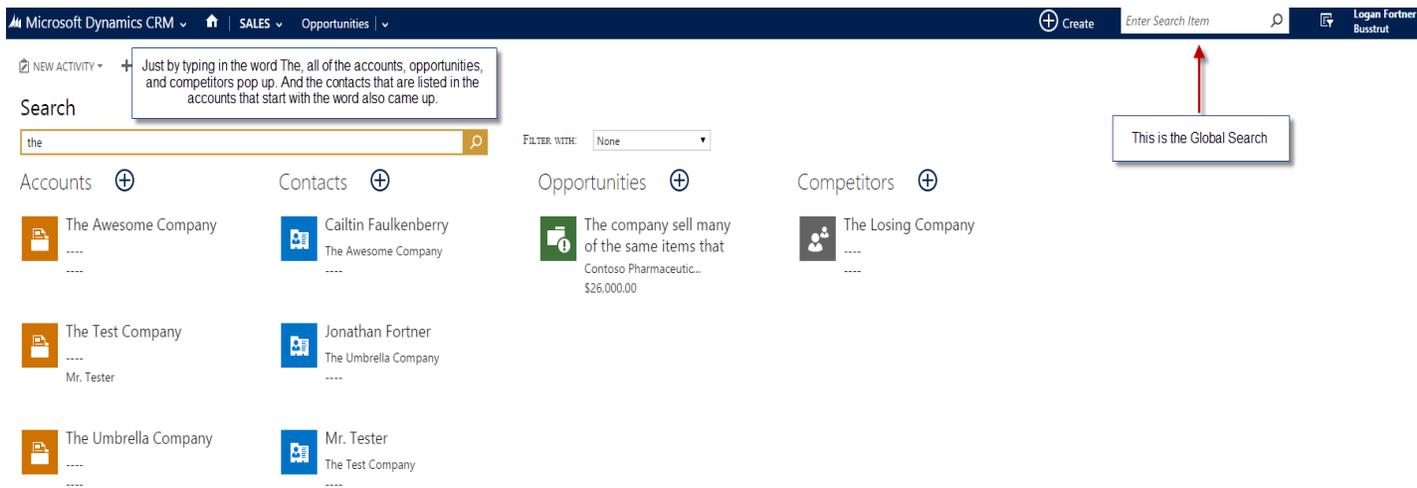


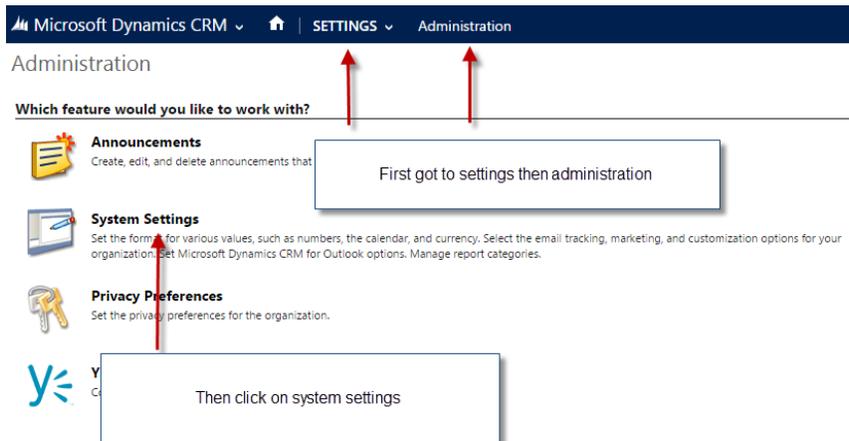
Microsoft Dynamics CRM 2015 - How To Enhance Global Search by Adding/Removing New Entities

The global search is a great tool for looking up information in a fast and efficient way. Just type in a word and the global search will pull up every entity that is attached to that word. An entity is an account, contact, lead, opportunity, and ext. In the example below, I typed in the word “the” and it pulled up everything that started with and linked to the word “the”.



But the global search is limited because it only looks up the entities it is told to. Sometimes you want a more widespread search or sometimes you want a very specific search. The best way to utilize global search to look up exactly what you want is to add the entities you want and exclude the ones you don't want. Just follow these steps to learn how to do this. (Note: You are limited to looking up ten entities).

1. First go to settings and Administration. Then click on system settings.



- Once the system settings comes up, scroll down and click on select entries for search.

System Settings

Set system-level settings for Microsoft Dynamics CRM.

General | Calendar | Formats | Auditing | Email | Marketing | Customization | Outlook | Reporting | Goals | Sales

Select the default save option for forms
 Enable auto save on all forms Yes No

Set the IM presence option
 Enable presence for the system Yes No

Set the full-name format
 Name Format

Set the currency precision that is used for pricing throughout the system
 Pricing Decimal Precision

Set whether reassigned records are shared with the original owner
 Share reassigned records with original owner

Set blocked file extensions for attachments

Set the currency display option
 Display currencies by using

Set up Quick Find
 Enable Quick Find record limits Yes No
 Select entities for search

Scroll down to find Set up Quick Find, then click on select

- Highlight all of the entities in the available entities that you want the global search to use. Then click add. If you want to remove any entities, highlight what you want to remove on the Selected Entities section. Then click remove. You can also rearranged them by highlighting one entity and clicking move up or down.

File | Save and Close | Help

Set up Multi-Entity Quick Find for Default Search
 You can include up to 10 entities in a multi-entity Quick Find. Most entities are included by default. The order results are displayed.

| Available Entities | Selected Entities |
|--------------------|-------------------|
| Account Number | Account |
| Address | Contact |
| AN Testing | Lead |
| Anonymous Visitor | Opportunity |
| Appointment | User |
| Article | Competitor |
| Article Text | Activity |
| Auto Number | |
| Broadband | |
| Broadband | |
| Bulk Text | |
| Business | |
| Call History | |
| Campaign | |
| Campaign Activity | |
| Campaign Response | |
| Candidate | |
| Capture Request | |
| Captured Contact | |
| Case | |
| Case Creation Rule | |

Then click add

First Highlight what you want to add

If you want to remove an entitie highlight the entities

Then click the remove button

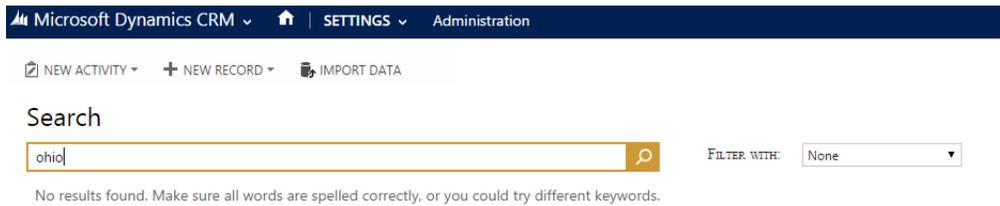
An example of this could be that you want to be able to quick search your goals to see where you are at with certain goals you have set. This is the exact same search as the example provided earlier but with the goal entity added. Now any goal with the key word pops up along with everything else.

The screenshot shows the Microsoft Dynamics CRM interface with a search bar containing the text "the". The search results are displayed in a grid format across five categories: Accounts, Contacts, Opportunities, Competitors, and Goals. Each category has a plus sign icon to expand it. The search results are as follows:

| Category | Item Name | Details |
|---------------|--|--|
| Accounts | The Awesome Company | |
| Accounts | The Test Company | Mr. Tester |
| Accounts | The Umbrella Company | |
| Contacts | Caitlin Faulkenberry | The Awesome Company |
| Contacts | Jonathan Fortner | The Umbrella Company |
| Contacts | Mr. Tester | The Test Company |
| Opportunities | The company sell many of the same items that | Contoso Pharmaceutic... \$26,000.00 |
| Competitors | The Losing Company | |
| Goals | the awesome company | Logan Fortner Quarter 1 |

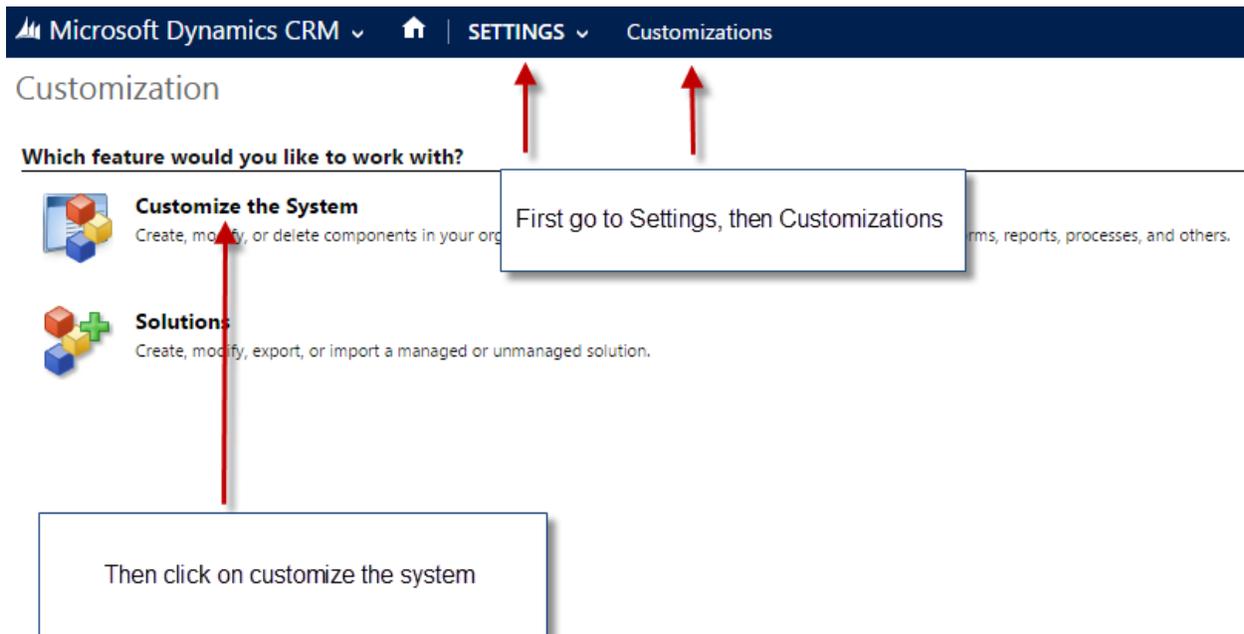
Enhance the Global Search By Adding/Removing Fields

Sometimes the global search will look for information in the entity you want it to but will not look deep enough to find exactly what you are looking for. This usually happens because the global search is not looking in the specific field in that entity that you would prefer it to look in. By adding fields, you really can fine tune exactly what the global search will look for. Just follow the steps below to learn how to add fields in a specific entity to the global search. Reminder, the more fields you have the search look for, the longer the search will take. For my example, I want to be able to global search a state and see every contact who lives in that state. Let's say I global search for "Ohio" and I get this.



By adding the specific field I need so I can accomplish my goal.

1. First go to settings and customizations. Then click on customize the system.



- Then click on entities. This will open up all of the entities that you can customize. Click on the entity that you want to edit, in this example I will be clicking on contact. Once you click on the entity, you want to click on view. Then scroll down until you find quick find active contacts. Quick find means global search. Before you click it make sure the customize section for this is true or else you will not be able to customize this entity. If it is true then click on it.

File Publish All Customizations

Contact Views

olution Default Solution

View: All Active Views

Components

- Entities
 - Account
 - Activity
 - Address
 - Appointment
 - Article
 - Article Template
 - Attachment
 - Business Unit
 - Campaign
 - Campaign Activity
 - Campaign Response
 - Case
 - Case Creation Rule
 - Case Creation Rule ...
 - Case Resolution
 - Competitor
 - Competitor Address
 - Connection
 - Connection Role
 - Contact
 - Forms
 - Views
 - Charts
 - Fields
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationshi...
 - Messages
 - Business Rules
 - Hierarchy Setti...

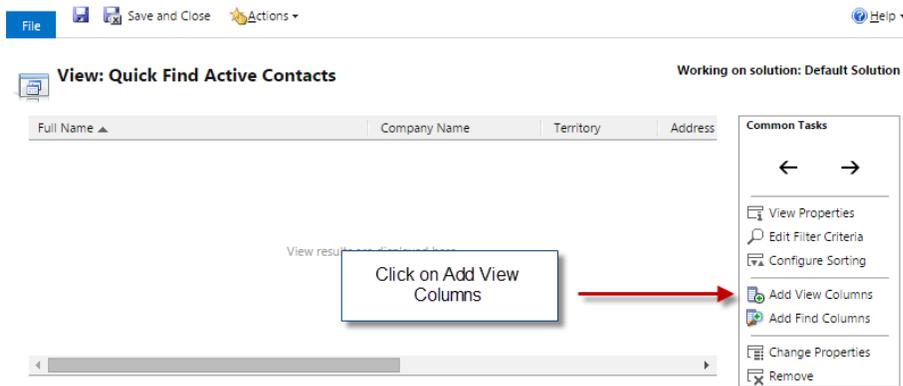
| View | State | Customizable | Descrip |
|---|--------------------|--------------|---------|
| Active Contacts Subgrid View | Public View | Managed | True |
| Contact Associated View | Associated View | Managed | True |
| Contact List Members View | Associated View | Managed | True |
| Contacts Advanced Find View | Advanced Find View | Managed | True |
| Contacts Being Followed | Public View | Unmanaged | True |
| Contacts BulkOperation View | Associated View | Managed | True |
| Contacts I Follow | Public View | Unmanaged | True |
| Contacts Lookup View | Lookup View | Managed | True |
| Contacts: Influenced Deals That We ... | Public View | Managed | True |
| Contacts: No Campaign Activities in ... | Public View | Managed | True |
| Contacts: No Orders in Last 6 Months | Public View | Managed | True |
| Quick Find Active Contacts | Quick Find view | Managed | True |

First click on entities

Next, in the entity that you want to edit, click on view

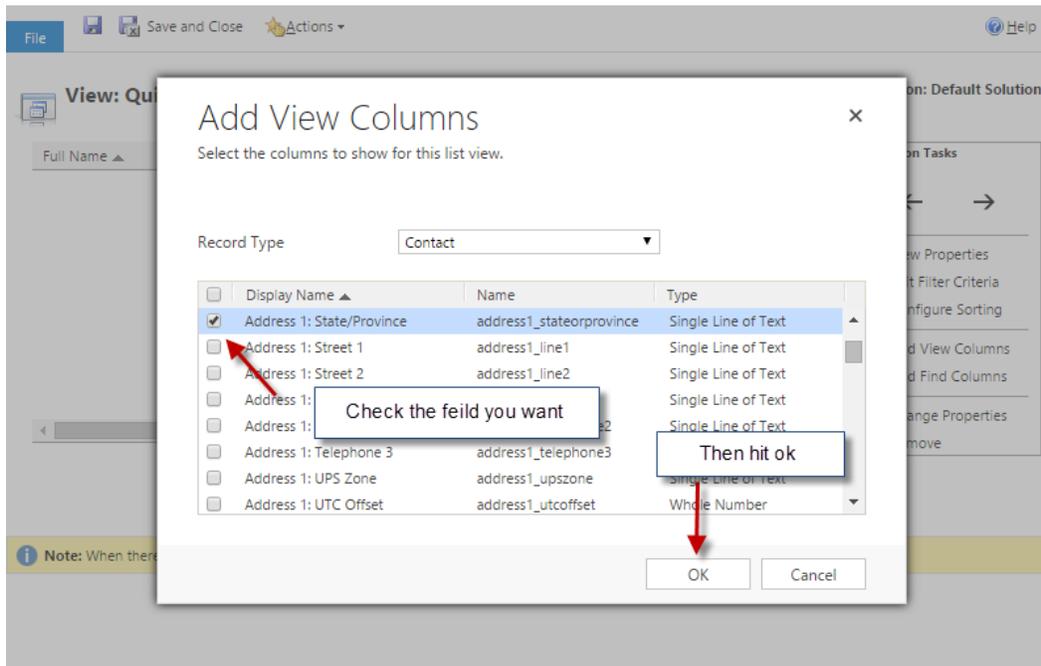
Last click on Quick Find

3. A new window will pop up. Find and click on add view columns.



Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.

4. Another window will pop up. This is where you can check what fields you want the global search to look in for this specific entity. Once you are done selecting what you want, click ok. For this example I check address 1: State.

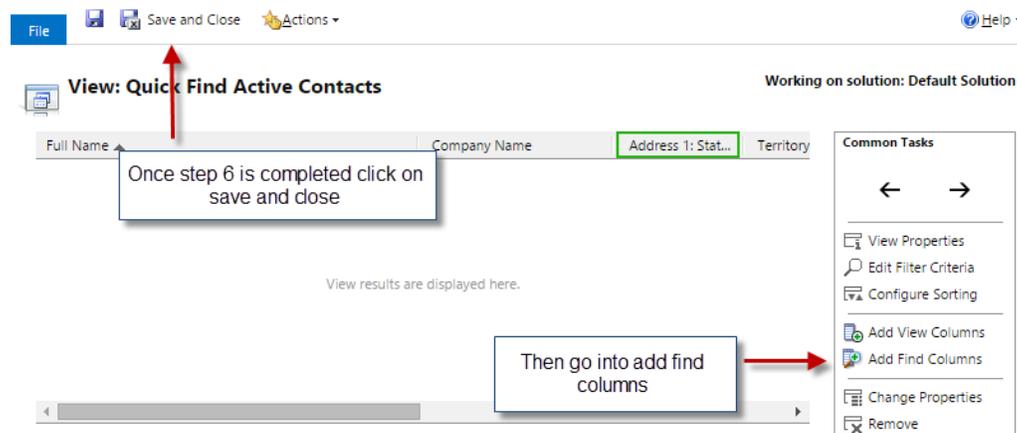


5. The global search will only look in the first three fields so you have to move the field that you just add to one of the first three spots. Click on the field you just added and use the arrows under common tasks to move it.

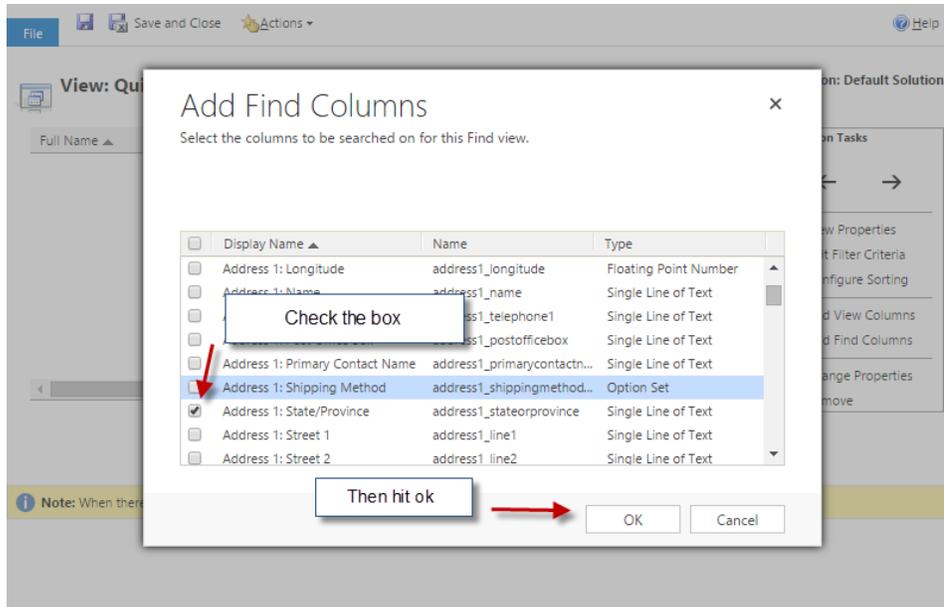


Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.

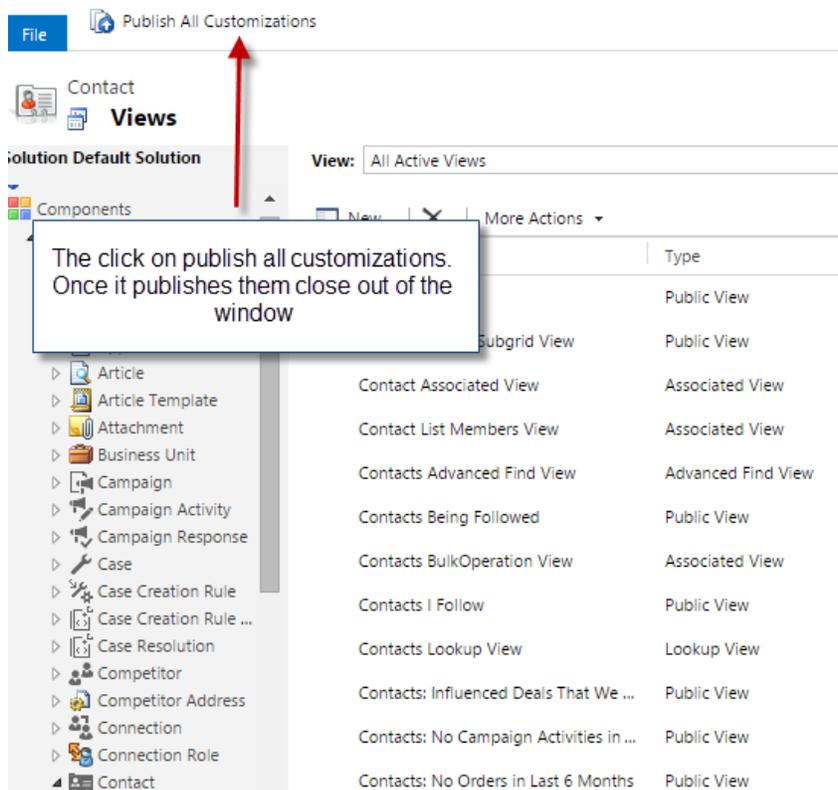
6. The next step is to go into add find columns. That will bring up a similar pop up like the view columns. Again check the field you would like to add and hit ok. Once you have completed steps 5 and 6 click on save and close.



Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.



- Then click on publish all customizations. A small pop up window will appear saying publishing. Once it goes away you can exit out of this screen.



- Now your global search is find tuned to do exactly what you want. In my example, when I type Ohio into the global search, it brings up every contact that is located in Ohio.

NEW ACTIVITY | NEW RECORD | IMPORT DATA

Search

Contacts (+)

 Caitlin Faulkenberry
The Awesome Company
Ohio

 Jonathan Fortner
The Umbrella Company
ohio

 Patrick Chantharangsy
Nike
ohio

And that is how to refine your global search to get exactly what you want.

Affiliated, Microsoft Dynamics CRM Implementation & Support, www.aresgrp.com