

Dynamics 365 - Reports & Views Quick Guide

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Reports & Views Quick Guide

Creating reports and editing views

- Navigate to the view you would like to create your view/report
- In the dropdown on the top left (this would normally default to for e.g. My Open Opportunities, Active Services dependent on the view)
- Select a view in the list
- This view can be saved as a new view, once you add columns or filters

Changing order of columns

- In your chosen view, go to Edit Columns
- This will list the columns and the order they appear in
- Hover over the field you would like to move
- Drag the field up and down the list to where you would like it to appear
- Apply
- You should now see the change in the table
- If you would like this view to persist, click into the top left view dropdown
- Select Save as new view
- Name the new view
- Save
- The new view can be found in dropdown. Saved views will have a person icon next to it.

Add Columns

- In your chosen view, go to Edit Columns
- Click Add Columns
- A list of fields from the Opportunity area will appear
- Select a field to add to the table (If the field cannot be found, go to part 2 below)
- Close
- The field selected will be added to the bottom of the table list
- Drag the field to where you would like it to appear
- Apply

- You should now see the change in the table
- If you would like this view to persist, click into the top left view dropdown
- Select Save as new view
- Name the new view
- Save
- The new view can be found in dropdown. Saved views will have a person icon next to it

Part 2 - Add related field as a column

- If the field cannot be found in the list above, it may be in the related area.
- Click into Related
- This will list a number of areas, click into the arrow beside each area to view available fields
- Find the field and select to add it to the table. If you can't find the field, try using the search box
- Once selected, Close
- The field selected will be added to the bottom of the table list
- Drag the field to where you would like it to appear
- Apply
- You should now see the change in the table
- If you would like this view to persist, click into the top left view dropdown
- Select Save as new view
- Name the new view
- Save
- The new view can be found in dropdown. Saved views will have a person icon next to it

Filter the view

- In your chosen view, go to Edit Filters
- Existing filters in the view will be listed
- Filters can be amended and new filters can be added.
- For e.g. In opportunities, we will add a Created By filter
- Click Add
- Add row
- In the Select a field, find Created By (if you cannot find the field you are looking for, go to Part 2 below)
- Select
- In the second field, chose the operator. For e.g. Equals, contains, begins with
- In the Value field, click into the dropdown.
- We will search for the user, for e.g. Amy Paulsen

- Apply
- You should now see the change in the table
- If you would like this view to persist, click into the top left view dropdown
- Select Save as new view
- Name the new view
- Save
- The new view can be found in dropdown. Saved views will have a person icon next to it

Part 2 - Filter this view

- If the field cannot be found in the list above, it may be in the related area.
 - Click +Add
 - Add related entity
 - Choose a related entity in the dropdown. For e.g. Primary Product
 - Select an operator or keep as default. Contains data
 - Select a field
 - Opportunity Product
 - Choose an operator
 - Select product from the dropdown
 - Apply
 - You should now see the change in the table
 - If you would like this view to persist, click into the top left view dropdown
 - Select Save as new view
 - Name the new view
 - Save
 - The new view can be found in dropdown. Saved views will have a person icon next to it.
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