



## Advanced Find

Dynamics CRM provides Advanced Find to allow customers to query data in a friendly user interface. The searches can be saved and shared as dynamic personal views of system data. The results can be exported to EXCEL for further analysis or reporting. Advanced Find results can also be exported to EXCEL templates which allow customers to preset formatting and formulas.

**COURSE OBJECTIVE:** To create Advanced Finds and organize columns for the desired results.

### **LESSON 1: Navigating and Defining the Advanced Find Toolbar**

- Task 1: Show: Query, Saved Views, Results
- Task 2: View: New, Save, Save As, Edit Columns, Edit Properties
- Task 3: Query: Clear, Group And, Group Or, Details
- Task 4: Debug: Download Fetch XML

### **LESSON 2: Create Simple Advanced Finds**

- Task 1: Choosing the Right Look For
- Task 2: Selecting from Saved Views
- Task 3: Add criteria together to narrow results/Limitations of Search Fields
- Task 4: Understand how adding criteria can confuse results

### **LESSON 3: Use Edit Columns to customize Results**

- Task 1: Add columns from Look For Entity
- Task 2: Add columns from Related Entities/Limitations of Related Data
- Task 3: Organize Column Order

### **LESSON 4: Group criteria for more complex Queries**

- TASK 1: Using Or Criteria
- TASK 2: Grouping And
- TASK 3: Grouping Or

### **LESSON 5: Using Results**

- TASK 1: Sorting Results
- TASK 2: Saving and Sharing the Advanced Find as a View
- TASK 3: Export and Import/Excel Template
- TASK 4: Dynamic Excel Exports
- TASK 5: Select an Individual Record for Action
- TASK 6: Bulk Edit: Select Multiple Records for Action