Microsoft

Step by Step

Microsoft Dynamics CRM 4.0

Build *exactly* the skills you need.
Learn at the pace *you* want.

Mike Snyder, Jim Steger,
Kara O'Brien, and Brendan Landers

Easy-search CD includes:
- Skill-building practice files
- Complete eBook

How to access your CD files

The print edition of this book includes a CD. To access the CD files, go to http://aka.ms/625761/files, and look for the Downloads tab.

Note: Use a desktop web browser, as files may not be accessible from all ereader devices.

Questions? Please contact: mspinput@microsoft.com

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Foreword

In these uncertain economic times, a company's ability to adequately manage its relationships with customers, partners, and vendors can determine whether it just survives or has the relationship capital to drive the business, and protect and grow revenue. No software application is better suited to helping companies address these challenges than Microsoft Dynamics CRM. In the 4.0 version, Microsoft Dynamics CRM delivers comprehensive Sales, Marketing, and Service functionality with its trademark user-friendly interface, powerful ability to meet the changing business processes and needs, as well as the ability to leverage all the other investments a company has already made in systems and infrastructure.

Companies large and small will find that Microsoft Dynamics CRM is a system that grows with them. The true measure of CRM success is the degree to which it is adopted by employees and how the system empowers users to drive business growth and success. Unlocking the power of CRM, however, is not always an easy task. With this book, Sonoma Partners delivers an extremely rich and easy-to-follow text for learning the Microsoft Dynamics CRM application.

For users of Microsoft Dynamics CRM, the well-organized content allows you to zero in on topics and learn quickly regardless of your level of experience with CRM. Whether you're a user, consultant, or implementer, this book equips you to extract the maximum value from your Microsoft Dynamics CRM system.

Sincerely,

Mark Corley

Senior Director

Microsoft Dynamics CRM

Introduction

Welcome to *Microsoft Dynamics 4.0 CRM Step by Step*! Chances are your organization has implemented—or is considering implementing—a Microsoft Dynamics CRM system, and you're ready to learn more about what the software can do.

Whether you're a sales associate following up with your top accounts, a marketing professional reaching out to prospects and customers, a customer service representative resolving customer requests and issues, or an executive manager seeking to analyze and understand all of your organization's customer interactions, Microsoft Dynamics CRM can help you do business better.

The intent of this book is to show you how to use key features in the software to understand your customers better, increase sales and productivity, and improve customer satisfaction. It's important to note that Microsoft Dynamics CRM allows administrators to easily customize the forms, fields, and other options in the software, so some of the names used in this book might not match your environment.

A Word About Sandbox Environments

If possible, ask your system administrator about setting up a second Microsoft Dynamics CRM environment—often referred to as a *sandbox environment*—that you can use to step through the exercises in this book. A sandbox environment allows you to modify records without affecting the data in your live system. Your organization might already have a staging or test environment that you can use.

About the Examples in This Book

The descriptions and procedures in this book are based on the default forms and views in Microsoft Dynamics CRM. As you'll learn in the chapters that follow, the software also offers several access options: CRM data can be accessed from a Windows Internet Explorer Web browser or from Microsoft Office Outlook by using the Microsoft Dynamics CRM Outlook feature. Most of the screenshots and examples in this book show the Web browser option.

Just like some of the forms, fields, and data described in this book, the security roles referenced throughout this book also might have been modified in or even removed from your system. If you do not have the access needed to view or assign security roles, talk to your system administrator about setting up a few roles for testing. For the purposes of this book, we assume the default roles included with Microsoft Dynamics CRM have not been modified.

Looking Forward

Microsoft Dynamics CRM is a fluid system that can adapt as your business grows and changes. By using the step-by-step processes laid out in these pages, you can explore whatever options you need to match the software with your requirements. We hope you find this book useful and informative as your organization moves into the future!

Acknowledgments

We want to thank all of the people that assisted us in writing this book. If we accidentally miss anyone, we apologize in advance. We want to thank these members of the Microsoft Dynamics CRM product team, Sonoma Partners colleagues, and friends who helped us at one point or another during the book project:

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And we want to thank Jean Trenary for managing the editing and production process and ensuring a successful delivery of the book. We extend our thanks to Joan Preppernau, Kathy Krause, and the rest of the OTSI team who contributed to our book.

Last but not least, we want to thank Sumit Virmani. As the technical editor for the book, Sumit worked around the clock to confirm the technical accuracy of the text. This included reviewing and testing all of our procedures and double-checking our facts.

Mike Snyder's Acknowledgments

I want to thank my wife, Gretchen, who supported me during this project. Writing this book required a significant time commitment above and beyond my normal work responsibilities, but Gretchen remained supportive from start to finish. I want also to thank my children for not deleting my completed work as they learned to play games on daddy's computer! I want to recognize my parents and my wife's parents who assisted my family with various babysitting stints. Lastly, thanks to all of my coworkers at Sonoma Partners who allowed me the time and understanding to work on this book.

Jim Steger's Acknowledgments

First and foremost, I wish to thank my beautiful wife, Heidi, for her patience and for continuing to support me during this arduous process again. I want to thank both of my children, who continue to grow, impress, and motivate me. I also received input from numerous members of the Microsoft Dynamics CRM product team, and I want to extend my thanks to them as well. Finally, I wish to express my gratitude to my associates at Sonoma Partners who really stepped up their effort and understanding while I was forced to prioritize my writing over some of my day-to-day duties.

Brendan Lander's Acknowledgments

I'd like to thank all the great people that made the writing process achievable, including my wife, Jennifer, my daughters, Caily, Shannon, and Cassidy, and my peers at Sonoma Partners.

Information for Readers Running Windows XP

The graphics and the operating system–related instructions in this book reflect the Windows Vista user interface. However, Windows Vista is not required; you can also use a computer running Windows XP.

Most of the differences you will encounter when working through the exercises in this book on a computer running Windows XP center around appearance rather than functionality. For example, the Windows Vista Start button is round rather than rectangular and is not labeled with the word *Start*; window frames and window-management buttons look different; and if your system supports Windows Aero, the window frames might be transparent.

In this section, we provide steps for navigating to or through menus and dialog boxes in Windows XP that differ from those provided in the exercises in this book. For the most part, these differences are small enough that you will have no difficulty in completing the exercises.

Managing the Practice Files

The instructions given in the "Using the Companion CD" section are specific to Windows Vista. The only differences when installing, using, uninstalling, and removing the practice files supplied on the companion CD are the default installation location and the uninstall process.

On a computer running Windows Vista, the default installation location of the practice files is *Documents\Microsoft Press\CRM4_SBS*. On a computer running Windows XP, the default installation location is *My Documents\Microsoft Press\CRM4_SBS*. If your computer is running Windows XP, whenever an exercise tells you to navigate to your *Documents* folder, you should instead go to your *My Documents* folder.

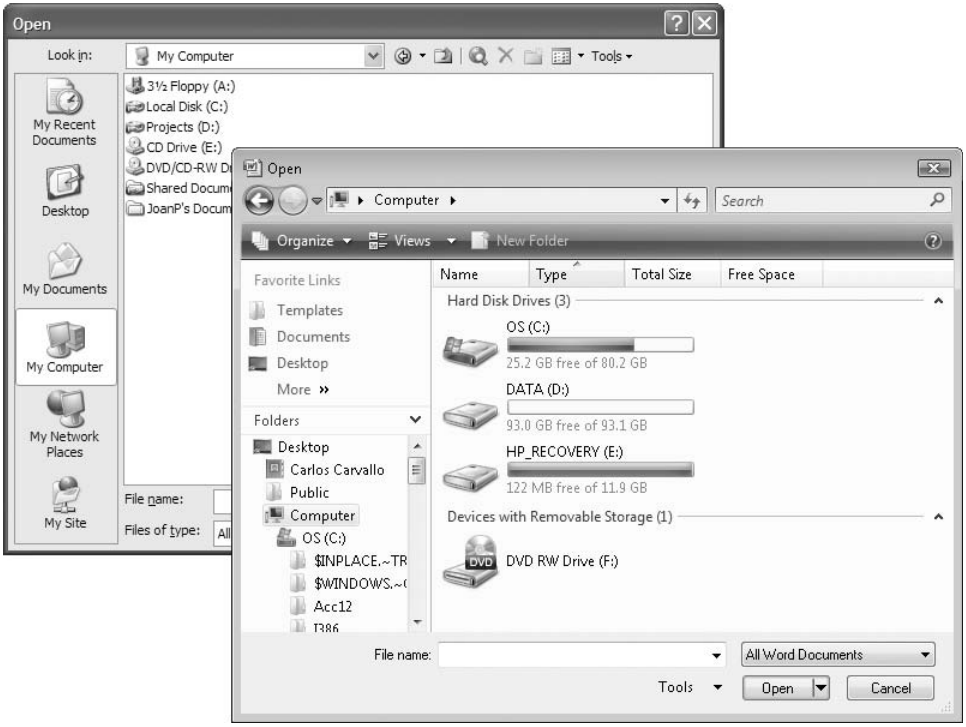
To uninstall the practice files from a computer running Windows XP:

1. On the Windows taskbar, click the **Start** button, and then click **Control Panel**.
2. In **Control Panel**, click (or in Classic view, double-click) **Add or Remove Programs**.
3. In the **Add or Remove Programs** window, click **Microsoft Dynamics CRM Step by Step**, and then click **Remove**.
4. In the **Add or Remove Programs** message box asking you to confirm the deletion, click **Yes**.

> **Important** If you need help installing or uninstalling the practice files, please see the "Getting Help" section later in this book. Microsoft Product Support Services does not provide support for this book or its companion CD.

Navigating Dialog Boxes

On a computer running Windows XP, some of the dialog boxes you will work with in the exercises not only look different from the graphics shown in this book but also work differently. These dialog boxes are primarily those that act as an interface between Microsoft Dynamics CRM and the operating system, including any dialog box in which you navigate to a specific location. For example, here are the Open dialog boxes from Microsoft Dynamics CRM running on Windows Vista and Windows XP and examples of ways to navigate in them.



To navigate to the *WorkingAccounts* folder in Windows XP:

➜ On the Places bar, click **My Documents**. Then in the folder content pane, double-click *Microsoft Press*, *CRM4_SBS*, and *WorkingAccounts*.

To move back to the *CRM4_SBS* folder in Windows XP:

➜ On the toolbar, click the **Up One Level** button.

Features and Conventions of This Book

This book has been designed to lead you step by step through all the tasks you are most likely to want to perform in Microsoft Dynamics CRM 4.0. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to create and work with all of the common modules and functionality of Microsoft Dynamics CRM 4.0. However, each topic is self contained. If you have worked with a previous version of Microsoft Dynamics CRM, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

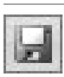
- **Detailed table of contents.** Scan a listing of the book's topics and sidebars within each chapter.
- **Chapter thumb tabs.** Easily locate the beginning of the chapter you want.
- **Topic-specific running heads.** Within a chapter, quickly locate the topic you want by looking at the running head of odd-numbered pages.
- **Detailed index.** Look up specific tasks and features and general concepts in the index, which has been carefully crafted with the reader in mind.
- **Companion CD.** Install the practice files you use while working through the step-by-step exercises, and browse a fully searchable electronic version of this book and other useful resources.

In addition, we provide a glossary of terms for those times when you need to look up the meaning of a word or the definition of a concept.

You can save time when you use this book by understanding how the Step by Step series shows special instructions, keys to press, buttons to click, and other functionality.

Convention	Meaning
	This icon at the beginning of a chapter introduction indicates information about the practice files provided on the companion CD for use in the chapter.
USE	This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise.

(continued)

Convention	Meaning
BE SURE TO	This paragraph preceding or following an exercise indicates any requirements you should attend to before beginning the exercise or actions you should take to restore your system after completing the exercise.
OPEN	This paragraph preceding a step-by-step exercise indicates files that you should open before beginning the exercise.
CLOSE	This paragraph following a step-by-step exercise provides instructions for closing open files or programs before moving on to another topic.
1 **2**	Large numbered steps guide you through hands-on exercises.
1 2	Small numbered steps guide you through procedures in sidebars and expository text.
→	An arrow indicates a procedure that has only one step.
See Also	These paragraphs direct you to more information about a given topic in this book or elsewhere.
Troubleshooting	These paragraphs explain how to fix a common problem that might prevent you from continuing with an exercise.
Tip	These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options.
Important	These paragraphs point out information that you need to know to complete a procedure.
 Save	The first time you are told to click a button in a chapter, a picture of the button appears in the left margin. If the name of the button does not appear on the button itself, the name appears under the picture.
Enter	In step-by-step exercises, keys you must press appear as they would on a keyboard.
Ctrl+Tab	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "Press Ctrl+Tab" means "hold down the Ctrl key while you press the Tab key."
Program interface elements and user input	In steps, the names of program elements, such as buttons, commands, and dialog boxes, and anything you are asked to type are shown in bold characters.
Glossary terms	Terms that are explained in the glossary at the end of the book are shown in bold italic characters.
Paths, URLS, and emphasized words	Folder paths, URLs, and emphasized words are shown in italic characters.

Using the Companion CD

The companion CD included with this book contains the practice files you'll use as you work through the book's exercises, as well as other electronic resources that will help you learn how to use Microsoft Dynamics CRM.

Digital Content for Digital Book Readers: If you bought a digital-only edition of this book, you can enjoy select content from the print edition's companion CD.

Visit *http://www.microsoftpressstore.com/title/9780735625761* to get your downloadable content. This content is always up-to-date and available to all readers.

CD Contents

The companion CD contains practice files necessary to complete the step-by-step exercises. The following table lists the practice files supplied on the companion CD.

Chapter	Folders\Files
Chapter 3: Working with Accounts and Contacts	*WorkingAccounts\Orders1.xls*
Chapter 18: Importing Data	*ImportingData\ContactImport1.csv*

In addition to the practice files, the CD contains the following resources in electronic format:

- *Microsoft Dynamics CRM 4.0 Step by Step* in eBook format
- *Microsoft Computer Dictionary, Fifth Edition*
- *Windows Vista Product Guide*
- Sample chapter from *Microsoft Office Live Small Business: Take Your Business Online* (Katherine Murray, 2008)

- Sample chapter from *Beyond Bullet Points: Using Microsoft Office PowerPoint 2007 to Create Presentations That Inform, Motivate, and Inspire* (Cliff Atkinson, 2008)
- Sample chapter from *Microsoft Windows SharePoint Services 3.0 Step by Step* (Olga Londer, Penelope Coventry, Bill English, and Todd Bleeker, 2008)
- Sample chapter from *Working with Microsoft Dynamics CRM 4.0, Second Edition* (Mike Snyder and Jim Steger, 2008)

> **Important** The companion CD for this book does not contain the Microsoft Dynamics CRM software. You must have access to a working Microsoft Dynamics CRM application before using this book.

Minimum System Requirements

To perform the exercises in this book, your computer should meet the following requirements:

- 700 megahertz (MHz) processor; 2 gigahertz (GHz) recommended
- 512 megabytes (MB) RAM; 1 gigabyte (GB) or more recommended
- CD or DVD drive
- For the eBooks and downloads, we recommend 3 GB of available hard disk space with 2 GB on the hard disk where the operating system is installed

> **Tip** Hard disk requirements will vary depending on configuration; custom installation choices might require more or less hard disk space.

- Monitor with 800 × 600 screen resolution; 1024 × 768 or higher recommended
- Keyboard and mouse or compatible pointing device
- Internet connection, 128 kilobits per second (Kbps) or greater, for accessing online Help topics, and any other Internet-dependent processes
- Windows Vista with Service Pack 1 (SP1), Windows XP with Service Pack 2 (SP2), or Windows Server 2003 with Service Pack 1 (SP1) or later
- Windows Internet Explorer 7 or Microsoft Internet Explorer 6 with service packs

Step-by-Step Exercises

In addition to the hardware, software, and connections required to run the 2007 Microsoft Office system, you will need the following to successfully complete the exercises in this book:

- Microsoft Office Word 2003 or 2007, Microsoft Office Excel 2003 or 2007, and Microsoft Office Outlook 2003 or 2007
- Microsoft Dynamics CRM for Outlook client installed for use with exercises in Chapter 5 and Chapter 8
- Sample product configured within Microsoft Dynamics CRM for use with an exercise in Chapter 9
- Sample relationship roles configured within Microsoft Dynamics CRM for use with an exercise in Chapter 3
- 1 MB of available hard disk space for the practice files

Installing the Practice Files

You need to install the practice files in the correct location on your hard disk before you can use them in the exercises. Follow these steps:

1. Remove the companion CD from the envelope at the back of the book, and insert it into the CD drive of your computer. If the **AutoPlay** window opens, click **Run startcd.exe**.

   The Microsoft Software License Terms appear. To use the practice files, you must accept the terms of the license agreement.

2. Click **I accept the agreement**, and then click **Next**.

   After you accept the license agreement, the CD interface appears.

> **Important** If the menu screen does not appear, click the Start button and then click Computer. Display the Folders list in the Navigation pane, click the icon for your CD drive, and then in the right pane, double-click the StartCD executable file.

3. Click **Install Practice Files**. If the **File Download** and/or **Internet Explorer Security** dialog boxes open, click **Run**.
4. On the **Welcome** page of the **InstallShield Wizard**, click **Next**. On the **License Agreement** page, click **I accept the terms in the license agreement**, and then click **Next**.
5. If you want to install the practice files to a location other than the default folder (*Documents\Microsoft Press\CRM4_SBS*), click the **Change** button, select the new drive and path, and then click **OK**.

> **Important** If you install the practice files to a location other than the default, you will need to substitute that path within the exercises.

6. On the **Custom Setup** page, click **Next**, and then on the **Ready to Install the Program** screen, click **Install**.
7. After the practice files have been installed, click **Finish**.
8. Close the **Step by Step Companion CD** window.
9. Remove the companion CD from the CD drive, and return it to the envelope at the back of the book.

Using the Practice Files

When you install the practice files from the companion CD that accompanies this book, the files are stored on your hard disk in chapter-specific subfolders under *Documents\Microsoft Press\CRM4_SBS*. Each exercise is preceded by a paragraph that lists the files needed for that exercise and explains any preparations needed before you start working through the exercise. Here is an example:

> **USE** the Sonoma Partners account record you created earlier in this chapter, and the *Orders1.xls* practice file. This practice file is located in the *Documents\Microsoft Press\CRM4_SBS\WorkingAccounts* folder.
>
> **BE SURE TO** use the Windows Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.

You can browse to the practice files in Windows Explorer by following these steps:

1. On the Windows taskbar, click the **Start** button, and then click **Documents**.
2. In your *Documents* folder, double-click *Microsoft Press*, double-click *CRM4_SBS*, and then double-click a specific chapter folder.

Removing and Uninstalling the Practice Files

You can free up hard disk space by uninstalling the practice files that were installed from the companion CD. The uninstall process deletes any files that you created in the *Documents\Microsoft Press\CRM4_SBS* chapter-specific folders while working through the exercises. Follow these steps:

1. On the Windows taskbar, click the **Start** button, and then click **Control Panel**.
2. In **Control Panel**, under **Programs**, click the **Uninstall a program** task.
3. In the **Programs and Features** window, click **Microsoft Dynamics CRM Step by Step**, and then on the toolbar at the top of the window, click the **Uninstall** button.
4. If the **Programs and Features** message box asking you to confirm the deletion appears, click **Yes**.

See Also If you need additional help installing or uninstalling the practice files, see the "Getting Help" section later in this book.

> **Important** Microsoft Product Support Services does not provide support for this book or its companion CD.

Getting Help

Every effort has been made to ensure the accuracy of this book and the contents of its companion CD. If you do run into problems, please contact the sources listed in the following sections for assistance.

Getting Help with This Book and Its Companion CD

If your question or issue concerns the content of this book or its companion CD, please first search the online Microsoft Press Knowledge Base, which provides support information for known errors in or corrections to this book, at the following Web site:

www.microsoft.com/mspress/support/search.asp

Locate information specific to this book by searching for the book's ISBN, which is printed above the UPC code in the white box in the lower-left corner of the back cover of the book.

If you do not find your answer at the online Knowledge Base, send your comments or questions to Microsoft Press Technical Support at:

mspinput@microsoft.com

Getting Help with Microsoft Dynamics CRM 4.0

If your question is about Microsoft Dynamics CRM 4.0, and not about the content of this Microsoft Press book, your first recourse is the Microsoft Dynamics CRM Help system. You can find general or specific Help information in a couple of ways:

- In the Microsoft Dynamics CRM program window, you can click the Help button (labeled with a question mark) at the right end of the application toolbar to display the Microsoft Dynamics CRM Help window.
- In a dialog box, you can click the Help button at the right end of the dialog box title bar to display the Help window with topics related to the functions of that dialog box already identified.

Microsoft Dynamics CRM Help is context-sensitive; from the Microsoft Dynamics CRM Help menu, you can click Help On This Page to access the portion of the Help contents most relevant to the page you're currently viewing. For example, if you're viewing a lead record and you click Help On This Page, Microsoft Dynamics CRM automatically directs you to the Help topic titled "Work with Leads."

If you want to practice getting help, you can work through the following exercise, which demonstrates two ways of locating information.

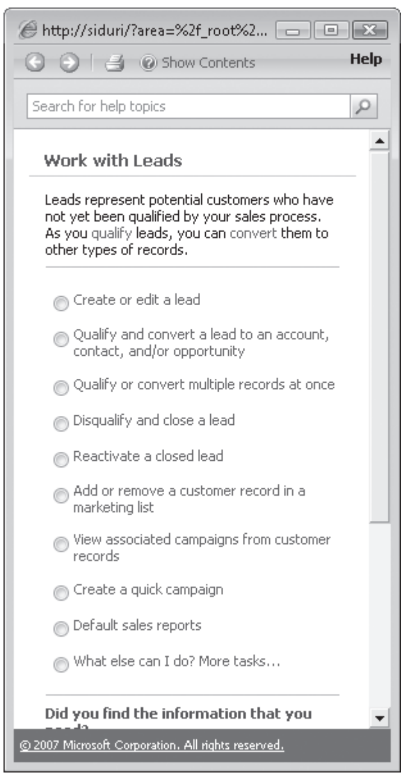
BE SURE TO use the Windows Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site before beginning this exercise.

1. At the right end of the Microsoft Dynamics CRM application toolbar, click the **Help** button.

   The Microsoft Dynamics CRM Help menu opens.

2. In the list of topics in the **Microsoft Dynamics CRM Help** menu, click **Help on this Page**.

   Microsoft Dynamics CRM Help displays a list of topics related to the page from which you started the Help process.

   You can click any topic to display the corresponding information.

3. On the toolbar, click the **Show Contents** button.

The Contents appears in the left pane, organized by category, like the table of contents in a book.

Clicking any category (represented by a book icon) displays that category's topics (represented by help icons) as well as any available online training (represented by training icons).


Back


Forward

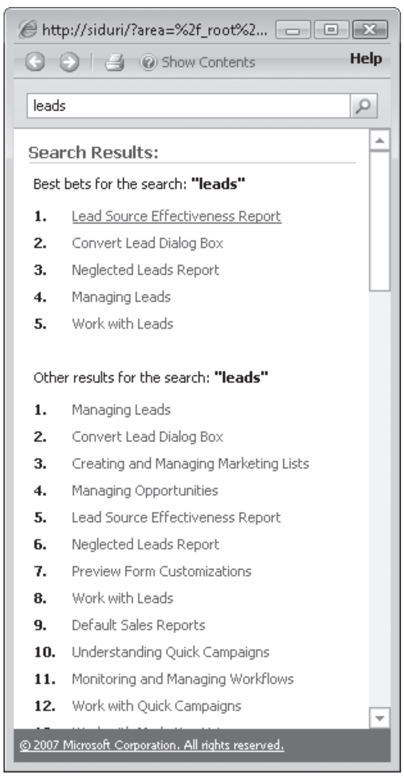
4. In the **Contents** area, click a few categories and topics. Then click the **Back** and **Forward** buttons to move among the topics you have already viewed.


Close

5. At the upper-right of the Internet Explorer window, click the **Close** button to close Help.

6. At the top of the **Microsoft Dynamics CRM Help** window, click the **Search for help topics** box, type **leads**, and then press the Enter key.

The Microsoft Dynamics CRM Help window displays topics related to the words you typed.



CLOSE the Microsoft Dynamics CRM Help window.

More Information

If your question is about Microsoft Dynamics CRM or another Microsoft software product and you cannot find the answer in the product's Help system, please search the appropriate product solution center or the Microsoft Knowledge Base at:

support.microsoft.com

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

support.microsoft.com/gp/selfoverview/

You can also click the Resource Center link, typically found at the bottom left of the Microsoft Dynamics CRM application. Or, you can access the same information via the Internet at the following locations:

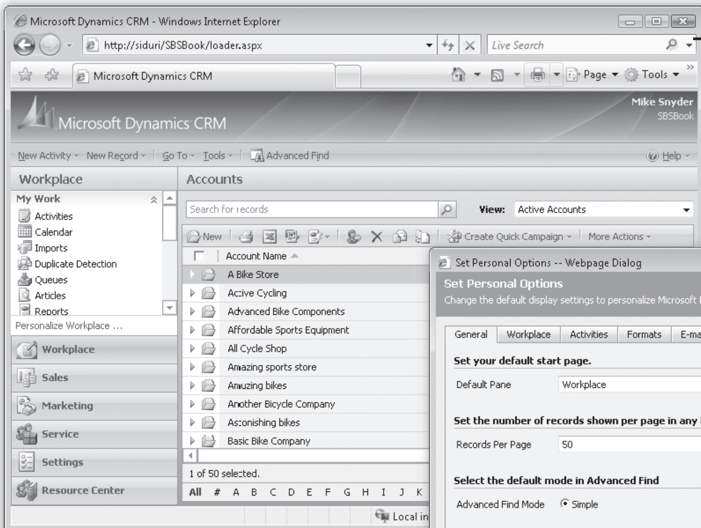
Microsoft Dynamics CRM on-premise and service provider editions:

rc.crm.dynamics.com/rc/regcont/en_us/opdefault.aspx

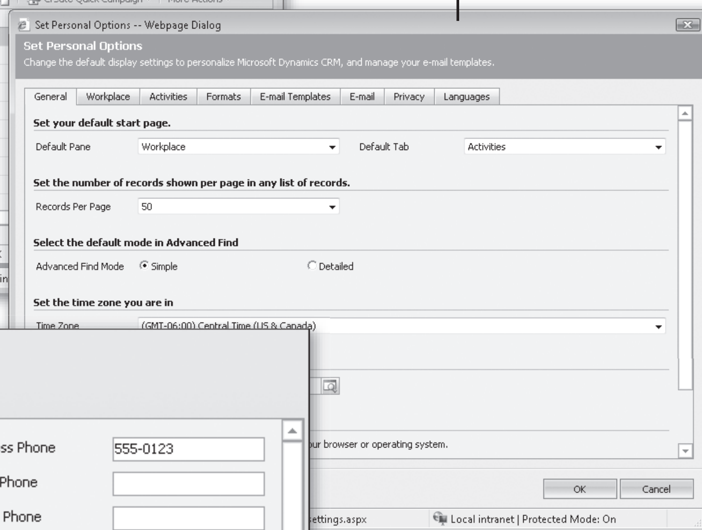
Microsoft Dynamics CRM Online:

rc.crm.dynamics.com/rc/regcont/en_us/onlinedefault.aspx

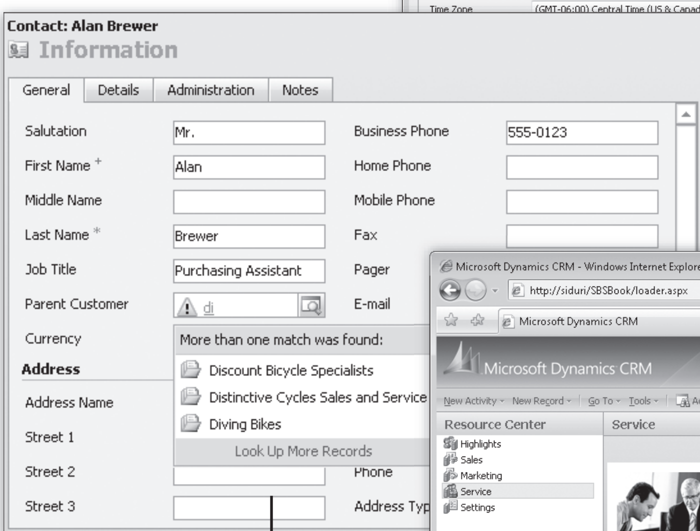
Chapter at a Glance



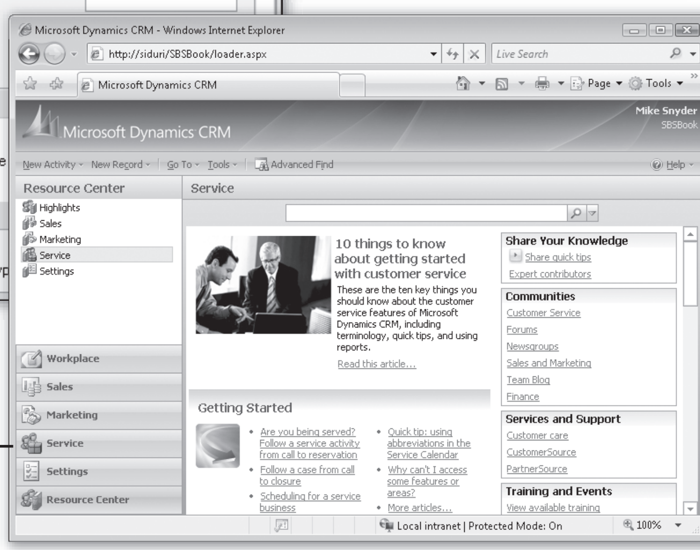
Understand the user interface components, **page 16**



Modify your personal options, **page 29**



Work with lookup fields, **page 27**



Use the Resource Center, **page 32**

2 Getting Around in Microsoft Dynamics CRM

In this chapter, you will learn to:

- ✔ Understand and work with the components of the user interface.
- ✔ Use Microsoft Dynamics CRM views to work with records.
- ✔ Use Quick Find to search for records in a view.
- ✔ Modify your personal options to suit your individual preferences.
- ✔ Work with lookup fields and use the automatic resolution feature.
- ✔ Use the Resource Center to learn more about Microsoft Dynamics CRM.
- ✔ Access software help within the system.

Before you can track and manage customer data in Microsoft Dynamics CRM, you need to know how to work in the user interface.

In this chapter, you will learn where to find the areas referenced in this book and how to navigate through the software. You'll also learn about the resources that can give you more information on how to work with the software.

> **Important** There are no practice files for this chapter.

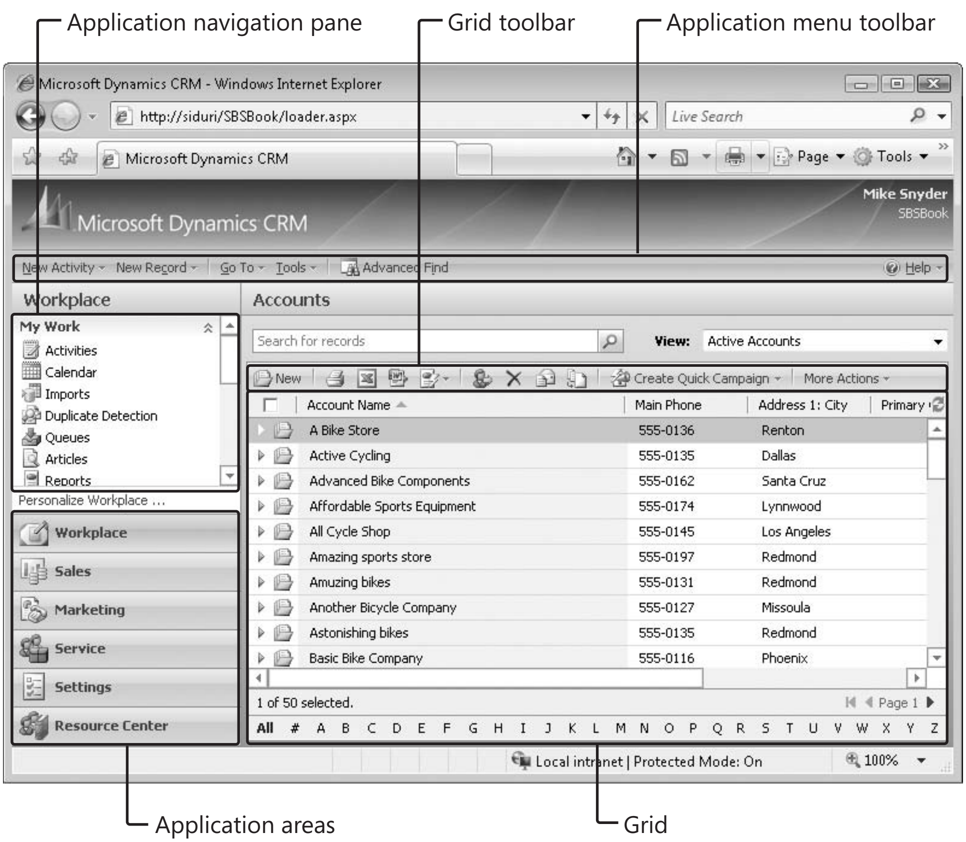
> **Troubleshooting** Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

> **Important** You must know the location of your Microsoft Dynamics CRM Web site to work the exercises in this book. Check with your system administrator to verify the Web address if you don't know it.

> **Important** The images used in this book reflect the default form and field names in Microsoft Dynamics CRM. Because the software offers extensive customization capabilities, it's possible that some of the record types or fields have been relabeled in your Microsoft Dynamics CRM environment. If you cannot find the forms or fields referred to in this book, contact your system administrator for assistance.

Understanding the Microsoft Dynamics CRM User Interface

As you learned in Chapter 1, "Introduction to Microsoft Dynamics CRM," Microsoft Dynamics CRM offers two primary user interfaces: the Web client and Microsoft Dynamics CRM for Outlook. The exercises and examples in this book use the Web client unless otherwise specified. To help you better understand how to navigate the software, we will explain the various components of the user interface.

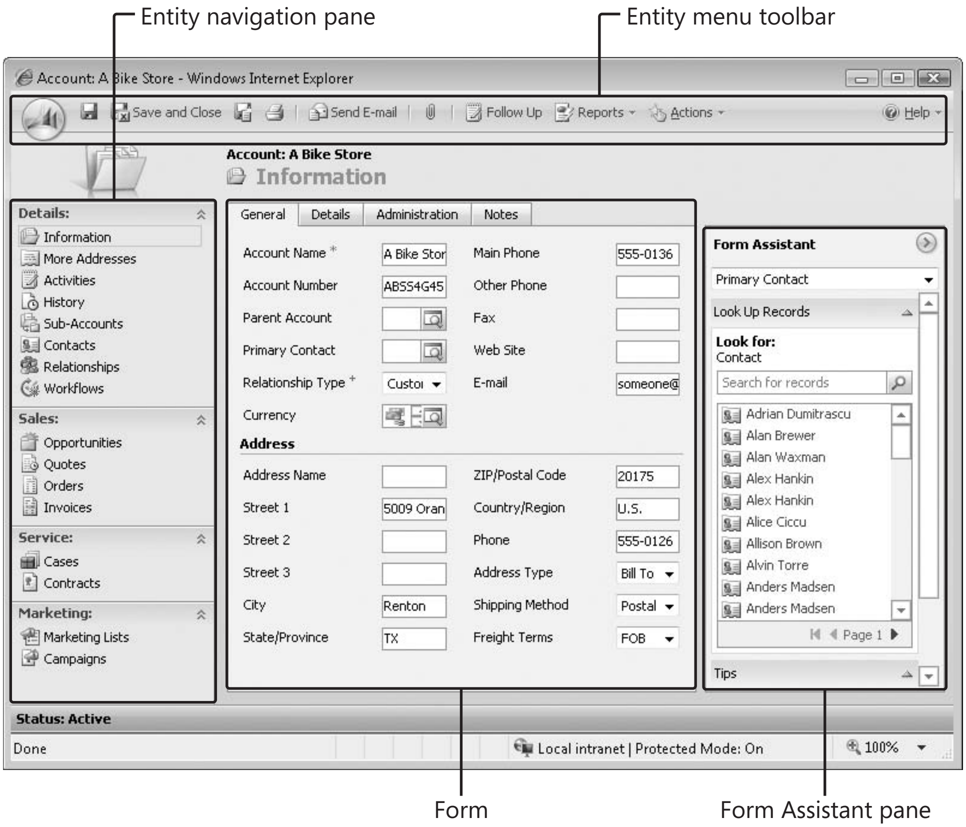


The following list describes the major components of the user interface:

- **Application menu toolbar.** This toolbar provides buttons that let you quickly create new activities or records. The Go To menu lets you navigate directly to other parts of the user interface. The Tools menu provides access to useful features such as importing data or setting your personal options. The Advanced Find button launches the Advanced Find interface, which you can use to perform ad-hoc data queries. You can also access the system help via a button on the application menu toolbar.
- **Grid.** The grid displays a list of records. Each record set is known as a data ***view*** in Microsoft Dynamics CRM. The grid consists of rows and columns of data. The bottom row of the grid provides information about the number of records in the view. The grid also includes an ***index bar*** that allows you to quickly filter records in the grid, based on the starting letter you select.
- **Grid toolbar.** The buttons in this toolbar allow you to take action on selected records in the grid. For example, if you select three records in a grid and click a button in the grid toolbar, Microsoft Dynamics CRM will apply that button's action to the three records you selected. You can also create new records by clicking the New button in the grid toolbar. The actions available in the toolbar vary depending on the type of records displayed.
- **Application navigation pane.** This portion of the user interface provides access to the various types of Microsoft Dynamics CRM data. Simply click a hyperlink in the application navigation pane to view that set of records.
- **Application areas.** Each application area provides a logical grouping of Microsoft Dynamics CRM records. The default application areas are Workplace, Sales, Marketing, Service, Settings, and Resource Center. If you click one of these buttons, Microsoft Dynamics CRM will update the application navigation pane to display the records grouped within that section.

> **Troubleshooting** Your system administrator has the ability to add, delete, or rename buttons, so your system might look different than the one shown on the previous page.

When you open a record in Microsoft Dynamics CRM, you'll see additional parts of the user interface.




Microsoft Dynamics

- **Entity menu toolbar.** The buttons in this toolbar let you take action on the open record, such as saving or uploading an attachment. Click the Microsoft Dynamics button located in the upper-left corner of the record to access additional menu items related to the record.
- **Entity navigation pane.** Similar to the application navigation pane, the entity navigation pane displays different types of Microsoft Dynamics CRM records. However, the entity navigation pane displays only those records that are linked to the open record. For example, clicking the Contacts link in the entity navigation pane of an account record will display only those contacts that have the open account record listed as their parent customer.
- **Form.** The Microsoft Dynamics CRM form displays the data related to the open record. The fields on the entity form are often referred to as ***attributes***.
- **Form Assistant pane.** This tool provides a quick way of locating related records for lookup fields and also allows you to create follow-up activities for the open record.

Using Views to Filter Data Records

Now that you understand the main components of the Microsoft Dynamics CRM user interface, you're ready to start working with data records. Microsoft Dynamics CRM uses a view to display a list of data records in a grid. You will spend a lot of time working with views, so it's important that you understand the utilities Microsoft Dynamics CRM offers to work with views of data.

Each view can contain an unlimited number of data records. Microsoft Dynamics CRM splits the view data into multiple pages of records, so you might need to click the page arrows located in the lower-right corner of the view to access the additional records contained in your view. If the page arrows are disabled, your view does not contain multiple pages of records.

> **Tip** Many users want to know how many total records or pages each view contains. Unfortunately, Microsoft Dynamics CRM does not provide this information within the user interface. To get a count of the total number of records in a view, export the data into Microsoft Office Excel and count the number of records in the data set.

In this exercise, you will change the data records that appear in the grid by selecting a different view of the data. You might want to change a view for many reasons. For example, you might want to change views to export the records from the view into Excel for a report, or you might want to perform a bulk edit of the records.

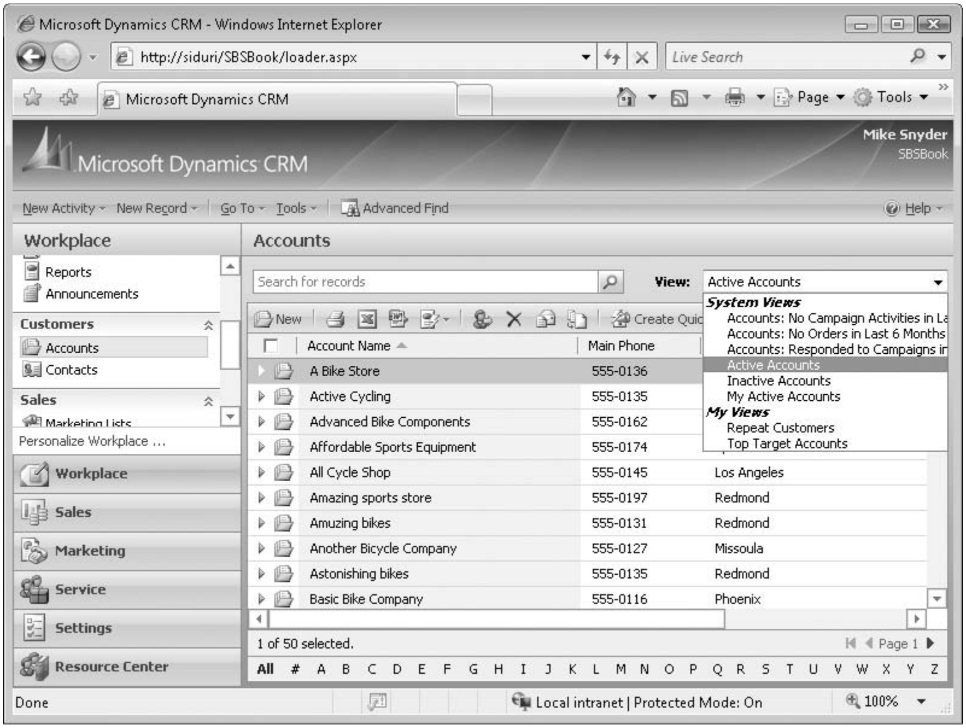
> **Tip** You can change the width of a view column by clicking the column divider and dragging it to the left or right. Resizing the column allows you to see more or less of the record's data.

> **BE SURE TO** use the Windows Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site before beginning this exercise.

1. In the application areas, click the **Sales** button.
2. In the application navigation pane, click the **Accounts** link.

   By default, Microsoft Dynamics CRM displays a view of all of the active account records in your system.
3. Click the arrow in the **View** list box.

   Microsoft Dynamics CRM displays a list of the views available for the account entity.

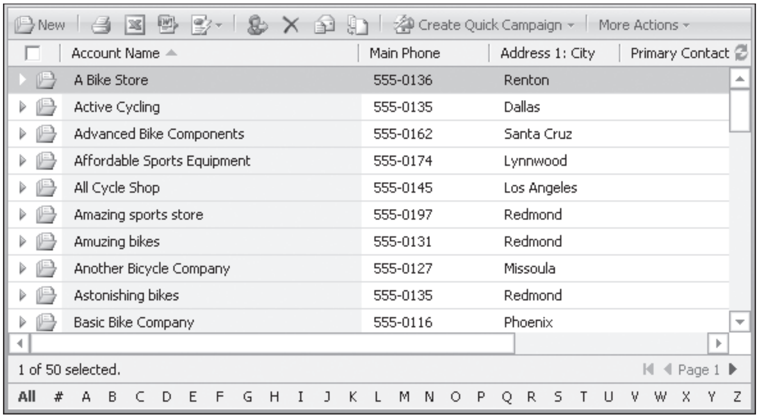


4. Click **My Active Accounts**.

   Microsoft Dynamics CRM changes the records displayed in the grid to show only active accounts that list you as the owner of the record.

Sorting Records in a View

Within each view, you can sort the records to see them in a particular order. Each view contains a default sort order, but you can change the record order in any grid. When you're looking at a view, Microsoft Dynamics CRM includes visual indicators to show how it is sorting the records. In the column header, next to the column name, is a small triangle pointing up or down. This triangle indicates that the view records are sorted with this column's data. An upward-pointing triangle means that the records are displayed in ascending order (low to high or A to Z); a downward-pointing triangle means that the records are displayed in descending order (high to low or Z to A). In addition to the triangle in the column heading, Microsoft Dynamics CRM shades the column a light blue color in the background to visually indicate that the view is sorting on this column.



Changing the sort order of a column is very straightforward; all you need to do is click the column heading. Clicking the column heading toggles the sort order between ascending and descending.

You can also sort records by more than one column at a time. In this exercise, you will sort a view by using multiple columns.

Important Even though you can display columns from related records in a view, you can sort only on columns that are attributes of the primary entity in the view. For example, if you have a Contact view that contains columns from the related account records, you can sort the Contact view only by clicking the columns that contain contact data; clicking the related account columns will not sort the records. You will not receive an error message when you click on the related columns; instead, Microsoft Dynamics CRM will not react at all.

BE SURE TO use the Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.

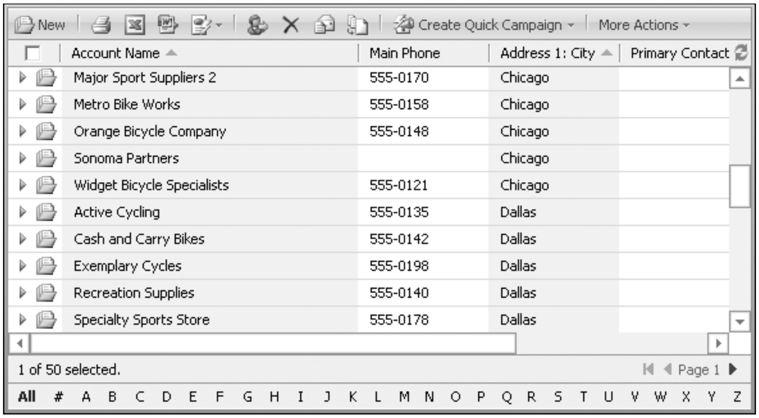
OPEN a Web page that contains multiple records in a view.

1. Click the heading of the column by which you want to sort the records.

   Microsoft Dynamics CRM adds the sort arrow with an ascending order and sorts the records in the view.

2. Hold down the Shift key and click the second column heading by which you want to sort the records.

   Microsoft Dynamics CRM adds the sort arrow to this column with an ascending sort order, while preserving the first sort column.



3. While keeping the Shift key down, click the second column heading again.

Microsoft Dynamics CRM switches the sort order to display the records in descending order.

Selecting and Refreshing Records in a View

As you learned earlier in this chapter, you can use the tools in the grid toolbar to perform actions on selected records in a view. Microsoft Dynamics CRM offers a few different ways to select records within a view. If you want to select one record, simply click the record row. Microsoft Dynamics CRM highlights the record with a blue background to indicate which record you selected. If you want to select all of the records, select the check box that appears in the upper-left corner of the view. Microsoft Dynamics CRM highlights all of the records that appear on the page. Selecting the check box again deselects all of the records.

> **Important** When you select the check box to select all of the records, you are only selecting the records on the page. You are not selecting all of the records in the view. For example, if your view contains 500 records and your page contains 25 records, selecting the check box selects only the 25 records displayed on the page. Some of the features in the entity toolbar, such as Export To Excel and Send Direct E-Mail, allow you to select all of the records from the view, but many of the features in the entity toolbar (such as assigning records and editing records in bulk) apply only to a single page of records. Unfortunately, in these scenarios, you will need to repeat the action on each page of records if your view contains multiple pages of records. Later in this chapter, we will explain how to display up to 250 records per page in a view (instead of the default value of 25 records per page). Displaying more records per page decreases the number of times you need to repeat an action on a set of records.

If you want to select more than one record in a view (but not all of them), you can do so by pressing the Ctrl and Shift keys. This technique should be familiar to users of Microsoft Office, because other applications such as Excel and Microsoft Office Outlook also allow users to select multiple records by holding down the Ctrl or Shift key while clicking the desired records.

As you work with the records in a view, you might find that the view does not refresh the data set as you expect. This might happen when you're working with different sets of records in multiple Internet Explorer windows or if a different user is editing the records in your view.

> **Tip** As a best practice, refresh the data in a view before performing any actions on the data set.

In this exercise, you will manually refresh the data that appears in a view, and then select multiple records in the view.

> **BE SURE TO** use the Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.
>
> **OPEN** a Web page that contains multiple records in a view.


Refresh

1. In the upper-right corner of the view, click the **Refresh** button.

   Microsoft Dynamics CRM refreshes the data in the view.

2. Click a record in the view.

   Microsoft Dynamics CRM highlights the row, indicating that the record is selected.

3. To add one record to your selection, hold down the Ctrl key and click another record.

   Microsoft Dynamics CRM highlights this new record as well, indicating that you've selected it.

4. To include multiple records in a selection, click one record, and then hold down the Shift key and select another record.

   Microsoft Dynamics CRM selects and highlights all of the records listed between the original selection and the new selection. With the appropriate records selected, you can apply the desired action to the records.

Bulk Editing Records in a View

As you work with various records in a view, you might want to update the data in multiple records at one time. Microsoft Dynamics CRM includes a bulk edit feature that allows you to select multiple records in a view and edit them with one form instead of having to modify each record individually. This tool can provide a significant time savings if you need to modify a large number of records. Although this bulk edit feature is very convenient, it does contain a few notable restrictions:

- If a particular field contains programming script behind the scenes (as configured by your system administrator), you cannot edit the data in that field with the bulk edit tool.
- You cannot use the bulk edit tool to remove values from a field. You can only modify or add data to a field.
- You cannot use the bulk edit tool to edit certain fields in Microsoft Dynamics CRM, such as the Parent Customer field of an account or contact record.
- The bulk edit tool updates only the selected records on the page; you cannot use it to update all of the records in the view if the records span multiple pages.
- If a data field is read-only on the form, you cannot edit it with the bulk edit tool.

Tip Even though you cannot edit the owner of a record by using the bulk edit tool, you can easily change the owner of multiple records at one time by using the Assign feature located in the entity menu toolbar.

In this exercise, you will use the bulk edit tool to update the State/Province field for multiple contacts.

BE SURE TO use the Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.

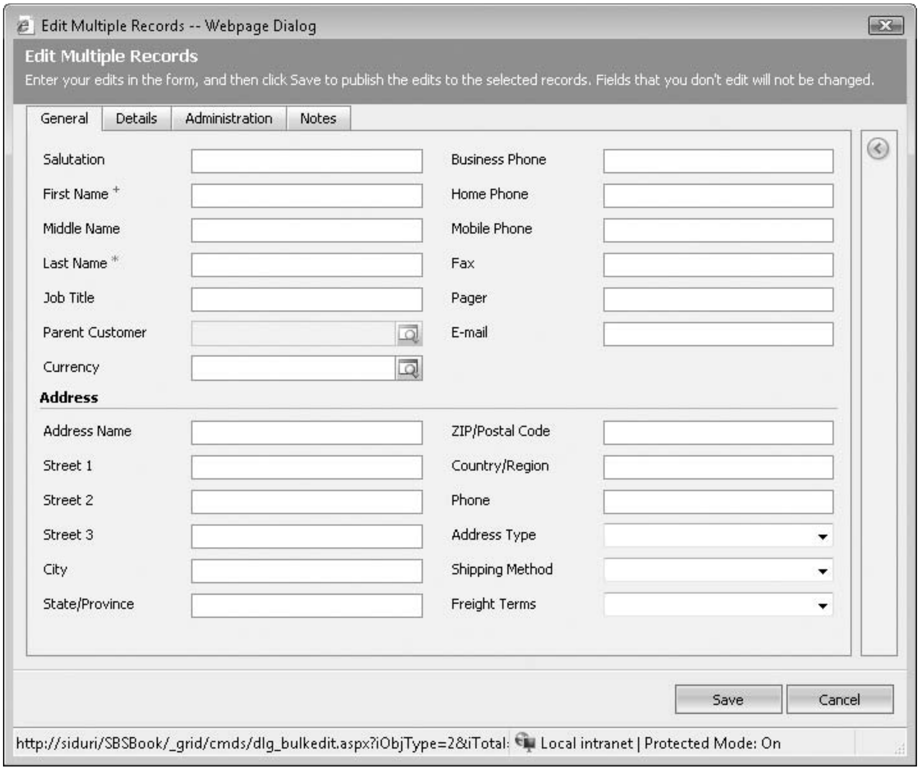
OPEN a view of Contacts that contains more than one record.

1. While holding down the Ctrl key, click two or more of the contact records.

   Microsoft Dynamics CRM highlights the records you click to indicate that they are selected.

2. In the entity menu toolbar, click **More Actions**, and then click **Edit**.

   The Edit Multiple Records dialog box opens. This dialog box is very similar to the contact form, with the same layout and fields.



3. In the **State/Province** field, type **Illinois**.
4. Click the **Save** button.

   Microsoft Dynamics CRM updates the State/Province field of the selected records and closes the Edit Multiple Records dialog box.

Using Quick Find to Search for Records in a View

Even with the sorting features in views, sometimes it can be time consuming to manually look for a particular record if the view contains a large number of records. To help address this concern, Microsoft Dynamics CRM includes a ***Quick Find*** feature that allows you to search for records by using keywords or wildcard characters. You can find the Quick Find search box above the grid and to the left of the View selector. To use it, enter a search phrase and press Enter on the keyboard or click the button with the magnifying glass to start the search. Even though Quick Find is simple to use, there are a few tips and tricks that will help you find records more efficiently.

Your system administrator can configure Microsoft Dynamics CRM to search for matching records across multiple columns. For example, you can search for particular contacts by name, phone number, or e-mail address. You can even include custom data fields as part of the search criteria.

When you enter search text, Microsoft Dynamics CRM searches for the value as it is entered. By default, it does not search for partial records. For example, if you search for a phone number by entering 555-1212 and the contact's phone number is (312) 555-1212, Microsoft Dynamics CRM does not consider that a match. It returns only those records that have 555-1212 as the start of their phone number.

Of course, there will be times when you don't know the exact value you're searching for. In these cases, you can enter an asterisk (*) as a wildcard character in your Quick Find search. In the previous example, if you did not know the exact phone number, you could search for *555-1212 and Microsoft Dynamics CRM would find the matching record.

> **Tip** You can enter the wildcard character anywhere in your search criteria: at the beginning, the middle, or the end. If you can't find the record you're looking for, be sure to try different combinations with the wildcard asterisk. Note that the Quick Find feature is not case-sensitive in its searches.

If you start a Quick Find search when you're working with a specific view, such as My Active Contacts, you might expect that Microsoft Dynamics CRM would search for matching records only within the My Active Contacts view. However, Quick Find always searches for matching records across all active records for that entity. Quick Find ignores inactive records.

> **Tip** To filter records within a specific view, you can click the letters in the index bar. Clicking a letter will update the view to show only those records whose entry in the current sort column starts with the selected letter. For example, if you're looking at the My Active Contacts view with the records sorted by City and you click B in the index bar, Microsoft Dynamics CRM shows you only those records in which the city starts with the letter B. If you then click the Full Name column to sort by that field and click the letter C in the index bar, Microsoft Dynamics CRM updates the My Active Contacts view to show only those records in which the Full Name entry starts with the letter C.

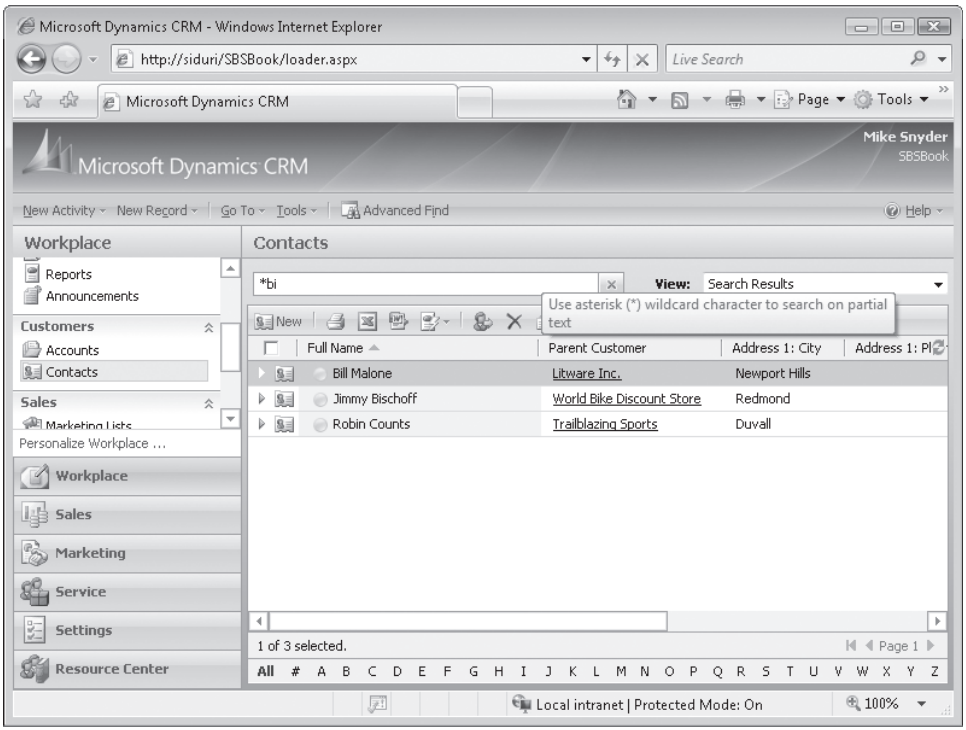
In this exercise, you will use the Quick Find feature to search for records in Microsoft Dynamics CRM.

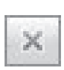
BE SURE TO use the Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.

OPEN a view of Contacts that contains more than one record.

1. In the **Quick Find** box, type ***bi**, and then press Enter.

   Microsoft Dynamics CRM searches and returns all active contacts for matching records.

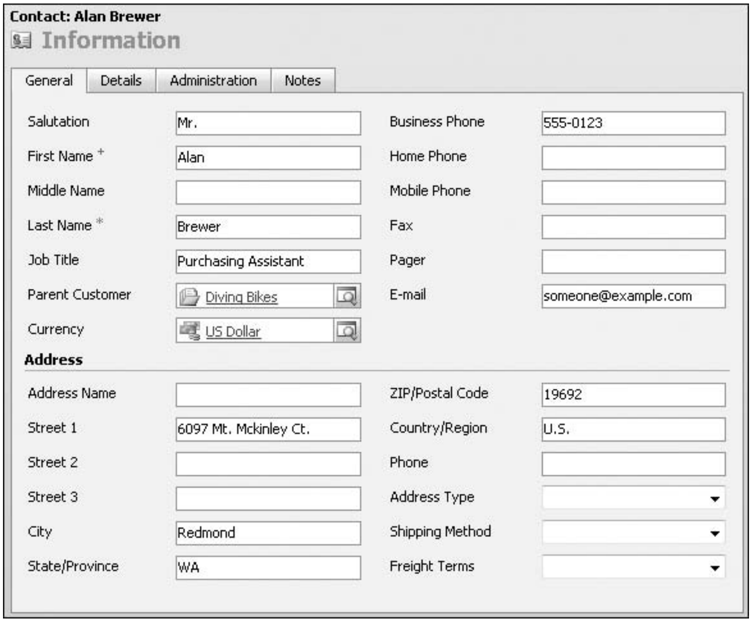



Cancel Search

2. To cancel the search, click the **Cancel Search** button to the right of the **Quick Find** box, or simply select a new view in the view selector.

Using Lookups and Automatic Resolution

One of the main benefits of any customer relationship management system is that you can use the software to create relationships between records in your database. These relationships allow you to understand the different types of data about your customers, vendors, and partners, and how they interact with one another. The Microsoft Dynamics CRM user interface displays the link between two records by using a ***lookup***. The default contact form includes two lookups: one for the Parent Customer and one for the default Currency.



You can visually determine that a field is a lookup because:

- The text in the field is hyperlinked (blue and underlined).
- There is an icon to the left of the text that indicates the entity of the linked record.
- The field includes an icon with a window and a magnifying glass.


Look Up

Clicking the hyperlinked text in the field launches a new window displaying the linked record. Unlike the other fields on the form, in which you simply enter data into the field, lookup fields require you to select a record to link. You can link records in the lookup field by using one of two techniques:

- **Use the Look Up Records dialog box.** To use this technique, click the lookup icon. Microsoft Dynamics CRM then launches the Look Up Records dialog box that you can use to search for and select a specific record.
- **Use automatic resolution.** To use this technique, simply start typing the name of the linked record in the lookup field. After you enter all (or a portion) of the linked record's name, click a different form field or press the Tab key. Microsoft Dynamics CRM then tries to automatically resolve your entry to an existing record.

> **Tip** The automatic resolution feature in lookups can provide a significant time savings when you work with many different records.

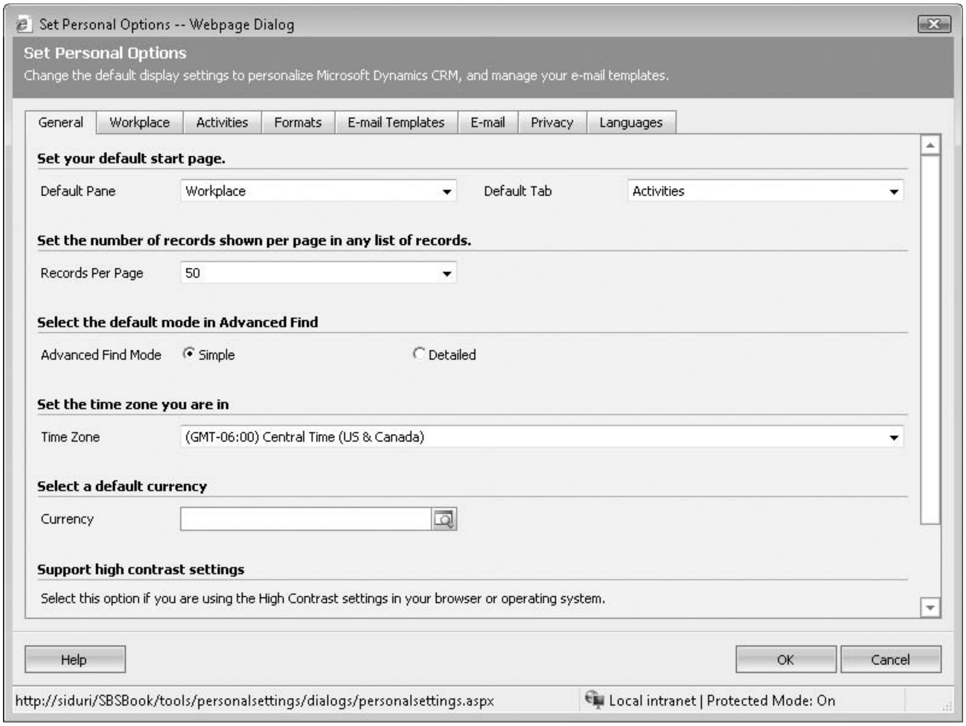
Microsoft Dynamics CRM tries to match records in the lookup by using the find fields of the entity. The record name is usually included as a find field, but your administrator might configure additional find fields that you can use with automatic resolution. If Microsoft Dynamics CRM finds just one matching record during the automatic resolution, it populates a link to that record in the lookup field. If more than one match is found, the lookup field displays a yellow warning icon and colors the text you entered red. Click the warning icon to view the potential matches, and then select the record you want. Microsoft Dynamics CRM then uses that value for the lookup field.

If Microsoft Dynamics CRM does not find any potential matches, it colors the text red and displays a red circle with a white X.

If you want to remove a value from a lookup field, you can select the white portion of the field (without clicking the hyperlinked text) and then press the Backspace key or Delete key.

Setting Personal Options

Microsoft Dynamics CRM allows you to set personal options to modify the user interface. You can access your personal options by clicking the Tools button in the application menu toolbar and then clicking Personal Options. Although we won't review all of the personal options available, we do want to review a few common configuration options.



On the General tab, you can specify the following:

- **Default start page.** By changing this section, you can determine which page Microsoft Dynamics CRM starts on after you log on with the Web client. Select the pane and tab you use most frequently.
- **Records per page.** As we mentioned earlier, you might want to change the number of records that appear on a page. By displaying more records on a page, you can apply actions to a larger data set. However, you should be aware that users with a large number of records per page might experience slower performance as the page loads, so use caution with this setting.
- **Time zone.** Be sure to select the correct time zone to match the time zone of your computer. If this time zone setting does not match the time zone on your computer, you might find that appointments synchronized to Outlook are shifted by a few hours.

On the Workplace tab, you can select which application areas to display in the navigation pane. This setting appears only to you as an individual user; it does not apply to all users in the system. Therefore, feel free to set up the Workplace area in whatever manner is most comfortable for you.

In this exercise, you will modify your Workplace pane to include new areas of the user interface.

Tip The Set Personal Options dialog box in Microsoft Dynamics CRM for Outlook provides additional configuration options when compared with the dialog box in the Web client. For more information about the personal options in Outlook, see Chapter 5, "Microsoft Dynamics CRM for Outlook."

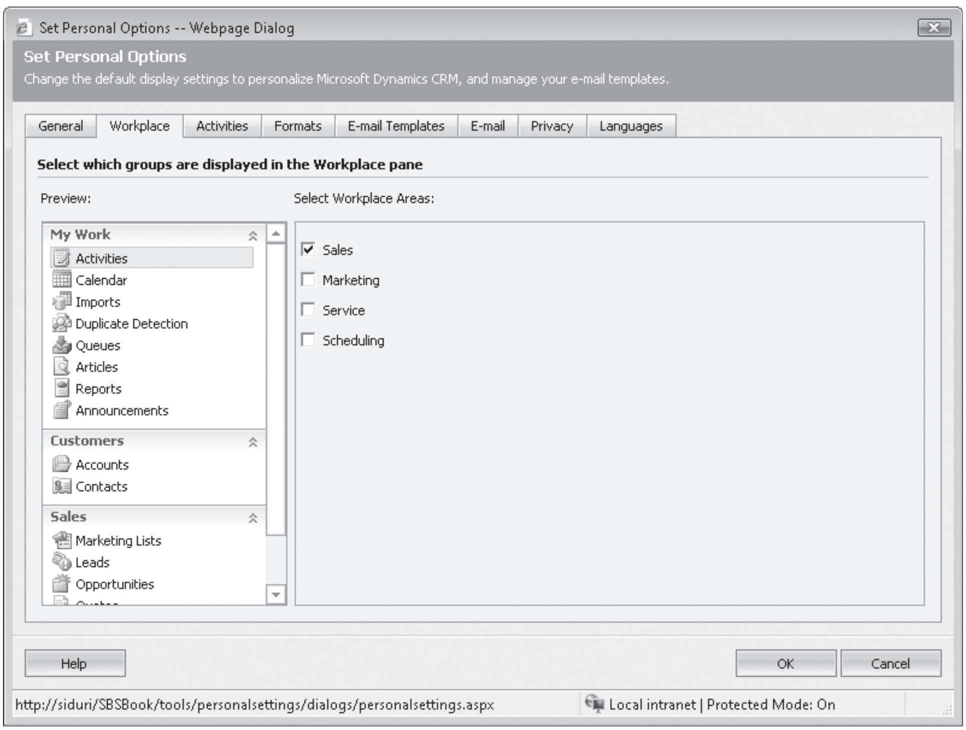
BE SURE TO log on to the Microsoft Dynamics CRM Web site through the Web client before beginning this exercise.

1. In the application menu toolbar, click **Tools**, and then click **Options**.

   The Set Personal Options dialog box opens.

2. On the **Workplace** tab, select the **Sales** check box.

   Microsoft Dynamics CRM updates the preview on the left side of the dialog box to include the Sales area.



5. Click **OK**.
6. Click **Workplace** in the application areas.

   Microsoft Dynamics CRM now includes the sales area that you just added in the application navigation pane.

Using the Resource Center

Microsoft Dynamics CRM includes a Resource Center that provides additional information about the software. The Resource Center contains dynamic content hosted on the Microsoft servers, and Microsoft provides continual updates to this content. You need an Internet connection to access content from the Resource Center. The Resource Center organizes information into five different sections:

- Highlights
- Sales
- Marketing
- Service
- Settings

Each section includes articles about working with Microsoft Dynamics CRM. Check the Resource Center periodically to see if there is any content that applies to you.

In addition to articles about using the software, the Resource Center contains links to other Microsoft Dynamics CRM resources such as newsgroups, blogs, and customer support.

Accessing Help in Microsoft Dynamics CRM

Even though most users indicate that Microsoft Dynamics CRM is intuitive and easy to learn, you might have questions about the software. Fortunately, Microsoft Dynamics CRM includes help guides for end users as well as administrators. To access Help, click the Help button on the application menu toolbar or the entity menu toolbar.

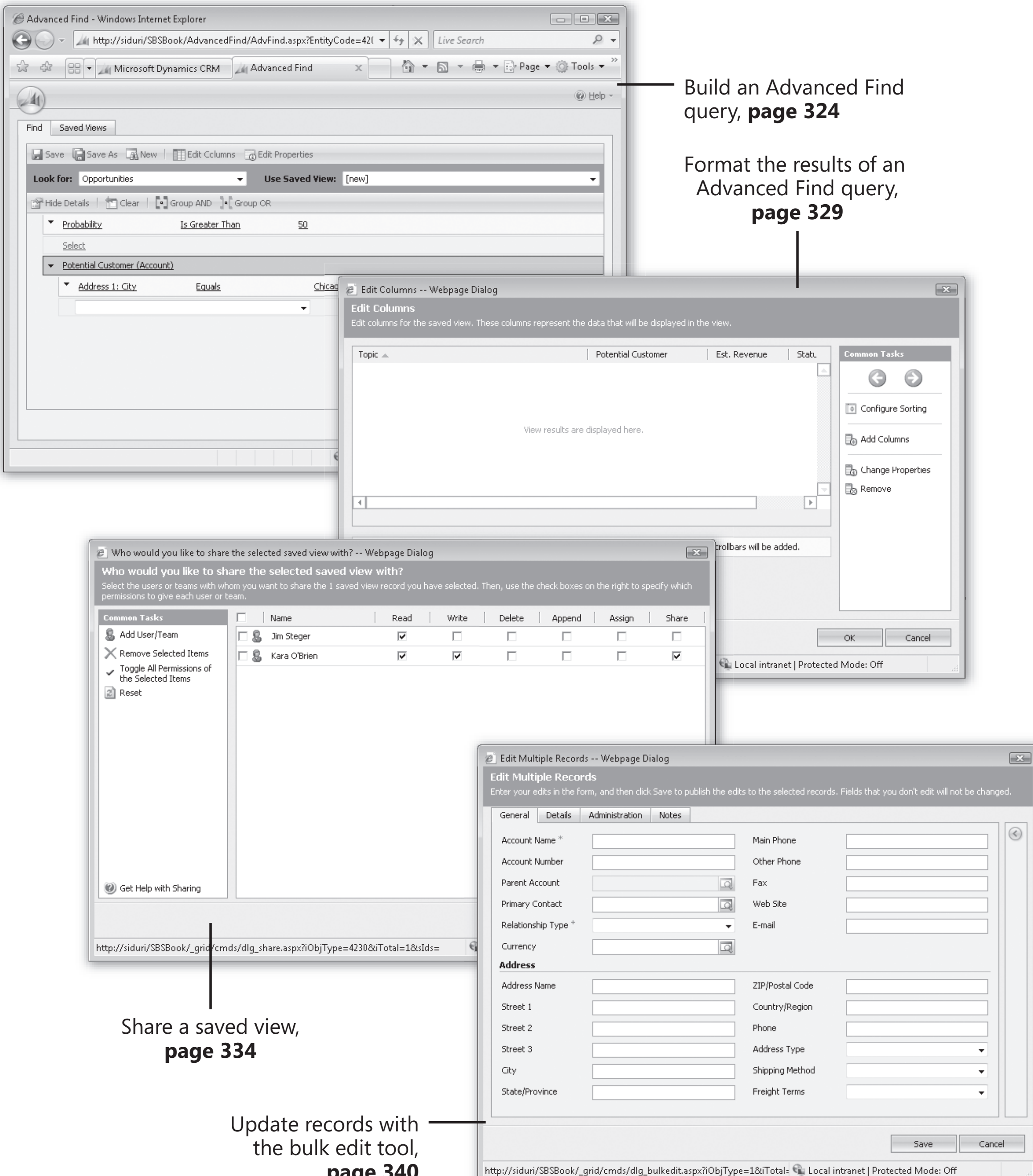
Microsoft Dynamics CRM Help is context-sensitive; you can click Help On This Page to access the portion of the Help contents most relevant to the page you're currently viewing. For example, if you're viewing a lead record and you click Help On This Page, Microsoft Dynamics CRM automatically directs you to the Help topic titled "Work with Leads."

> **Tip** Your system administrator can customize the Help content that appears in Microsoft Dynamics CRM to include specific instructions about your unique Microsoft Dynamics CRM deployment.

Key Points

- To sort records in a view, click the column heading to toggle the records in ascending or descending order. To sort by more than one column, hold down the Ctrl key and click a second column header.
- To select records in a view, use the Ctrl or Shift key to select multiple records. Selecting the check box selects all of the records on the page, but not all of the records in the view.
- Bulk editing allows you to modify multiple records at once, but you can only bulk edit records one page at a time.
- The Quick Find feature allows you to search for records in a view. You can use the asterisk (*) as a wildcard character in your searches.
- Lookups link records in the user interface. You can use the automatic resolution feature by typing text directly into the lookup field.
- You can modify your personal options to specify your preferences, including the start page when Microsoft Dynamics CRM first loads or the number of records displayed on each page.
- Microsoft Dynamics CRM includes additional information about using the software in the Resource Center and in the Help section.

Chapter at a Glance



Build an Advanced Find query, **page 324**

Format the results of an Advanced Find query, **page 329**

Share a saved view, **page 334**

Update records with the bulk edit tool, **page 340**

15 Using Advanced Find

In this chapter, you will learn to

- ✔ Perform ad hoc queries by using Advanced Find.
- ✔ Organize and format Advanced Find results.
- ✔ Create a saved view.
- ✔ Use saved views to share your queries with other users.
- ✔ Build a complex query to search data.
- ✔ Use bulk edit and bulk assign to take action on query results.

An important benefit of CRM systems is the central repository of customer data that builds as sales, marketing, and customer service teams track their interactions with customers. As this store of data grows, managers face the need to report on and analyze the data to understand trends and identify areas for improvement. Microsoft Dynamics CRM provides a variety of tools for extracting data and presenting it in a simple and easy-to-use format. This chapter focuses on the best tool for this task: Advanced Find. The Advanced Find tool lets you create your own queries through a simple interface. When end users are empowered to create reports and filter the results to return a specific data set, they rely less on IT resources to do their job. In addition, this flexibility will increase an organization's IT resources to focus on more complex business requirements.

In this chapter, you will learn to harness the power of the Advanced Find tool by creating a query, saving it as a system view that can be shared with others, and updating multiple records in the results set.

Tip Advanced Find respects the security settings of the end user. As a rule of thumb, you can assume that if a user can see the record elsewhere in the application, that user will be able to gain access to it within Advanced Find.

Important There are no practice files for this chapter.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Important The images used in this book reflect the default form and field names in Microsoft Dynamics CRM. Because the software offers extensive customization capabilities, it's possible that some of the record types or fields have been relabeled in your Microsoft Dynamics CRM environment. If you cannot find the forms, fields, or security roles referenced in this chapter, contact your system administrator for assistance.

Important You must know the location of your Microsoft Dynamics CRM Web site to work the exercises in this book. Check with your system administrator to verify the Web address if you don't know it.

Performing Advanced Find Queries

Business needs can change frequently over the course of a project and, as a result, reporting needs also change. Therefore, ad hoc reporting has become a standard feature within most business applications, because expecting end users to define all of their reporting needs before a system is implemented is unrealistic. The Advanced Find tool within Microsoft Dynamics CRM provides a flexible interface to query, view, analyze, and update data on an ongoing basis, so that predefined queries can be saved as the system is implemented and new queries can be created as the reporting needs of your business change. Examples of how Advanced Find is commonly leveraged by end users include:

- Configuring a customized to-do list to follow up on open opportunities.
- Determining leads that fall into a specific geographical region for distribution and assignment.
- Finding all activities due on the current date for a specific customer service representative who has called in sick, so that the activities can be reassigned to a different representative.
- Obtaining a list of contacts that have not been modified in more than two years, so that they can be considered for deactivation.

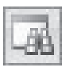
Advanced Find queries rely on an intuitive set of operators that you select when building a query. The data fields you select in your query determine the operators that will be available for filtering. The following table highlights the operators available for the different data fields.

Data type	Operators	
User (Owner)	Equals Current User	Contains
	Does Not Equal Current User	Does Not Contain
	Equals	Begins With
	Does Not Equal	Does Not Begin With
	Contains Data	Ends With
	Does Not Contain Data	Does Not End With
Text	Equals	Does Not Contain
	Does Not Equal	Begins With
	Contains Data	Does Not Begin With
	Does Not Contain Data	Ends With
	Contains	Does Not End With
Numeric	Equals	Is Less Than
	Does Not Equal	Is Less Than Or Equal To
	Is Greater Than	Contains Data
	Is Greater Than Or Equal To	Does Not Contain Data
Date	On	This Year
	On Or After	Last X Hours
	On Or Before	Next X Hours
	Yesterday	Last X Days
	Today	Next X Days
	Tomorrow	Last X Weeks
	Next 7 Days	Next X Weeks
	Last 7 Days	Last X Months
	Next Week	Next X Months
	Last Week	Last X Years
	This Week	Next X Years
	Next Month	Any Time
	Last Month	Older Than X Months
	This Month	Contains Data
	Next Year	Does Not Contain Data
	Last Year	

For each query, you can specify as many search criteria as you need. You must designate the primary record type you want returned in the results, but you can also include data fields from related records in your query. For example, you might search for top sales opportunities that are assigned to sales representatives in a certain geographical region. Your search could include the data fields the sales team uses to rate opportunities as well as the sales region field for the user records to which opportunities are assigned.

In this exercise, you will create an Advanced Find query to view the opportunities that have a probability value greater than 50 for accounts in the city of Chicago.

> **USE** your own Microsoft Dynamics CRM installation in place of the Adventure Works Cycle site shown in this exercise.
>
> **BE SURE TO** use the Windows Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site before beginning this exercise.

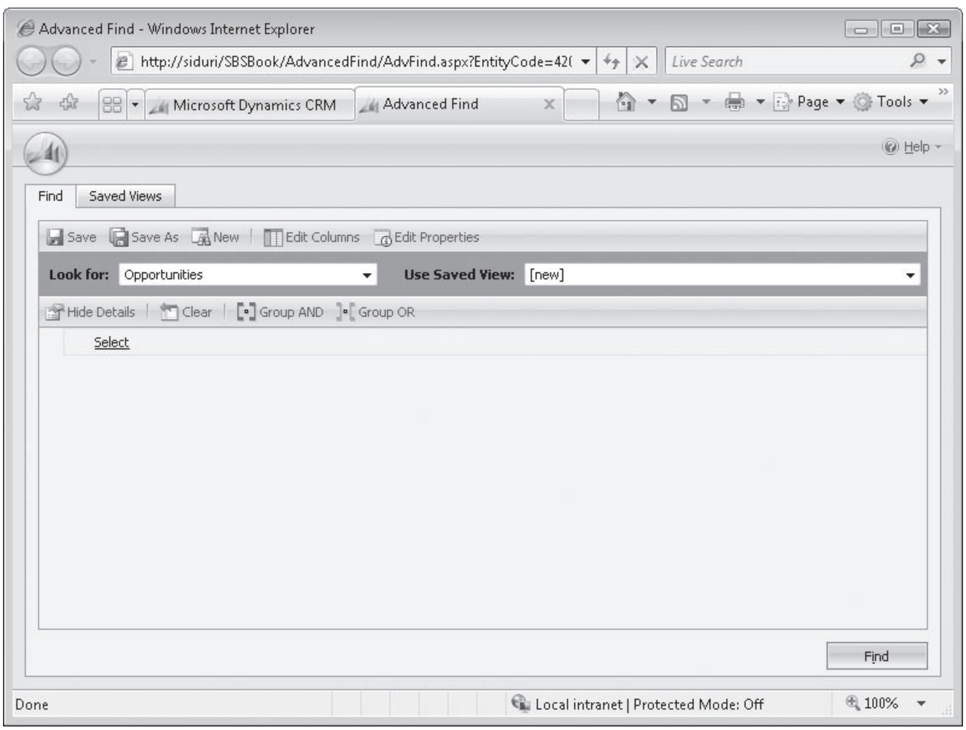

Advanced Find

1. On the application menu toolbar, click the **Advanced Find** button.

   The Advanced Find screen opens.

2. In the **Look for** list, select **Opportunities**.

   This specifies the primary entity for which you will be executing the query.



3. In the **Select** field, choose **Probability** to set the search criteria for the opportunity's **Probability** field.

   A second list of operators is displayed to the right of the Select field.

> **Tip** The Select field shows all searchable fields for the specified entity. System administrators can modify the selection of fields that are searchable in the database.

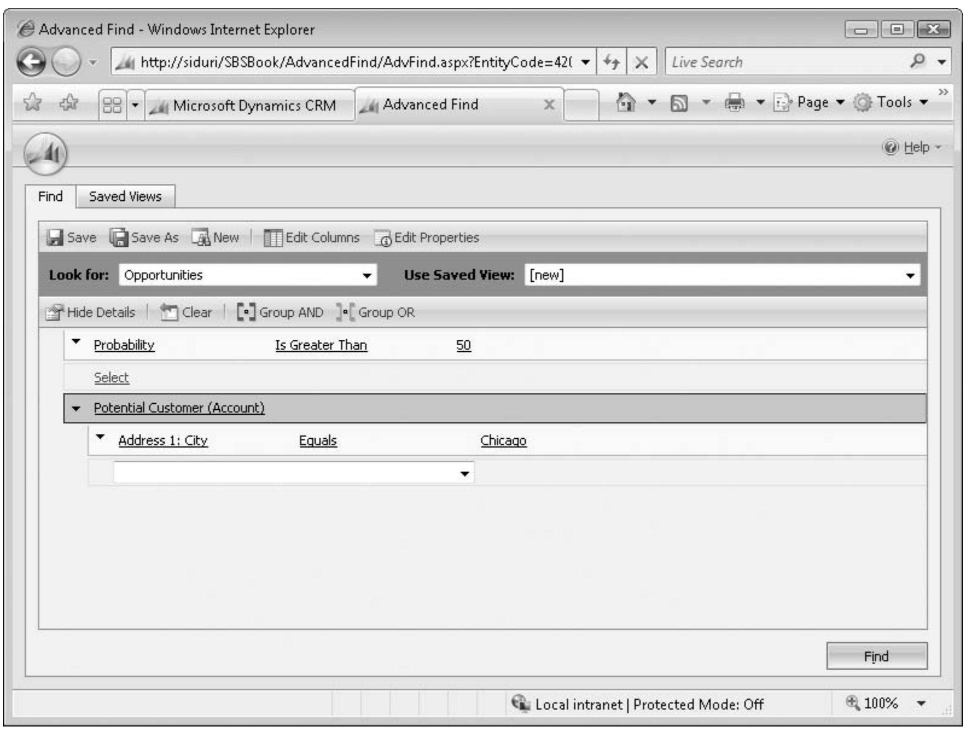
4. In the **Operator** field, select **Is Greater Than**. Then, in the **Enter Value** field, enter **50**.

> **Tip** The Select field turns into a list when you click on it, and a new row automatically appears below each row you add to your query, so you can add as many rows as needed in your search criteria.

5. In the second row of the Advanced Find query, in the **Select** field, scroll to the bottom of the list to the **Related** section and select **Potential Customer (Account)** to add a data field from the account record type to your search.

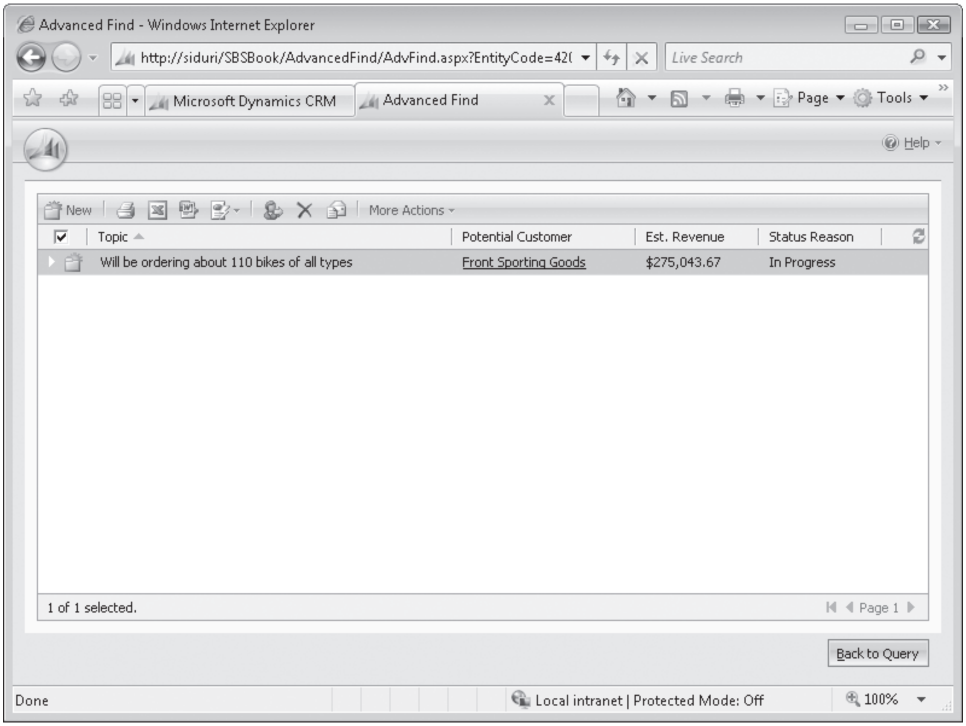
   This allows you to filter on attributes of the account related to the opportunities.

6. In the **Select** field, choose **Address 1: City**.
7. In the **Operator** field, leave **Equals** selected, and in the **Enter Value** field, enter **Chicago**.



8. Click the **Find** button in the lower right corner of the screen.

   The results of your search are displayed.



BE SURE TO leave the query open so that you can use it in the next exercise.

Tip If you want to modify an existing system view, navigate to the view before clicking the Advanced Find button. This will open the Advanced Find screen with the criteria from the system view already set. This also allows you to easily understand the criteria used in the system views.

Organizing and Formatting Advanced Find Results

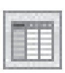
As you can see, Microsoft Dynamics CRM gives you the power to create a report that contains a set of records based on specific, user-defined criteria that is simple to put together. In addition to building your own search query, you can also format Advanced Find results to include additional data columns and sort, order, and size the results columns to meet your reporting needs. You can do the following:

- Add any column you want to the results.
- Adjust the order of the columns.
- Modify the size of each column.
- Define the sort order of the output.

For example, you might want to create a list of contacts that includes the contact name and primary address fields in a specific order. This can be accomplished with ease in Microsoft Dynamics CRM.

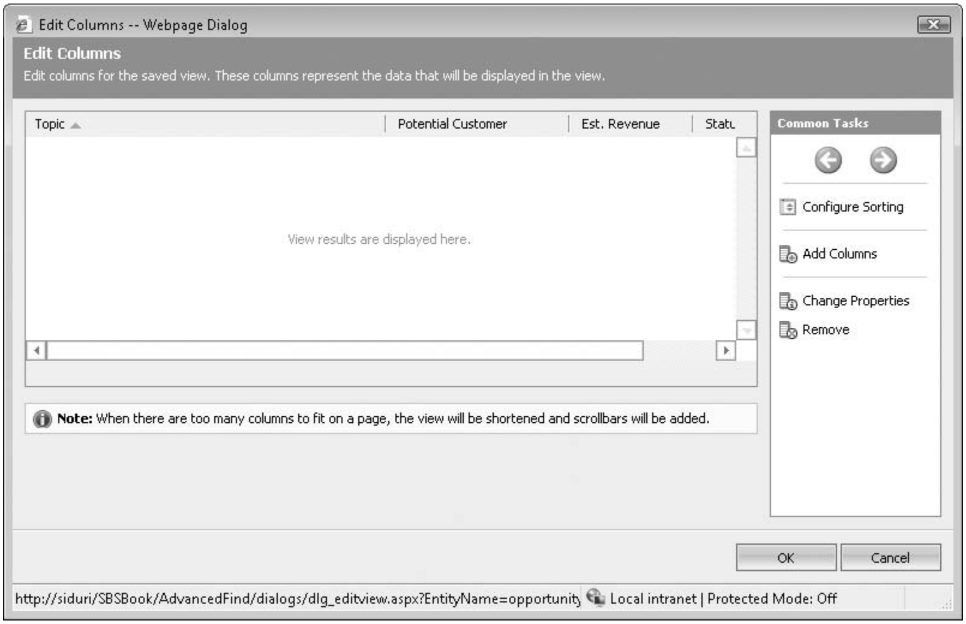
In this exercise, you will use the search query you created in the previous exercise, modifying the columns that appear in the output to include the Probability field for each opportunity as well as the Industry field for the customer account. In addition, you will sort and format your results.

USE your own Microsoft Dynamics CRM installation in place of the Adventure Works Cycle site shown in this exercise.


Edit Columns

1. In the **Advanced Find** criteria screen, click the **Edit Columns** button.

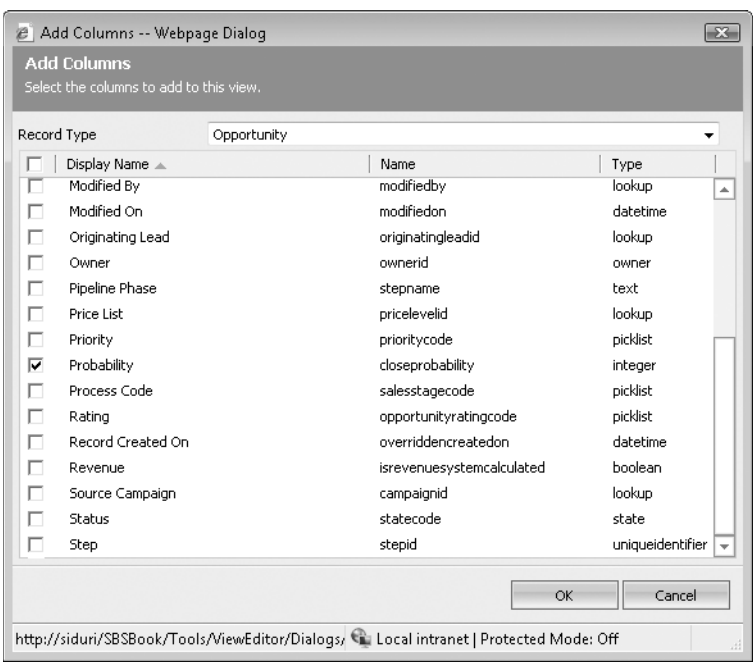
   The Edit Columns dialog box opens. Here you can modify the column order, set the column width, add or remove columns, and configure sorting.



2. In the **Common Tasks** area, click **Add Columns**.

   The Add Columns dialog box opens.

3. Locate the **Probability** field, and select the check box next to it to add the field to your results.

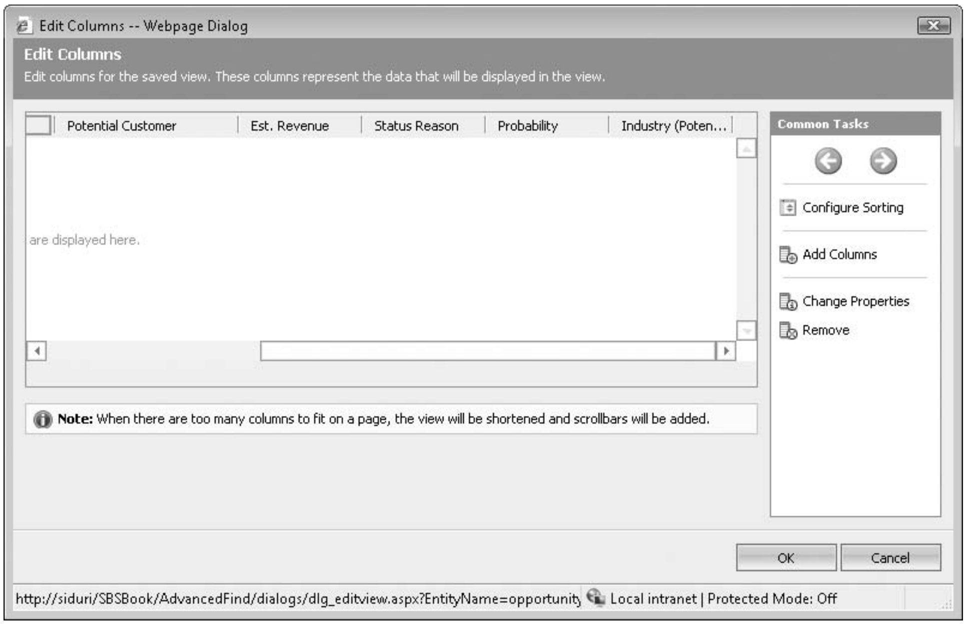


4. In the **Record Type** list at the top of the form, change the record type to **Potential Customer (Account)**.

   Notice that you can add columns from related record types in addition to those from the primary record type.

5. Select the **Industry** check box, and then click **OK**.

   The newly added columns appear to the right of the original columns.



> **Important** For each record type in Microsoft Dynamics CRM, system administrators can configure the default columns that appear in each Advanced Find results set. The images in this chapter show the default view for opportunities in Microsoft Dynamics CRM. It's possible that your results will include different columns. If there is a column you find yourself adding frequently to your searches, ask your system administrator about adding it to the default Advanced Find view.

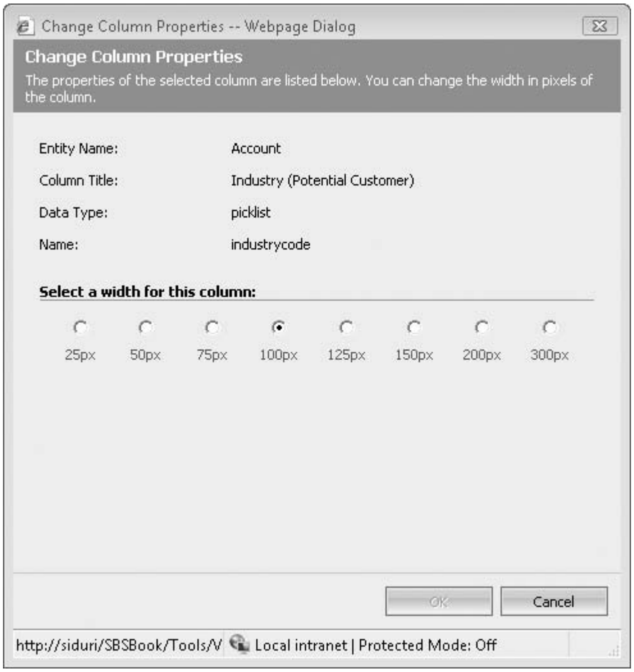
6. In the **Edit Columns** dialog box, click (don't double-click) the **Industry** column heading.

   The border color changes to green.

7. In the **Common Tasks** area, click the left arrow until the **Industry** column is the first column in the results grid.

8. Double-click the **Industry** column.

The Change Column Properties dialog box opens.



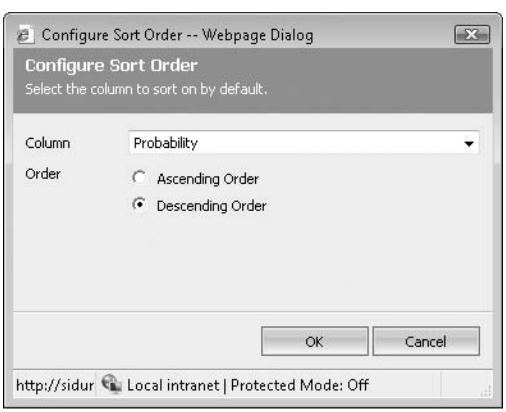
9. Change the column width to 200 pixels by selecting **200px**, and then click **OK**.

   This setting doubles the column width from the 100-pixel default.

10. In the **Edit Columns** dialog box, in the **Common Tasks** pane, click **Configure Sorting**.

    The Configure Sort Order dialog box opens.

11. In the **Column** list, select **Probability**, and in the **Order** field, select **Descending Order**, and then click **OK**.

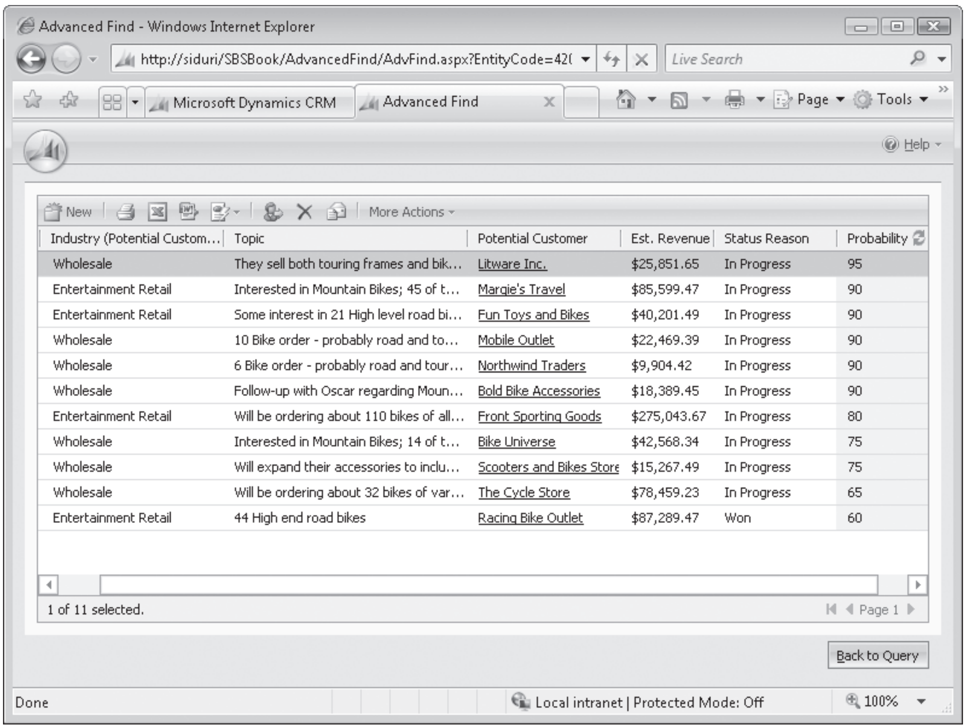


This sorts the results so that the opportunities with the highest closing probability appear at the top of the report.

> **Tip** Although the sort option includes only one sort level, you can sort by multiple columns on any grid within Microsoft Dynamics CRM if you hold the Shift key and click the column header.

12. In the **Edit Columns** dialog box, click **OK** to close the dialog box.

13. On the **Advanced Find** query form, click **Find**. The search results appear with the new columns you added.



> **BE SURE TO** leave the query open so that you can use it in the next exercise.

Creating and Sharing a Saved View

What if, sometime in the future, you want to run the same Advanced Find query for which you have already defined the criteria, specified the output format, and defined the sort order to address your needs? You would find it frustrating if you had to go through all of these steps each time you wanted to produce the report. Fortunately, Microsoft Dynamics CRM allows you to create saved views to save your Advanced Find queries for future use. Saved views can be run or modified at a later date, sparing you from recreating reports that you run on a regular schedule.

> **Tip** Although saved views store the specified criteria and formatting settings, results are dynamic and reflect the records that match your search criteria at the time the saved view is accessed. Saved views are not point-in-time data snapshots.

In addition to saving a view for yourself, it's likely that your reports will also be useful to your colleagues. Rather than trying to articulate the steps it took for you to create a view, you can ***share*** the view with other users in Microsoft Dynamics CRM. Typically, a sales manager or other "power user" creates a saved view that will be valuable to other team members. These saved views solve business-critical reporting needs without requiring advanced programming skills.

Saved views can be shared with other users or teams, which are groups of users that can share access privileges for certain records. By default, each user or team is granted Read access when you share a saved view. This allows the user or team to access the saved view but not modify it. You can assign additional permissions when you share a saved view. The following table outlines the security privileges available when sharing a view.

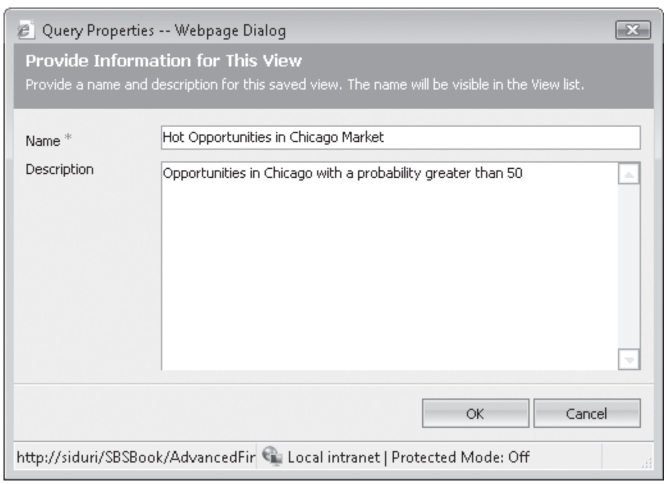
Privilege	Description
Read	Shared users can access the view but not modify it.
Write	Shared users can modify the view to include additional criteria, results fields, or other formatting.
Delete	Shared users can delete the view from the Microsoft Dynamics CRM database.
Append	Shared users can associate other records to the view.
Assign	Shared users can assign the view to an additional system user.
Share	Shared users can share the view with additional users or teams while maintaining their own access to the view.

In this exercise, you will save the view you created in the previous section so that you can access it in the future.

> **USE** your own Microsoft Dynamics CRM installation in place of the Adventure Works Cycle site shown in this exercise.

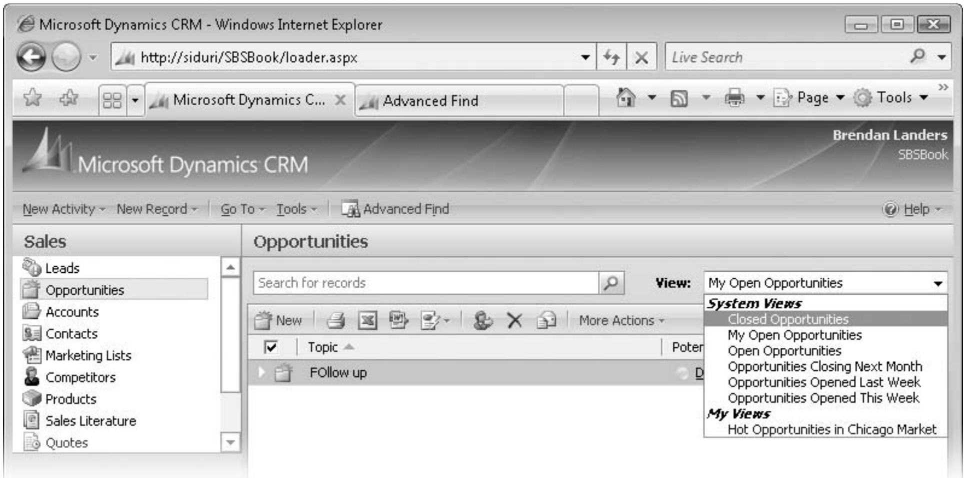
Save As

1. On the **Advanced Find** screen that includes the query you created in the previous section, click the **Save As** button.
2. In the **Name** field of the **Provide Information For This View** dialog box, enter **Hot Opportunities in Chicago Market**.
3. In the **Description** field, enter **Opportunities in Chicago with a probability greater than 50**.

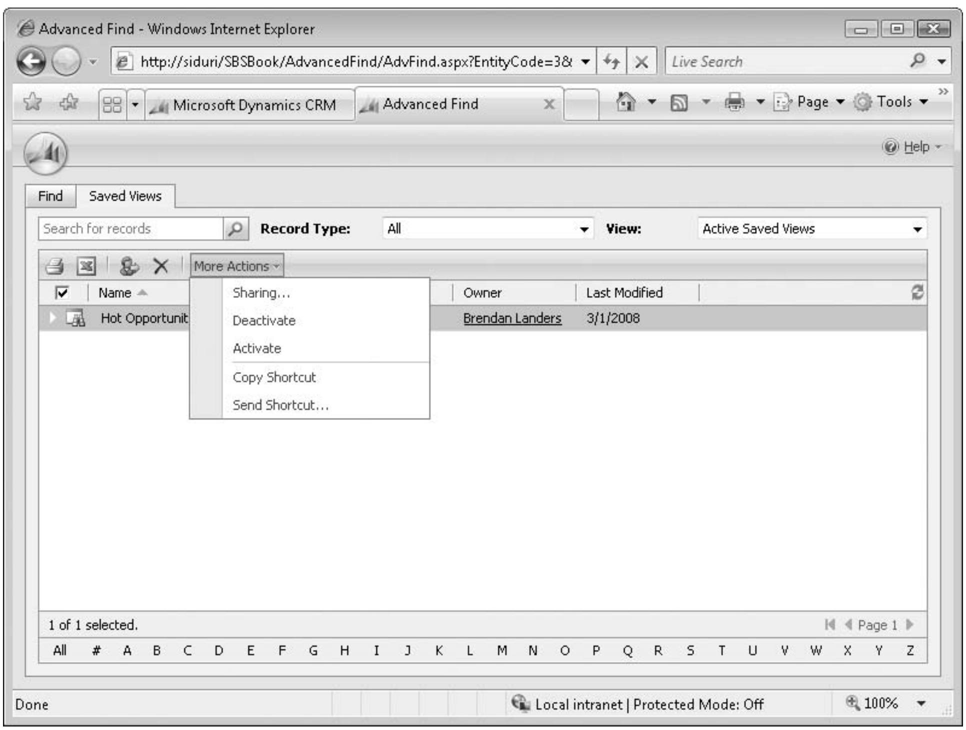


4. In the **Advanced Find** query form, click the **Saved Views** tab to see the newly created saved view.

   In addition to being accessible from the Saved Views tab, the saved view will appear in the View list on the Opportunities grid.



5. In the **Saved Views** tab, click the **More Actions** button, and then click **Sharing**.



The Who Would You Like To Share The Selected Saved View With? dialog box opens.

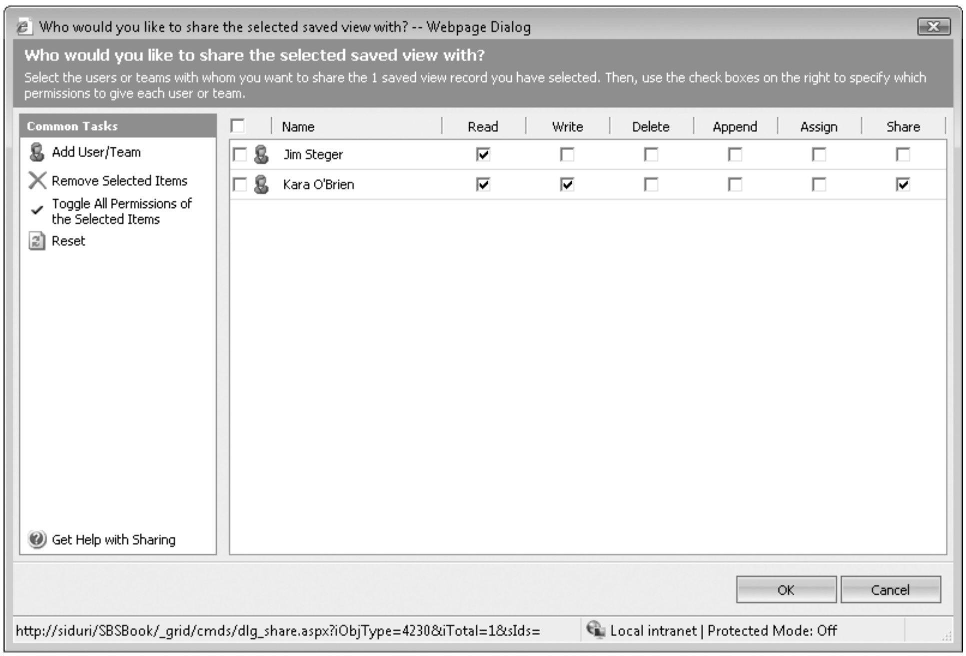
6. In the **Common Tasks** pane, click **Add User/Team**.

   The Look Up Records dialog box opens.

7. Enter the name of another system user in the **Look for** field, and then click **Find**.

8. Select a user record, and click the right arrow to move the record from the **Available Records** box to the **Selected Records** box. Then click **OK**.

   The selected user has been returned to the shared user screen. By default, the user receives Read rights to your view. Besides Read rights, you can empower the user to Write, Delete, Append, Assign, and Share your view with others.



9. Click **OK** in the **Who would you like to share the selected saved view with?** dialog box.

   With just a few clicks, your colleagues can now benefit from the reports you created.

Using Advanced Filter Criteria

By default, Microsoft Dynamics CRM applies AND logic to queries that include two or more search criteria. This means that results are limited to those records that meet all search criteria in the query. However, you also might be required to produce a report with records that match any of the search criteria. In this instance, you could use OR logic in Advanced Find to search multiple fields to find records that have matching data in any of the fields.

In this exercise, you will use the Group AND and Group OR functionality of the Advanced Find tool. As you saw earlier, the original criteria we applied to the Hot Opportunities In Chicago Market saved view included all opportunities that met the following criteria:

- The opportunity probability is greater than 50.
- The accounts are in the city of Chicago.

Now you will expand the criteria to include opportunities in Des Moines in addition to those in Chicago.

USE your own Microsoft Dynamics CRM installation in place of the Adventure Works Cycle site shown in this exercise.

BE SURE TO use the Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.

1. Launch **Advanced Find** if it is not open already.
2. In the **Advanced Find** query screen, in the **Look for** field, select **Opportunities**, and then select **Hot Opportunities in Chicago Market** in the **Use Saved View** list.

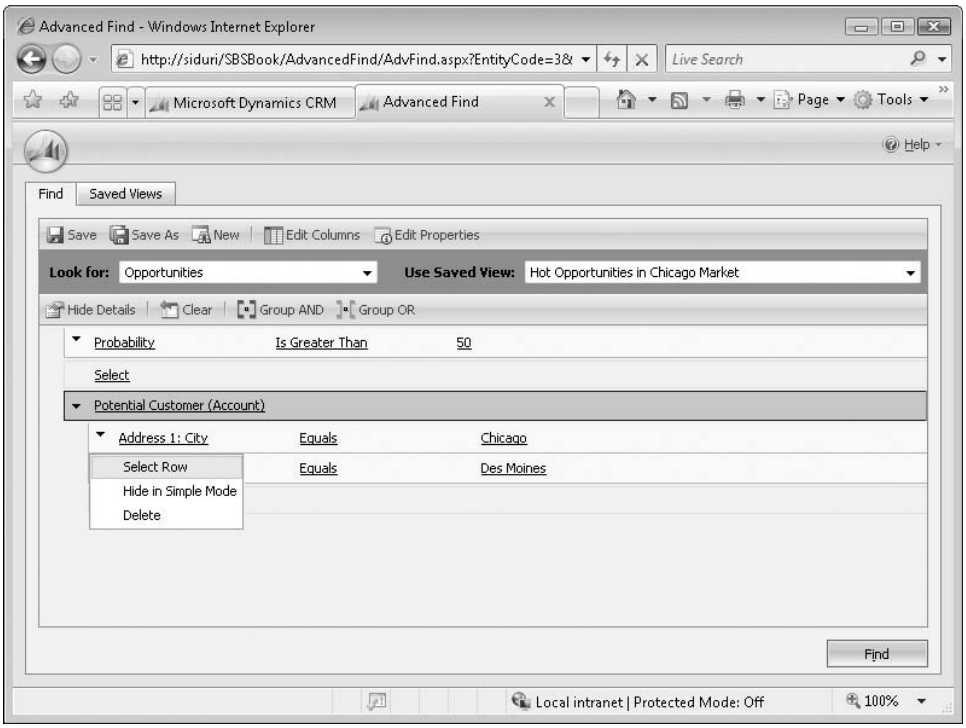
   The criteria for the saved query is displayed.
3. Click the **Show Details** button.


Show Details

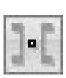
> **Tip** By default, the Advanced Find mode is set to Simple, which means that the details of the query are not shown until you click the Show Details button. You can change this setting on the General tab in the Personal Options area, which is accessible from the Tools menu on the application menu toolbar.

4. In the **Potential Customer (Account)** section, click the **Select** field underneath the row that specifies the city as **Chicago**.
5. In the **Select** field, choose **Address 1: City**.
6. In the **Enter Value** field, enter **Des Moines**.

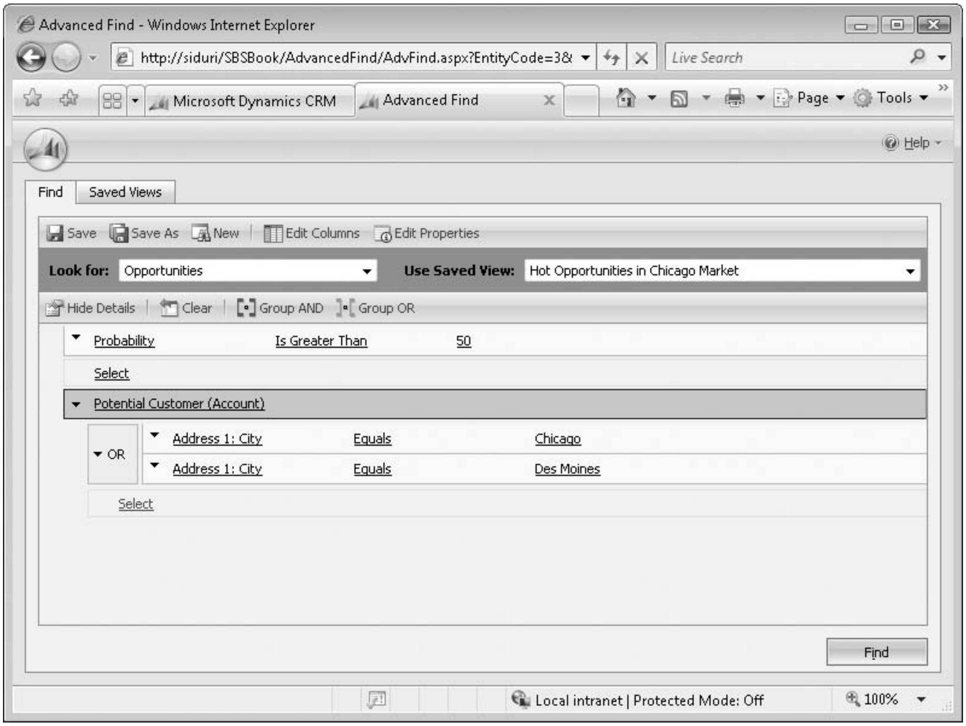
   Because Microsoft Dynamics CRM uses AND logic by default, if you click Find at this point, your search will not return any results, because no single account record can have a primary address in both Chicago and Des Moines.
7. Click the arrow to the left of the first **Address 1: City** field, and click **Select Row**.



8. Click the arrow to the left of the second **Address 1: City** field, and click **Select Row**.
9. On the toolbar, click **Group OR**.


Group OR

This selection will update the logic so that records that have a primary address in the city of Chicago or Des Moines will be returned in the results.



10. Click **Find** to see the results matching your new query.

Using Bulk Edit and Bulk Assign from Advanced Find

It is certainly powerful and exciting to have the ability to create a list of records that match your specific criteria. The ability to take action on those records to strengthen your Microsoft Dynamics CRM database and adapt it to your business as it evolves is equally important. With Microsoft Dynamics CRM, you can take many actions on the results of an Advanced Find query. For example, you can perform the following actions:

- Export the data to Microsoft Office Excel.
- Bulk edit the records.
- Bulk assign the records.
- Deactivate the records.

In this section, we focus on the bulk edit and bulk assign functionalities. With the Microsoft Dynamics CRM bulk edit functionality, you can make a change to many records at one time from any grid. For example, you might use bulk edit or bulk assign if:

- You realize that data has been entered incorrectly for several records.
- You add a new attribute that you would like to populate for all records.
- An employee decides to leave your company, and you need to distribute the records that the employee owns to other team members.

> **Important** Bulk edit rights might not be available for every user. Your ability to use bulk edit is configured by the system administrator in your security role.

In this exercise, you will edit the Address 1: City field of multiple records by using the bulk edit tool. In addition, you will use the bulk assign functionality to assign ownership of multiple records to another user.

> **USE** your own Microsoft Dynamics CRM installation in place of the Adventure Works Cycle site shown in the exercise.
>
> **BE SURE TO** use the Internet Explorer Web browser to navigate to your Microsoft Dynamics CRM Web site, if necessary, before beginning this exercise.

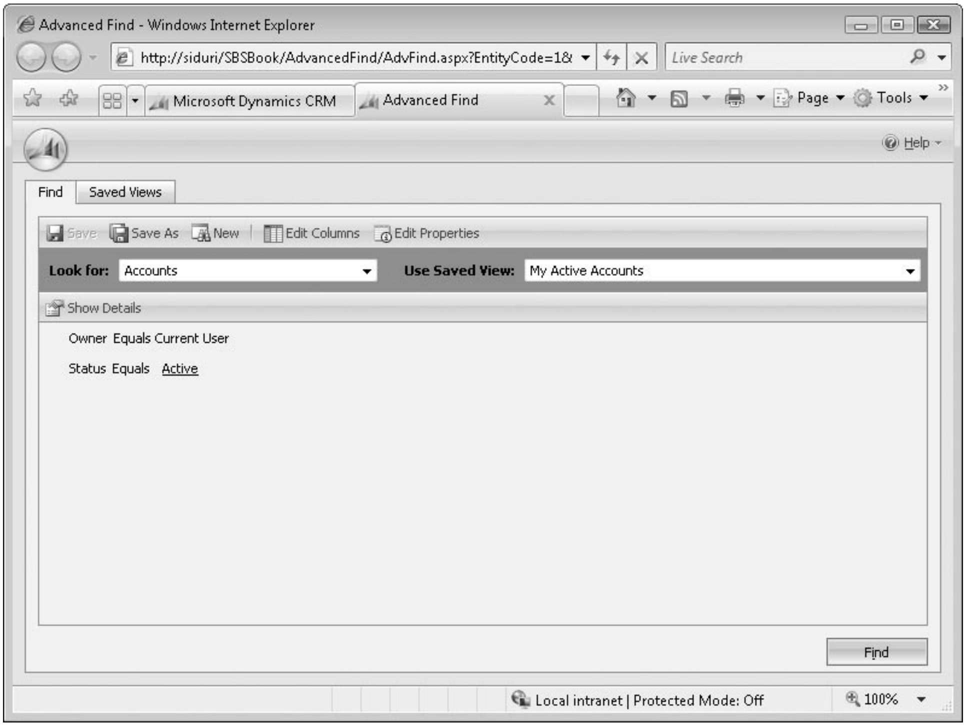
1. In the **Workplace** area, click **Accounts**.

   The default view appears in the grid.

   > **Important** You will see My Active Accounts as the default view. This view includes the Account Name, Main Phone, Address 1: City, Primary Contact, and E-mail (Primary Contact) fields for the accounts you own. The default view can be modified and therefore might be different in your environment.

2. On the application menu toolbar, click **Advanced Find**.

   The criteria from the current view populates the Show Details section.



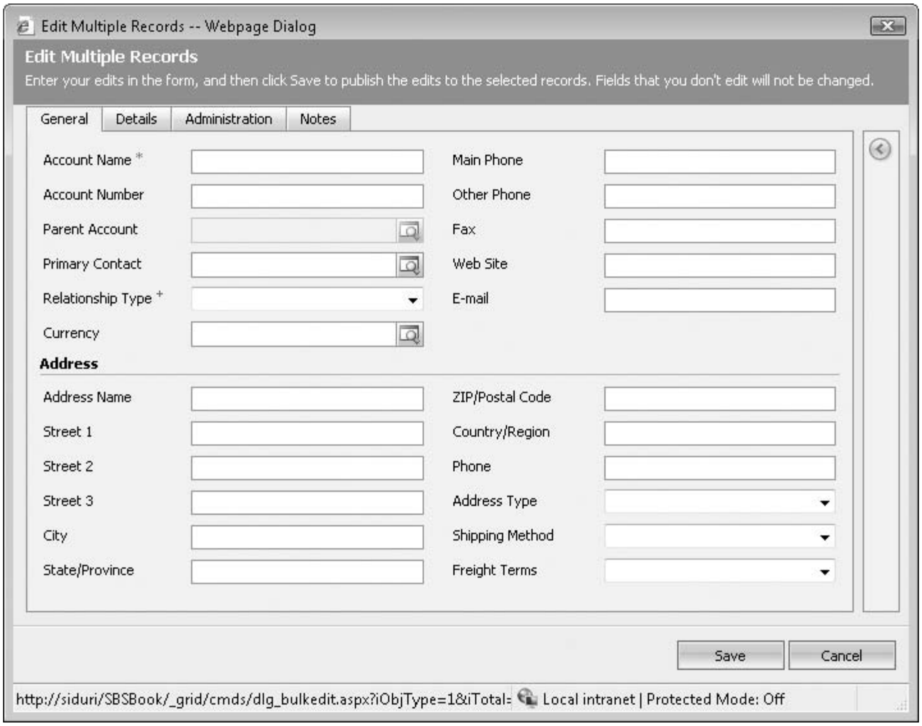
3. Click the **Show Details** button to view the details of the query, and then add a new search field by choosing **Address 1: City** in the **Select** field.
4. Leave the operator as **Equals**, and enter **NY** in the **Enter Value** field.
5. Click **Find**.

   All active accounts that you own with a city value of *NY* are displayed. Next you will update the city to *New York* by using the bulk edit tool.

> **Important** If your search did not return at least two results, modify the query before continuing with this exercise.

6. Select several records by holding the Ctrl key while clicking the records you want to update.
7. On the grid toolbar, select **More Actions**, and then choose **Edit**.

   The Edit Multiple Records dialog box opens. It resembles a blank Account form.



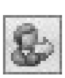
8. Enter **New York** in the **City** field, and then click **Save**.

> **Important** This action cannot be undone.

After you have clicked Save, the underlying records are updated. If you refresh the grid, you will no longer see these records.

> **Tip** If your query results return multiple pages, you will need to edit records one page at a time. The number of records returned on a page can be modified in the Personal Options area to a maximum of 250.

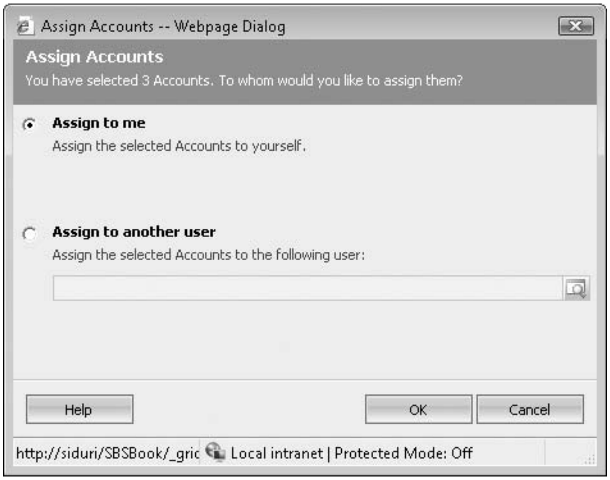
9. In the results grid, select at least two additional records by pressing the Ctrl key while clicking them.



Assign

10. In the grid toolbar, click the **Assign** button.

The Assign Accounts dialog box opens.



11. In the dialog box, click **Assign to me** to assign the selected records to yourself.

Key Points

- The Advanced Find tool in Microsoft Dynamics CRM allows you to search data in your system. You can filter results and display columns from the primary record type you are searching as well as from related record types.
- You can format and sort the output of your query to meet your specific needs.
- You can save your Advanced Find views for later use.
- With sharing, you can distribute your saved views to other users.
- You can create complex queries by using Group AND and Group OR logic.
- You can take action on the results of an Advanced Find query by using the bulk edit and bulk assign functionalities to update multiple records at a time.
- Similar to other views, Advanced Find results can be exported to Excel.

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