



PowerSearch for MS CRM 3.0

Version 1.0

Implementation Guide (How to install/uninstall)

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Common Information:

Before installing TI for MS CRM 3, please read this document and follow the steps carefully.

Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:

Follow each of the following steps, to complete the installation:

1. Installing the PowerSearch for MS CRM 3.
2. Configuring the Search -criteria

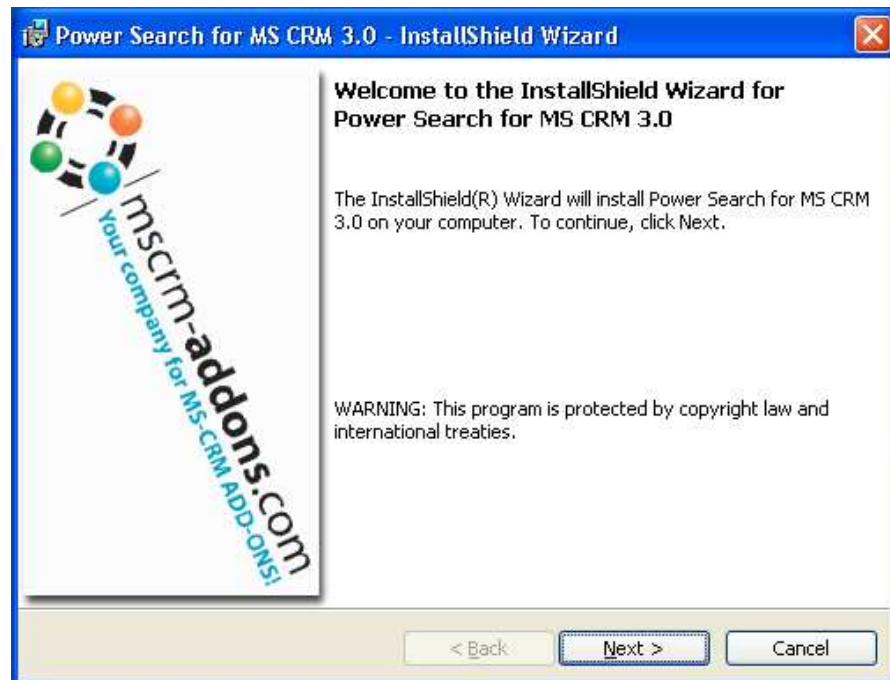
1. Installation

You have to install the Add-On on your MS CRM Server.

1. Intro:

Run the PowerSearch for MS CRM 3 Setup file.

Following window will appear:



Click [Next] to proceed.

2. EULA (End User License Agreement)

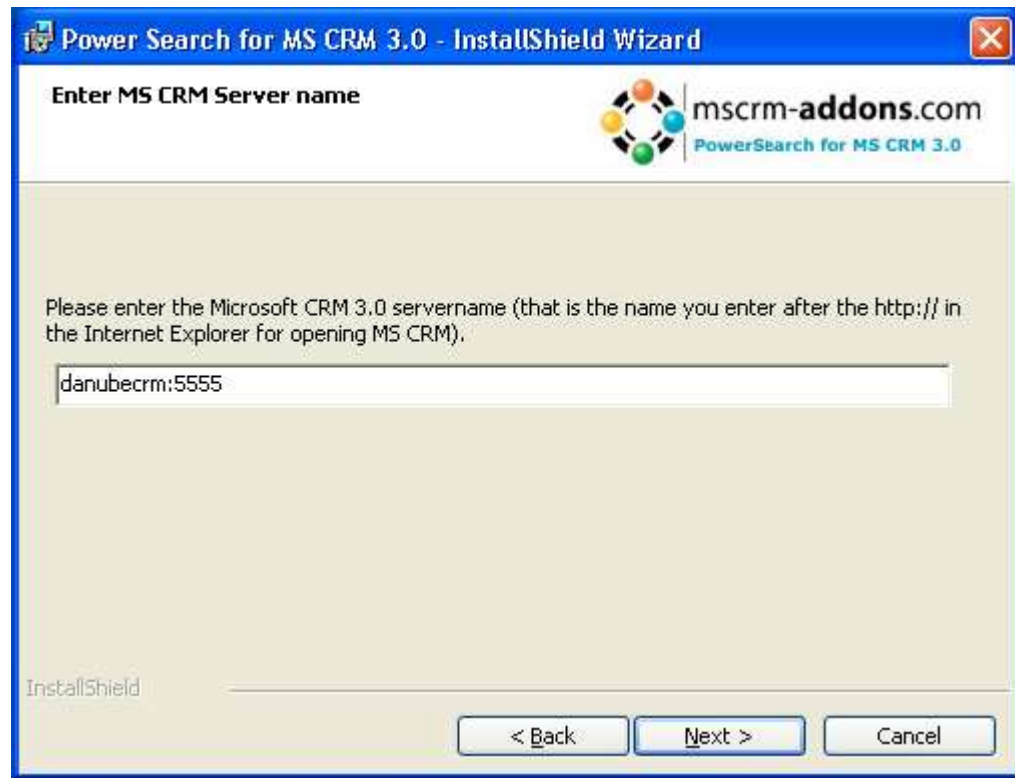


3. CRM Server

Enter the name of the CRM server.

Do not add "*http://*" nor "*https://*" to the sever name.

e.g: in our case CRM is called via *http://danubecrm:5555/loader.aspx* in the Internet Explorer, so we have to enter "*danubecrm:5555*" in here.



Power Search for MS CRM 3.0 - InstallShield Wizard

Enter MS CRM Server name

mscrm-addons.com
PowerSearch for MS CRM 3.0

Please enter the Microsoft CRM 3.0 servername (that is the name you enter after the http:// in the Internet Explorer for opening MS CRM).

danubecrm:5555

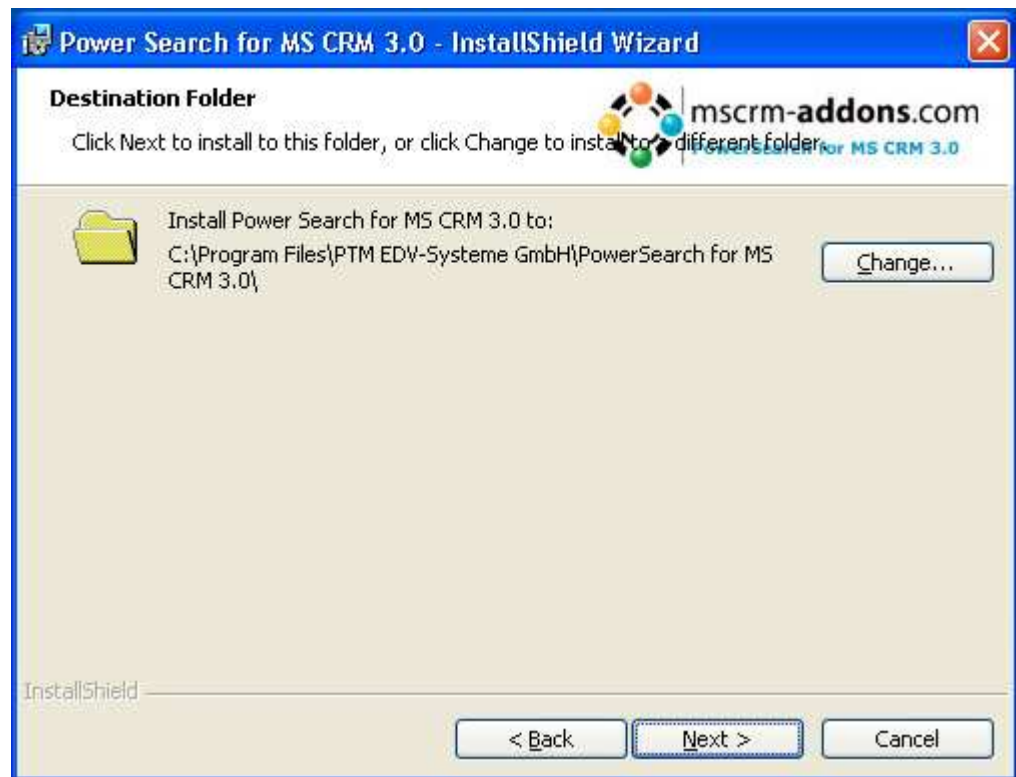
InstallShield

< Back Next > Cancel

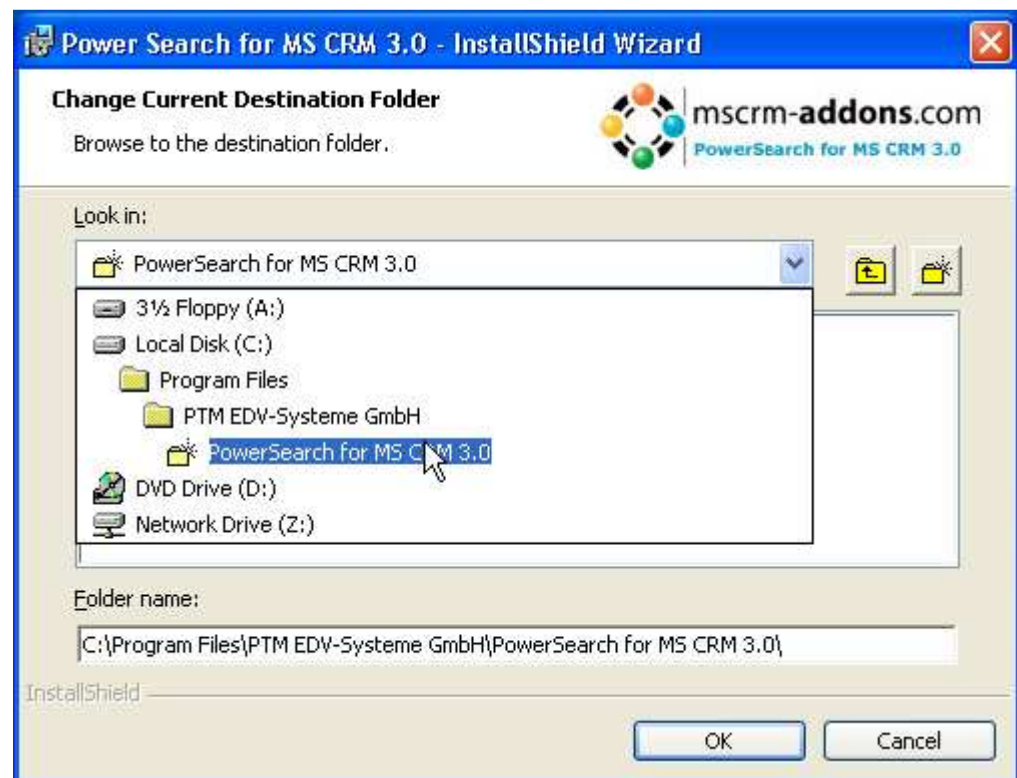
Click [Next] to proceed.

4. Folder Selection

Here it's possible to set the installation directory.

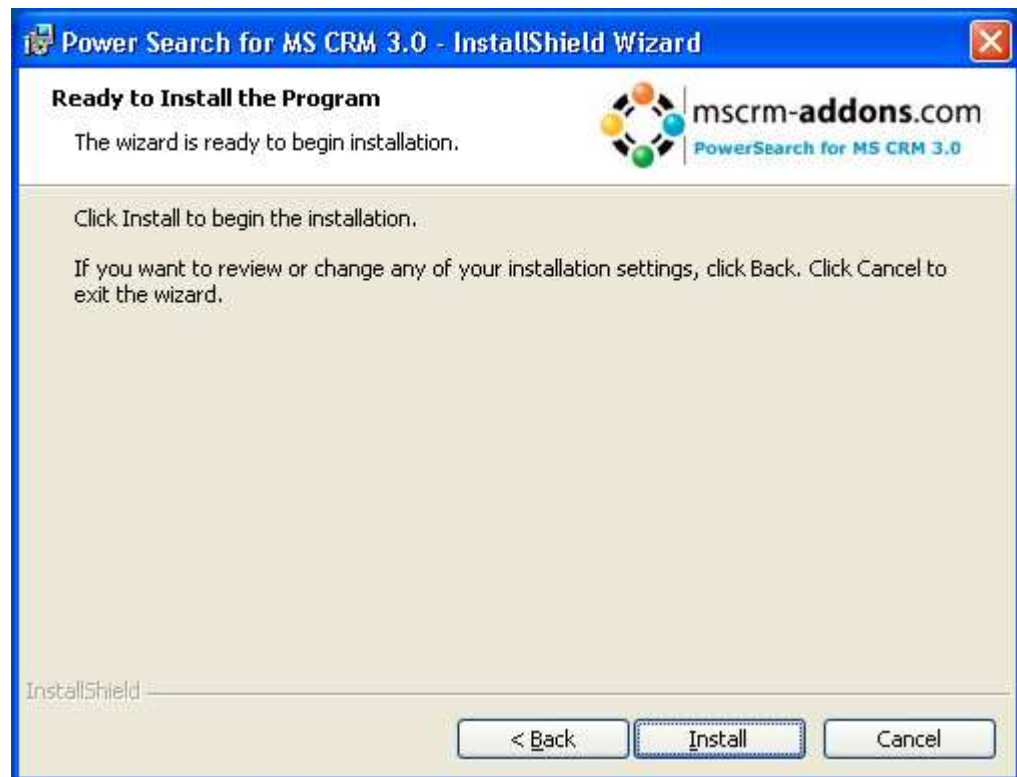


Press [Change] to specify the installation path.



5. Confirm Installation

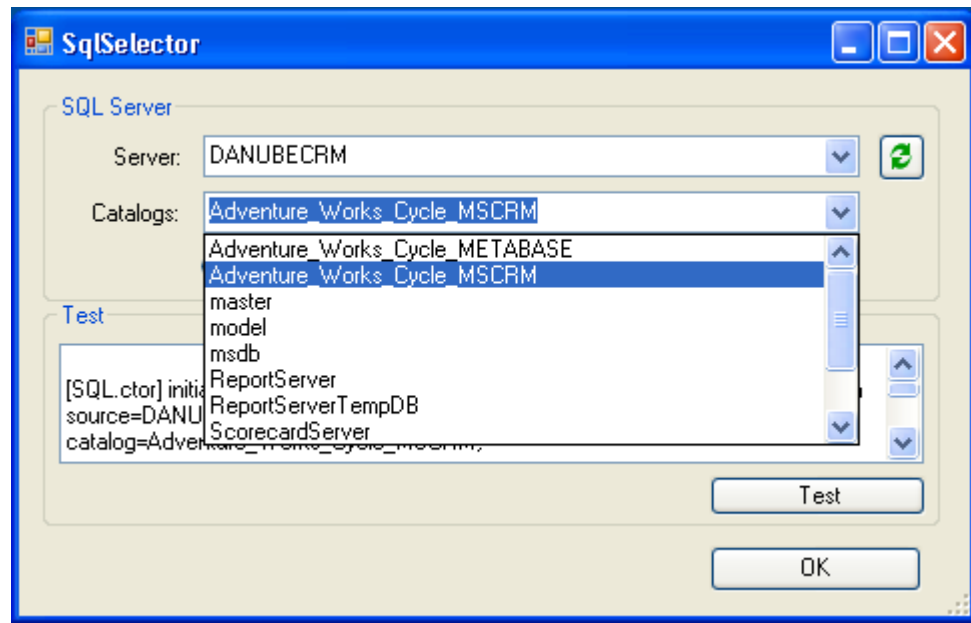
To start the installation, click on [Install].
To change the settings, click on [Back].



6. SQL settings

whilst the installations process you will be asked to specify the SQL settings.

Following window will appear:

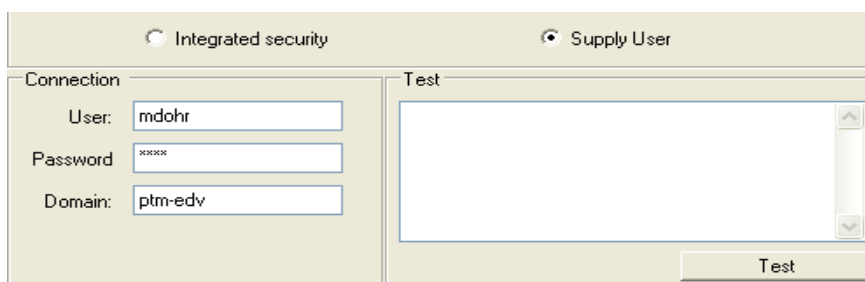


You have to specify the SQL-Servername and the MS CRM Catalogue.

IMPORTANT: The user has to be an existing CRM user.

Integrated security: Check this radiobutton to logon with your local credentials.

Supply User: Check if you want to supply a specific user. In this case you'll have to enter username, password and domain of the user.

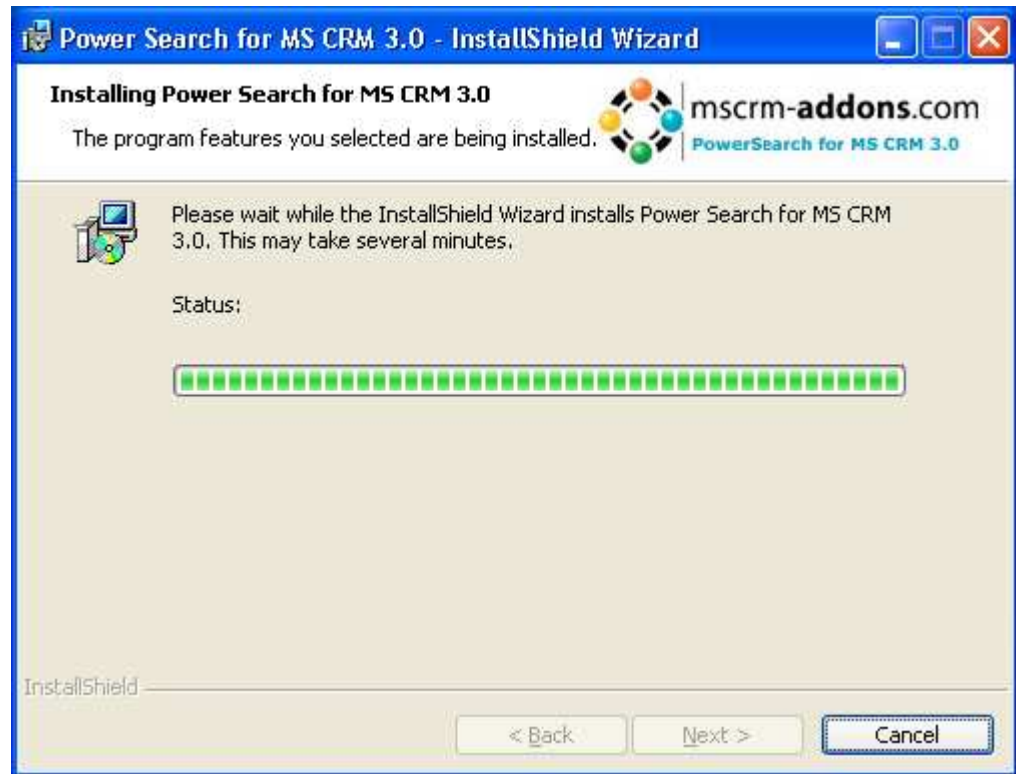


Press [Test] to verify the settings, you will see following window if the settings are correct:



7. Progress

After that, the installations progress goes on, the website is created and the files are copied, therefore it's possible that you will see following screen for a while:



You will be asked if you want to start the index – service which is needed for document search, it may takes some time if a lot documents have been saved within MS CRM so far.

8. Configuration

Next the Configuration Tool will start automatically.
For a detailed description, please go to **chapter 2**

9. Finish

When the setup has finished successfully, you will see following screen:



A new entry has been created in the sitemap.
You see a new menu item under "Workspace" in CRM called "Power Search".

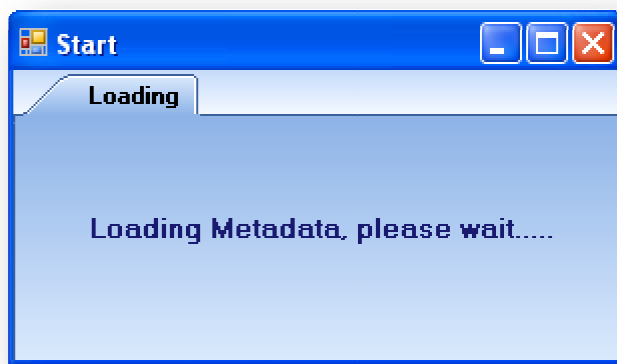
2. Configuration

The PowerSearch for MS CRM 3.0 configuration allows you to specify entities you want to use for searching.

Basically the setup consists of two forms:

1. The main setup form which allows you to specify the entities
2. The fields form which allows you to specify search and result attributes.

When you start the Tool you will see following loading screen:

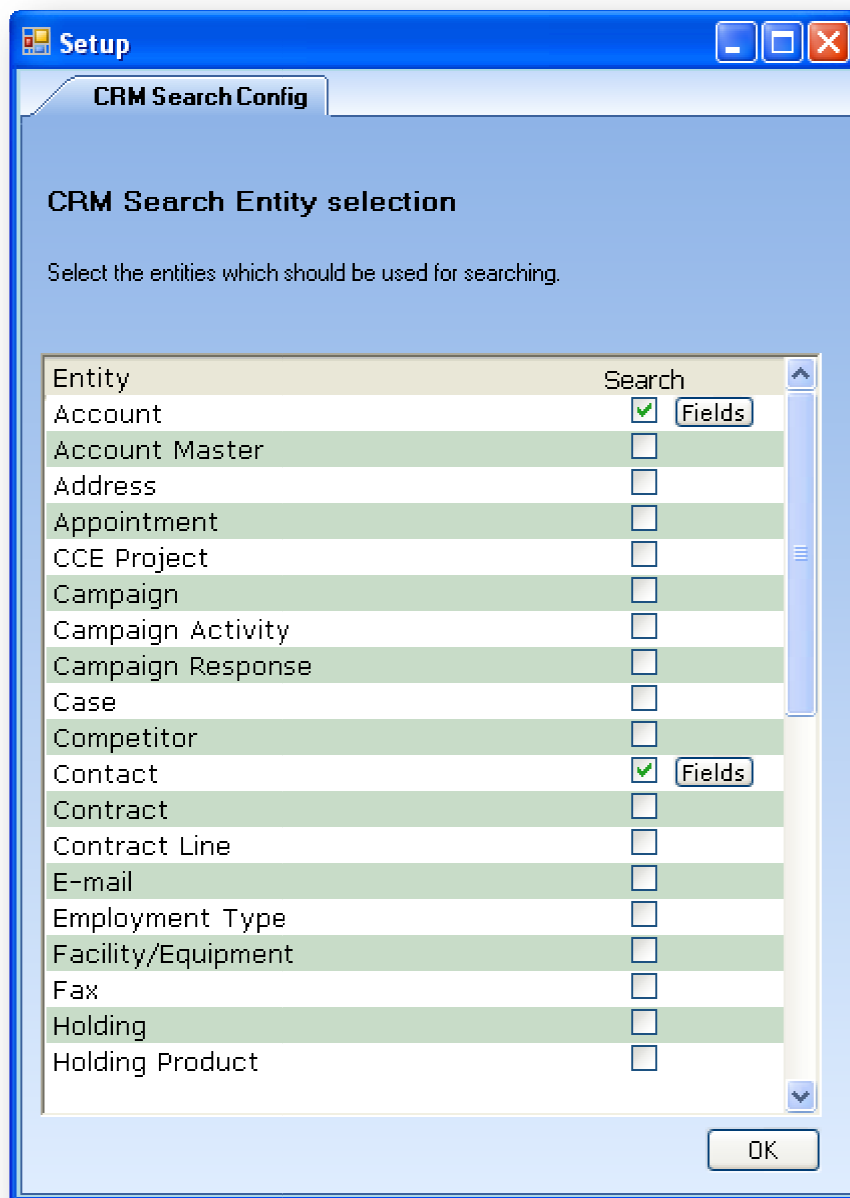


1. The main setup form:

In the Datawindow all available entities are listed. All entities you select will show up in the entity-toolbar afterwards:



If you select one entity, a new button "fields" will appear which allows you to open a new dialogue where it's possible to define the attributes used. (see chapter 1.2)



The screenshot shows a Windows-style dialog box titled "Setup" with a blue header bar. Below the header is a tab labeled "CRM Search Config". The main area has a light blue background and is titled "CRM Search Entity selection". Below the title is a text label: "Select the entities which should be used for searching." Below this is a table with two columns: "Entity" and "Search". The table lists 20 entities, each with a checkbox in the "Search" column. The "Account" and "Contact" rows have their checkboxes checked, and each has a "Fields" button next to it. The other 18 entities have unchecked checkboxes. At the bottom right of the dialog is an "OK" button.

Entity	Search
Account	<input checked="" type="checkbox"/> Fields
Account Master	<input type="checkbox"/>
Address	<input type="checkbox"/>
Appointment	<input type="checkbox"/>
CCE Project	<input type="checkbox"/>
Campaign	<input type="checkbox"/>
Campaign Activity	<input type="checkbox"/>
Campaign Response	<input type="checkbox"/>
Case	<input type="checkbox"/>
Competitor	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/> Fields
Contract	<input type="checkbox"/>
Contract Line	<input type="checkbox"/>
E-mail	<input type="checkbox"/>
Employment Type	<input type="checkbox"/>
Facility/Equipment	<input type="checkbox"/>
Fax	<input type="checkbox"/>
Holding	<input type="checkbox"/>
Holding Product	<input type="checkbox"/>

Please press the OK button to save the settings to the config file.

2. The fields form:

Here it's possible to set the attributes where the search routine should search in and the attributes that should show up as a result if a record is found.

Fields

Field specification

Specify Search fields for contact

Search: Check if you want this field to be searched in

Result: Check if you want this field to be returned as a search result

Fields	Search	Result
E-mail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E-mail Address 2	<input type="checkbox"/>	<input type="checkbox"/>
E-mail Address 3	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>
External User Identifier	<input type="checkbox"/>	<input type="checkbox"/>
FTP Site	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Government	<input type="checkbox"/>	<input type="checkbox"/>
Has Children	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input type="checkbox"/>	<input type="checkbox"/>
Lead Source	<input type="checkbox"/>	<input type="checkbox"/>

StatusCode Values for Active Objects: ☒ Active ☐ Inactive

OK Cancel

Furtheron it's possible to set the values for status-codes that should count as Active for search via the checkbox-list at the bottom.

All available status-codes are listed. Double click on the item to check.

StatusCode Values for Active Objects:

<input checked="" type="checkbox"/>	Active
<input type="checkbox"/>	Inactive

e.g.: Entity Lead, here we have 7 different states and we want to find qualified, new and contacted leads

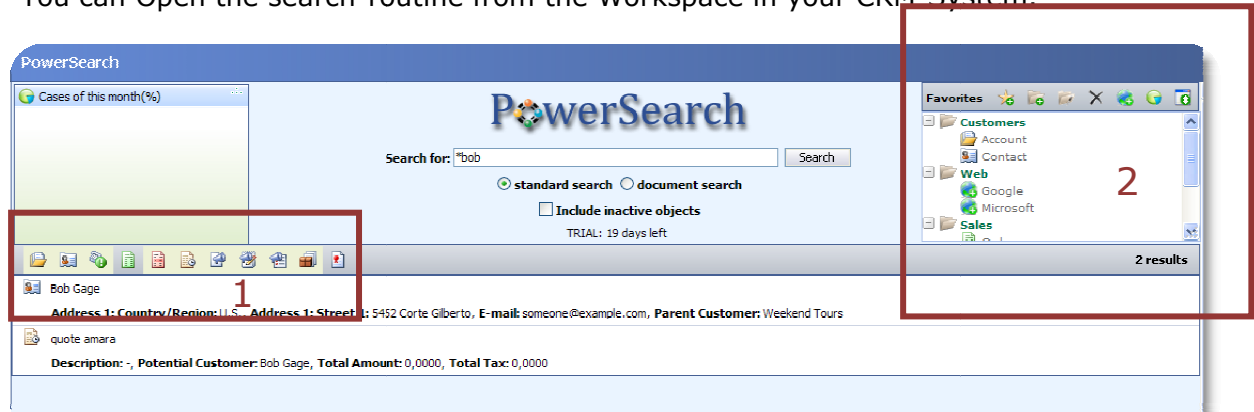
StatusCode Values for Active Objects:

<input checked="" type="checkbox"/>	New
<input checked="" type="checkbox"/>	Contacted
<input checked="" type="checkbox"/>	Qualified
<input type="checkbox"/>	Lost
<input type="checkbox"/>	Cannot Contact

Press [OK] to overtake the settings.

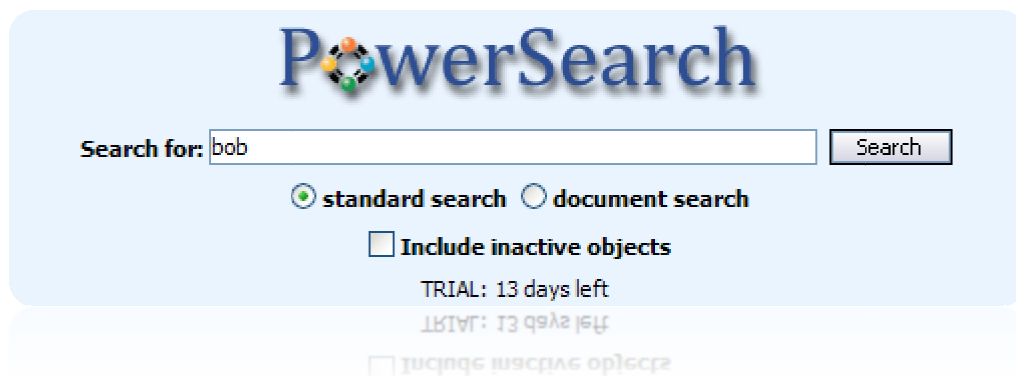
3. PowerSearch-Main Form

You can Open the search-routine from the Workspace in your CRM-System.



1. Standard search

1. Search options



Basically the PowerSearch – routine provides two search options:

- 1; **Standard search:** Searches through the CRM Database and lists all records.
- 2; **Document Search:** Lists all documents in which the keyword has been found

Next to this it's possible to decide, if inactive records (deactivated leads, etc.) should show up with the search results too. It's possible to selected states that should count as "active" in the Search – Configuration (see chapter2.2)

2. Entity selection

Here it's possible to define the entities which should be used for searching



Selected entities are lighted up by a yellow background.

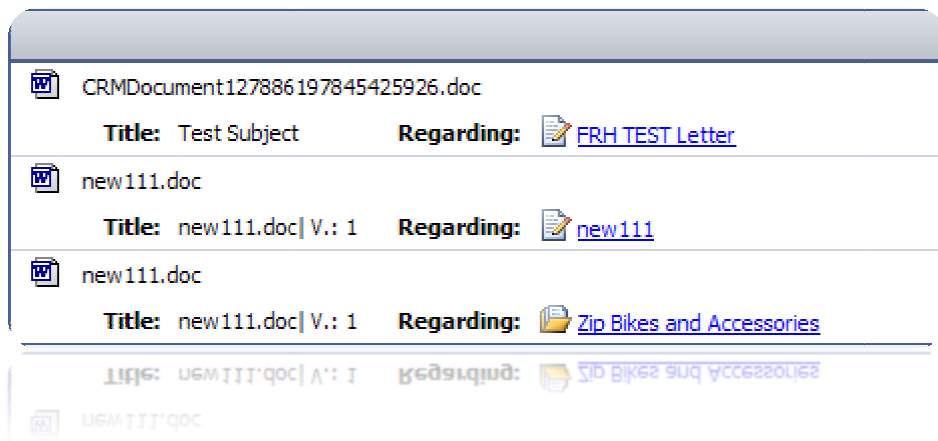
2. Document Search

The document search is based on an index service that runs on the server. The service is started automatically whilst installation and can manually be started manually from the indexservice – folder within the installation directory of Powersearch [usually located in **c:\program files\PTM EDV Systeme GmbH\PowerSearch for MS CRM 3.0\indexservice\CrmSuchindexDienst.exe**]

The document search is capable to search files from following format definitions:

- MS Word (*.doc)
- MS Excel (*.xls)
- MS PowerPoint (*.ppt)
- Adobe PDF (*.pdf)
- Text – files (*.txt)

When searching for documents, the result will show up in following format:



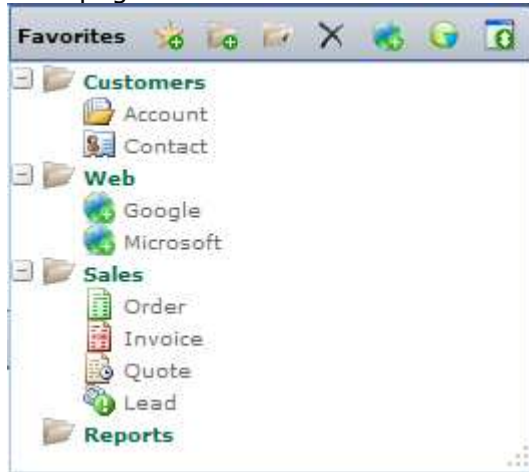
As shown above, you will get a list of all documents that contain the keyword entered and furthermore it shows up the CRM-record to which the document has been saved (company, contact, letter-/email-activity, etc...)

The index service will be updated by a task called "Schedule" every day at 10p.m. automatically. So if new documents are saved to CRM, they will not be found until the index is refreshed by the scheduler in the evening. To manually refresh the index, please start the CRMSuchIndexDienst.exe from the installation directory of Powersearch [usually located in **c:\program files\PTM EDV Systeme GmbH\PowerSearch for MS CRM 3.0\indexservice\CrmSuchindexDienst.exe**]

IMPORTANT: a task called "schedule" is created automatically within the Windows/System32/ - directory. In most cases services are disabled on MS 2003 Server – machines. As a result the **schedule**-task is not started and therefore the index is not updated automatically. Please open the services on the server and set the **schedule** –task to "automatically"

3. Favorites

The favorites provide a possibility to compile your favorites and to make them accessible within the search routine. The result will show up in an I-frame on the main page.

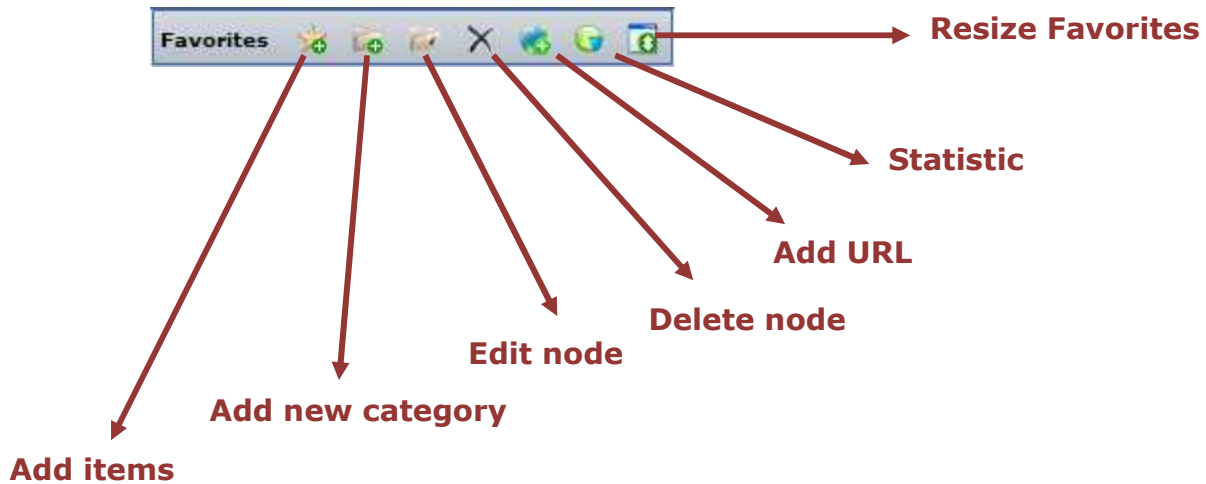


It is possible to add:

- Entity overviews: Show up the main entity – search from from CRM
- Advanced search: Shows up the results of predefined Advanced Searches
- URL's: Show up a specified URL

How edit favorites

The Favorites menu provides following possibilities:



3. Add Items:

It's possible to add two types of entries to the favorites here

- Entities: provide an entity overview
- Predefined advanced searches

With a click following window appears:

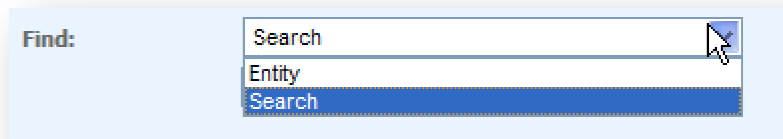
The 'Look Up Records' dialog box is shown. It has a title bar and a subtitle: 'Type the information you are looking for in the Find box and click Go. Then, select the records you want from the Available records list and move them to the Selected records list.'

At the top, there are two dropdown menus: 'Find:' with 'Search' selected, and 'Add to:' with 'Customers' selected. To the right of these is a 'Go' button.

Below the dropdowns are two large list boxes. The left one is titled 'Available records:' and contains the text 'Type a record name in the Find box and click Go.'. The right one is titled 'Selected records:' and contains the text 'No records have been selected yet.'.

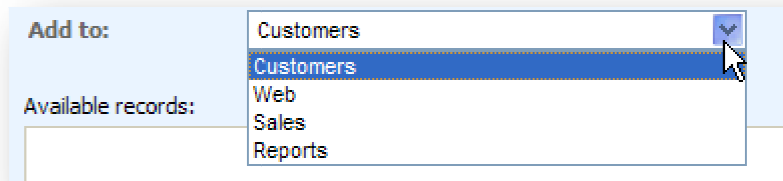
Between the two list boxes are two buttons: '>>' and '<<'. At the bottom right of the dialog are 'Cancel' and 'OK' buttons.

You can choose the type with the 1st drop-down-listbox:



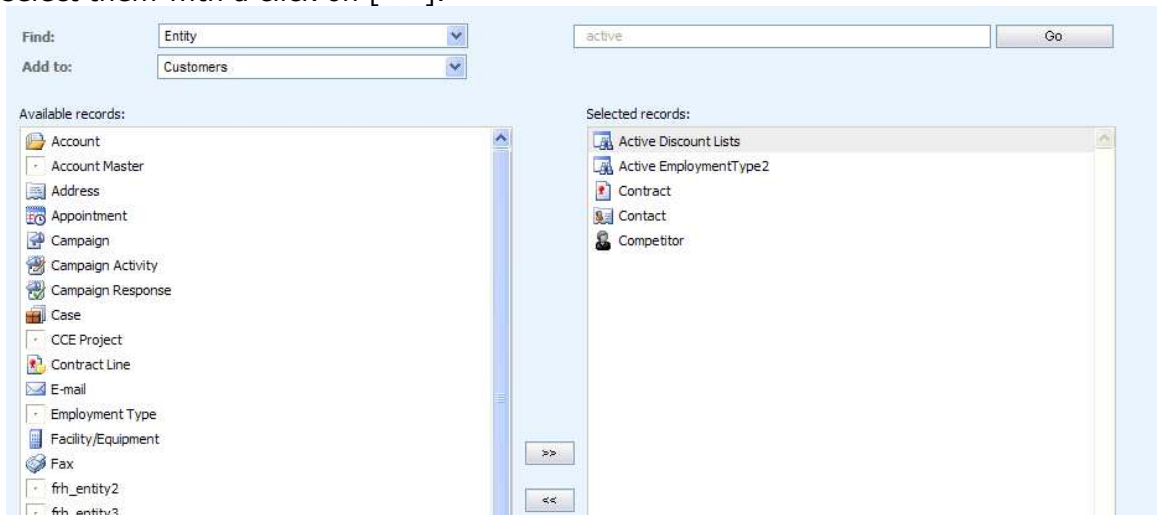
The image shows a close-up of the 'Find:' dropdown menu. The menu is open, displaying three options: 'Search', 'Entity', and 'Search'. The second 'Search' option is highlighted in blue. A mouse cursor is visible over the dropdown arrow.

You can specify the category to which you want to add the favorites with the 2nd drop-down-listbox:



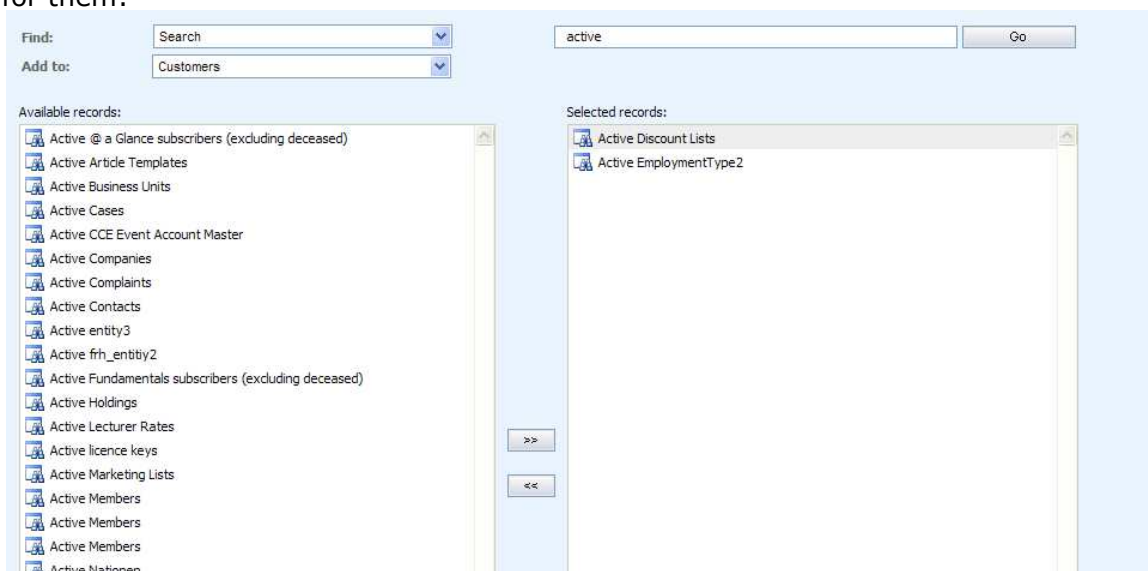
The image shows a close-up of the 'Add to:' dropdown menu. The menu is open, displaying five options: 'Customers', 'Customers', 'Web', 'Sales', and 'Reports'. The first 'Customers' option is highlighted in blue. A mouse cursor is visible over the dropdown arrow.

If you choose type "Entity" all entities will appear in the left listbox, you can add select them with a click on [>>].



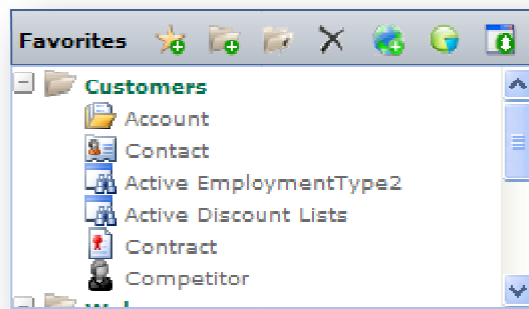
The image shows the main interface of the application. The 'Find:' dropdown is set to 'Entity' and the 'Add to:' dropdown is set to 'Customers'. The 'Available records:' listbox contains a list of entities, including 'Account', 'Account Master', 'Address', 'Appointment', 'Campaign', 'Campaign Activity', 'Campaign Response', 'Case', 'CCE Project', 'Contract Line', 'E-mail', 'Employment Type', 'Facility/Equipment', 'Fax', 'frh_entity2', and 'frh_entity3'. The 'Selected records:' listbox contains a selection of records, including 'Active Discount Lists', 'Active EmploymentType2', 'Contract', 'Contact', and 'Competitor'. There are buttons for '>>' and '<<' between the two listboxes.

Basically it's the same for Advances Searches. Additionally it's possible to search for them:



The image shows the main interface of the application. The 'Find:' dropdown is set to 'Search' and the 'Add to:' dropdown is set to 'Customers'. The 'Available records:' listbox contains a list of search results, including 'Active @ a Glance subscribers (excluding deceased)', 'Active Article Templates', 'Active Business Units', 'Active Cases', 'Active CCE Event Account Master', 'Active Companies', 'Active Complaints', 'Active Contacts', 'Active entity3', 'Active frh_entity2', 'Active Fundamentals subscribers (excluding deceased)', 'Active Holdings', 'Active Lecturer Rates', 'Active licence keys', 'Active Marketing Lists', 'Active Members', 'Active Members', 'Active Members', and 'Active Nationen'. The 'Selected records:' listbox contains a selection of records, including 'Active Discount Lists' and 'Active EmploymentType2'. There are buttons for '>>' and '<<' between the two listboxes.

All chosen entries will be added to the favorites -menu on the right top-corner afterwards:



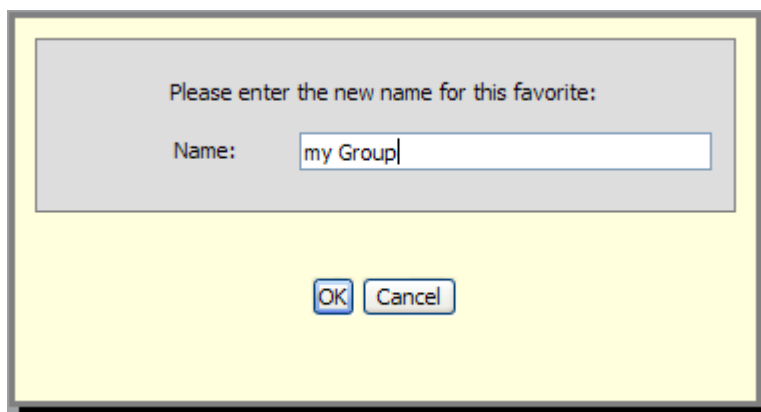
4. **Add new category:**

With a click a new folder named "New Folder" will appear in the tree. This folder could be used to add items afterwards.



5. **Edit node:**

With a click following window comes up:



Here its possible to rename the selected node (Category or entry).

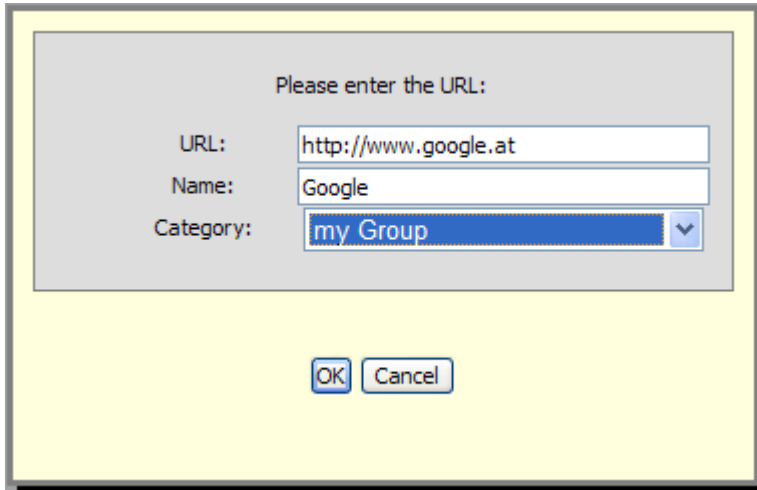
6. **Delete node:**

Deletes the selected node from the Favorites

7. Add URL:

Here it's possible to define URLs that should show up within the PowerSearch form.

With a click, following window appears:



Please enter the URL:

URL:

Name:

Category:

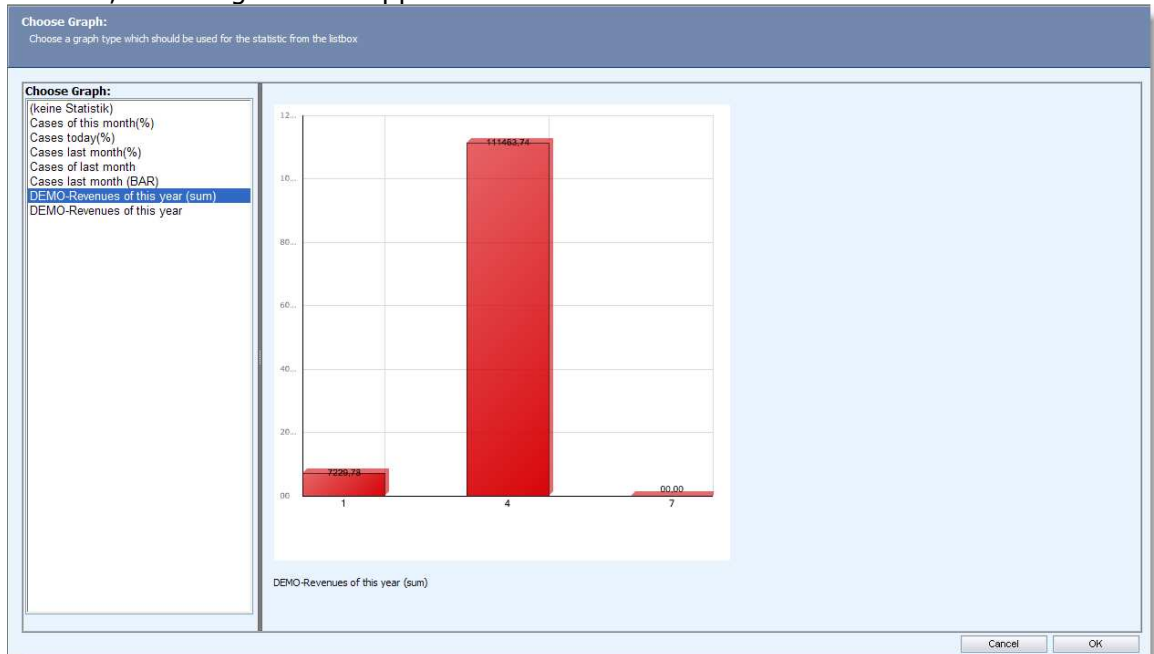
Afterwards a new node with the URL will show up in the tree and therefore can be accessed with PowerSearch:



8. Statistic:

Here it's possible to select the statistic, that should be presented in the statistic - sector on the main form afterwards.

On click, following window appears:



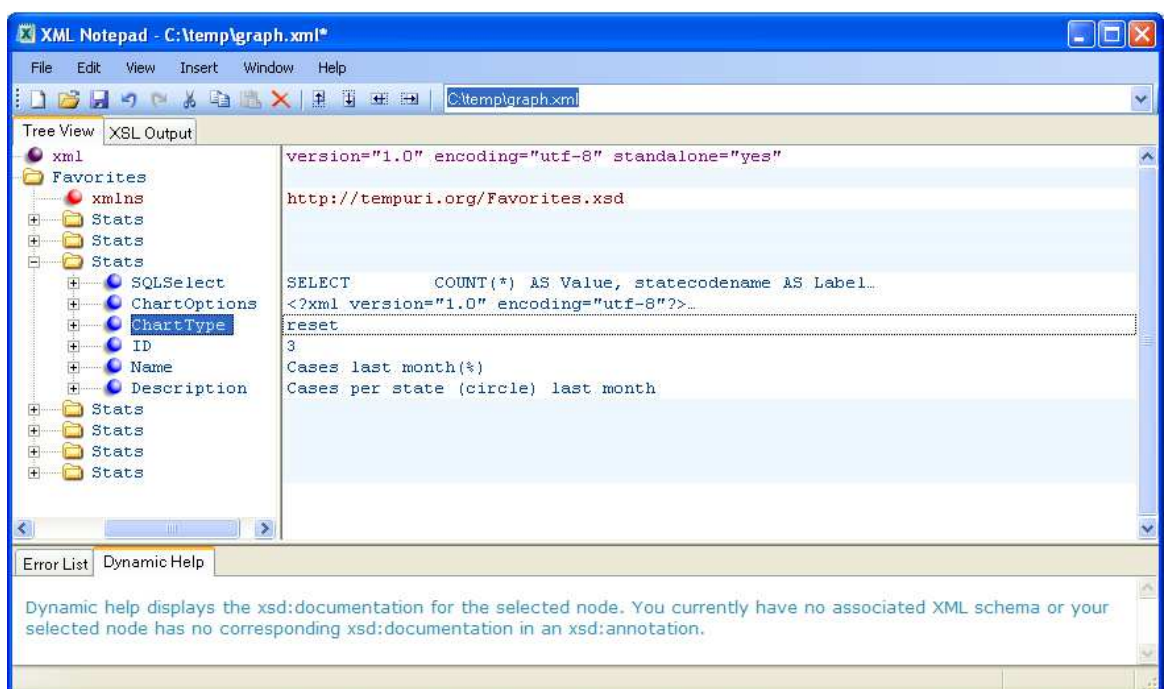
Here it's possible to select a statistic from the listbox on the left.

Add statistic: (**for enhanced users**)

This option requires XML and SQL- knowledge.

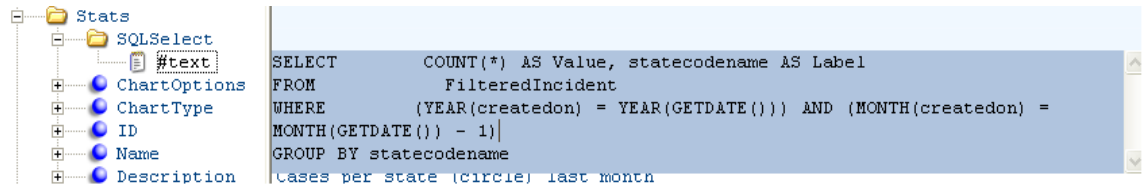
Basically statistics are defined in the graph.xml in the config-folder of PowerSearch for MS CRM 3.0.

(Edited with XML Notepad 2007 - available for free on www.microsoft.com)



Here you can see a "stats"- node for every statistic.
It consists of 6 config-entries:

- SQLSelect: Here the SQL-select which returns the data you want to show up has to be configured. E.g (cases of last month)



- ChartOptions: if you want to have a new chart, please send a request to support@mscrm-addons.com . We will take a look on this afterwards
- ID: Unique identifier of the chart
- Name: Name of the statistic. This name shows up in the listbox afterwards.
- Description: Description of the statistic. Shows up at the bottom of the statistic in the SelectStat.aspx.

For detailed information please contact our support- team.

9. **Resize:** Enlarges the Favorites window

4. Contact

If you have problems with the product send a Email to support@mscrm-addons.com or call +43 316 680 880 0