



CRM Partners Quick Find

Microsoft Dynamics 365 offers a variety of search options for users, including global search and advanced search. However, when you are dealing with large data sets, searches become time-consuming and complex. The Quick Find module allows Dynamics 365 users to easily find the correct records by providing context-dependent search forms. These search forms are fully configurable and therefore fully in line with the process. Do you want to look up a customer based on zip code and house number? Or would you rather like to search by policy number? With Quick Find you find the right records in an instant.

Boost your user adoption

Single search fields often result in too many hits (you may have dozens of contacts named 'smith'). Separate search fields instead deliver an optimized search experience. This is crucial, especially when you are on the phone.

Not found? Simply create a new record right from the search form, taking over your search values. This provides you a smooth experience for data entry. Boost your user adoption and start using Quick Find!

CRM Partners

- ✓ Founded in 2005
- ✓ Part of Fellowmind
- ✓ 180 employees
- ✓ Over 250 customers

Microsoft Dynamics 365

- ✓ Market leader in CRM
- ✓ Integrates effortlessly with other Microsoft products
- ✓ Customizable & flexible

Design your own search forms

Search forms must fit seamlessly with user processes. That is why Quick Find allows configuration of your own search fields and result views. Its extensive possibilities include searching in related entities (e.g. find customer based on order number) and formatting search values before execution of search requests.

Fill lookup fields using Quick Find

Selecting records in lookup fields can be even more difficult, as the search options are very limited here. With Quick Find you can use the same search forms to select values for lookup fields. Note that you can prefill search fields based on data from the current record form.

Key features

- Map search fields to multiple entity fields
- Search in multiple entities
- Search in related entities
- Use Quick Find to fill lookup fields
- Create new record based on search values

The screenshot displays a 'Contact Search' window with the following search criteria:

- Last Name: smith
- City: london

Other search fields include Postal Code, House Number, Relation Number, Phone, Email, and Birthdate.

Contact Results:

Full Name	Company Name	Address 1: City	Address 1: Phone	Business Phone	Email
Amena Smith	Non Lacinia Inc.	London		0500 480060	amena.smith@nonlaciniainc.com
Hayley Smith	Donec Limited	London		(0114) 062 2864	hayley.smith@doneclimited.com
Murphy Smith	Natoque Penatibus Et Ltd	London		070 5150 2469	murphysmith@natoquepenatibu...

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Leads Results:

Name	Topic	Status Reason	Created On	Company Name
Smith, Yasir	Event attendance	New	15-1-2020 16:38	
Smith, Abraham	Whitepaper download	New	15-1-2020 16:38	
Smith, Amelia	Request for information	New	15-1-2020 16:38	
Smith, Coby	Whitepaper download	New	15-1-2020 16:38	

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