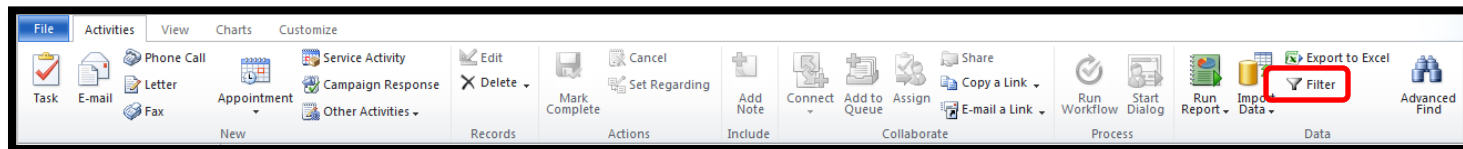


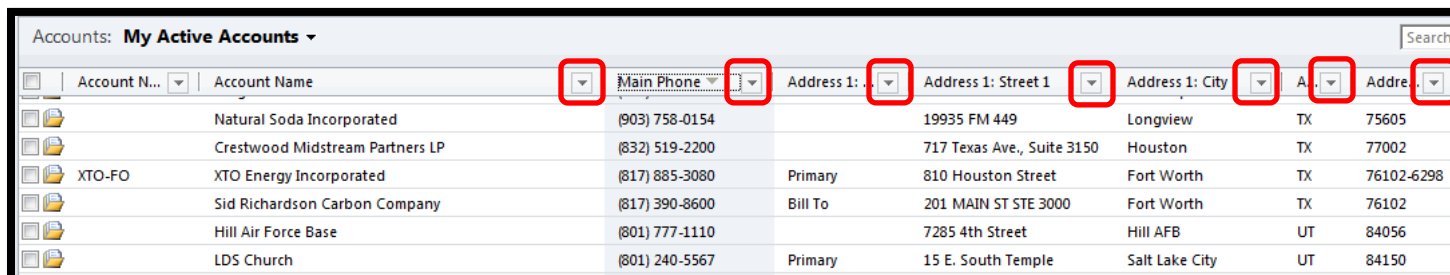
Tips & Tricks – Newsletter April 2012

Filtering in CRM:

You can filter the columns from within the Grid as shown in the below screen shot:

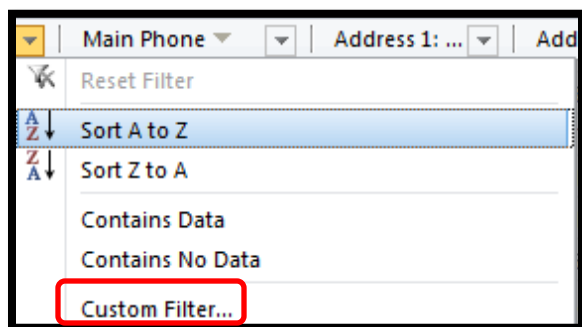


- Click on the Filter button that enables filtering for each column as shown in below screen shot.

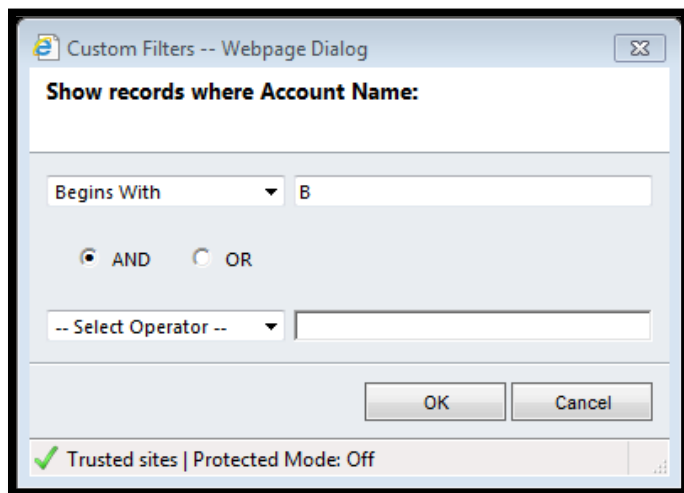


Account N...	Account Name	Main Phone	Address 1:	Address 1: Street 1	Address 1: City	A...	Address
	Natural Soda Incorporated	(903) 758-0154		19935 FM 449	Longview	TX	75605
	Crestwood Midstream Partners LP	(832) 519-2200		717 Texas Ave., Suite 3150	Houston	TX	77002
XTO-FO	XTO Energy Incorporated	(817) 885-3080	Primary	810 Houston Street	Fort Worth	TX	76102-6298
	Sid Richardson Carbon Company	(817) 390-8600	Bill To	201 MAIN ST STE 3000	Fort Worth	TX	76102
	Hill Air Force Base	(801) 777-1110		7285 4th Street	Hill AFB	UT	84056
	LDS Church	(801) 240-5567	Primary	15 E. South Temple	Salt Lake City	UT	84150

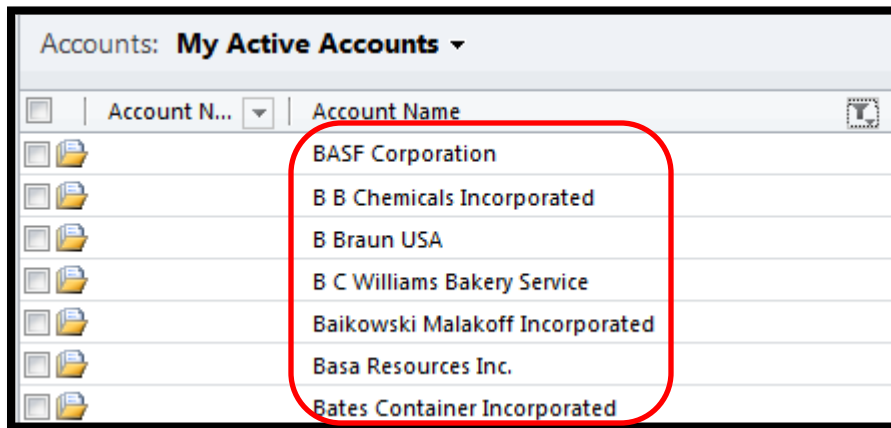
- The drop down shows the following options for filtering:



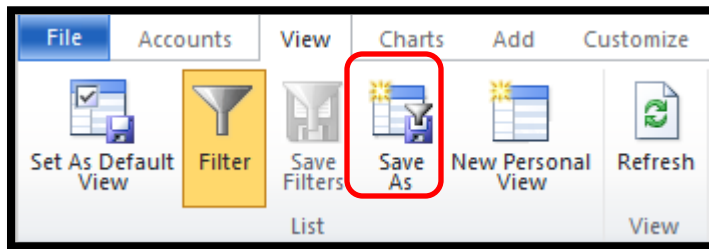
- Click on Custom filter option and specify the conditions for which the records will be filtered.



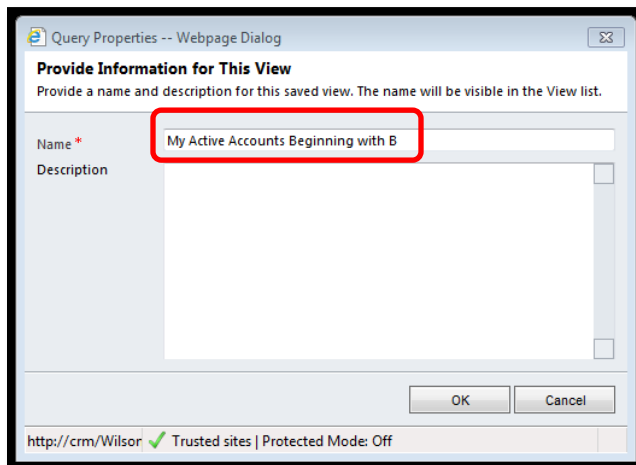
- Now records will be shown only for the Accounts whose name begins with “b” as shown in below screen shot.



- Select the View tab in the ribbon; click on Save As



- Specify the name of your custom view



- The custom view can be located in the “My Views” section of the View List.

