

# DYNAMICS 365 ENHANCED FILTERING

Presented by Brian Begley - [bbegley@encloudg.com](mailto:bbegley@encloudg.com)

# But first a little bit about us.....

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



- 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

# 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

## Advanced filters

AND ▾

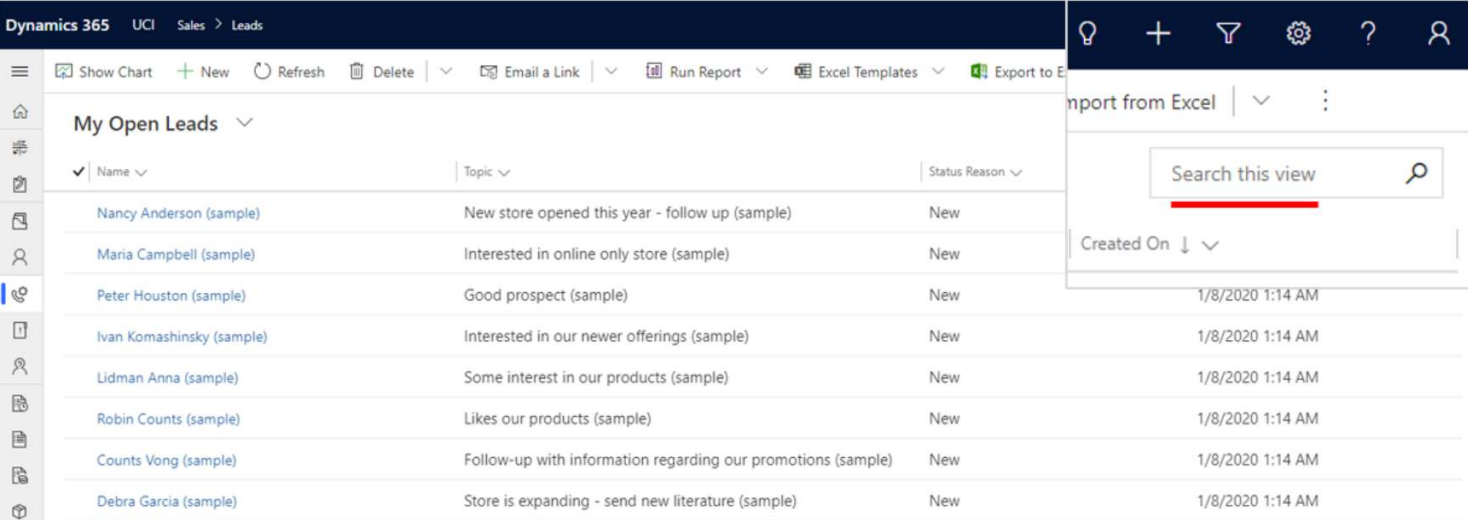
Activity Status ▾ Equals ▾ Open × ▾ ...

Owner ▾ Equals current user ▾ ...

+ Add ▾

# 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.



The screenshot shows the Dynamics 365 Sales Leads interface. The main view is 'My Open Leads' with columns for Name, Topic, Status Reason, and Created On. A search overlay is visible, showing a search box labeled 'Search this view' and a dropdown menu with 'Created On' selected. The search results are displayed in the context of the current view.

Name	Topic	Status Reason	Created On
Nancy Anderson (sample)	New store opened this year - follow up (sample)	New	1/8/2020 1:14 AM
Maria Campbell (sample)	Interested in online only store (sample)	New	1/8/2020 1:14 AM
Peter Houston (sample)	Good prospect (sample)	New	1/8/2020 1:14 AM
Ivan Komashinsky (sample)	Interested in our newer offerings (sample)	New	1/8/2020 1:14 AM
Lidman Anna (sample)	Some interest in our products (sample)	New	1/8/2020 1:14 AM
Robin Counts (sample)	Likes our products (sample)	New	1/8/2020 1:14 AM
Counts Vong (sample)	Follow-up with information regarding our promotions (sample)	New	1/8/2020 1:14 AM
Debra Garcia (sample)	Store is expanding - send new literature (sample)	New	1/8/2020 1:14 AM

# 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

# Next steps and resources

- Contact at enCloud9 with any questions
- [sales@encloud9.com](mailto: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