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Microsoft Dynamics 365

An Introductory Guide to Mastering Views

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Types of Views

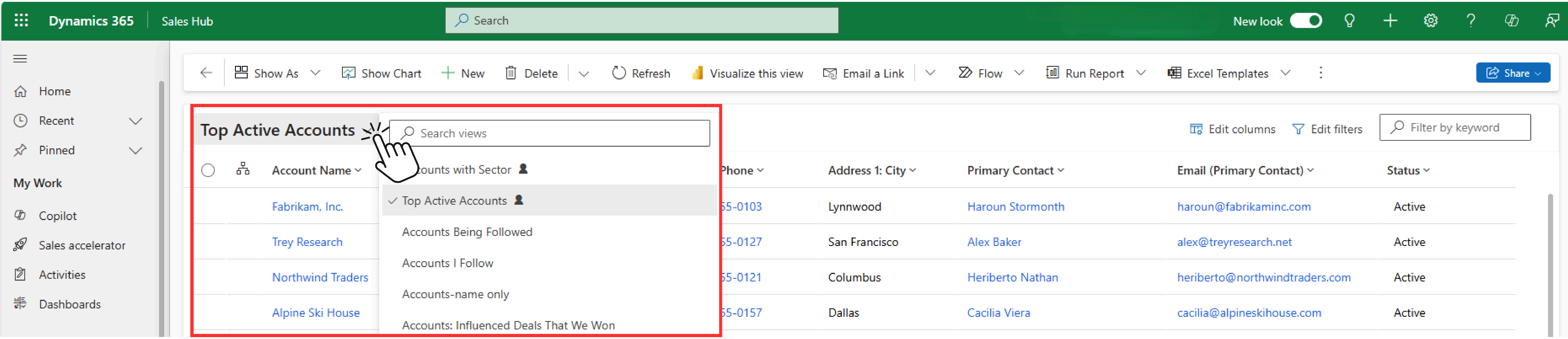
In Dynamics 365, views define how a list of records is displayed for each table, such as accounts, contacts, leads or cases.

Within read-only grids, views filter data into manageable lists, helping you quickly find the information you need.

There are two main types of views:

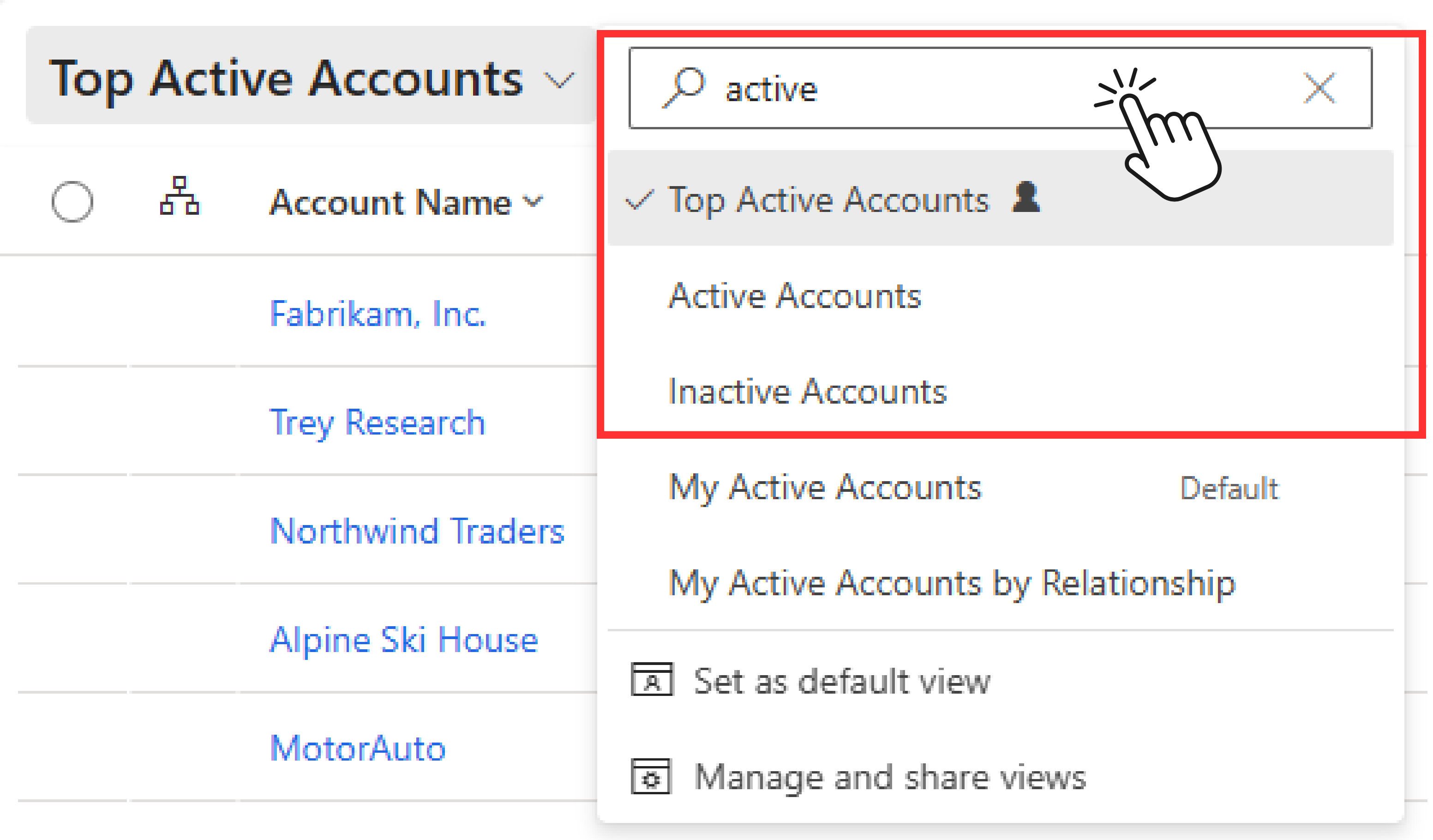
System views - views available all users managed by administrators.

Personal views - shareable views created by users.



Overview of a Read-Only Grid View

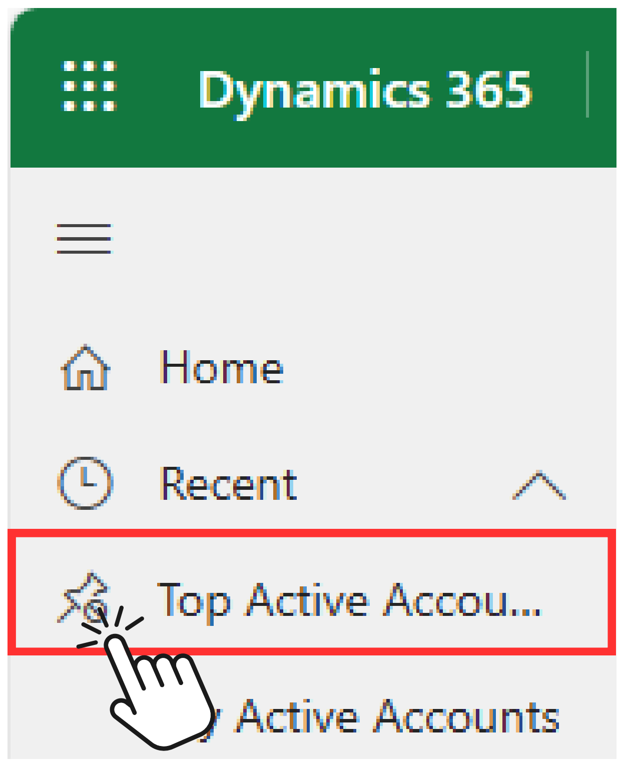
Selecting Views

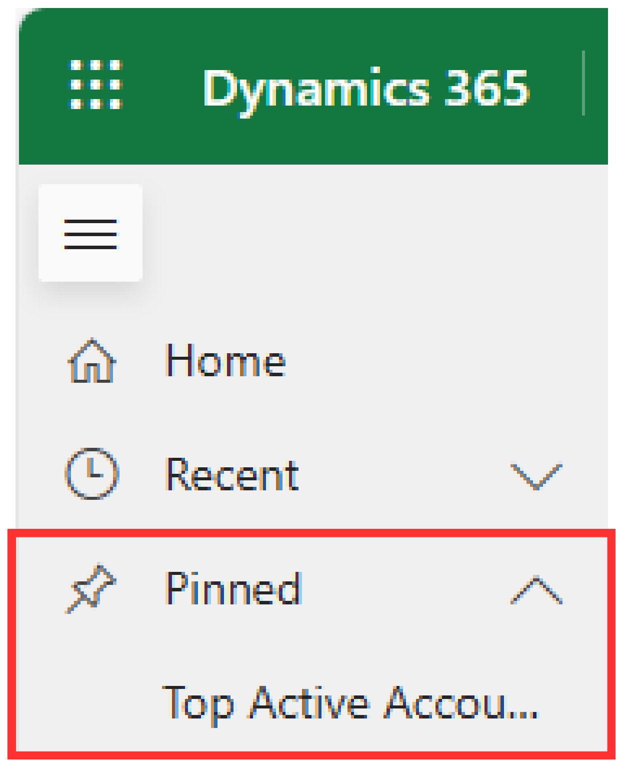


Each type of record can have multiple system views and personal views, often resulting in long lists.

To quickly find and select a view, use the search box to filter by keyword.

To quickly access the views you use most frequently, these can be pinned from recent list on the Dynamics 365 site map.





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Filtering Views

Quickly find rows within a grid view using a keyword search filter

Top Active Accounts* ⌵   Edit columns   Edit filters   alpine

		Account Name ↑ ⌵	Main Phone ⌵	Address 1: City ⌵	Primary Contact ⌵	Email (Primary Contact) ⌵
		Alpine Ski House	281-555-0157	Dallas	Cacilia Viera	cacilia@alpineskihouse.com
		Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com

The filter by keyword search uses a ‘begins with’ rule. If enabled by your administrator, you can also use an asterisk to search columns for keywords contained in the view.

Top Active Accounts* ⌵   Edit columns   Edit filters   *works*

		Account Name ↑ ⌵	Main Phone ⌵	Address 1: City ⌵	Primary Contact ⌵	Email (Primary Contact) ⌵
		Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com

Some columns in your view might not currently be enabled for quick find. Hover over the filter by keyword box to see which columns are indexed. If additional columns require quick find to be enabled, speak to your administrator.

Filter by keyword

Apply **begins with** filter on these columns:
Account Name
Account Number
Email
Main Phone
Other Phone

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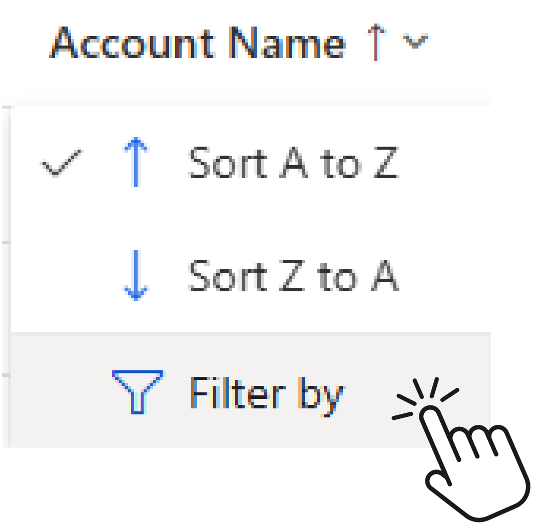
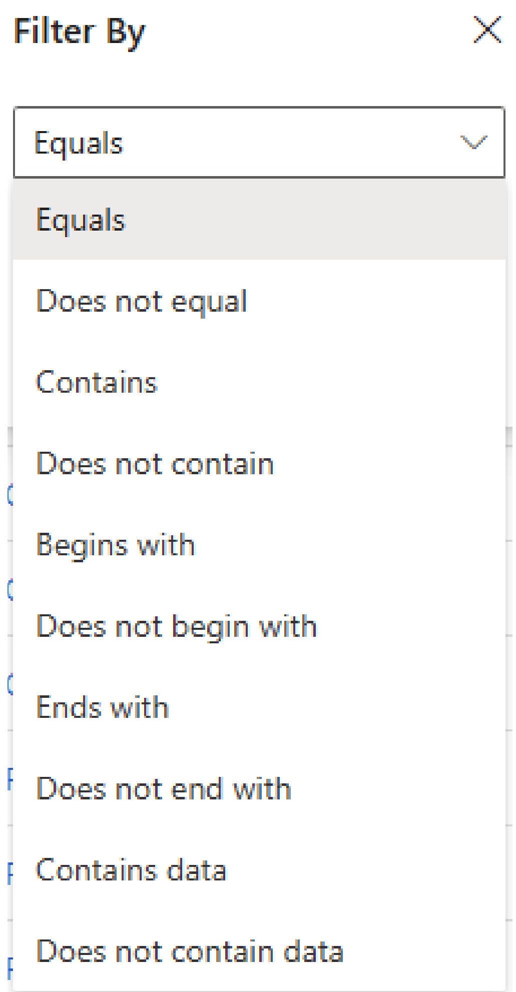
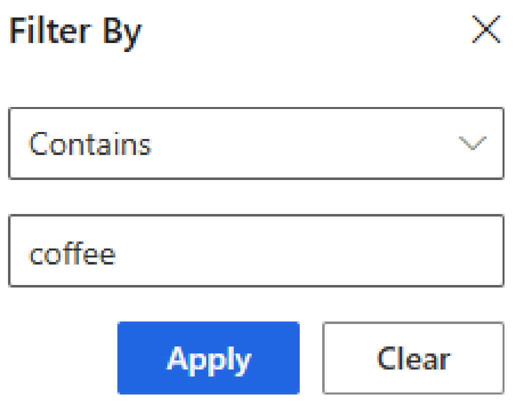
Filtering Views by Column

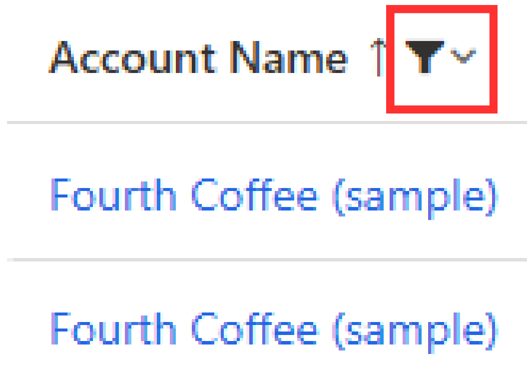
To refine a view, click a column and select ‘Filter by’ and enter a condition using query rules including ‘contains’, ‘does not equal’ and more.

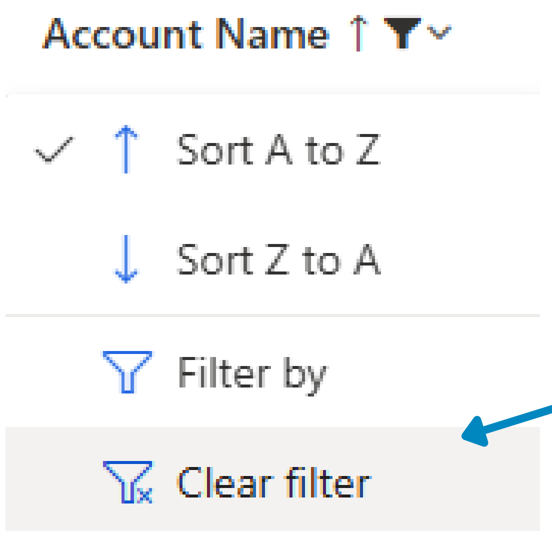






When a condition is applied, a filter icon appears alongside the column title.



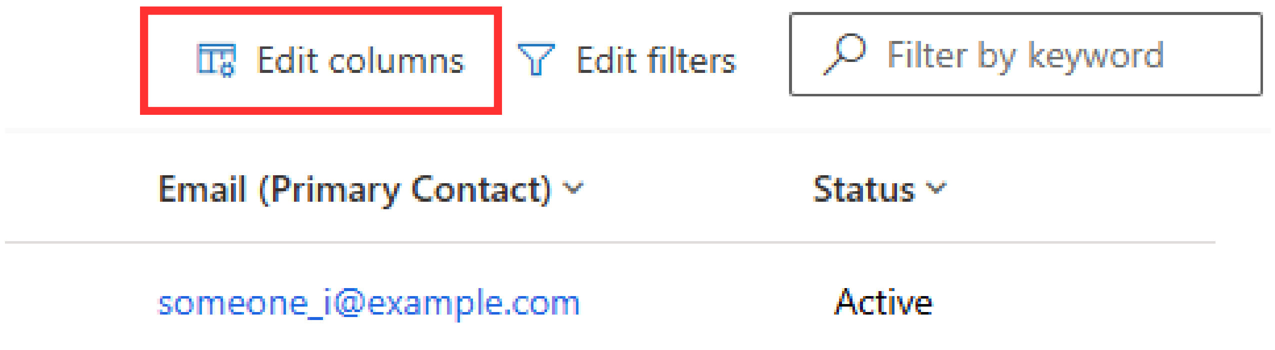


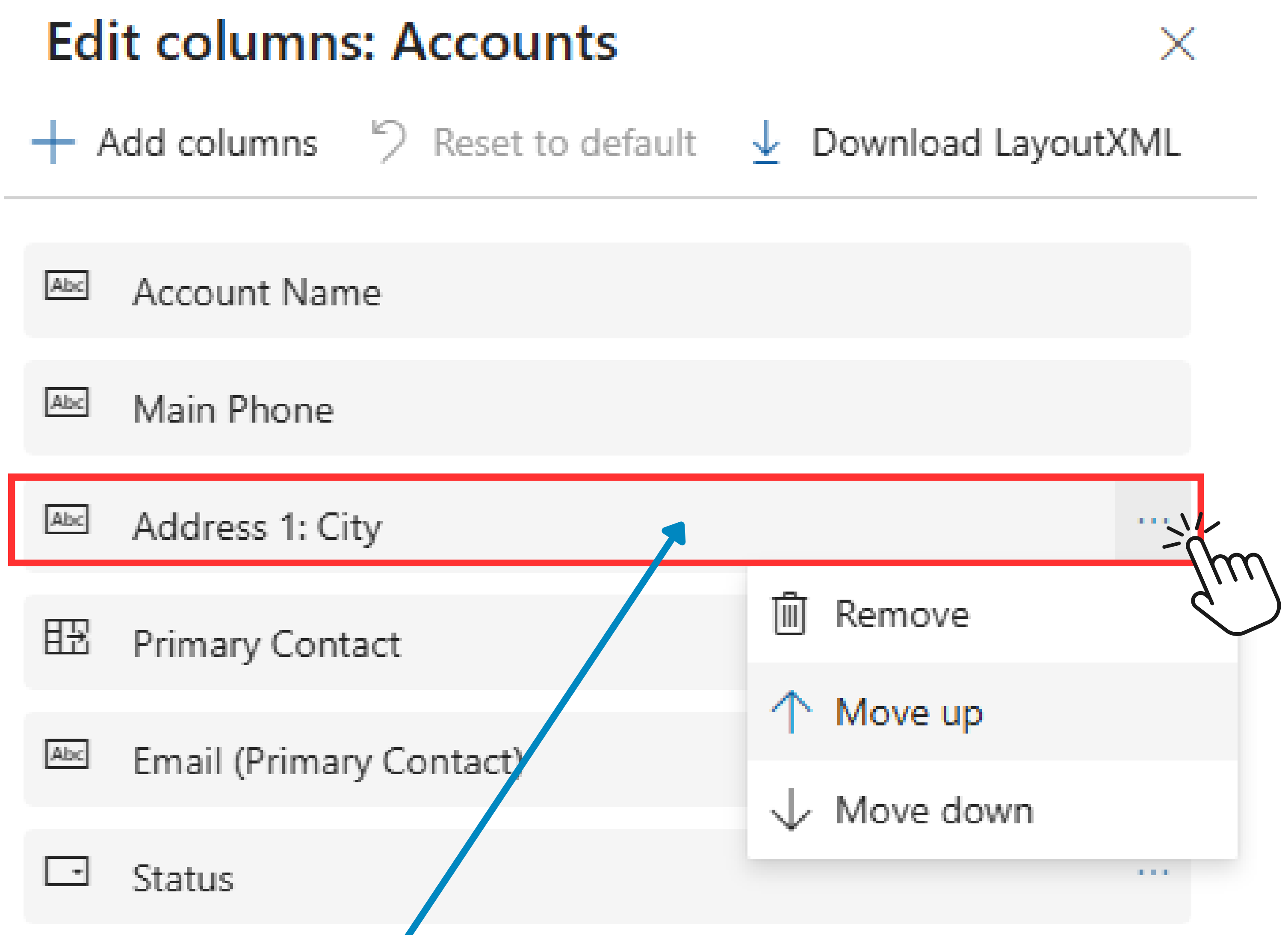
Click ‘Filter by’ to edit a condition or ‘Clear filter’ to reset the column.

Customising a View: Editing and Reordering Columns

To create a new Dynamics 365 view, start by customising an existing view.

Click ‘Edit columns’ to customise the columns shown in a view





- To reorder columns drag tiles or click the ellipsis to use the move up/down controls.
- Click ‘Remove’ for any unwanted columns.

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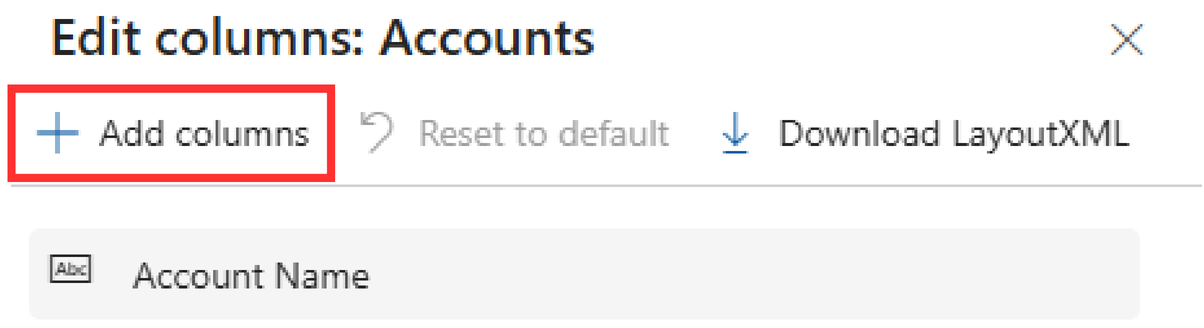
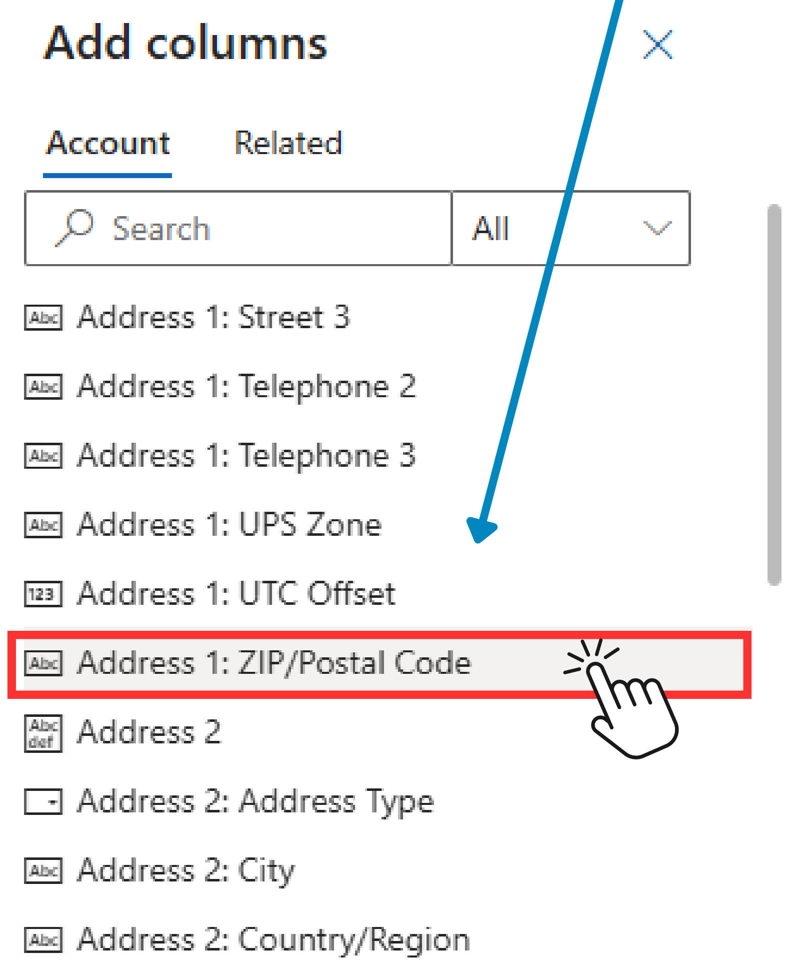
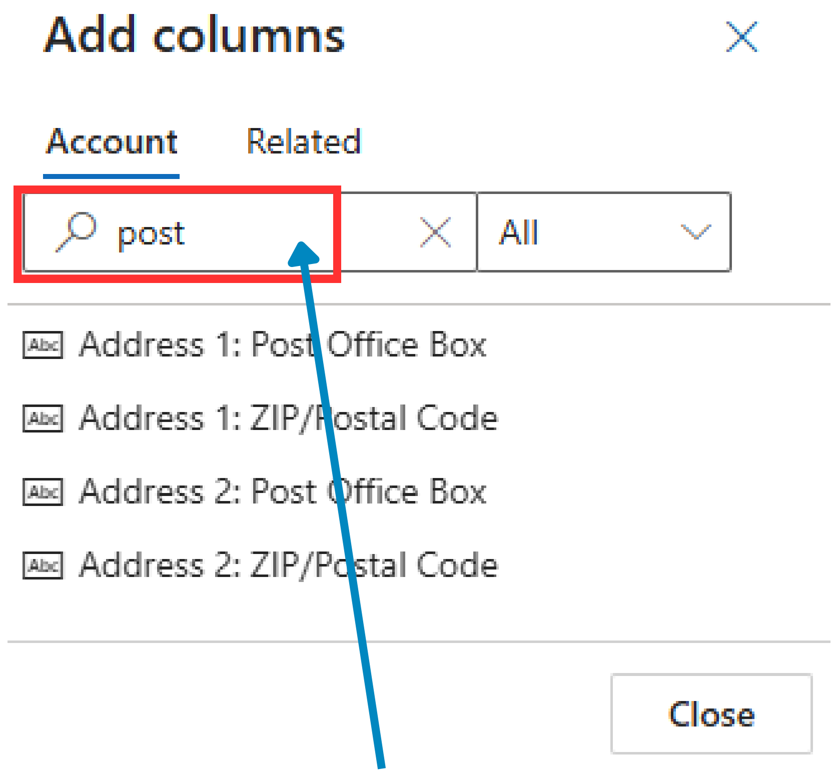
Customising a View: Adding Columns

Click ‘Add columns’ to customise a view with data from additional columns/fields on the selected table/entity. In this example, the post code field will be added to an Account view.



Scroll down the list to select the appropriate column(s).

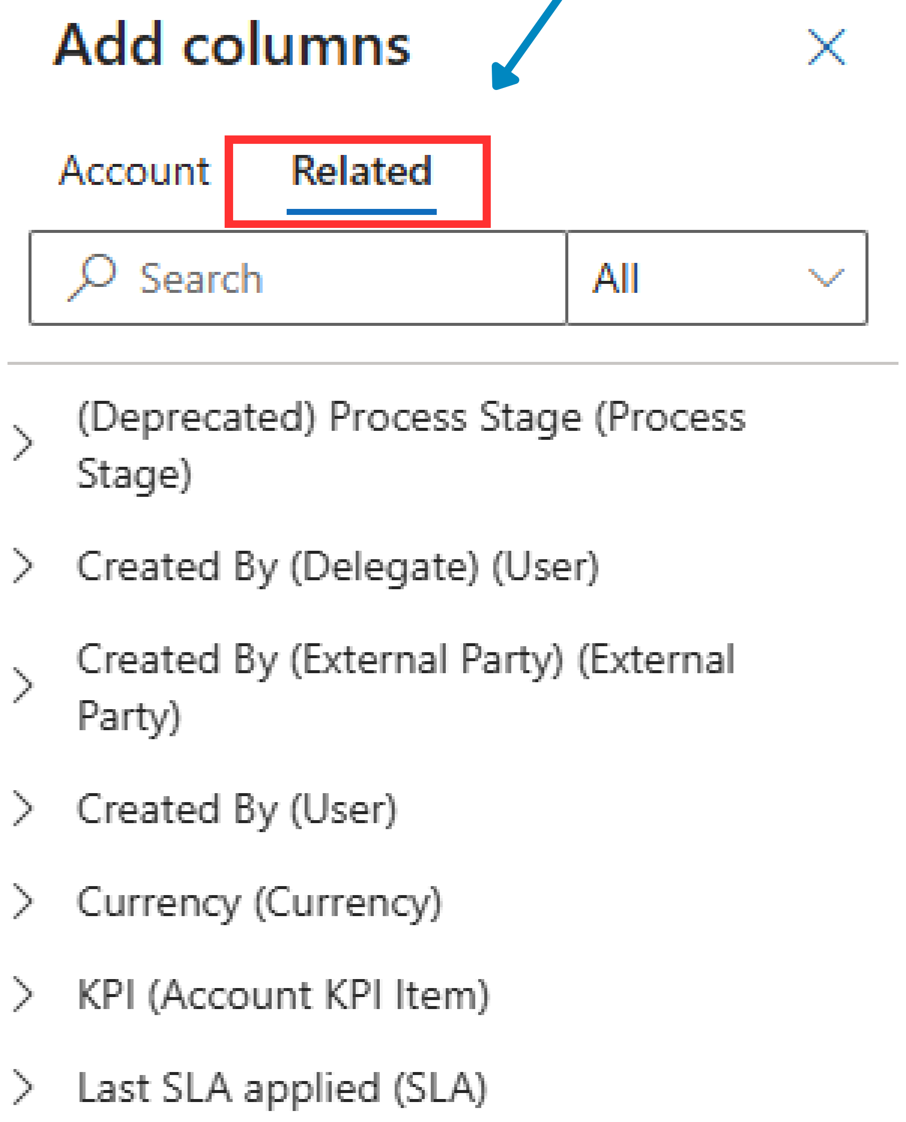




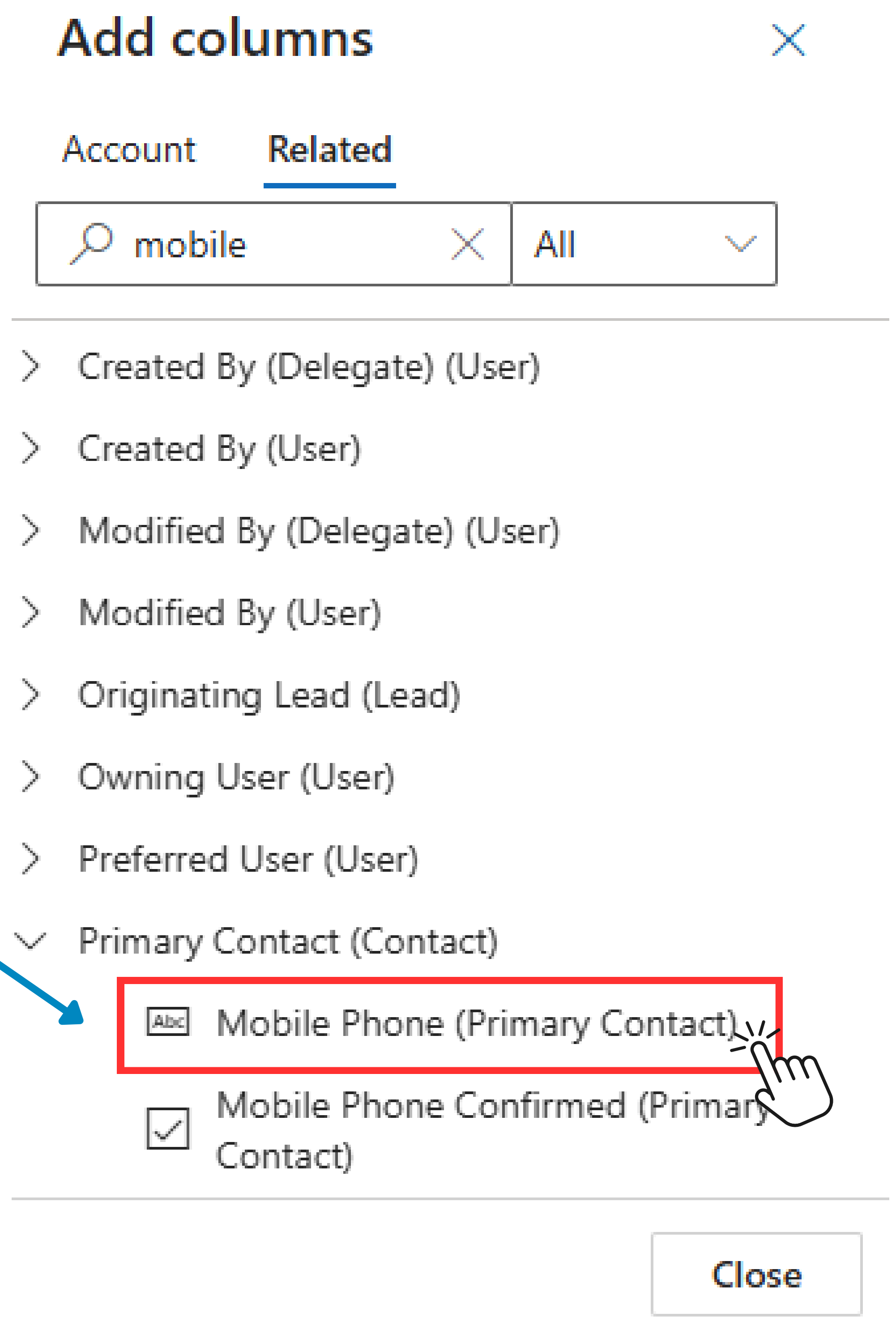
Or use a keyword search to quickly find the relevant column

Customising a View: Adding Columns from Related Tables

You can include columns from a related table to further personalise a view.

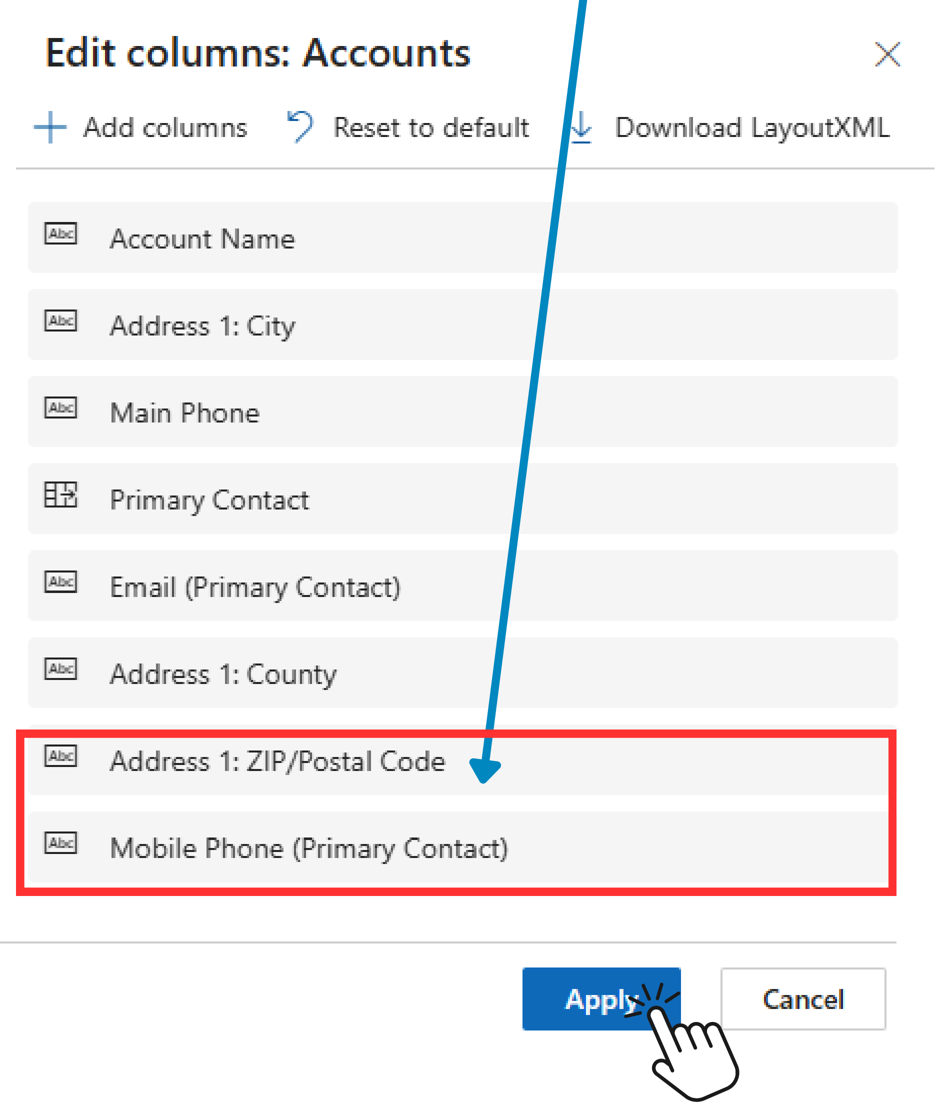


For this Account view, we'll also include the mobile phone number of the primary contact.

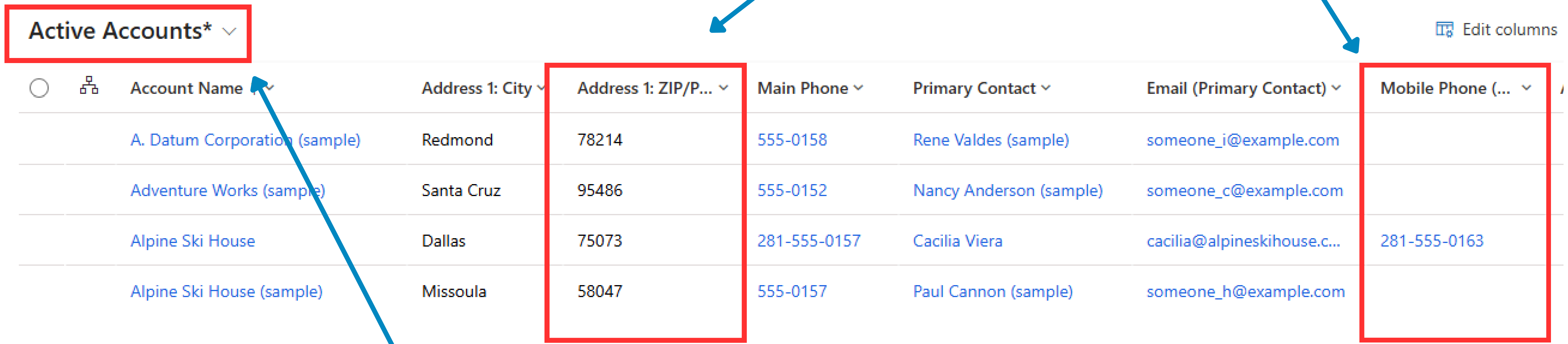


Customising a View: Applying Changes

Select the newly selected columns to reorder them in the view before applying the changes.

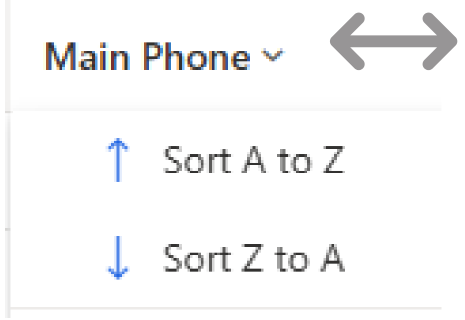


The view is updated to include the additional columns.



An asterisk appears after the view name, highlighting unsaved customisations to an existing view.

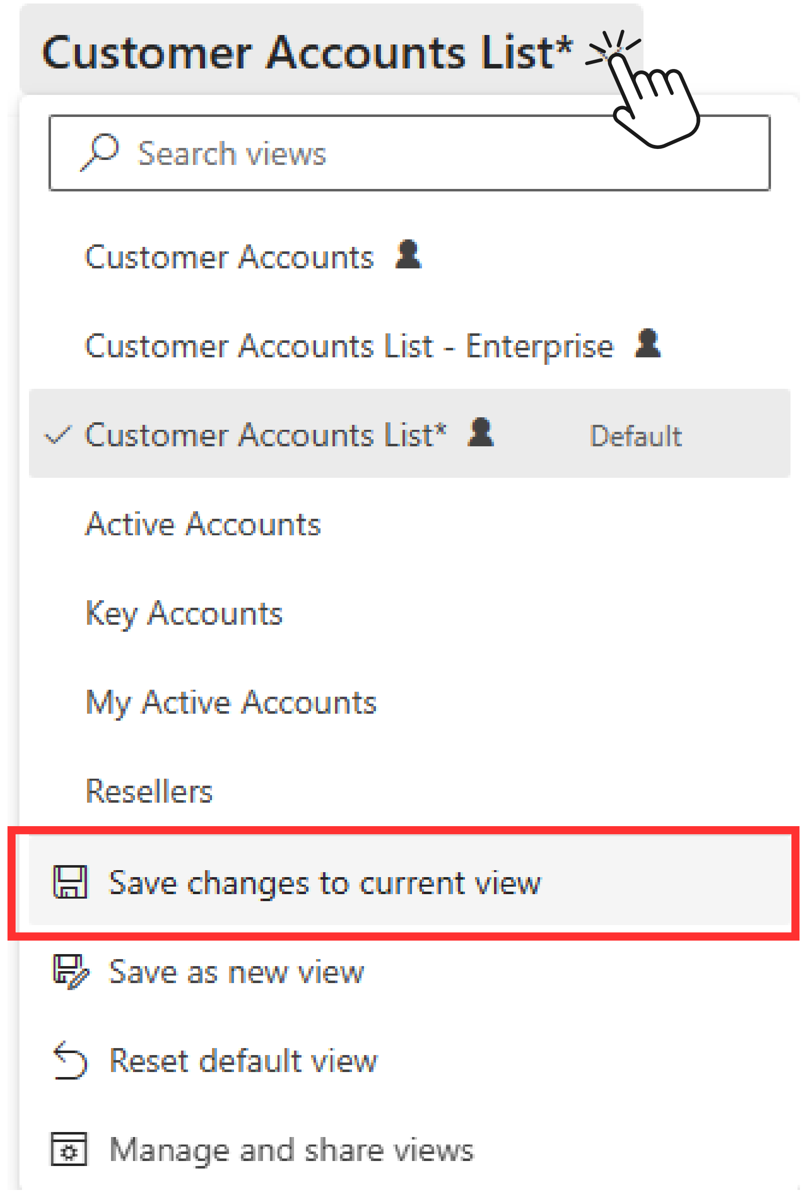
Select a column to adjust its width or adjust the sort order.



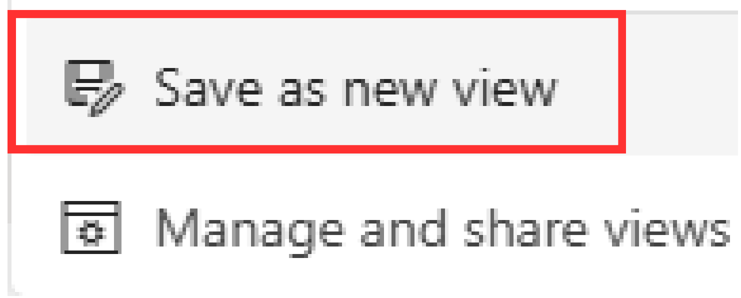
At this point, the view changes aren't saved, so they would be lost after the session ends. So how do you save updates to a view or create a new one?

Saving and Creating Views

If you are updating a **personal view**, expand the view selector to save your changes



Only administrators can change **system views**, so the 'save' option isn't available. If you want to adapt a system view, you'll need to save this as a new personal view.



To create a new view, start by customising an existing view and then save these changes as a new view.

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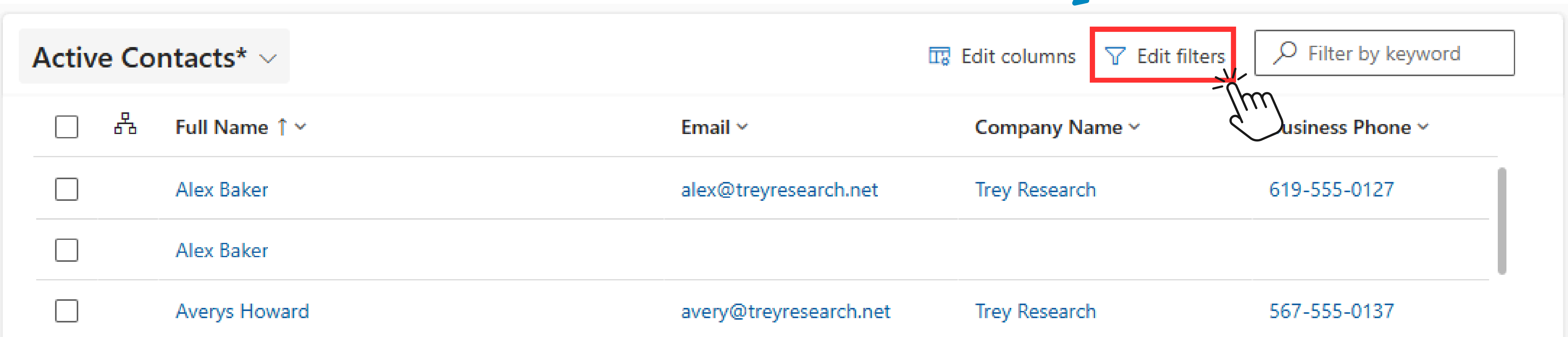
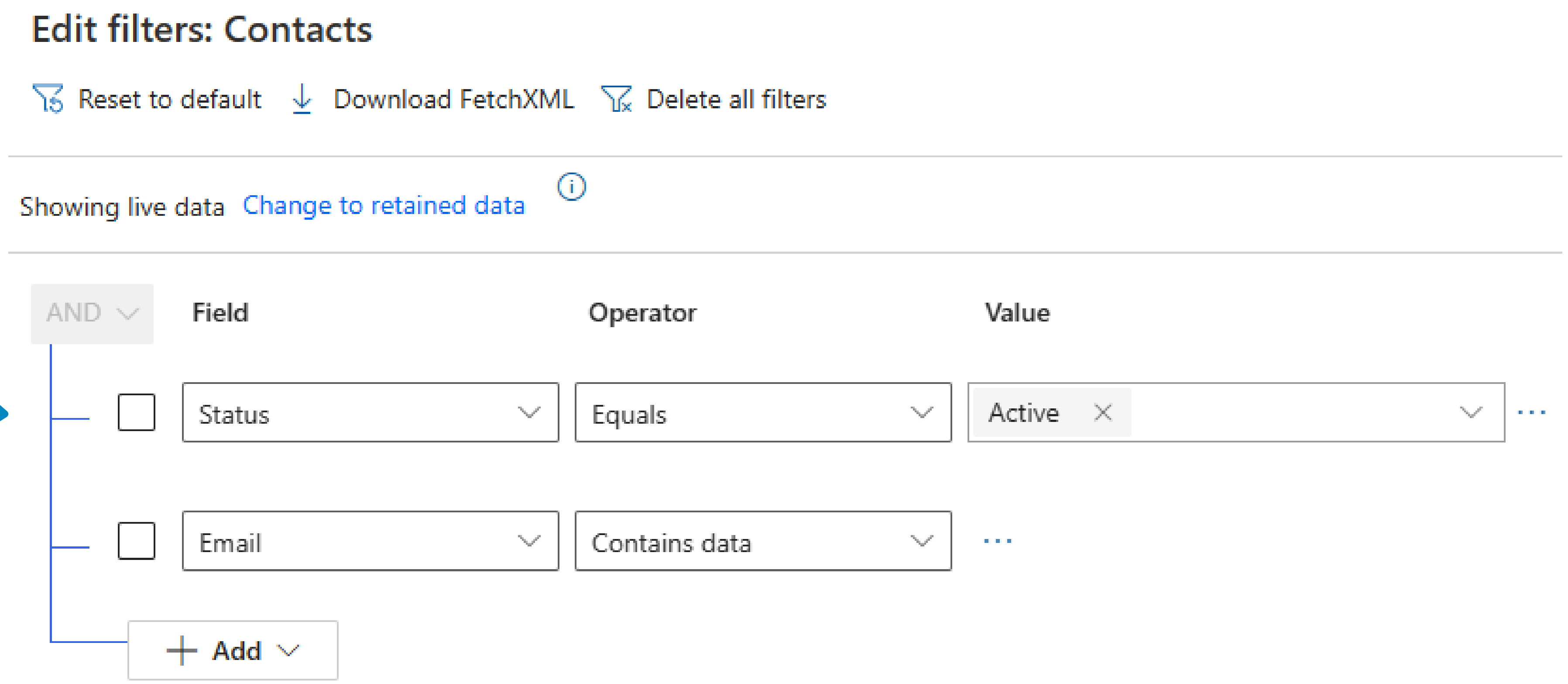
Customising a View: Using filter conditions

To update the criteria for which records are shown in a view, select ‘Edit filters’.



This example displays the current rules that define a Contacts view. There are only two basic field criteria, so let’s extend this.



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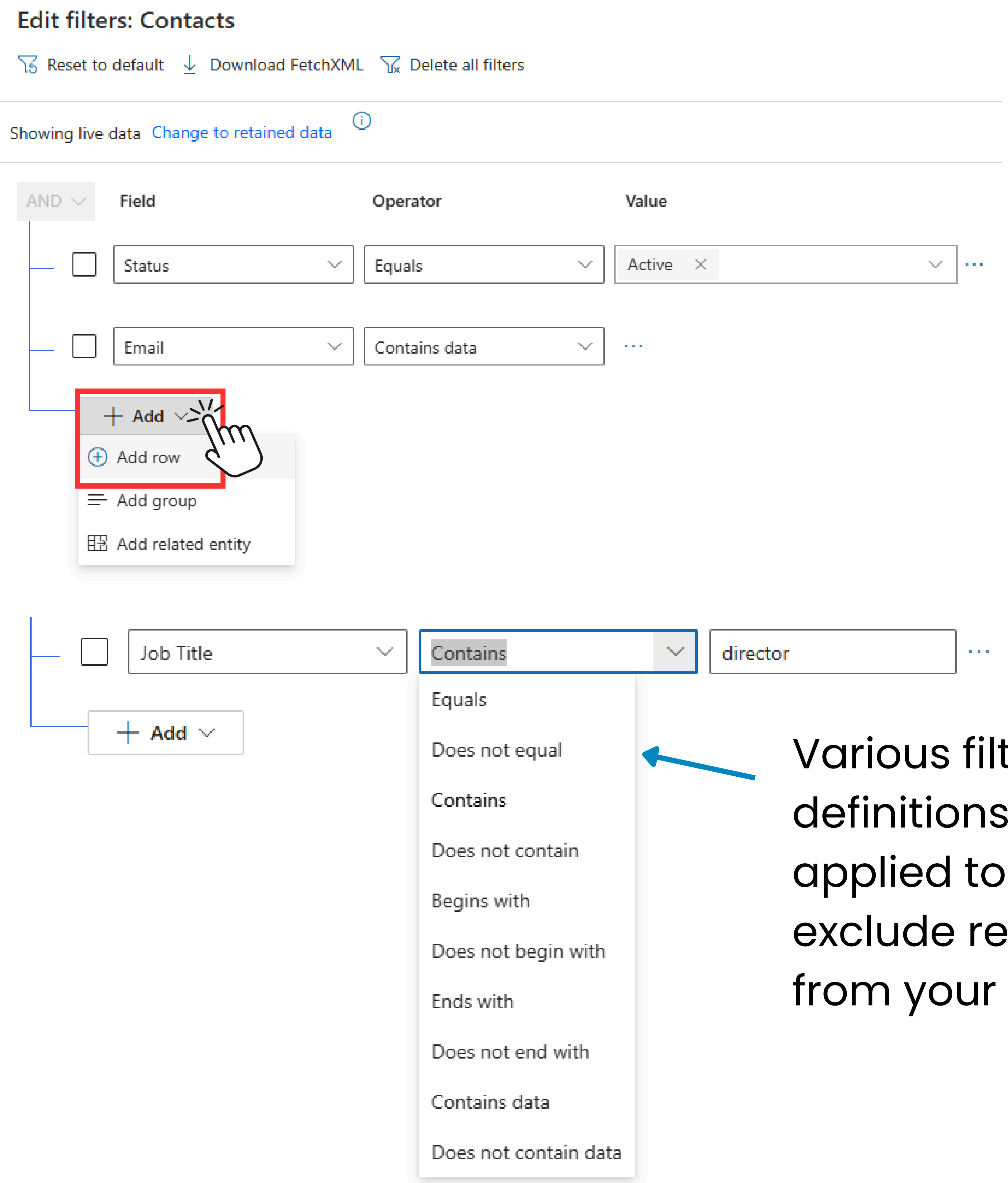
Customising a View: Using filter conditions

Click ‘Add’ to include another field rule for a contact view.

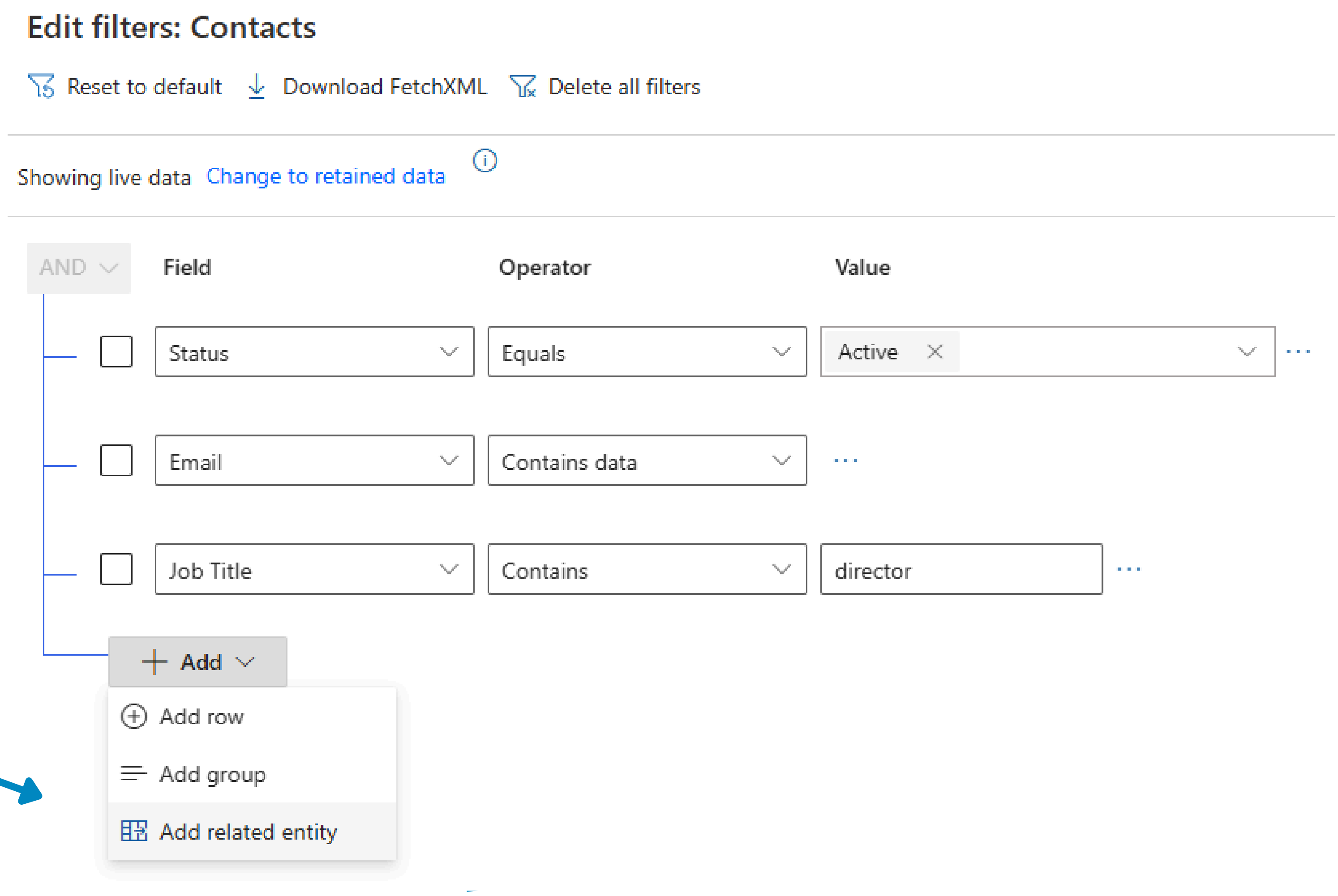
Select an additional field from the list and set the appropriate conditions. In this example, we’ll use the contact Job Title field to identify contacts with ‘director’ in their titles.



Various filter definitions can be applied to match or exclude records from your views.

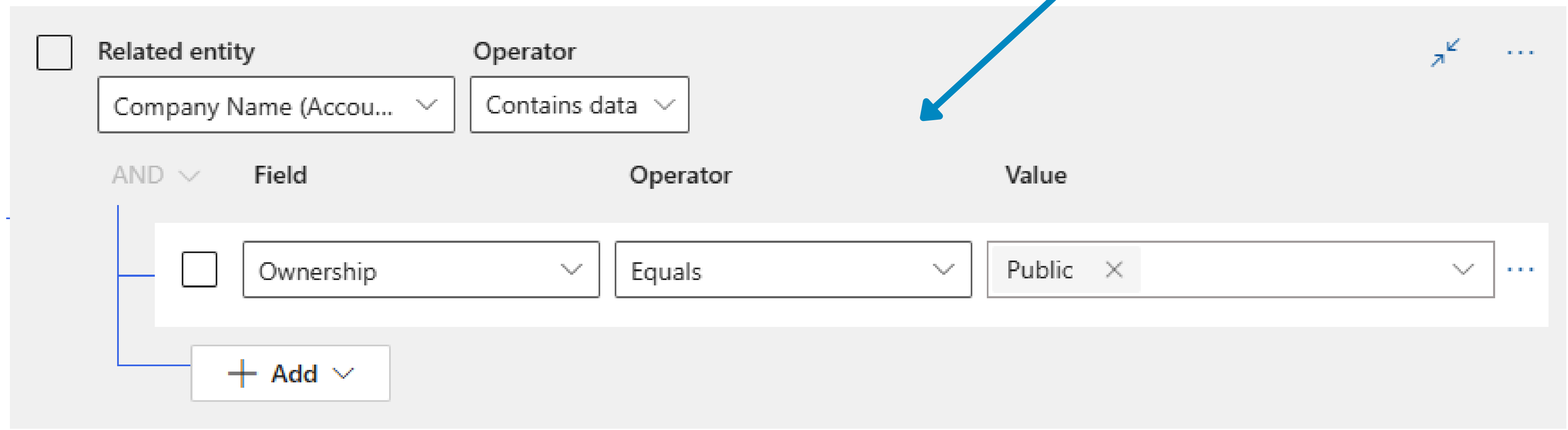
Customising a View: Using filter conditions with related tables

Criteria from related tables can also be used to customise view definitions.



For this example, the Ownership field on the related Account table is added to the filter.

In addition to the Contact field rules, these criteria must match Contacts associated with publicly owned organisations.



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Customising a View: Saving updated filter conditions

Once these revised filter rules are applied, the Dynamics 365 view is updated to list the matching rows/records.

Active Contacts*

Edit columns | Edit filters | Filter by keyword

Full Name ↑	Job Title	Email	Company Name	Ownership (Co...	Business Phone
Haroun Stormonth	Production Director	haroun@fabrikaminc.com	Fabrikam, Inc.	Public	423-555-0122
Jim Glynn (sample)	Sales Director	philc@serversys.com	Coho Winery (sample)	Public	555-0109
Sidney Higa (sample)	Marketing Director	someone_e@example.com	Blue Yonder Airlines (sample)	Public	555-0104
Yvonne McKay (sample)	Sales Director	someone_a@example.com	Fourth Coffee (sample)	Public	555-0100

Further action is needed to save these view changes for future use. Open the view selector to save this as a new view.

Active Contacts*

Search views

Active Contacts Subgrid View

✓ Active Contacts*

Save as new view

Manage and share views

Or you can save changes to an existing personal view.

Save changes to current view

Save as new view

Reset default view

To save as a new view, enter a name.

Save as new view

The view is stored in the list of saved views

Name * Directors at Public Com...

Description ---

Save | Cancel

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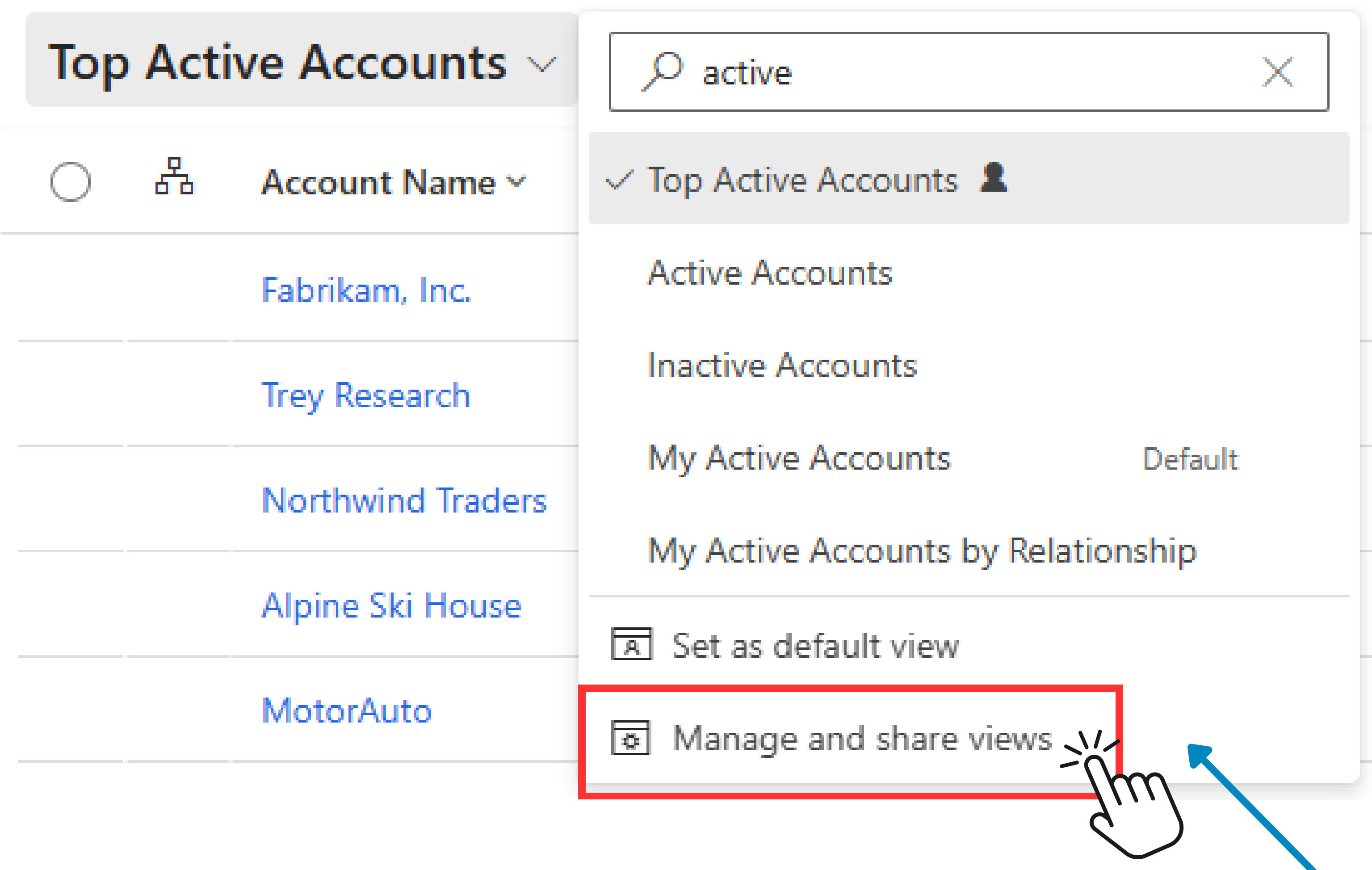
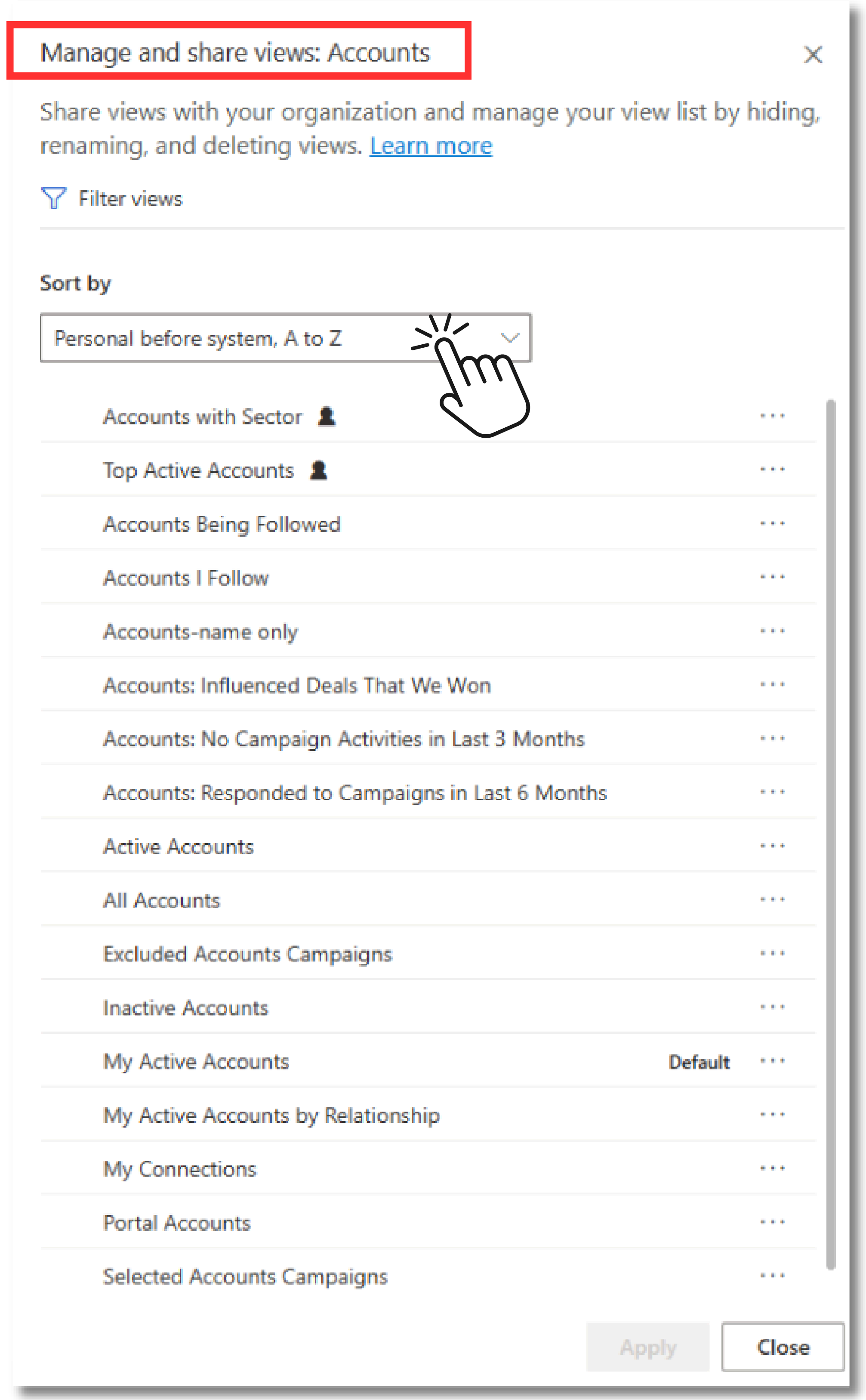
Managing and Sharing Views



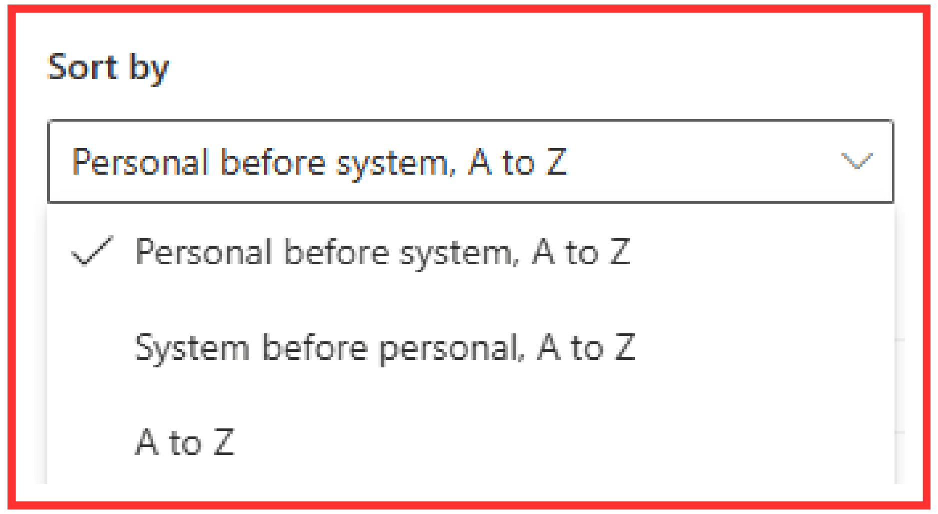
To customise the appearance of the saved view list or share views, click the highlighted option in the view selector.

Managing and Sharing Views: Changing sort order

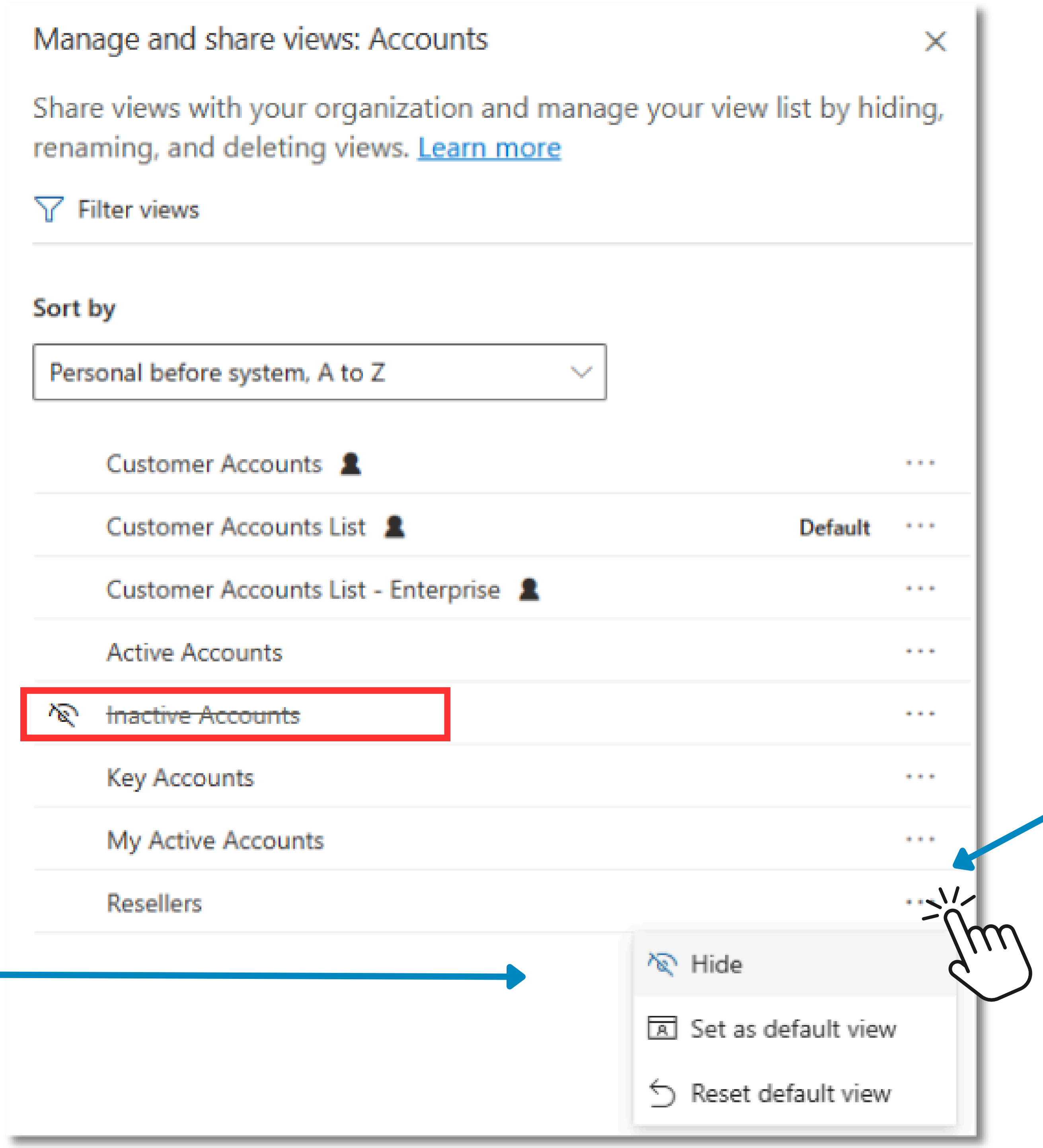


Here's where you can manage your list of personal and system views for each table/record type.

- In this example, we'll look at the Accounts view.
- This side panel displays available views and highlights the default view for this record type/table.
- Use the 'sort by' control to adjust this order using one of the available options.



Managing and Sharing Views: Hiding system views



To declutter a list of views for a specific table, you can hide the system views you don't use.

Click the ellipsis and select 'Hide'.

This control can also be used to set a view as the default for the current table.

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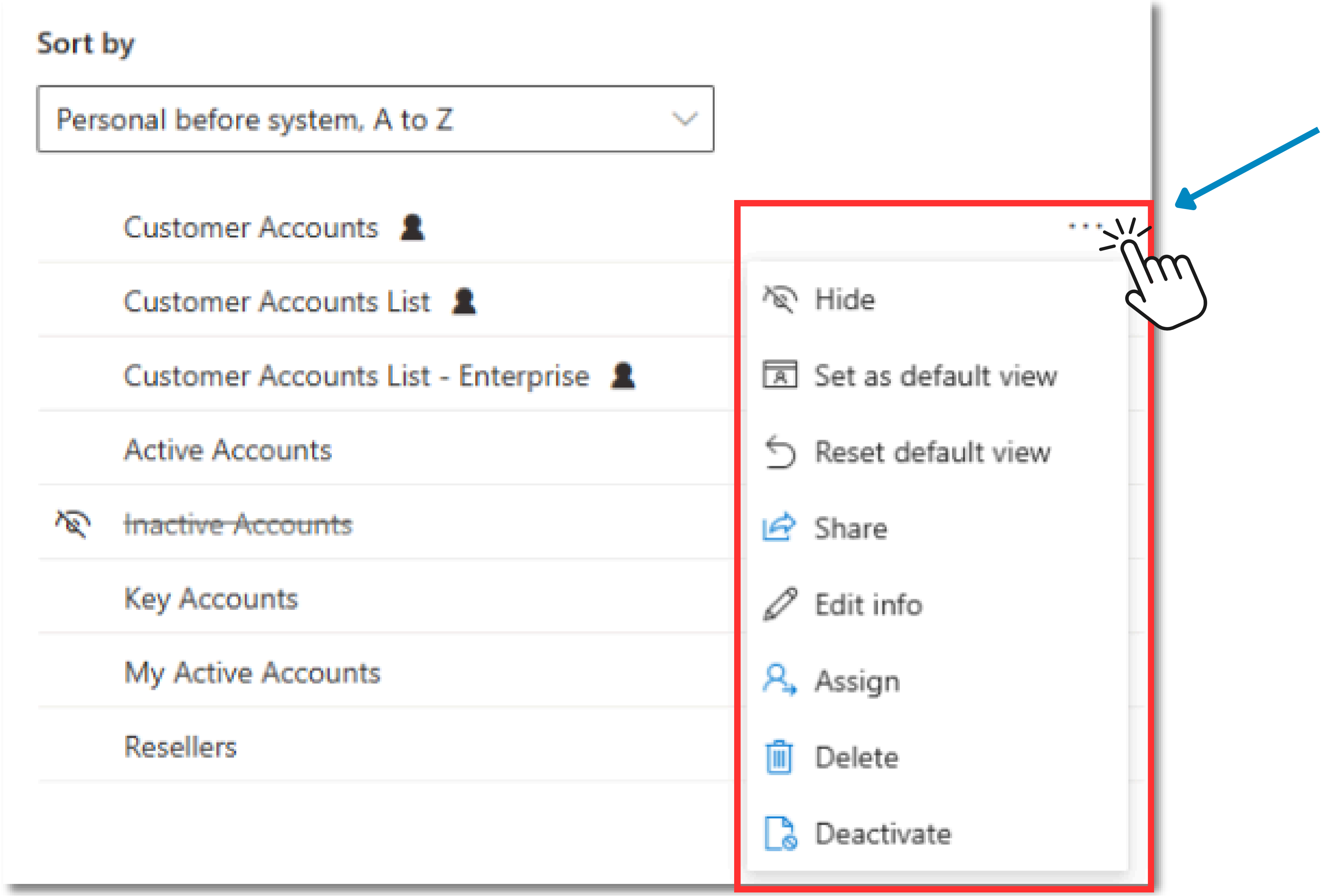
Managing and Sharing Views: Personal view actions



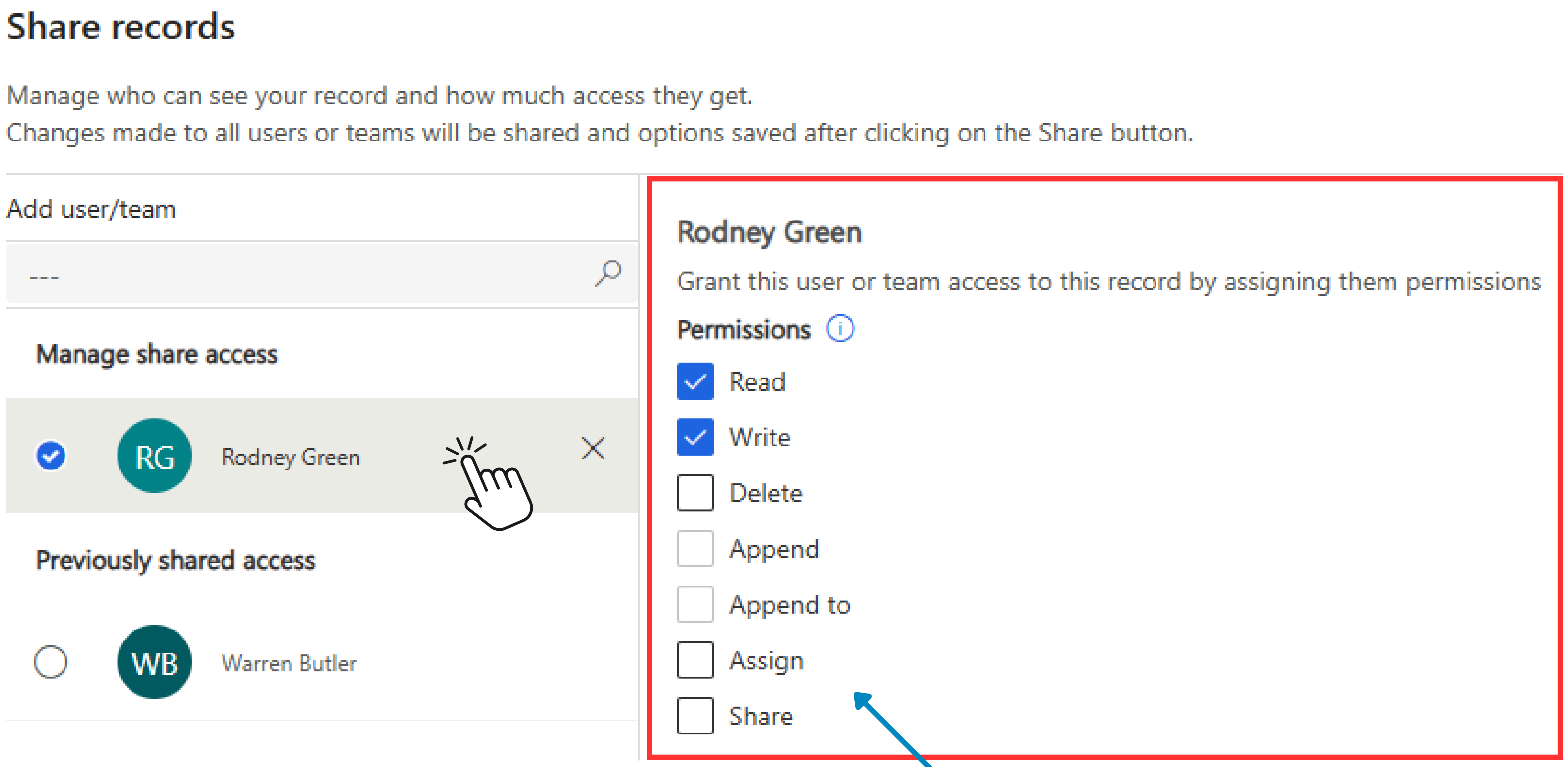
Clicking the ellipsis on a personal view brings up additional options, including:

- Edit info to change the name of a view.
- Delete a personal view.
- Deactivate the view.
- Assign ownership of a personal view to another user or team.

You can also share your personal views with other users and teams from here.

Sharing Personal Views

See at a glance which users or teams you've previously granted access to a personal view. Click a user/team entry to review or update access permissions.

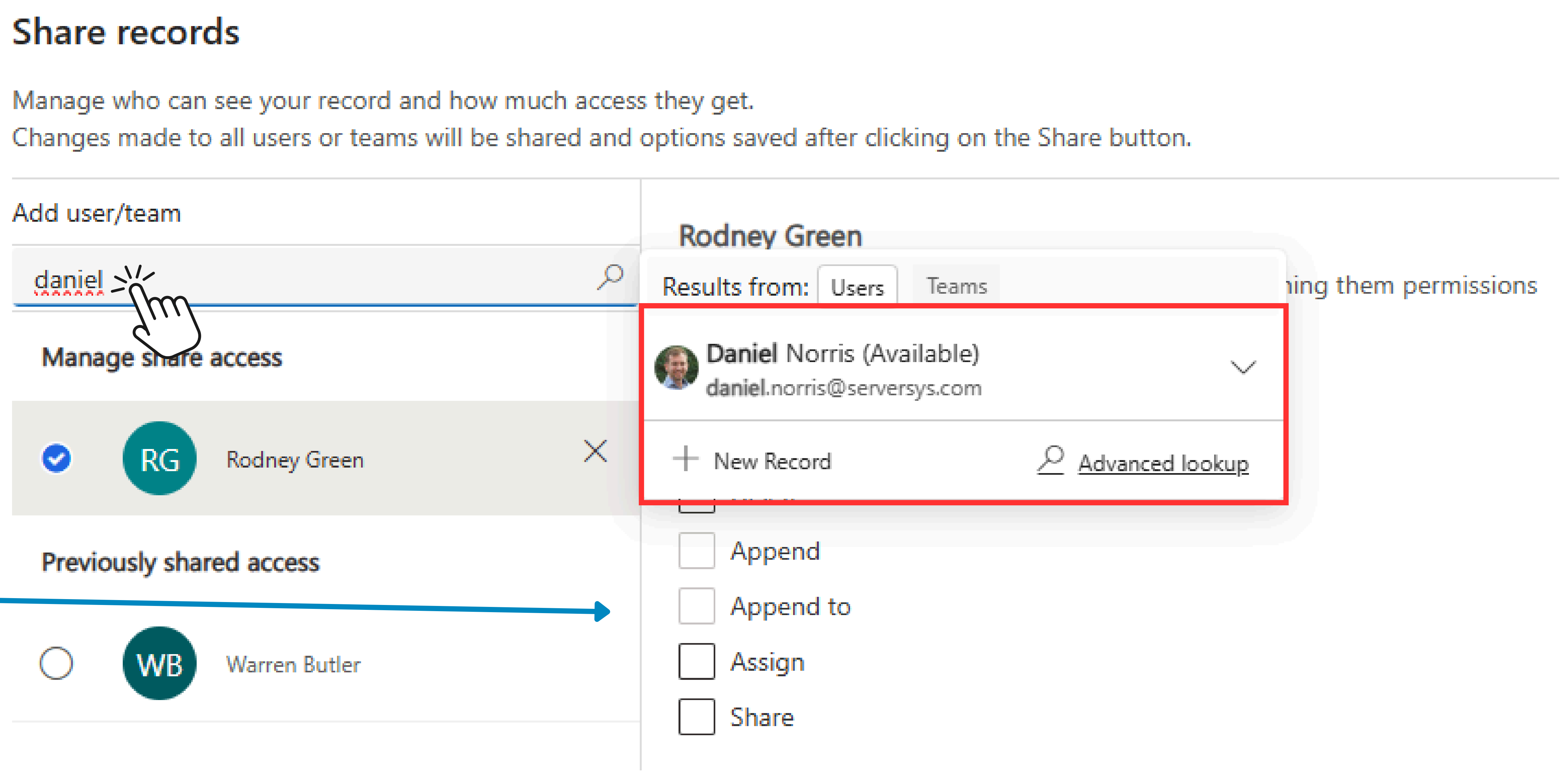


Basic permission allows others to have read-only access to a personal view. Additional options include allowing others to save changes, share or delete a view.

Sharing Personal Views

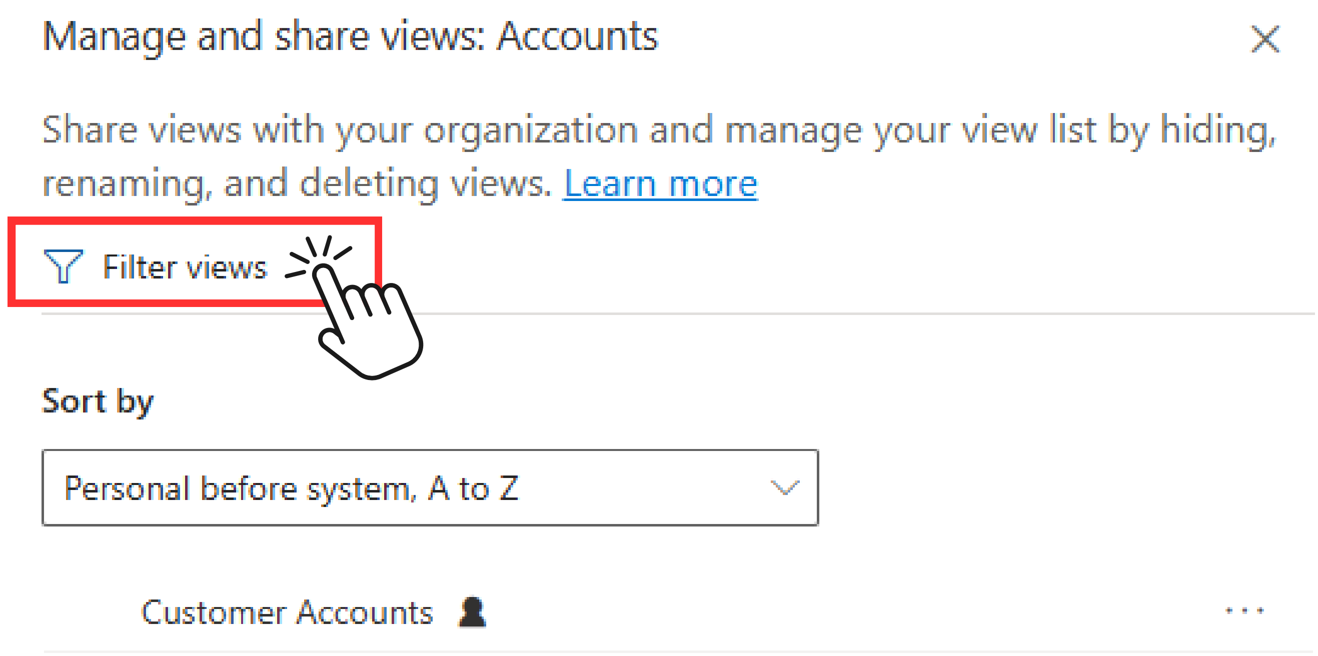
To allow more people to access a personal view, type the name of a user or team.

Once you've selected a record, tick the appropriate boxes to set the appropriate access permission.

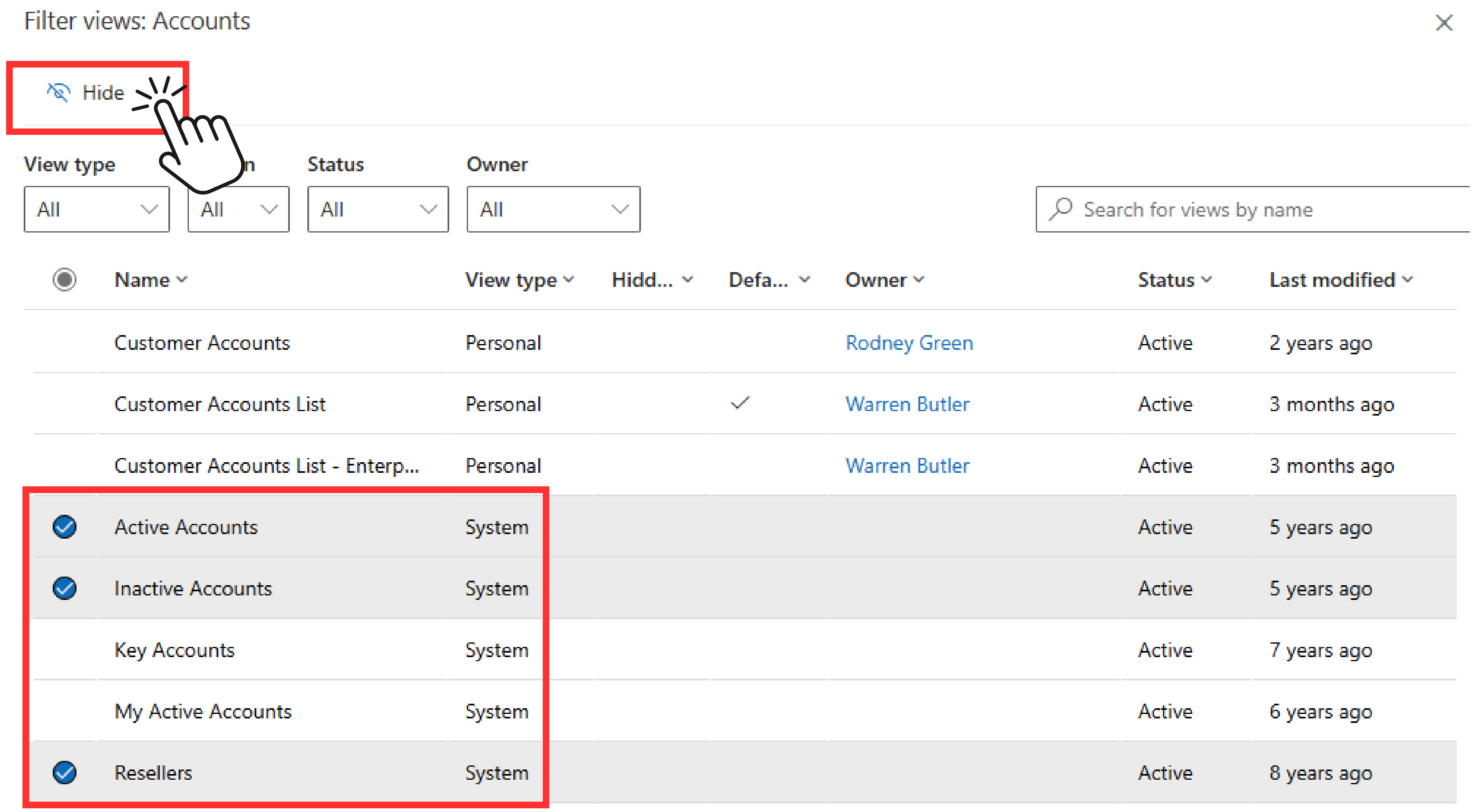


Using Filters for Managing and Sharing Views

Filters offer another approach for managing and sharing views.

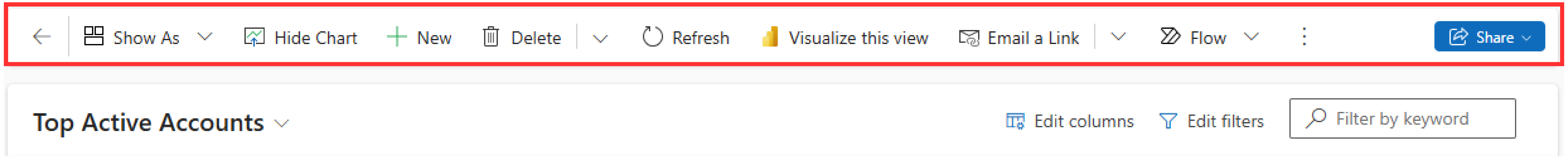


This includes the option to select multiple views and apply bulk actions, such as hiding or sharing personal views.



View command bar

Using the command bar, you can apply actions to the view or selected rows.



The available options shown in the command bar will vary depending on your user security role, current table and selected rows, but these may include:

- **Toggle focused view** - initially available for leads and now available for all tables, offering a centralised place to view records and activities within a single screen.
- **Show chart** - open a pane to view or create charts that provide a contextual view of the information on the grid.
- **Visualise this view** - use an auto-generated Power BI dashboard to interpret the view and uncover insights
- **Edit/decativate/delete rows** - perform individual actions or apply in bulk to multiple rows.
- **Merge records** - select two records to merge.
- **Add to marketing list** - add one or more rows to an existing marketing list.

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Want to know more?

Speak to ServerSys to learn more about using views and other Microsoft Dynamics 365 features.

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