

New Search functionality in MS Dynamics Student CRM



MS Dynamics Student CRM Flinders University

New Search Functionality in MS Dynamics Student CRM

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The new CRM Search bar will be available from Friday 11th December, 2020. Some of the features and instructions are described below.

'Office 365 like' Search bar

- The Search bar is similar to Office 365 applications and will always be displayed in the centre of MS Dynamics CRM Navigation Menu, top of the screen.
- The search results are displayed in a List view and Filters can be applied to narrow down the results.

Student CRM	✓ Search
\leftarrow 🛯 Save As $+$ New \vee $ imes$ Clear Defa	ault 🖑 Refresh All

Records and the Fields which are searched

- The search results are dependent upon the information typed in the Search bar. For example, searching for **assignment comment** will display results from Cases and an Email subject,
- Searching a phone number will display Contact records. The number must be typed as it appears in the Contact record usually without spaces.
- If any text searched exists in any of the fields below then these records will be displayed.

Records and Fields searched

- The table below explains the Records and some of the fields which can be searched.
- Search will locate information in most of the following record fields. Some fields can be filtered. Refer to **Filters** on Page 7.

Record	Fields
Contact	FAN
	First Name
	Middle Name
	Last Name
	Full Name
	Flinders / Default Email
	Home Phone
	Mobile Phone
	Preferred Name
	Student ID
Case	Case Number
	Case Title
	Customer
	Description (Works best with quotation marks around the text.)
Email	Subject
Opportunity	Opportunity Title
Organisation	Email address
	Organisation Name
	Organisation Number

Quotation marks ("")

• On occasions there are many more results than expected due to the in depth searching. If you are absolutely sure about the information to be searched, place quotation marks around the words to narrow down the search.

Recent searches are displayed

- Click in the Search bar.
- Recent searches are displayed.

Automatic suggestions are displayed

- Click in the Search bar and type the information.
- **DO NOT** press the Enter key.
- A drop down list of records is displayed when typing any information
- The drop down list content is dependent on the information typed.
- Clicking a record from the drop down list will open that record.



Display Search results

After typing the search information, pressing the **Enter** key displays the search results in the List view.

Search for Contact Record

- Type the first and last names in the Search bar and press the Enter key.
- The matching Contact record is displayed at the top of the Search results and similar names beneath.

Student CRM		♀ susan holton	
\leftarrow Search results			
Top results Conta	acts (847) Cases (55)	Opportunities (69)	Email Messages (!
💬 Did you find wha	t you were looking for?	Yes No	
Contacts			
Full Name	Student ID	FAN	Pi
Susan Holton			Si
Susan Hodges			Si
Susan Winton	790835	wint0011	
Susan Czernich			
Susan Robertson			
Susan Czernich			

Search for Student ID

- Type the Student ID and press the **Enter** key.
- The matching Contact record is displayed in the Search results.



Quotation marks ("")

- Typing any information in quotation marks narrows down the search results.
- Typing the first and last names in quotation marks and pressing the **Enter** key displays the Contact and Case information for the exact search in the Search results.

Student CRM	🔎 "susa	ın holton"	X	SA	NDBOX	Ø
\leftarrow Search results						
Top results Contacts (1)	Cases (1)					
💬 Did you find what you w	vere looking for? Yes No					
Contacts						
Full Name	Student ID	FAN	Preferred Given Name	Flinders/Default Email	Home Phone	
Susan Holton			Sue	susan.holton@flinders		
Show more						
Cases						
Case Title	Case Number	Customer	Owner	Area	Created On	
Printing information	CAS-46560-Z4S3V0	Susan Holton	Admissions		27/11/2020 4:08	B PM
Show more						

Navigate the Search results List view

This will depend on the selected Search results view and the example below is Contacts. The same applies if Cases has been selected.

Open the Contact Record

- Click in the Search bar and type the information to be searched. Press the **Enter** key.
- Click on the Search results **Contacts** tab. This reduces the amount of information in the list.
- Click on the Full Name to open the Contact record.
- If needed, click the Go Back arrow to navigate back to the Search results.

\leftarrow Search r	results			
Top results	Contacts (846)	Cases	(55)	Opportunities
Showing 30 r Name, FAN, E	results based on f 3usiness Phone, B	ields: Stu irthday	dent ID	, Preferred Give
Full Name		Stu	FAN	Preferre
Susan Holt	on			Sue

Filters

•

Filtering can be applied to narrow down the search results. The options available in the Filters pane are dependant upon which Search results tab is selected. Click in the square to the left of the Filters option to select and again to deselect. Click **Clear all** to clear all searches.

Filtering on Contacts

- Click in the Search bar and type the information to be searched. Press the Enter key.
- Click on the Search results Contacts tab.

	← Search resu	ılts		
	Top results	ontacts (846)	Cases (55)	Opportunities
The followi Domesi Studeni Owner. Modifie Created One v One v One v Todav	Iop results ing fields can be filt tic / International. t Status. d On (From Oldest d On (From Oldest st year ago month ago week ago day ago y	to Latest). to Latest).	Filters Clear al Domestic/I Domestic/I Domestic/I Domestic/I Internation Student State Prospecies Current Not Current Not Current Not Current Not Current Not Current Not Current Owner W Wer Owner W Wer Owner W Not Current Not Current Not Current Not Current Show more Modified C From To	Opportunities I International tic (75) tional (50) atus atus ct (143) c(29) rrent (17) Method of Contact 01) ndy James (Me) (3) 4 UAT Service Acc (116) mi Service (63) nu Manuel (6) 4 PROD Service Acco (2) on Oldest Latest
			created Of	•

Filtering on Cases

- Click in the Search bar and type the information to be searched. Press the Enter key.
- Click on the Search results Cases tab.

\leftarrow Search r	esults		
Top results	Contacts (846)	Cases (55)	Opportunities

- Filters pane-click in the box to the left of the Contact name. Show more may need to be clicked to expand the list. OR
- Click on each of the names under **Filters**, **Customer** to select them and display the Cases in a list view.

\leftarrow Search results								Filters
Top results Contacts (847) Cases (1)	pportunities (69) Em	ail Messages (5)	Organisatio	ns (1)				
Showing 1 results based on fice and the state of the stat	Freated On, Case Title, Ca	ase Number						Susan Holton (1)
Case Title	Case Number	Customer	Owner	Area	Created	Status Re	Origin	
Printing information	CAS-46560-Z4S3V0	Susan Holt	Admissions		27/11/202	Resolved	Face To Face	-

 Only the Cases for the selected Contact Record/s are displayed and the field names have changed appropriately.

\leftarrow Search results					
Top results Contacts	(849) Opportunities	(68)	Cases (1)	Org	anisations (2)
Showing 1 results based	on fields: Description, (Created	On, Case Tit	le, Ca	se Number
Case Title		Case	Number		Customer
Printing information		CAS-4	46560-Z4S3\	vo	Susan Holt

Filtering on Emails

- "Enquiry form" was searched with the quotation marks to narrow down the search. This is the information in the Email subject.
- Click on the Search results Email Messages tab.

Student CRM	$\mathcal P$ "enquiry form"
\leftarrow Search results	
Top results Cases (4412)	Email Messages (58)

 The following fields can be filt Regarding 	The following fields can be filtered:		Filters		
 Status Reason. 	 Status Reason. 				
 Owner. Modified On (From Oldest 	to Latest).	Regarding			
 Created On (From Oldest) Oldest 	to Latest).	🔲 🕑 Printin	g information (4)		
One year ago		Status Reasor	n		
One year ago		Sent (2)			
One month ago		Received ((2)		
One week ago		Owner			
One day ago		🗌 🐼 Admissions (4)			
Today		Modified On			
		From	Oldest 🗸		
		То	Latest 🗸		
		Created On			
		From	Oldest 🗸		
		То	Latest \checkmark		

Filtering Case – Created On date

This is helpful to locate Cases created between a length of time.

- Click in the Search bar and type the name of the Contact. Press the Enter key.
- Click on the Search results Cases tab.
- Filters Created On.
 - From: Click on One month ago.
 - **To**: Click on Today.
- The Cases meeting the search and filter conditions are displayed.

Student CRM	♀ susan holton		×			SANDB	OX & () + 7	+ ¢ ©	? (W)	
← Search results						Filters	Filters				
Top results Contacts (847) Cases (1)	Opportunities (69) Em	ail Messages (5)	Organisatio	ns (1)				🔀 Clear all			
Showing 1 results based on fields: Description, Created On, Case Title, Case Number							Customer	Customer			
Case Title	Case Number	Customer	Owner	Area	Created	Status Re	Origin	Susa	n Holton (1)		
Printing information	CAS-46560-Z4S3V0	Susan Holt	Admissions		27/11/202	Re-opened	Face To Face	Owner	issions (1)		
								& Adm	13310113 (1)		
								Modified O	Modified On		
								From	Oldest	\sim	
								То	Latest	\sim	
								Created On	Created On Clear		
								From	One month ag	lo 🗸	
								То	Latest	\sim	

Version Control

Version Number	Version Date	Changes
1.0	2020	Original Notes. Uploaded to FLO.