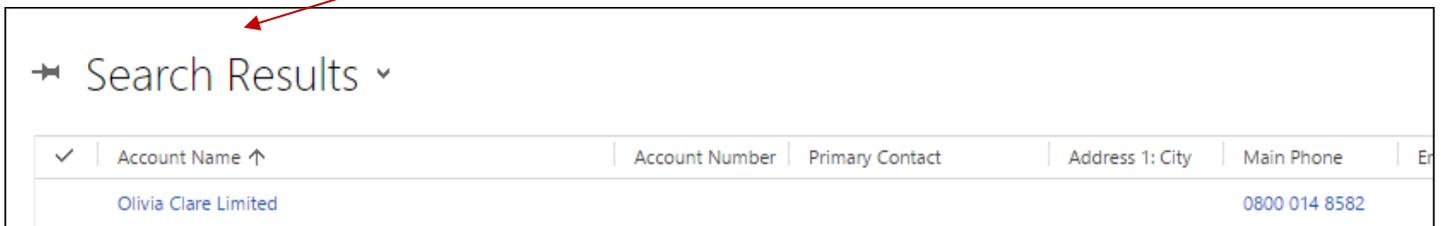
The program will also display a total number count which is found at the bottom left of the search screen, as well as displaying the first 50 records


Additional Options When Working with Views

Sorting data by an Individual Column

Every view has a default sort on one column header you are however able to change the sort order of the columns in the view by simply clicking on a column header, the data will sort either ascending or descending depending on which way the arrow faces. The column that the view is currently sorting on will have a small arrow to signify it is the sorting column, which faces up for ascending and down for descending. Simply click the column header to reverse the sort, or alternatively click a different column header to change the column that you are sorting by:
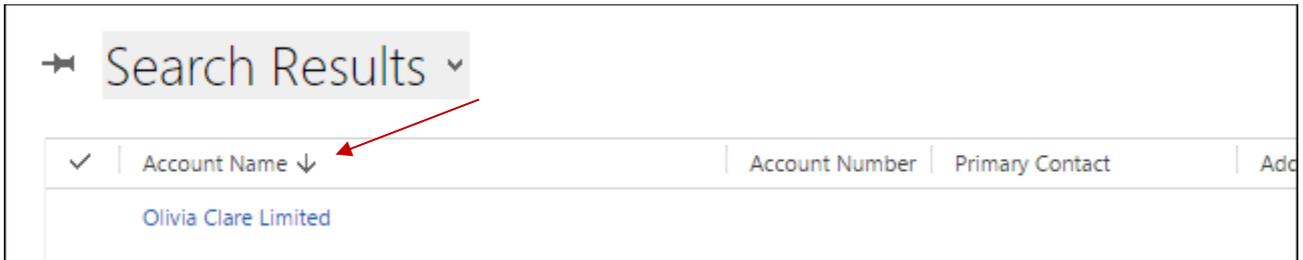
Filtering data Alphabetically and Numerically

To sort and filter the data alphabetically, click the series of letters along the bottom of the view and the data will filter down to just the values that begin with the letter you selected, but working in conjunction with the column that you are sorting by. Also, remember that the hash symbol **#** will give anything that starts numerically and the **All** option will return you to the full list.

Clearing a Search Filter

To release the search, click the cross at the end of the search field and the search filter will clear returning you to the original view that you were working from.
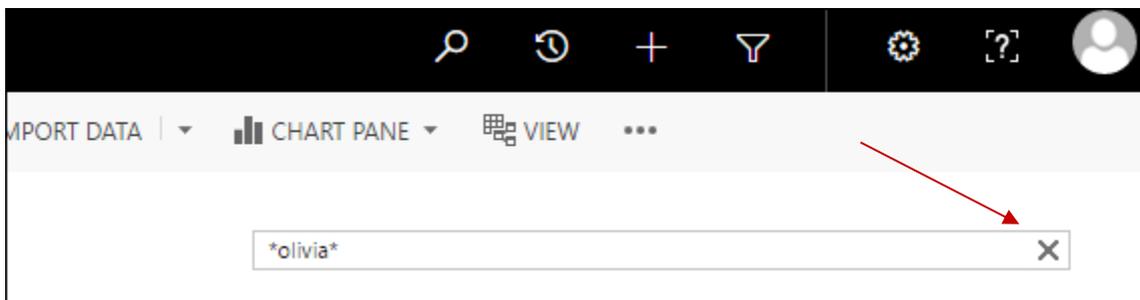
Active Views and Search Results the Difference

Whenever a search is activated within an entity the search result will always be returned in a search result view which is completely different to either the system or user saved views. To see the difference, activate a view such as the Active Accounts view.

Enter a search criteria in the search box on the top right of the Active Accounts screen and hit the magnifying glass or the enter key to run the search:

As soon as the search result activates on screen, you will see that the Active Accounts view has now disappeared and has been replaced by the Search Results view:
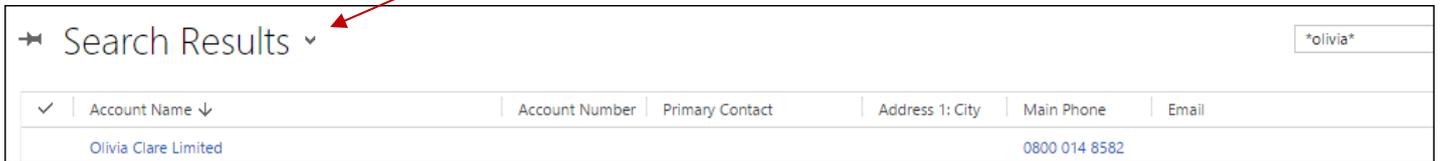

Just to confuse matters, if your system administrators have customised the database to maximise efficiency, then the columns in the Search Results View should look the same as the Active Account View, or any other system view that you activate for that matter. It is only the view name that cosmetically will appear differently. As soon as you release the filter the search results view will hide again and you will return to the original view that you started the search within.

## Creating Filters within a View

In any active view, it is possible to create a filter but make sure that you do not have the Search Results view active. The Search Results view is a filter within itself and the program will inform you that you are not allowed to search in this type of view. Running a filter works in much the same way as the same functionality works in Excel. To activate a filter, click the filter icon within the top right hand corner of the screen:

As soon as you select the filter icon, a small downward arrow will appear in the corner of every column of the view to indicate that the filter is switched on:
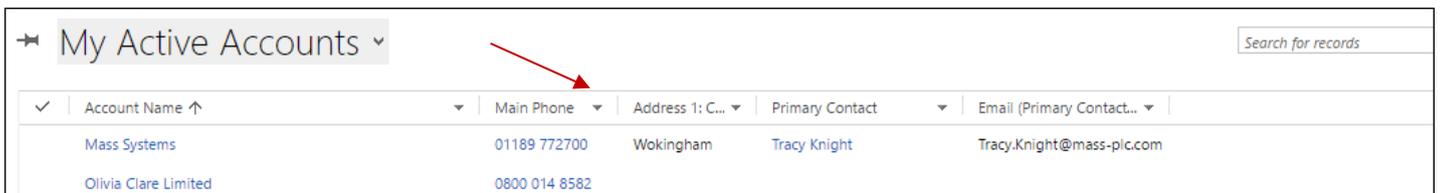
Use the downward arrow to select the values required when running the filter, firstly the field that you are filtering on will become shaded and the filter relevant to the type of field that you are working with will activate:

5
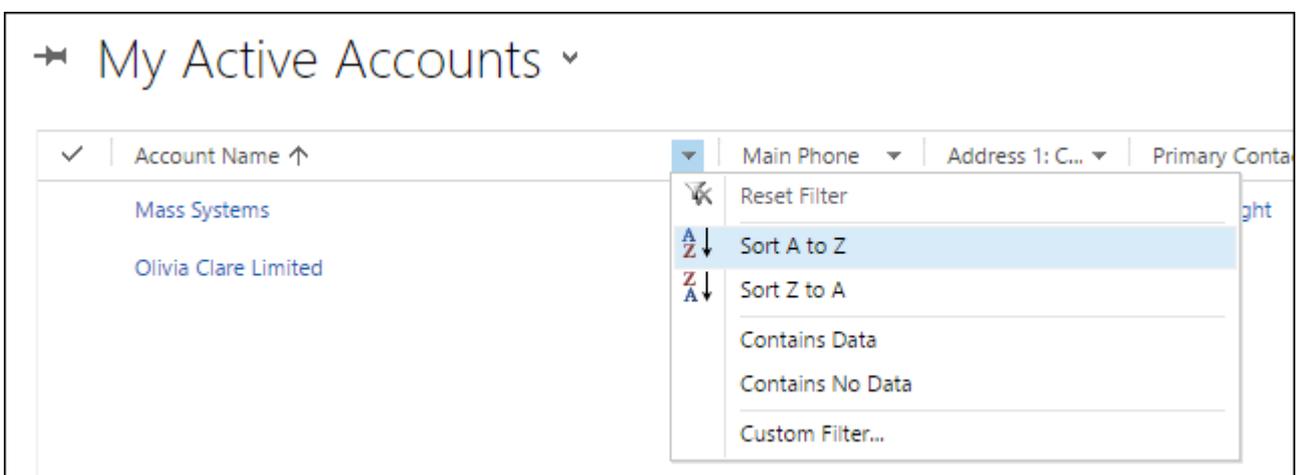
TRAINING MODULES
SEARCHING FOR DATA

Sort A to Z or Z to A

Using this filter is the same as clicking the column header to sort ascending or descending, using this option will overwrite the existing sort and is a good way to stack the data once you have filtered on one of the other options as outlined below.

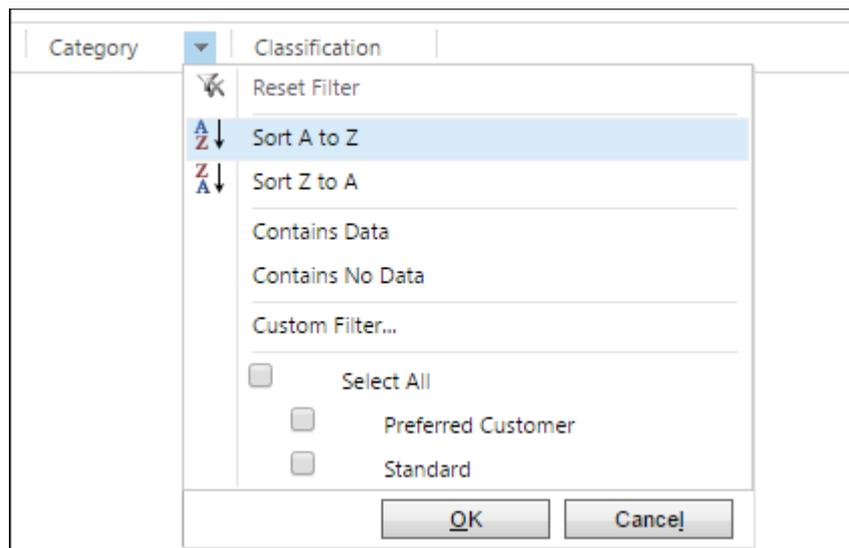Contains Data/Contains No Data

As described this filter will return a result where the field either contains or does not contain any data, in other words it has a value in a field of any description or it does not have any value at all.

Custom Filter

There are a couple of ways to run a custom filter and these are dependent on whether the field has a type of Lookup or Pick list.

Using a Custom filter on a Pick List Field

If the field type is pick list, then you will be offered every value available within the pick list if you choose to filter on a field of this type. Simply tick the box next to the value you wish to run the filter on, selecting several if you need more than one and then select OK at the bottom of the list. The filter result will just be the values selected and you can now sort A to Z to view the data in a more logical order.

| Category	▼	Classification	
	⊼	Reset Filter	
	A↓ Z	Sort A to Z	
	Z↓ A	Sort Z to A	
		Contains Data	
		Contains No Data	
		Custom Filter...	
	☐	Select All	
		☐ Preferred Customer	
		☐ Standard	
		OK	Cancel

Using a Lookup Table to Select Data

Lookup tables work slightly different to pick lists and are a little more complex to work with, but when you understand the basics of how they work they are very simple to understand. There are two options within this type of filter, Custom Filter and Filter by specific Owner the next section will explain the differences:
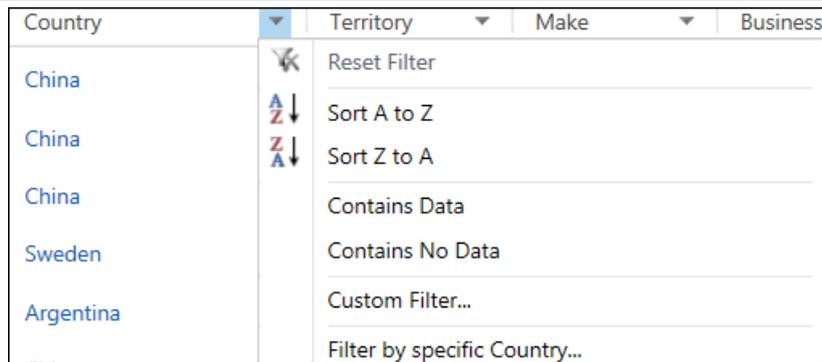
Running a Custom Filter

In our example, we have used the field Country to run our search, but this type of filter can be used on any field holding a lookup table. Click on the Custom Filter option and in the Select Operator box choose the relevant logical operator, if you are searching for China you could effectively search where the Country begins with Chi or alternatively select Equals China. The search result that is returned will be the same, it is just a matter of preference which option you use.
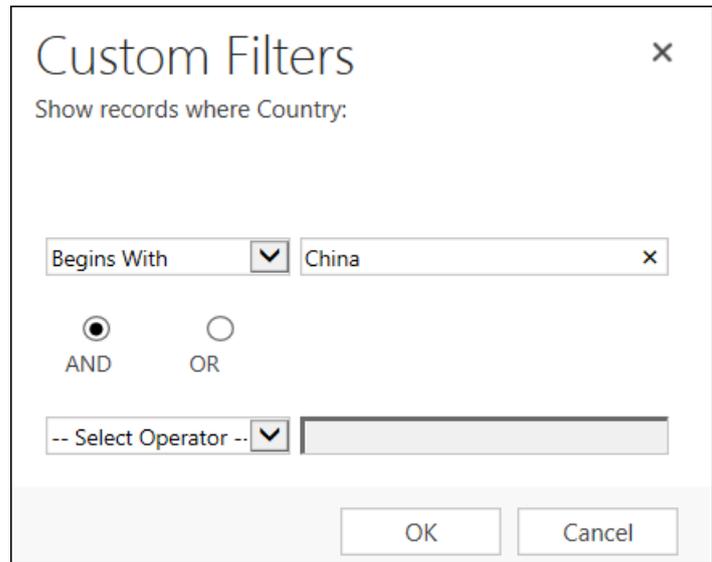
Running a Custom Filter using an And/Or condition

You are able to use a custom filter to do an And/Or search within this type of filter, and the system will allow you just two values. There is a much shorter way of carrying out this type of search outlined in the next section. Filter by Specific Field Value.

Filtering by a Specific Field Value

If preferred, you can go straight to the specific lookup table behind the field to complete the search. To do so, select the specific field option at the very bottom of the list. In the example below, we are looking at the Primary Contact Field:
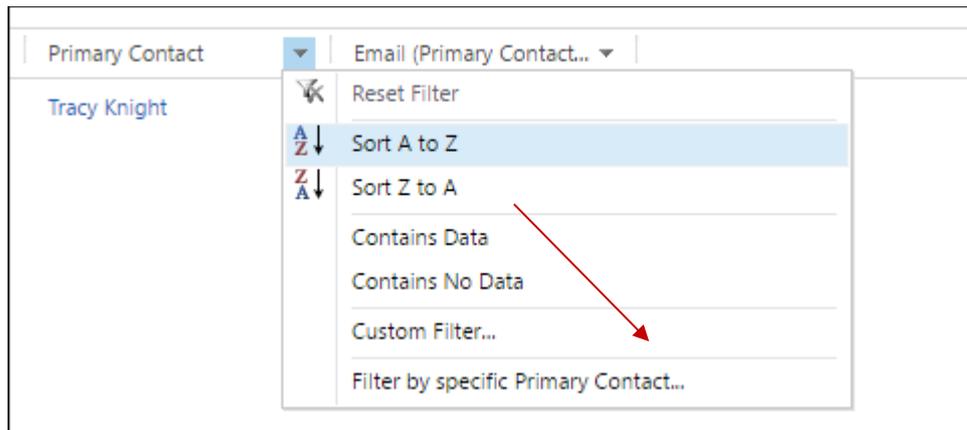
On selection of this option the following dialogue box will activate make sure that you tick the names of all the values that you need returning as part of your search result, you can choose as many as you need. Remember to also click the Select icon so that the values are visible in the Selected Records box:
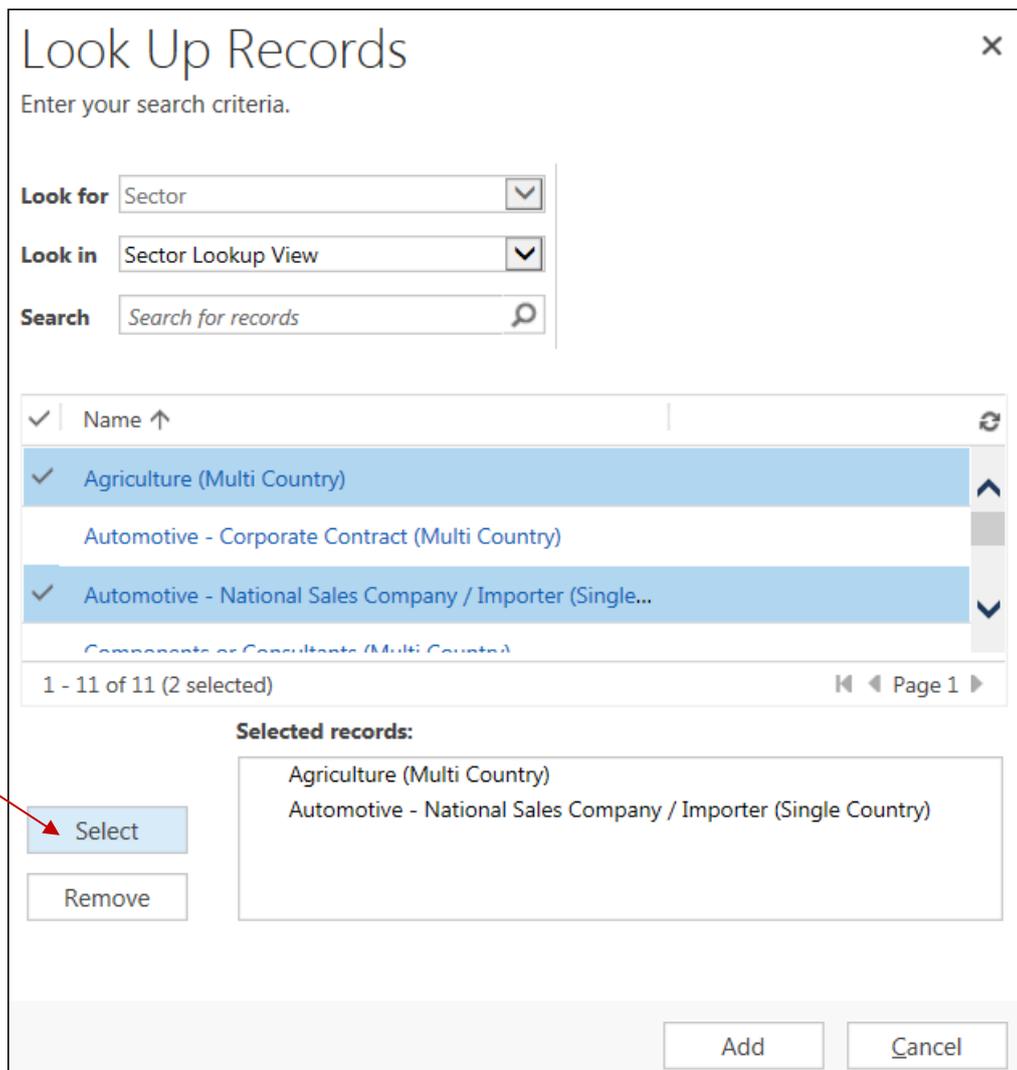
When you have finished your selection, select Add and the view will reflect the filter that you have applied.

Running filters on Multiple Fields

Just as you can in excel, the system will allow you to run filters on multiple columns of data at once. Simply activate the view that you would like to run the filter upon and use the examples above to create your filter, clicking on the column headers that you need to run the filters across.

Releasing a Filter

To release a filter simply click the filter icon again and the arrows will drop from the right edge of each column header returning you to the full record count for the view that you started in.