DYNAMICS 365 ENHANCED FILTERING

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But first a little bit about us……

Microsoft Partner
Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions

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- Dynamics 365 Cloud Customer Relationship Management – Silver 2012 - present
- 15 years experience working with small to mid-sized businesses to modernize sales, marketing, and customer service
- Work with companies throughout the US and Canada
- Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform
- Premier provider of low-cost fixed fee support services for Dynamics 365, Power Apps, and Power Automate

APRIL 2020 WAVE SEARCH ENHANCEMENTS

- View lists now feature personal views at the top
  - Change your default view using the pin
- Easier filtering from within the view pane - The Grid filter understands the underlying data type
- Multiple sorting options
- Filtering on Lookups – Auto-suggest as you type
- Filter on values in option sets
- Filtering on date fields – between 2 dates
  - More filtering options than before
- Save your filtered views as a personal view to easily reuse

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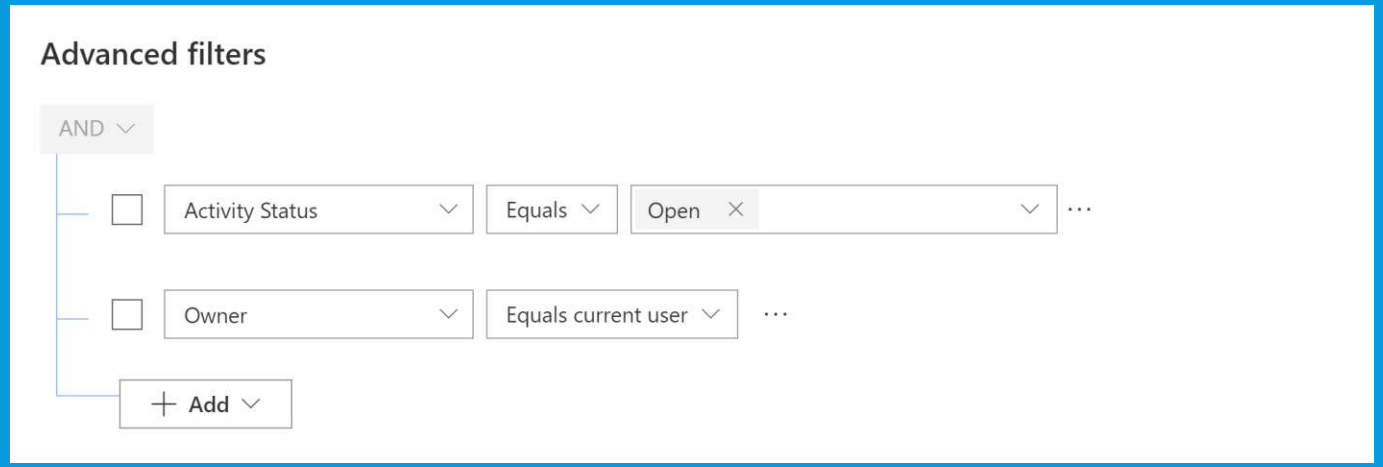
ADVANCED FILTERING VS ADVANCED FIND

- Advanced Find funnel button still exists in Ribbon
- Advanced Filter Button is next to the search box in the view
- Advanced Filters are a new way to perform advanced Finds within the context of the current view
- Allow users to modify the current view with more filtering
- Search related entities where "Does not Contain" condition exists



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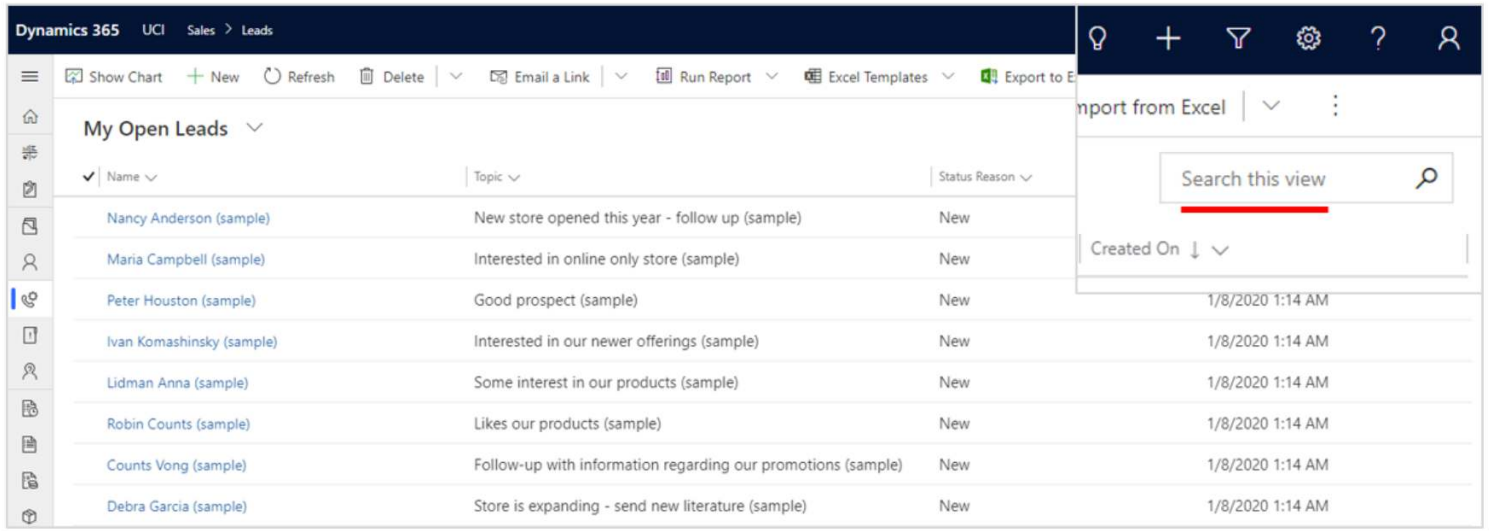
SEARCHING WITHIN GRIDS

- Before the recent update, searching in a grid results would be shown in another view (Quick Find View) So resulting columns would not be the same as the view you search from
- Also, Search box would show the results based on the Quick Find default Query. Now results show in the context of the current view that you are in.



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ADVANCED FIND AND ENHANCED FILTERS

A few good reasons to keep using Advanced Finds

- Searching for data in entities not on the site map
- To add or remove columns from a view.
- To share or unshare a personal view with other users
- Deleting obsolete personal views

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Next steps and resources

- Contact at enCloud9 with any questions
- sales@encloud9.com

- Sign up for our August webinar with our partner iPayments – **Case Management in Dynamics 365**
  - **A walkthrough of Customer Service Hub**

Resources

enCloud9 Blog
https://www.encloud9.com/blog/user-experience-made-easier-with-enhanced-filtering/

Microsoft Docs

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