



ServerSys

# Microsoft Dynamics 365 An Introductory Guide to Mastering Views

Microsoft Partner

[www.serversys.com](http://www.serversys.com)



# Types of Views

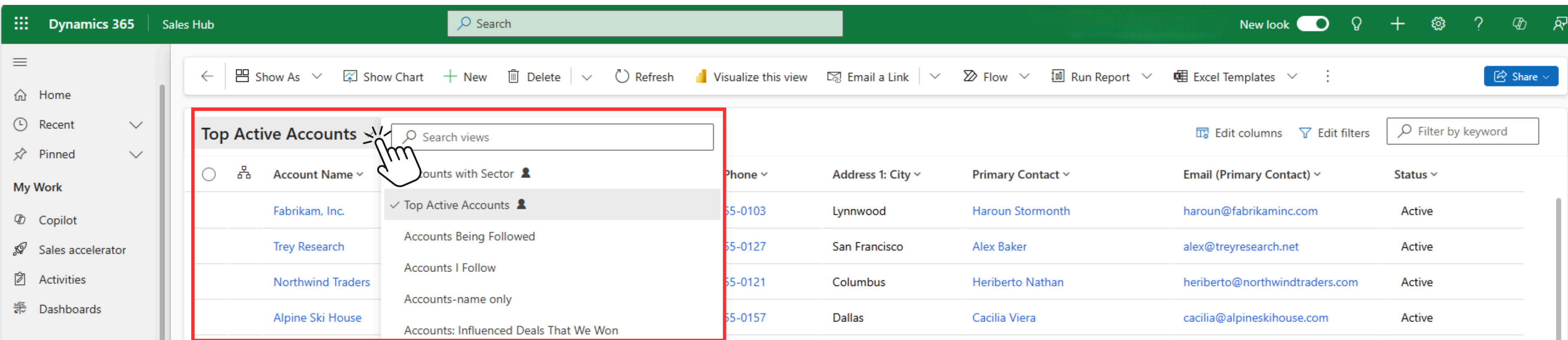
**In Dynamics 365, views define how a list of records is displayed for each table, such as accounts, contacts, leads or cases.**

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.



The screenshot shows the Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, Sales Hub, a search bar, and various utility icons. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Copilot, Sales accelerator, Activities, and Dashboards. The main content area displays a list of accounts with columns for Account Name, Phone, Address 1: City, Primary Contact, Email (Primary Contact), and Status. A red box highlights the 'Top Active Accounts' view selection process. A hand cursor is shown clicking on the 'Top Active Accounts' view in the dropdown menu. The view selection dropdown includes options like 'Accounts with Sector', 'Top Active Accounts', 'Accounts Being Followed', 'Accounts I Follow', 'Accounts-name only', and 'Accounts: Influenced Deals That We Won'.

Account Name	Phone	Address 1: City	Primary Contact	Email (Primary Contact)	Status
Fabrikam, Inc.	55-0103	Lynnwood	Haroun Stormonth	haroun@fabrikaminc.com	Active
Trey Research	55-0127	San Francisco	Alex Baker	alex@treresearch.net	Active
Northwind Traders	55-0121	Columbus	Heriberto Nathan	heriberto@northwindtraders.com	Active
Alpine Ski House	55-0157	Dallas	Cacilia Viera	cacilia@alpineskihouse.com	Active

# Overview of a Read-Only Grid View

Current view

How a column is sorted and filtered

Column order

Columns shown

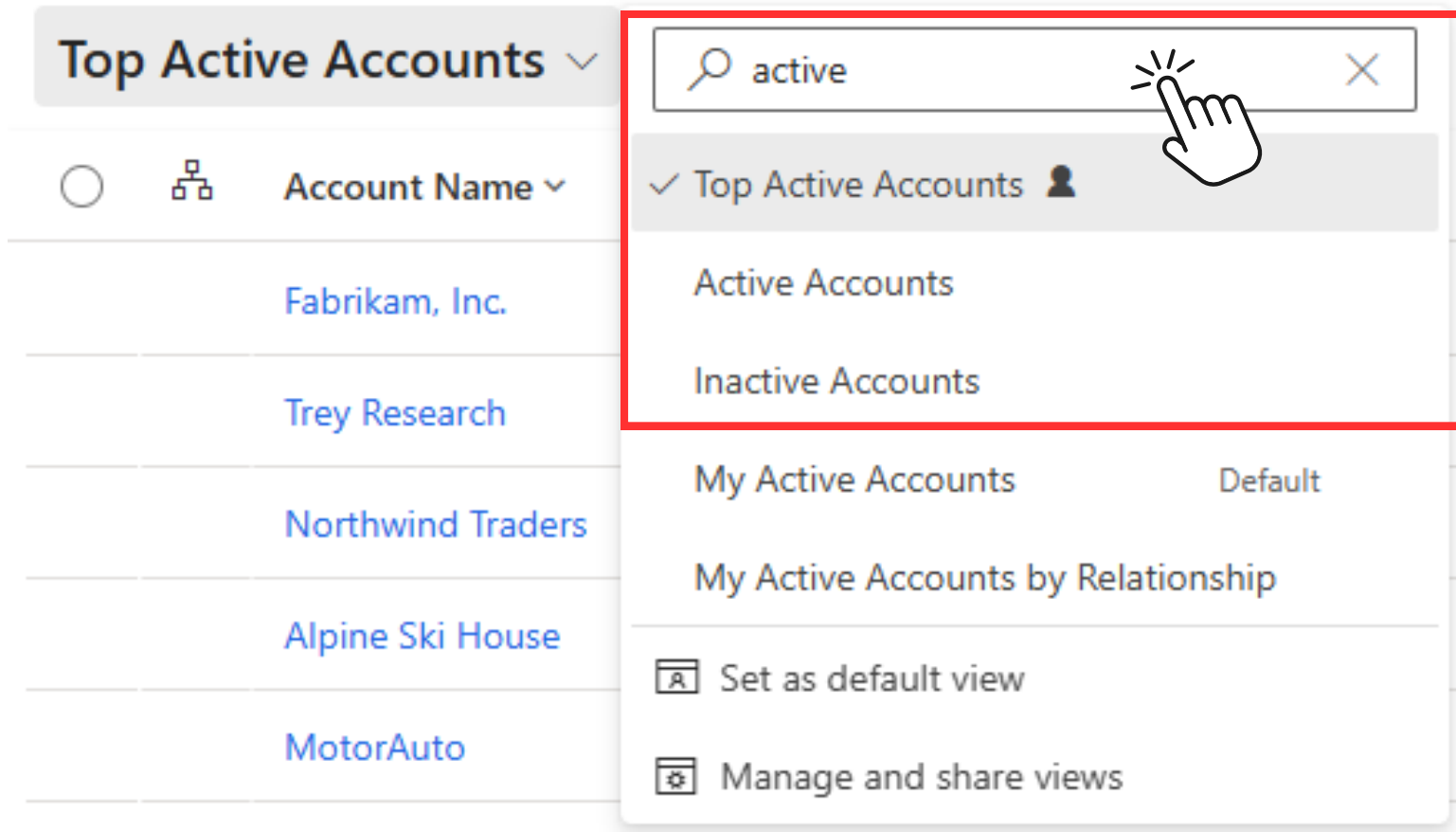
Quick find lookup

Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)	Status
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com	Active
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com	Active
Alpine Ski House	281-555-0157	Dallas	Cacilia Viera	cacilia@alpineskihouse.com	Active
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com	Active
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com	Active

Column widths

Default search criteria filters

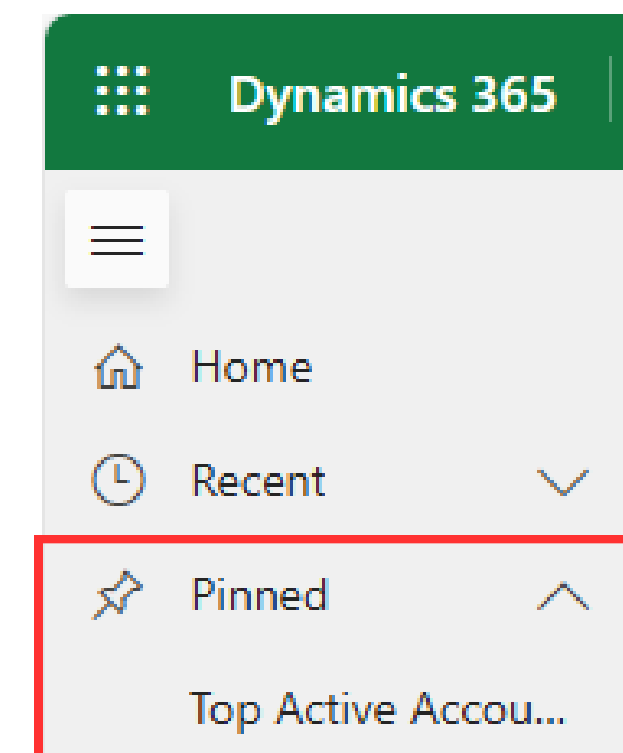
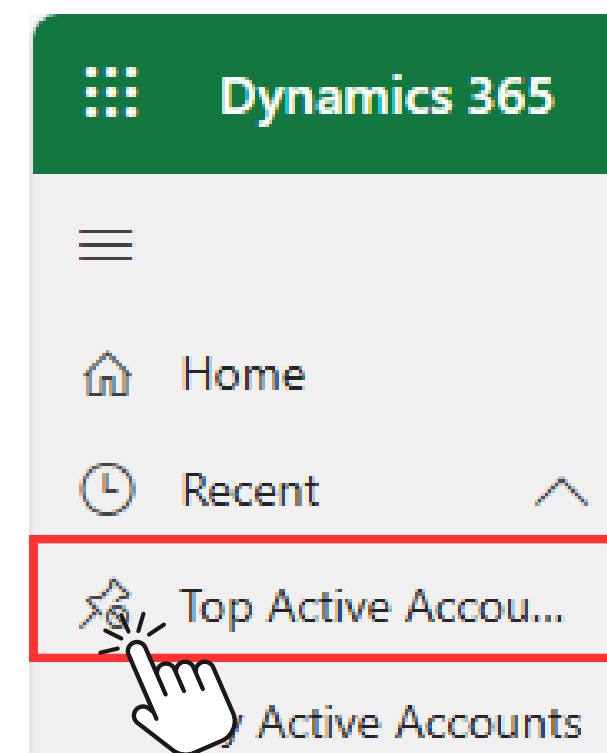
# Selecting Views



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.



# Filtering Views

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

Top Active Accounts\* Edit columns Edit filters

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

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

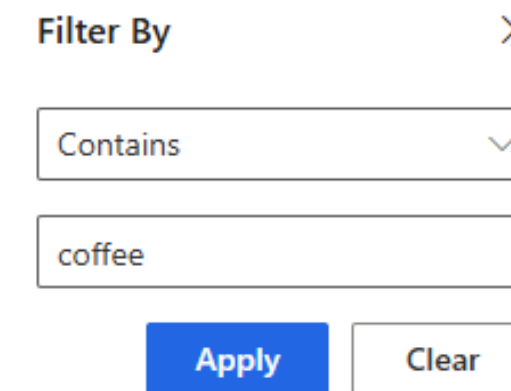
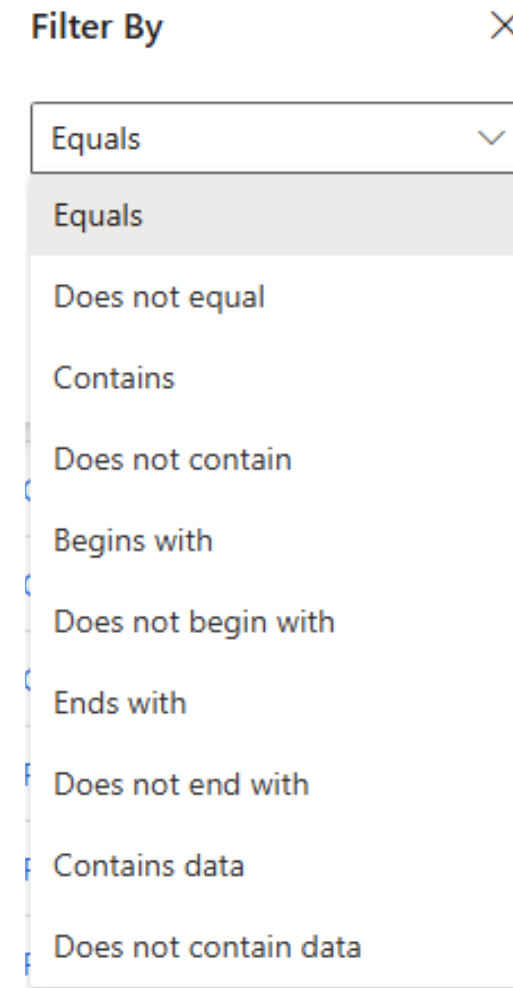
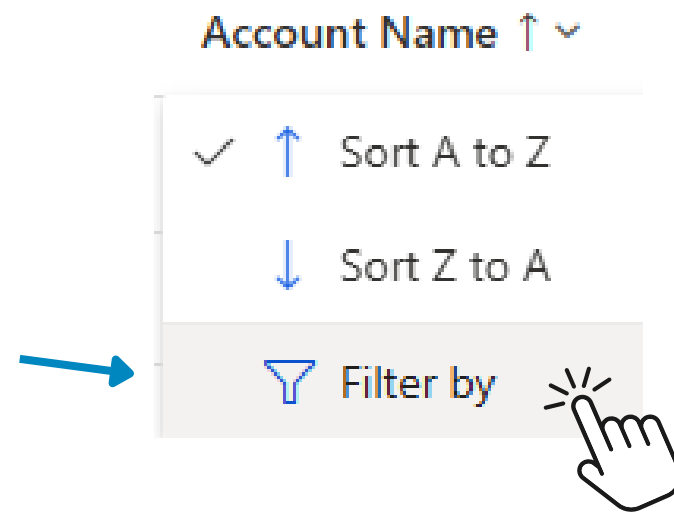
Some columns in your view might not currently be enabled for quick find. Hover over the filter by keyword box to see which columns are indexed. If additional columns require quick find to be enabled, speak to your administrator.

Filter by keyword

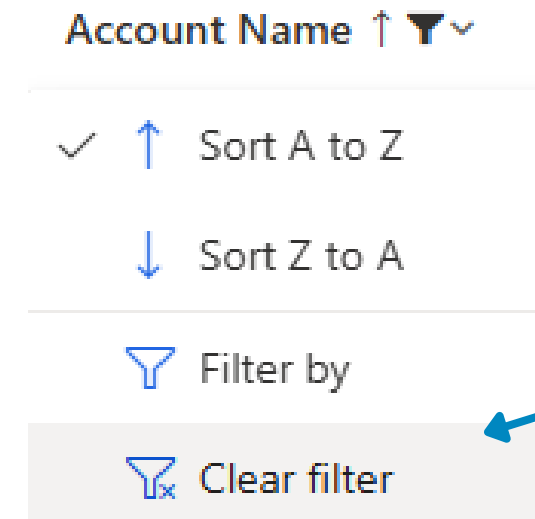
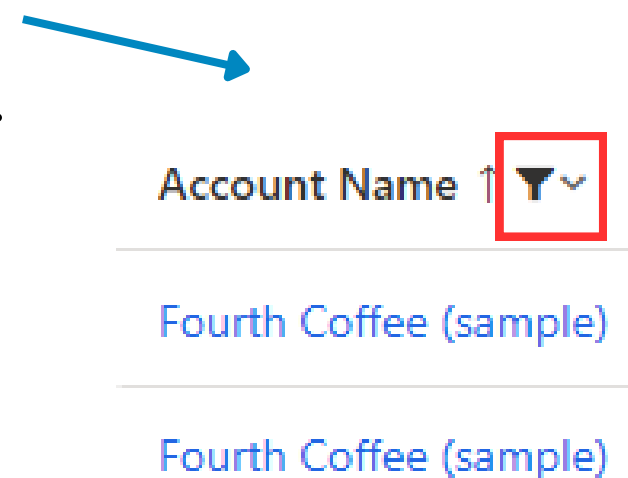
- Apply begins with filter on these columns:
- Account Name
- Account Number
- Email
- Main Phone
- Other Phone

# 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.



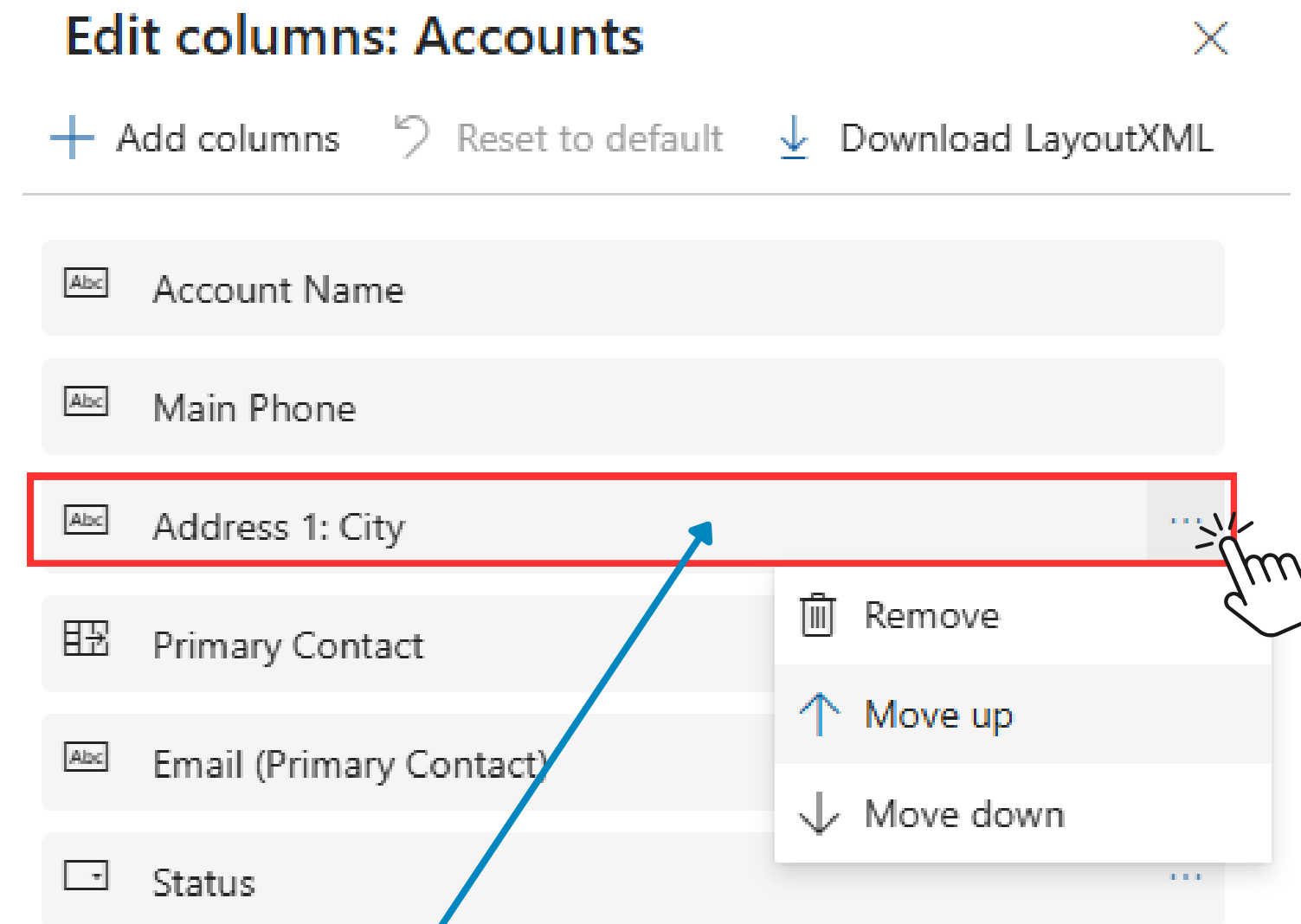
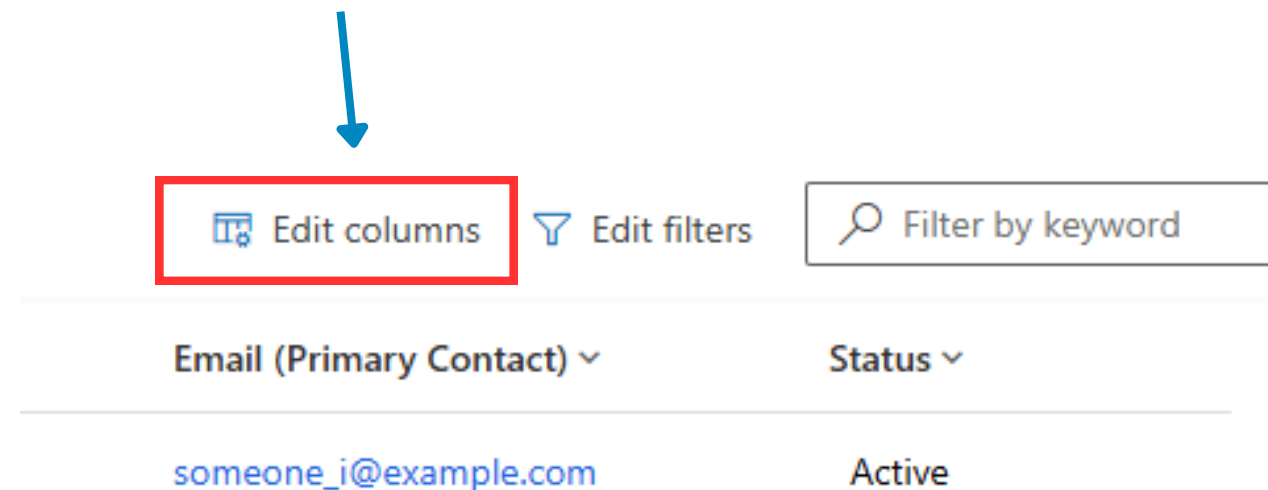
Click 'Filter by' to edit a condition or 'Clear filter' to reset the column.



# Customising a View: Editing and Reordering Columns

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

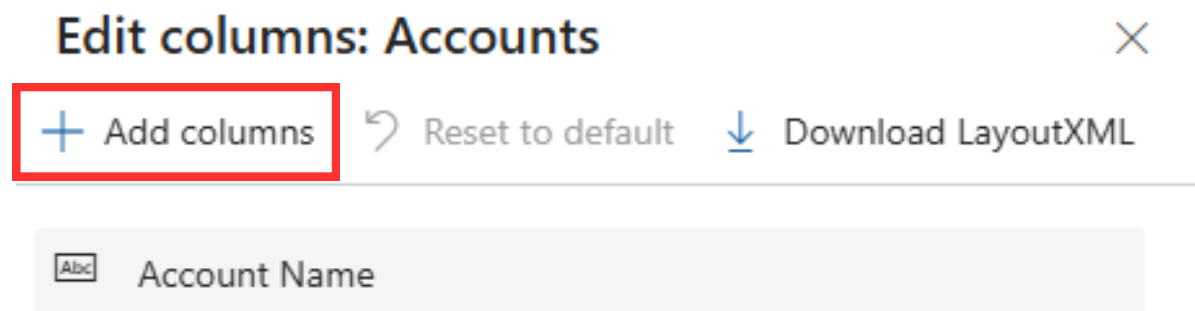
Click 'Edit columns' to customise the columns shown in a view



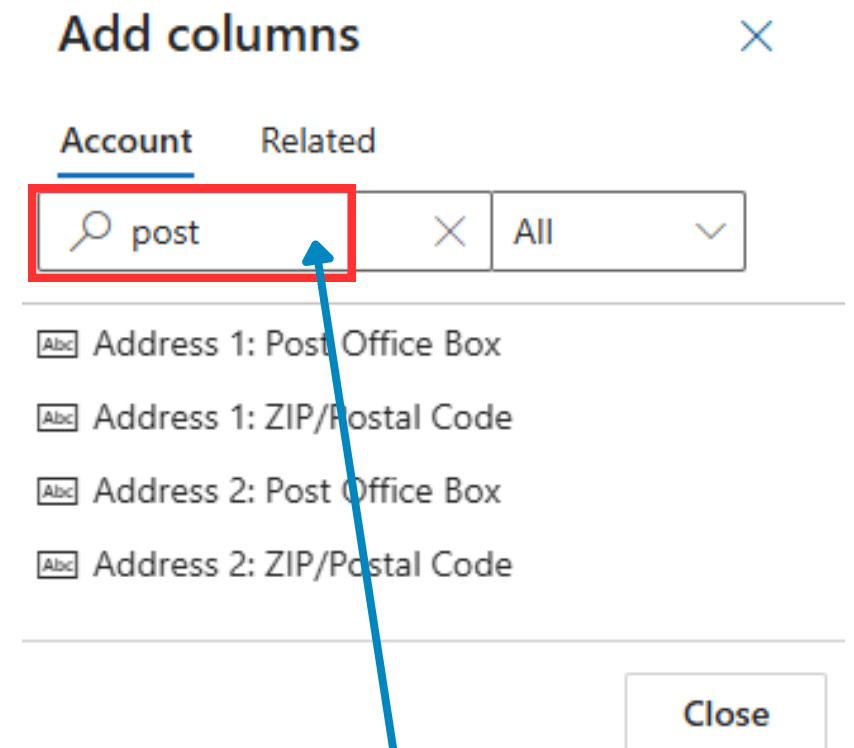
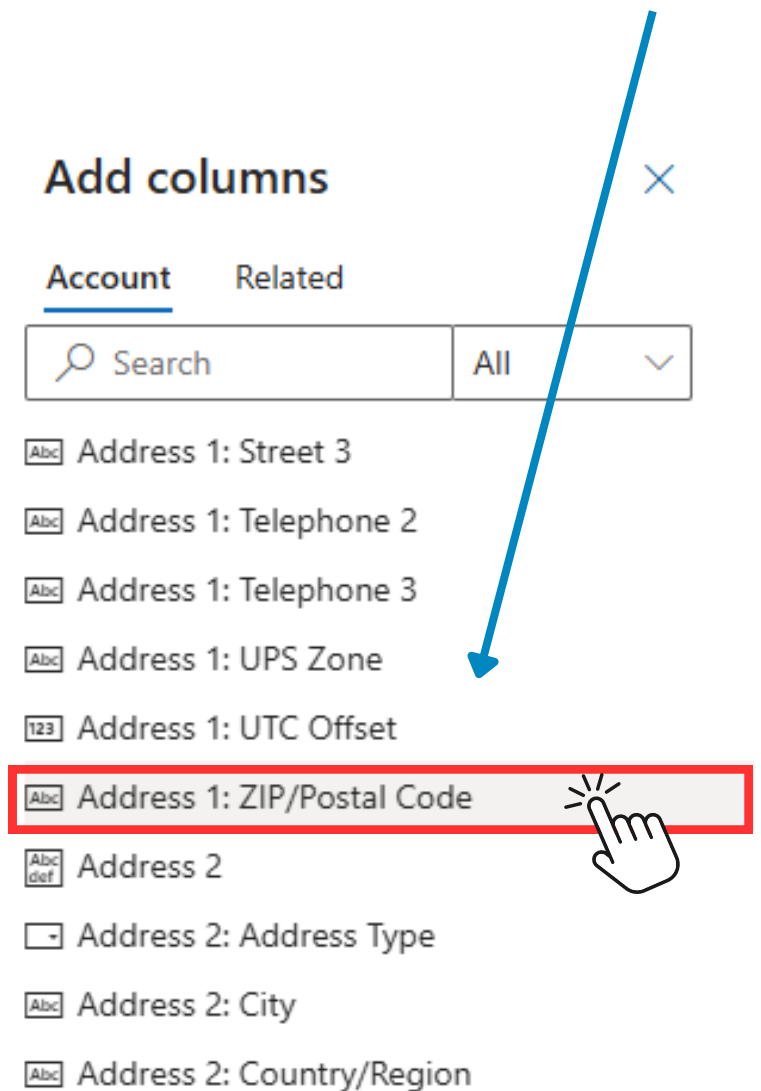
- To reorder columns drag tiles or click the ellipsis to use the move up/down controls.
- Click 'Remove' for any unwanted columns.

# 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.

Add columns



Account

Related

Search

All

- > (Deprecated) Process Stage (Process Stage)
- > Created By (Delegate) (User)
- > Created By (External Party) (External Party)
- > Created By (User)
- > Currency (Currency)
- > KPI (Account KPI Item)
- > Last SLA applied (SLA)

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

Add columns



Account

Related

mobile



All



- > Created By (Delegate) (User)
- > Created By (User)
- > Modified By (Delegate) (User)
- > Modified By (User)
- > Originating Lead (Lead)
- > Owning User (User)
- > Preferred User (User)
- ✓ Primary Contact (Contact)

Mobile Phone (Primary Contact)

Mobile Phone Confirmed (Primary Contact)

Close

# Customising a View: Applying Changes

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

**Edit columns: Accounts** ✕

+ Add columns ↶ Reset to default ⬇ Download LayoutXML

- Account Name
- Address 1: City
- Main Phone
- Primary Contact
- Email (Primary Contact)
- Address 1: County
- Address 1: ZIP/Postal Code**
- Mobile Phone (Primary Contact)**

Apply Cancel

The view is updated to include the additional columns.

Active Accounts* ▾	Account Name ▾	Address 1: City ▾	Address 1: ZIP/P... ▾	Main Phone ▾	Primary Contact ▾	Email (Primary Contact) ▾	Mobile Phone (... ▾
	A. Datum Corporation (sample)	Redmond	78214	555-0158	Rene Valdes (sample)	someone_i@example.com	
	Adventure Works (sample)	Santa Cruz	95486	555-0152	Nancy Anderson (sample)	someone_c@example.com	
	Alpine Ski House	Dallas	75073	281-555-0157	Cacilia Viera	cacilia@alpineskihouse.c...	281-555-0163
	Alpine Ski House (sample)	Missoula	58047	555-0157	Paul Cannon (sample)	someone_h@example.com	

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.

Main Phone ▾ ↔

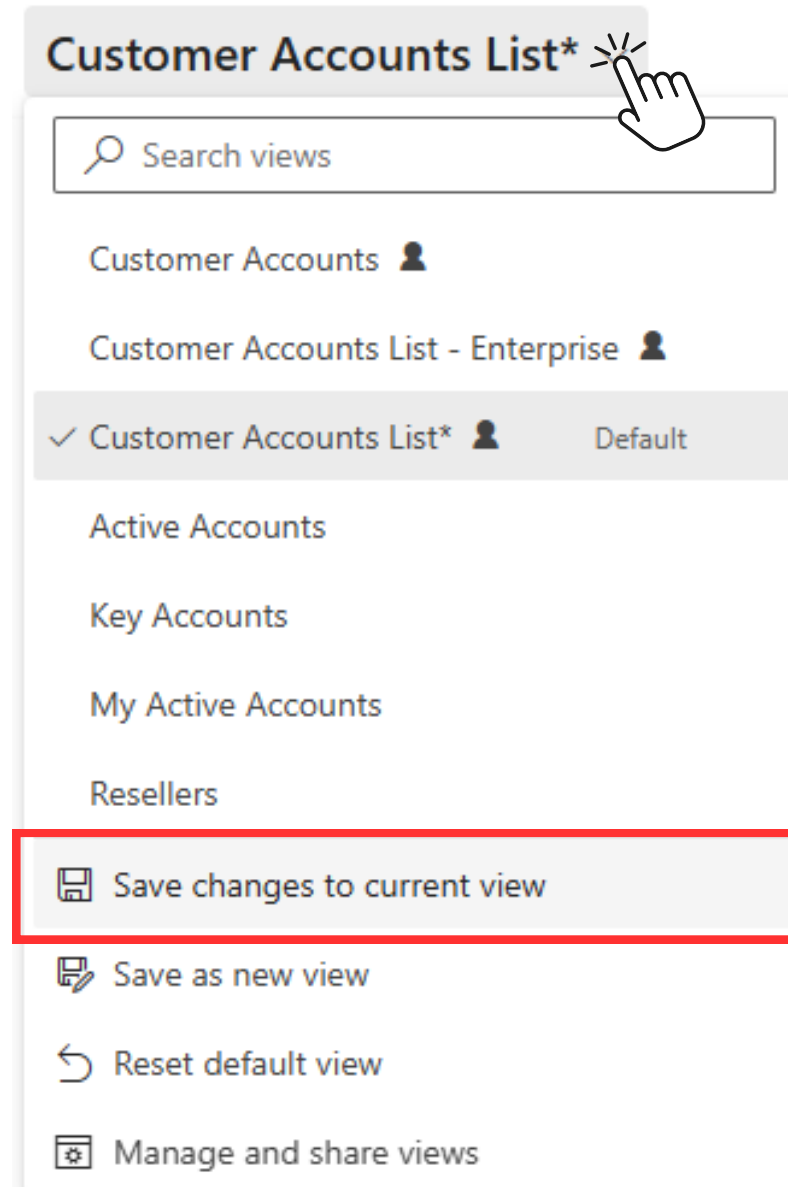
↑ Sort A to Z

↓ Sort Z to A

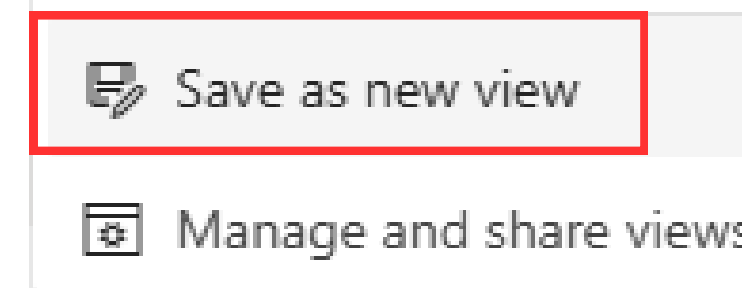
**At this point, the view changes aren't saved,** so they would be lost after the session ends. So how do you save updates to a view or create a new one?

# Saving and Creating Views

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



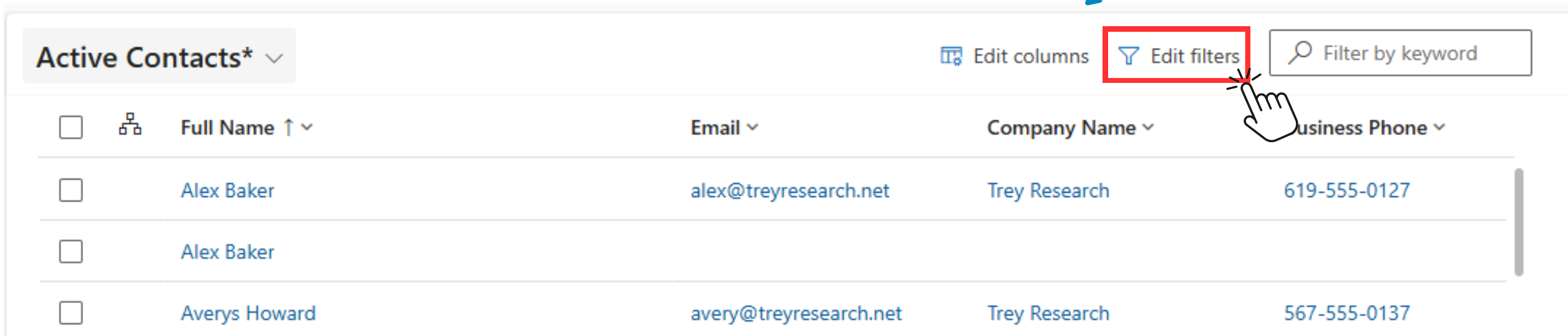
Only administrators can change **system views**, so the 'save' option isn't available. If you want to adapt a system view, you'll need to save this as a new personal view.



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

# Customising a View: Using filter conditions

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



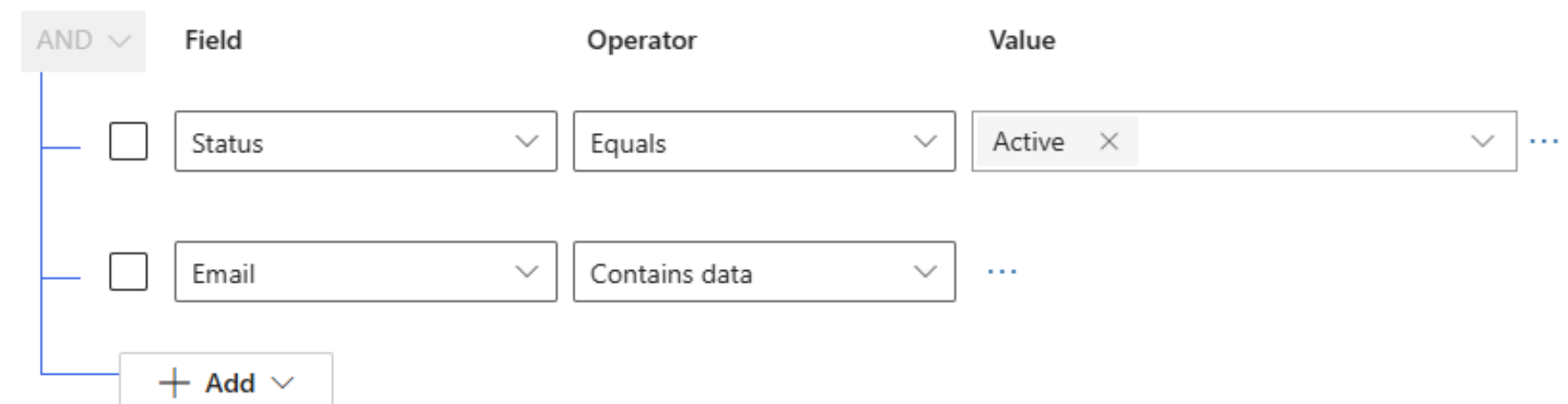
<input type="checkbox"/>	Full Name ↑	Email	Company Name	Business Phone
<input type="checkbox"/>	Alex Baker	alex@treyresearch.net	Trey Research	619-555-0127
<input type="checkbox"/>	Alex Baker			
<input type="checkbox"/>	Averys Howard	avery@treyresearch.net	Trey Research	567-555-0137

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

## Edit filters: Contacts

[Reset to default](#) [Download FetchXML](#) [Delete all filters](#)

Showing live data [Change to retained data](#)



AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Active
<input type="checkbox"/>	Email	Contains data	...
<a href="#">+ Add</a>			

# 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.

Edit filters: Contacts

Reset to default Download FetchXML Delete all filters

Showing live data [Change to retained data](#)

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Active
<input type="checkbox"/>	Email	Contains data	
<input type="checkbox"/>	Job Title	Contains	director

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.

Edit filters: Contacts

[Reset to default](#) [Download FetchXML](#) [Delete all filters](#)

Showing live data [Change to retained data](#) ⓘ

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Active
<input type="checkbox"/>	Email	Contains data	
<input type="checkbox"/>	Job Title	Contains	director

+ Add

- + Add row
- ≡ Add group
- 🔗 Add related entity

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.

Related entity	Operator
<input type="checkbox"/> Company Name (Accou...	Contains data

AND	Field	Operator	Value
<input type="checkbox"/>	Ownership	Equals	Public

+ Add



# 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\* Filter by keyword

<input type="checkbox"/>	Full Name ↑	Job Title	Email	Company Name	Ownership (Co...)	Business Phone
<input type="checkbox"/>	Haroun Stormonth	Production Director	haroun@fabrikaminc.com	Fabrikam, Inc.	Public	423-555-0122
<input type="checkbox"/>	Jim Glynn (sample)	Sales Director	philc@serversys.com	Coho Winery (sample)	Public	555-0109
<input type="checkbox"/>	Sidney Higa (sample)	Marketing Director	someone_e@example.com	Blue Yonder Airlines (sample)	Public	555-0104
<input type="checkbox"/>	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.

Or you can save changes to an existing personal view.

Active Contacts\*

Search views

Active Contacts Subgrid View

✓ Active Contacts\*

**Save as new view**

Manage and share views

**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...

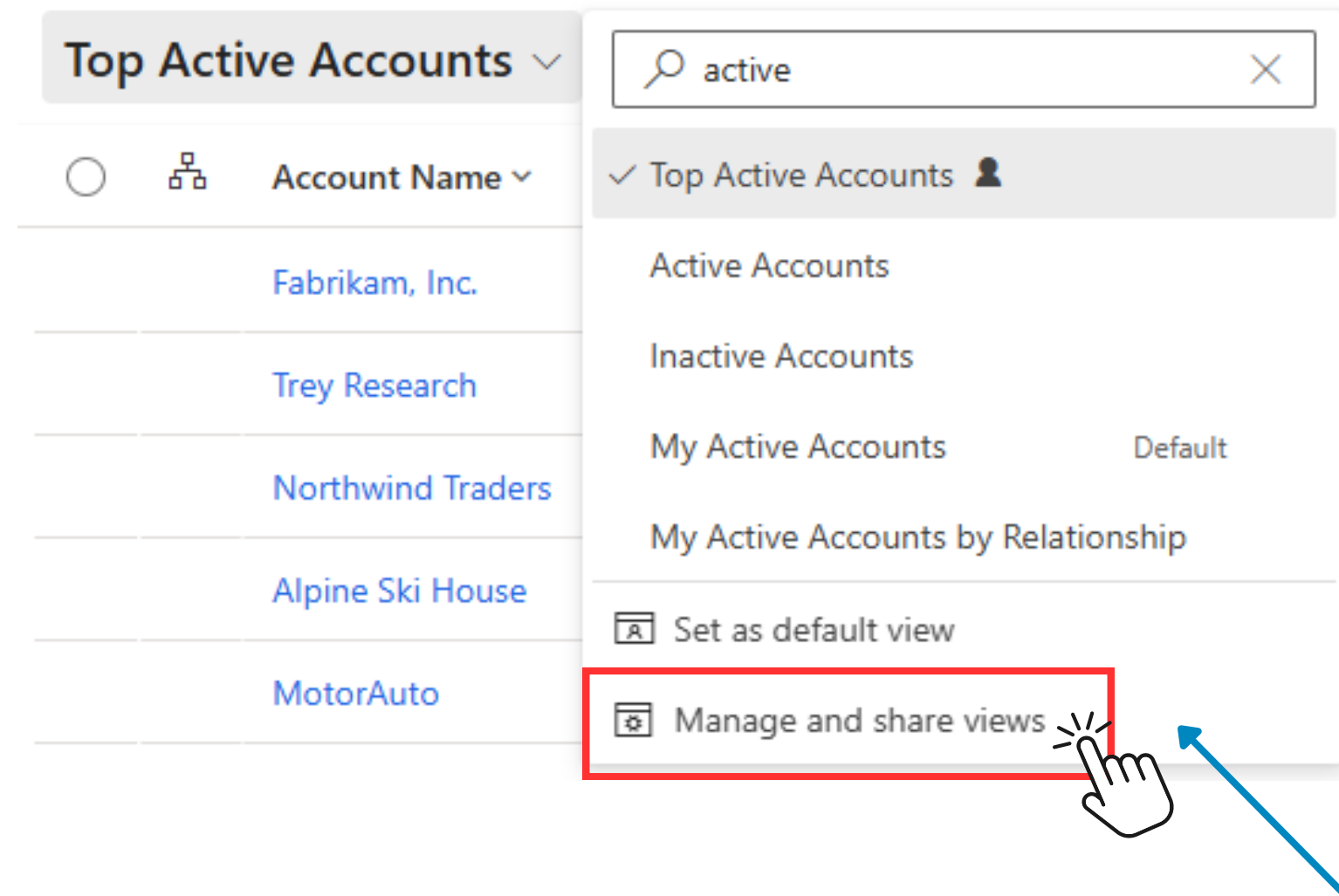
Description

---

Save

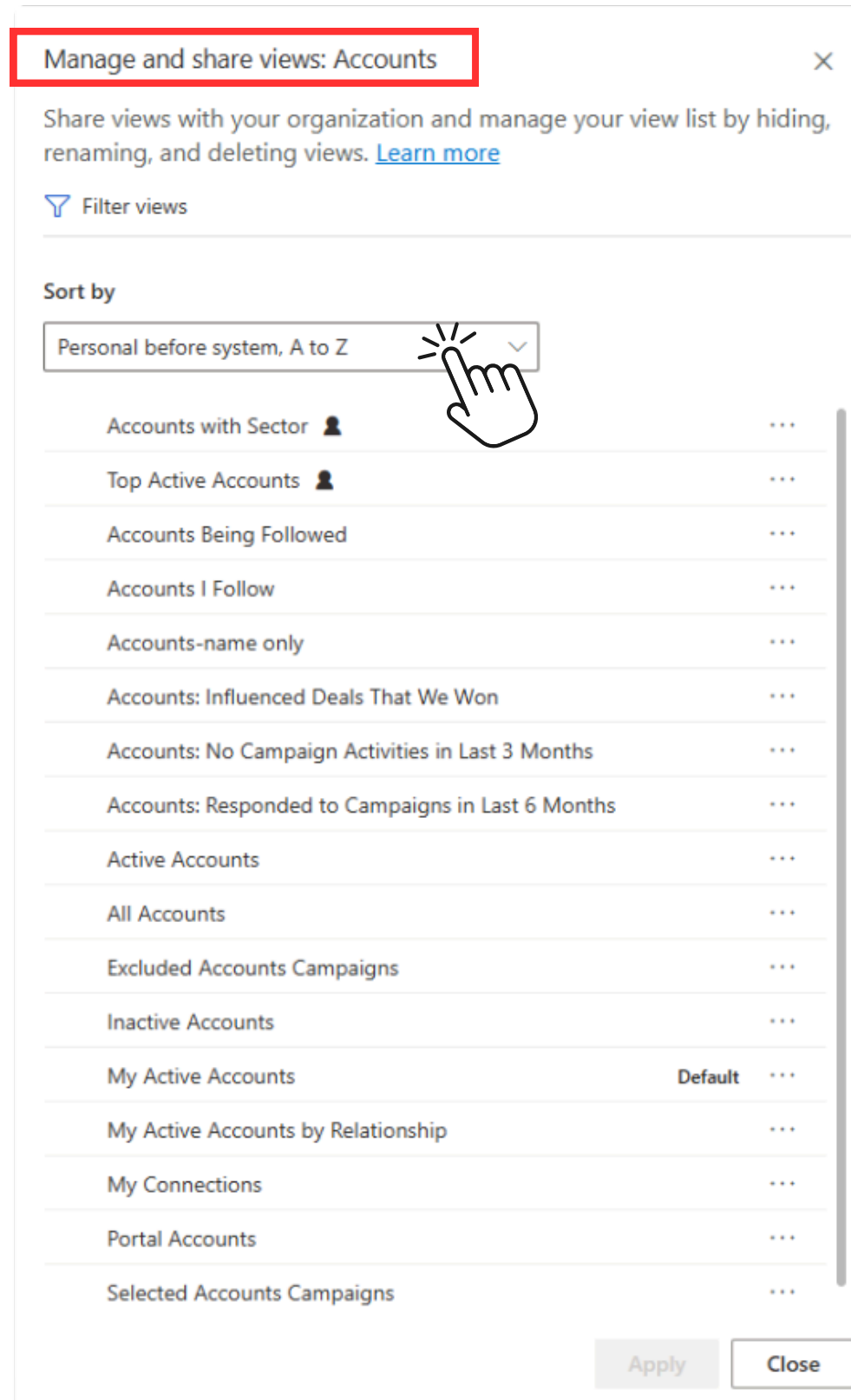
Cancel

# Managing and Sharing Views



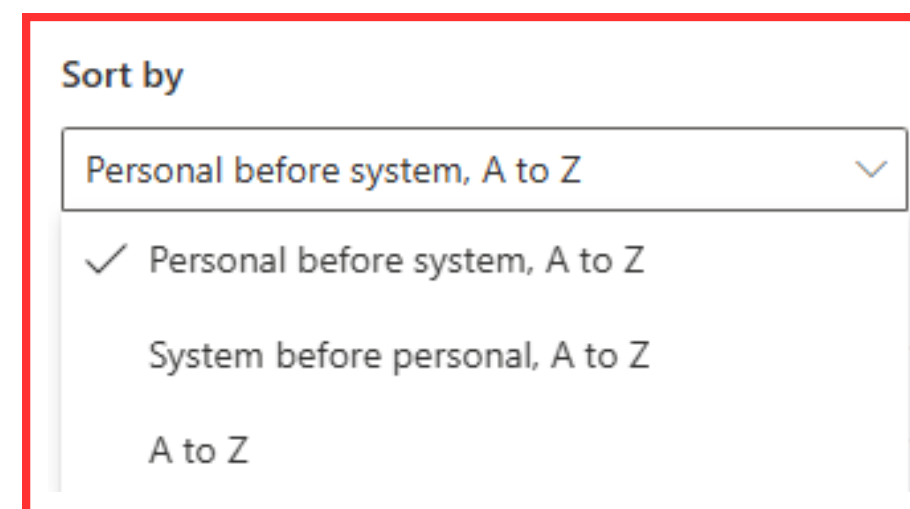
To customise the appearance of the saved view list or share views, click the highlighted option in the view selector.

# 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.

Manage and share views: Accounts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

Filter views

Sort by

Personal before system, A to Z

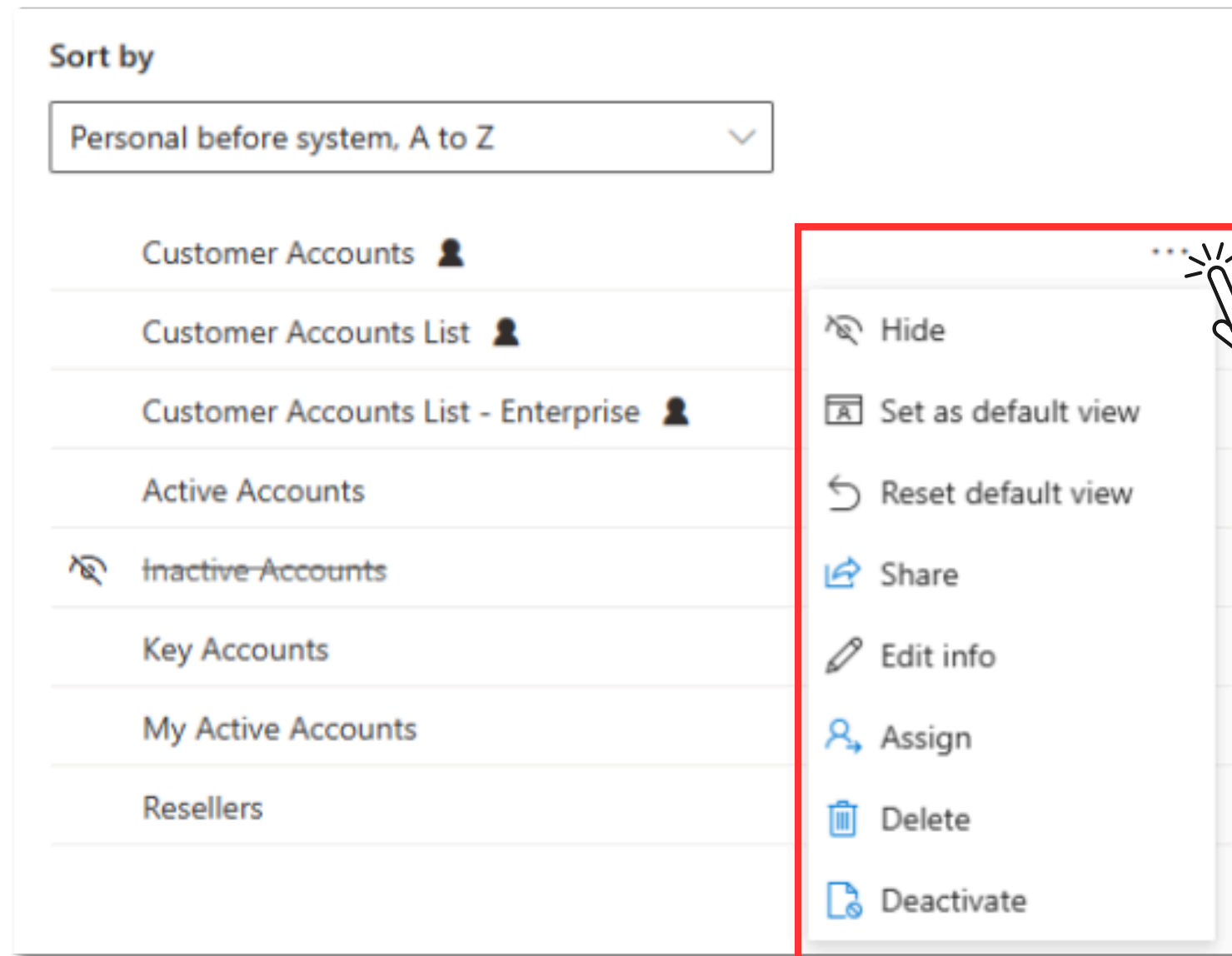
Customer Accounts	...
Customer Accounts List	Default ...
Customer Accounts List - Enterprise	...
Active Accounts	...
<b>Inactive Accounts</b>	...
Key Accounts	...
My Active Accounts	...
Resellers	...

- Hide
- Set as default view
- Reset default view

Click the ellipsis and select 'Hide'.

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

# 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.

## Share records

Manage who can see your record and how much access they get.

Changes made to all users or teams will be shared and options saved after clicking on the Share button.

The screenshot shows the 'Share records' interface. It has three main sections: 'Add user/team', 'Manage share access', and 'Previously shared access'. The 'Add user/team' section has a search bar. The 'Manage share access' section lists Rodney Green with a checkmark and a hand icon pointing to a settings icon. The 'Previously shared access' section lists Warren Butler. A red box highlights the permission configuration for Rodney Green, which includes a title, a description, and a list of permissions with checkboxes.

Section	User/Team	Access Status	Permissions
Add user/team	---	---	---
Manage share access	RG Rodney Green	Checked	Read, Write
Previously shared access	WB Warren Butler	Unchecked	None

**Rodney Green**  
Grant this user or team access to this record by assigning them permissions

**Permissions** ⓘ

- Read
- Write
- Delete
- Append
- Append to
- Assign
- Share

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.

## Share records

Manage who can see your record and how much access they get.

Changes made to all users or teams will be shared and options saved after clicking on the Share button.



The screenshot shows the 'Share records' interface. On the left, there is a search bar labeled 'Add user/team' with the text 'daniel' entered. A blue arrow points to this search bar. Below the search bar is a 'Manage share access' section with a list of users. The first user is 'Rodney Green' (RG) with a checked box. Below that is 'Previously shared access' with 'Warren Butler' (WB) and an unchecked box. A blue arrow points from the 'Previously shared access' section to the right. On the right, a dropdown menu is open for 'Rodney Green', showing 'Results from: Users Teams' and a search result for 'Daniel Norris (Available)' with the email 'daniel.norris@serversys.com'. A red box highlights this search result. Below the dropdown, there are checkboxes for permissions: 'Append', 'Append to', 'Assign', and 'Share'. A blue arrow points from the 'Previously shared access' section to the 'Append' checkbox.

# Using Filters for Managing and Sharing Views

Filters offer another approach for managing and sharing views.


Manage and share views: Accounts ×

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

 Filter views 



Sort by

Personal before system, A to Z ▾

Customer Accounts  ⋮

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

Filter views: Accounts ×

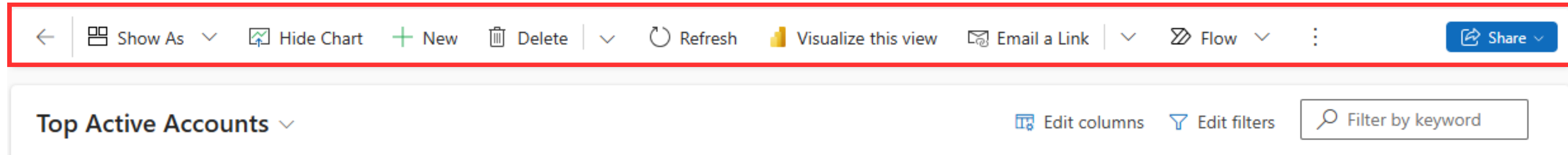
 Hide 

View type ▾ Status ▾ Owner ▾

<input type="checkbox"/>	Name <span>▾</span>	View type <span>▾</span>	Hidd... <span>▾</span>	Defa... <span>▾</span>	Owner <span>▾</span>	Status <span>▾</span>	Last modified <span>▾</span>
<input type="checkbox"/>	Customer Accounts	Personal			Rodney Green	Active	2 years ago
<input type="checkbox"/>	Customer Accounts List	Personal	✓		Warren Butler	Active	3 months ago
<input type="checkbox"/>	Customer Accounts List - Enterp...	Personal			Warren Butler	Active	3 months ago
<input checked="" type="checkbox"/>	Active Accounts	System				Active	5 years ago
<input checked="" type="checkbox"/>	Inactive Accounts	System				Active	5 years ago
<input type="checkbox"/>	Key Accounts	System				Active	7 years ago
<input type="checkbox"/>	My Active Accounts	System				Active	6 years ago
<input checked="" type="checkbox"/>	Resellers	System				Active	8 years ago

# 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/deactivate/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.





## Want to know more?

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

Contact us today on  
**+44(0)203 884 3804**

Microsoft Partner

[www.serversys.com](http://www.serversys.com)

