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# PowerSearch for MS CRM 2015/2016 and Dynamics 365

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v.2.2, Nov 2016

PowerSearch

(How to work with PowerSearch for MS CRM 2015/2016 and Dynamics 365)

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## Preamble

This documentation is intended to guide you through the generation of searches with PowerSearch in Microsoft Dynamics CRM/Dynamics 365.

This guide applies to version 7.110 (8.110) or higher.

Please read this document carefully and follow the steps as described to achieve the described results.

## Target Audience

This guide is intended for users applying search queries with PowerSearch who have the following minimum skills:

- Basic Microsoft Dynamics CRM/Dynamics 365 knowledge
- Maintaining and configuring a Microsoft CRM/Dynamics 365 Organization

## Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM/Dynamics 365 must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

## Purpose of PowerSearch?

PowerSearch facilitates – among other things – search queries in Microsoft Dynamics CRM/Dynamics 365. It is the perfect mix between Microsoft Dynamics CRM/Dynamics 365 Standard Search and Microsoft Dynamics CRM/Dynamics 365 Advanced Find.

Thus, PowerSearch provides a powerful search routine. In addition to the standard search functionality, users can predefine common queries and save tons of time on finding records in CRM.

PowerSearch provides its users with the possibility to use multiple fields for search queries that are frequently used. This allows the user to search in multiple fields at the same time, for example, to filter a view based on the account name and the city. There is no need to repeatedly insert every single search parameter anymore. Our powerful add-on allows its users to preconfigure the search fields in order to save valuable time.

# 1 How to install PowerSearch for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

PowerSearch can be installed and integrated in Microsoft Dynamics CRM/Dynamics 365 in two different ways:

via solution import (SEE CHAPTER 1.1 HOW TO INSTALL POWERSEARCH VIA SOLUTION IMPORT, PAGE 6)

via .msi-files (import via .exe installer). (SEE CHAPTER 1.2 HOW TO INSTALL POWERSEARCH VIA .MSI-FILE IMPORT, PAGE 10)

To get the required data for the installation, login to the Download Area on <http://www.msrm-addons.com/Downloads/PowerSearchforMSCRM2015.aspx>.

## Download

Title	Category	Modified Date	Size	
<a href="#">PowerSearch</a>	v.2015.109	7/20/2016	26.88 MB	<a href="#">Download</a>

Figure 1: PowerSearch – Download .zip-file

Click on the **[Download]**-button and you will receive a .zip-file that contains all the required data for the installation (Please see figure 2 and 3).

## Name


 PowerSearch for Microsoft CRM.zip

Figure 2: PowerSearch for Microsoft CRM.zip

The .zip-file is the starting point for your installation – no matter which way you choose. Please make sure that you unpack the .zip-file after the download. When unzipped, the solution package looks like below:

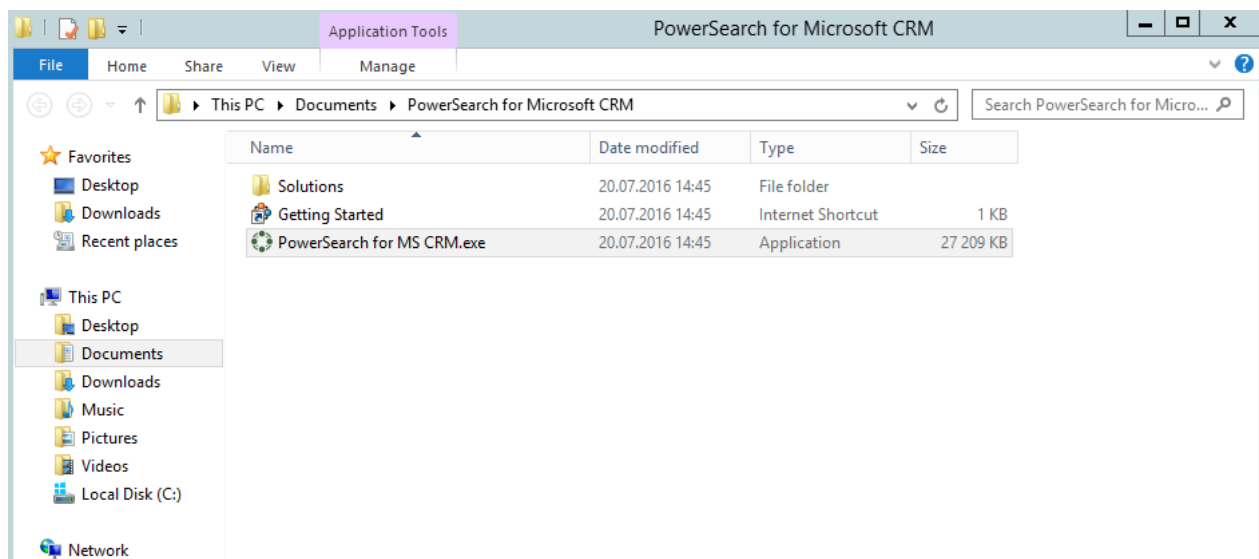


Figure 3: PowerSearch for Microsoft CRM.zip (unzipped)

## 1.1 How to install PowerSearch via solution import

Installing PowerSearch via solution import avoids local installations (for example when using CRM Online). The solution folder contains the four PowerSearch solutions. Two of them are mandatory. The other two files are optional. During the course of this chapter you will find detailed information on how to install them correctly.

### 1.1.1 How to import PowerSearch solutions

Navigate to *Settings > Solutions* in Microsoft Dynamics CRM/Dynamics 365. There, click on the **[Import Solutions]**-button in order to import PowerSearch. If you have already installed an older version of PowerSearch, no worries, you can use them simultaneously.

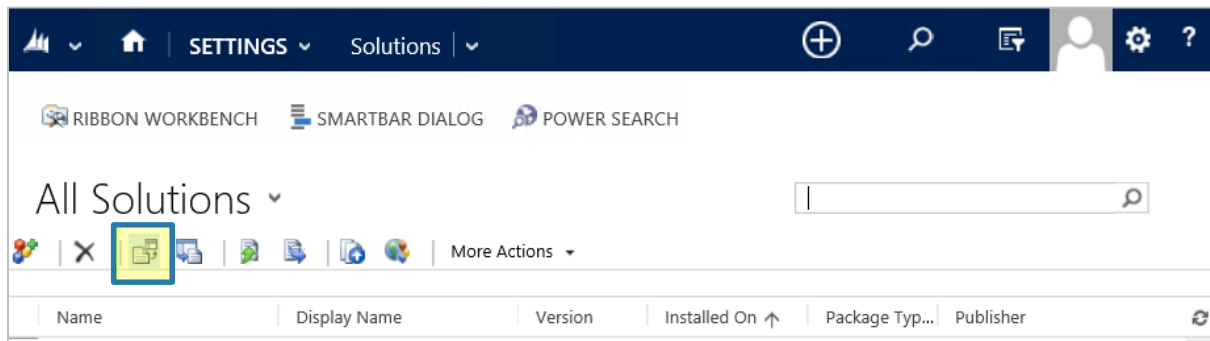


Figure 4: PowerSearch – Import solutions

The "Import Solution"-wizard opens:

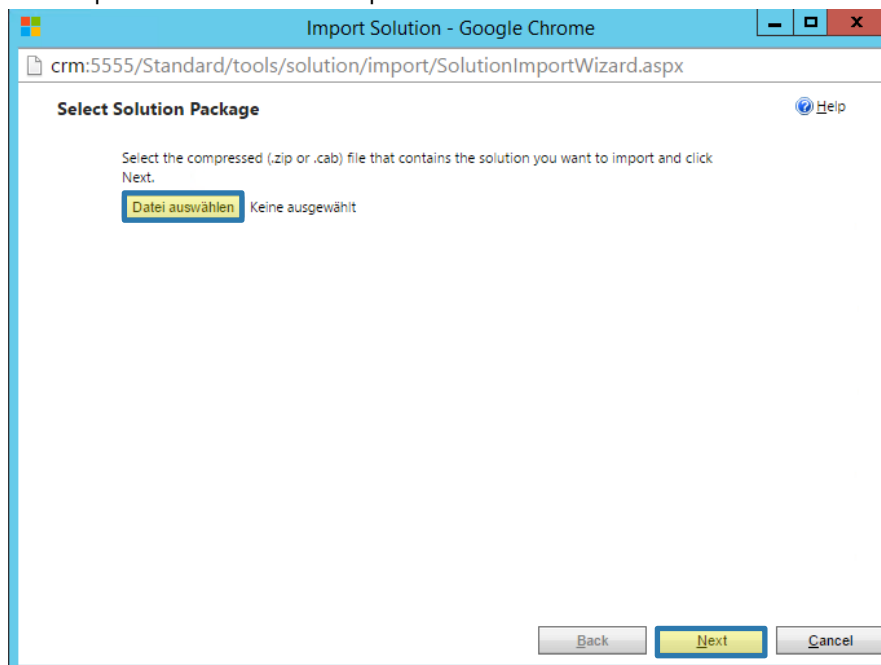


Figure 5: PowerSearch – Solution Import Wizard

If you have not modified the file location in the beginning, you should find the files in your Download folder. Now click on the **[Browse]**-button and upload the following files:

- ① MSCRMADDONScomGeneral
- ② PowerSearchPluginCore
- ③ PowerSearchPluginConfig (optional: embeds links in SiteMap and adds a dashboard)
- ④ PowerSearchPluginGlobalButton (optional: adds the global button to PowerSearch)



It is of upmost importance to upload the two mandatory files in the above order.

After a simple double-click on the first file ("MSCRMADDONScomGeneral"), you can proceed with the upload.

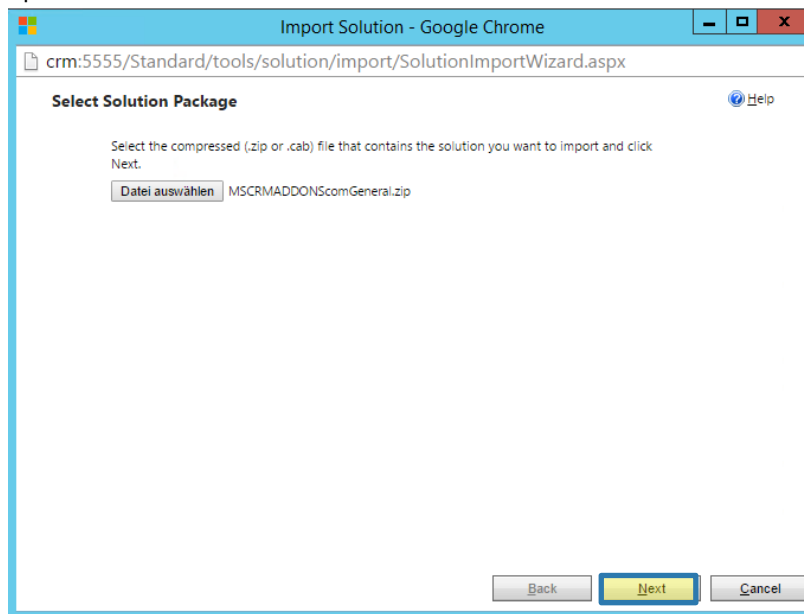


Figure 6: PowerSearch – Select solution package in the Solution Import Wizard

Click on the **[Next]**-button in order to proceed.



If the solution you try to import to the system already exists, the following window appears:

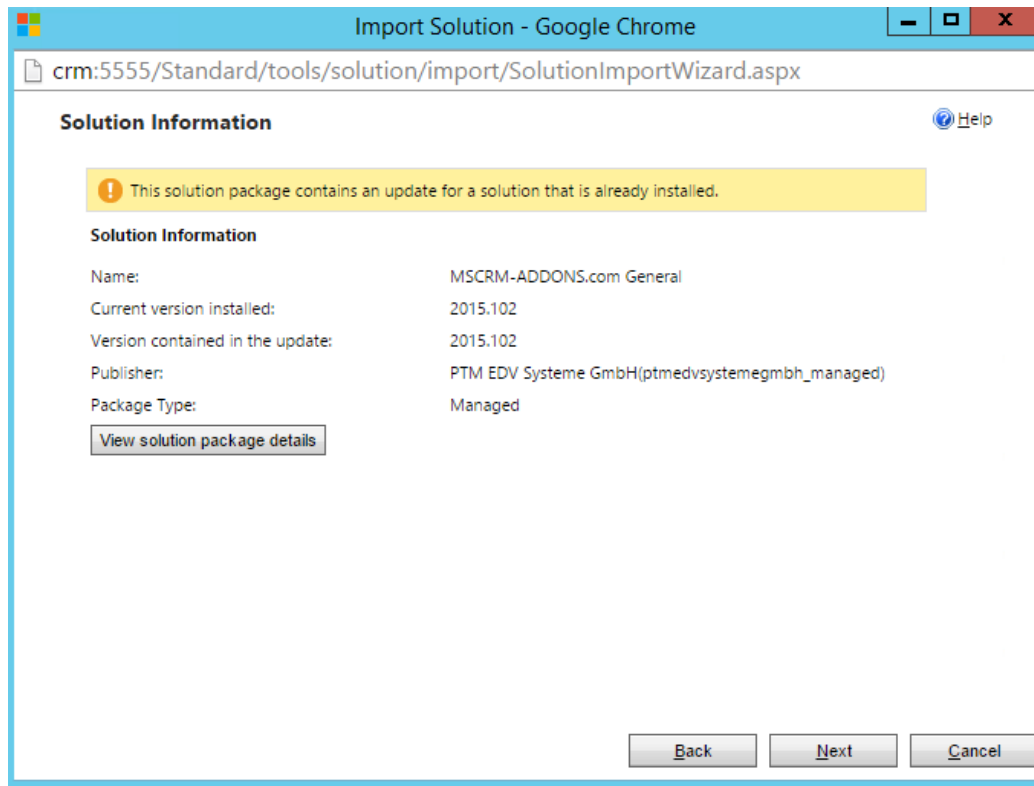


Figure 7: PowerSearch – Solution Information in the Solution Import Wizard

If the same solution version is already installed, skip this step. If not, follow the steps as described below: Simply click on the **[Next]**-button. The following window appears. When asked for previous customizations on components, please select **Overwrite Customizations** (1), as shown below and proceed with a click on the **[Import]**-button.

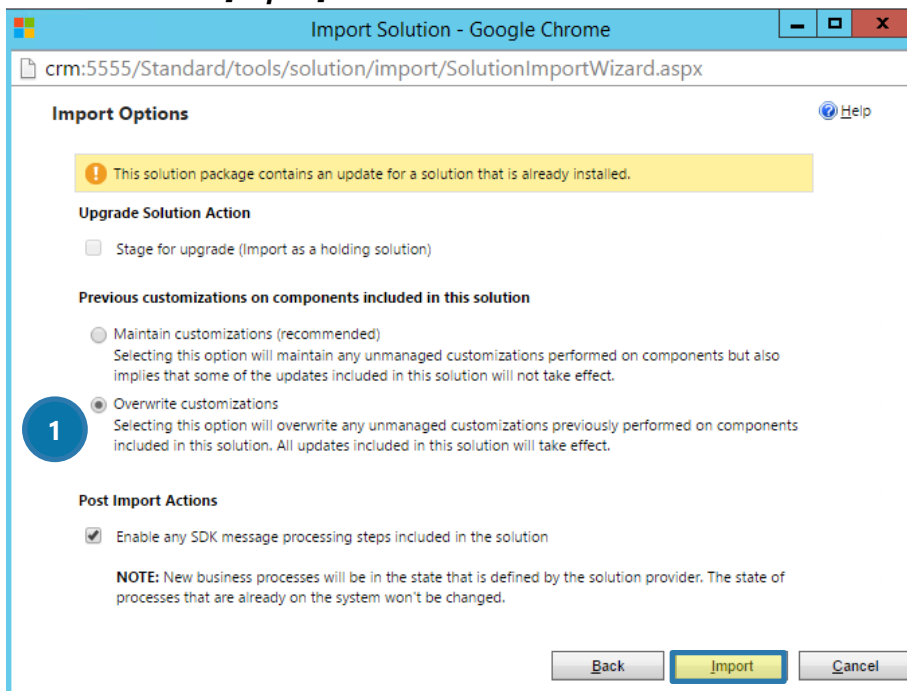


Figure 8: PowerSearch – Overwrite customizations in the Solution Import Wizard





Once the import has started, it might last a few minutes. Please repeat the steps with all the other solutions. All the imported files can be seen in the solution window of your MS Dynamics CRM/Dynamics 365:

That's it! You can start to configure PowerSearch now!

## 1.2 How to install PowerSearch via .msi-file import (import via .exe installer)

Installing PowerSearch via .msi-file import means that you have decided to go with a local installation. During the course of the chapter you will find detailed information on how to install the .msi-file correctly. Again, our starting point are the previously downloaded files.

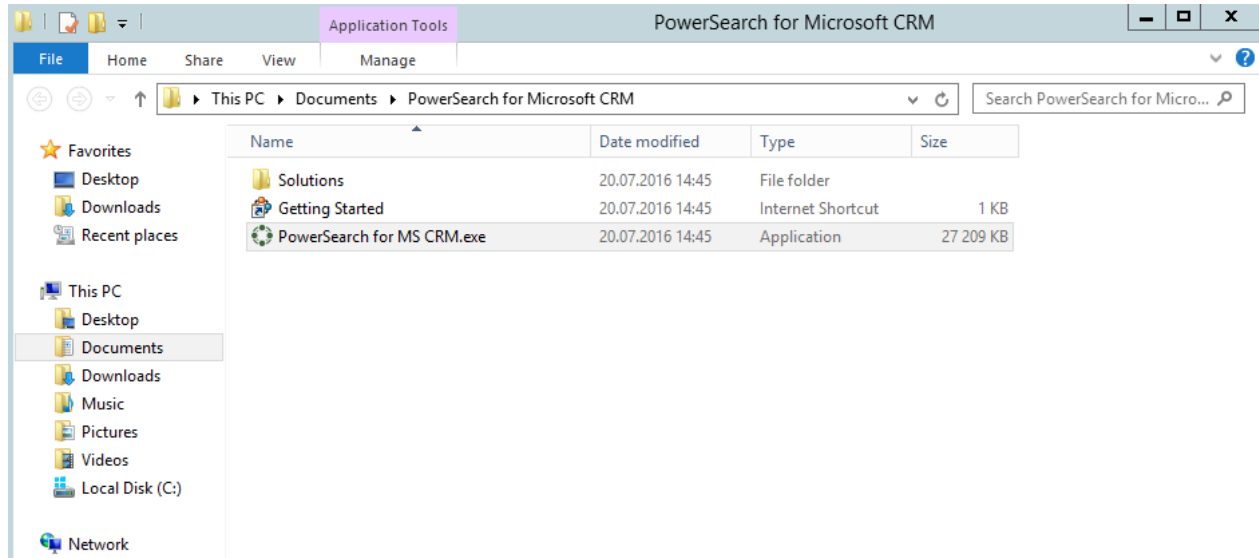


Figure 9: PowerSearch for Microsoft CRM.zip (unzipped)

### 1.2.1 How to import PowerSearch with the .msi-files (import via .exe installer)

To start the installation process, simply double-click on PowerSearch for MS CRM.exe in your downloaded files. This action opens the PowerSearch installer. Click on the **[Next]**-button in order to proceed.

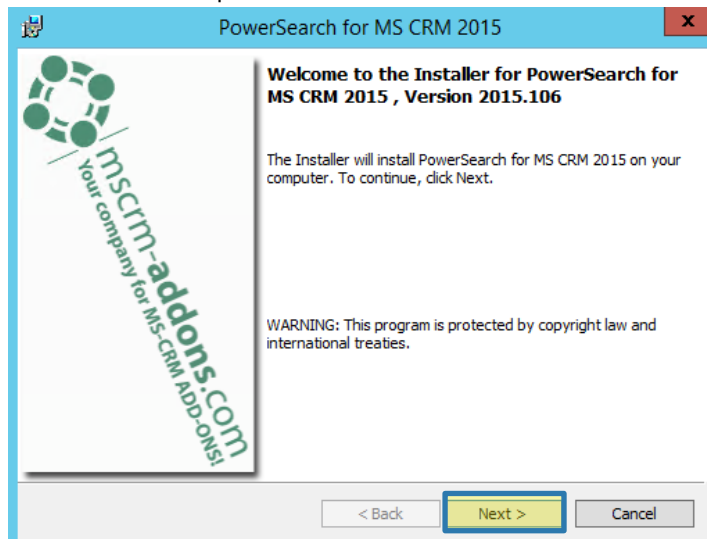


Figure 10: PowerSearch – .exe Installer

The EULA (End User License Agreement) opens. Read the license agreement carefully and accept its terms if you agree to them. If you do not accept the license agreement, you cannot continue with the installation. Using the **[Print]**-button, you can also print the EULA. Click on the **[Next]**-button in order to proceed.

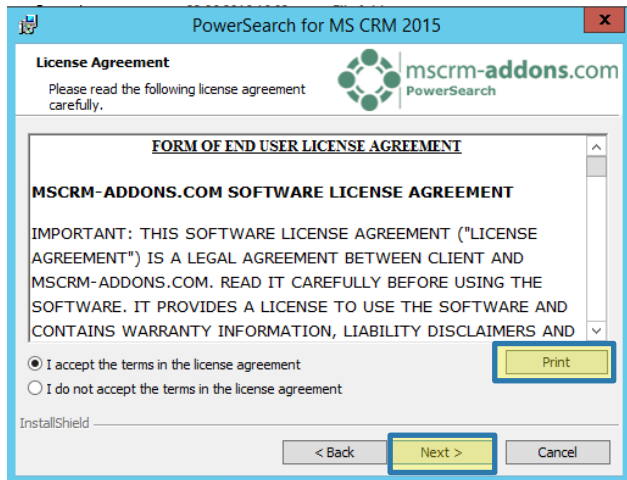


Figure 11: PowerSearch – EULA (End User License Agreement)

As soon as you have accepted the EULA, click on the **[Next]**-button in order to continue with the installation. If you want to change the save location, feel free to click on the **[Change...]**-button in order to change the save location of the PowerSearch data.

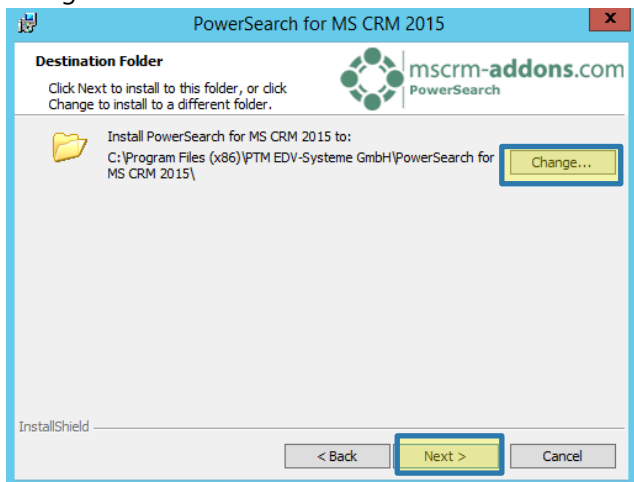


Figure 12: PowerSearch – Installer: Save location

In the window that follows now, you can select your preferred setup type. When checking *Standard type*, only the current version of PowerSearch is installed. When checking *Custom type*, you are offered to install the older version (Silverlight) as well. Simply decide which one suits you more and then click on the **[Next]**-button in order to proceed.

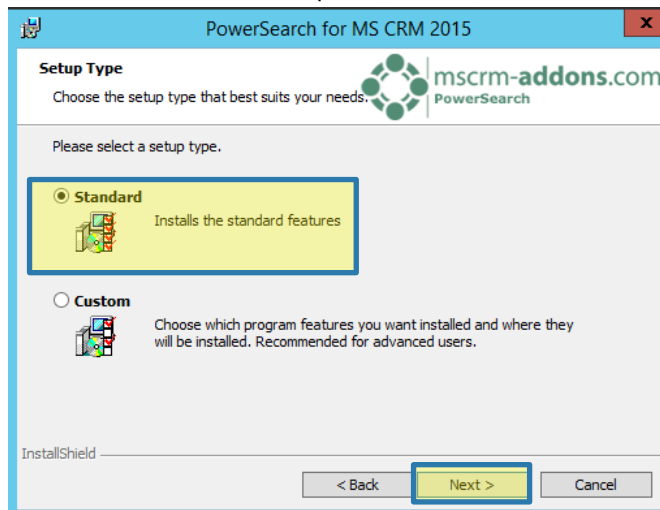


Figure 13: PowerSearch – Installer: Select setup type

The installer is ready to install the program now. To do so, simply click on the **[Install]**-button.

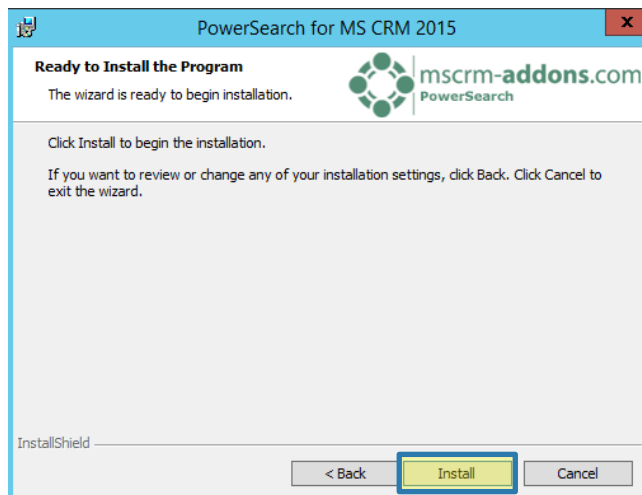
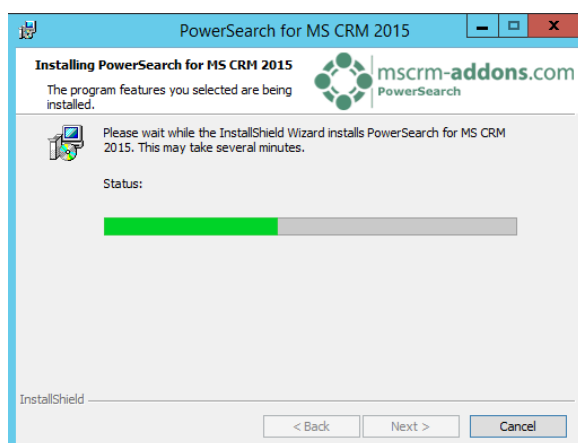


Figure 14: PowerSearch – Installer: Select setup type



The installation can take a few minutes. Enjoy your coffee.

Figure 15: PowerSearch – Installer: InstallShield Wizard

PowerSearch .msi installer requires a connection to Microsoft Dynamics CRM/Dynamics 365. To configure your server, select an existing profile or create a new profile in the *Connection Dialog*. Select your preferred server path and add your login credentials by filling in the field's username (1), password (3) and domain (2). Press the **[Retrieve all organizations]**-button and select your organization. For further information on the connection dialog, please have a look at the corresponding documentation, which you can find here:

<http://www.msrm-addons.com/Support/Documentation#LM>

Press the **[OK]**-button in order to proceed.

Figure 16: PowerSearch – Connection Setup dialog

If everything was set up perfectly, the Installation Wizard appears again on the screen (see Figure 14).

Within the next step, you will be asked if you want to install the security roles for all users. Click on the **[Yes]**-button in order to continue. If you want to assign the security roles manually, please click on the **[No]**-button.

Figure 17: PowerSearch – security roles



Even though the PowerSearch *Configuration Page* is already visible in the background, the installation process is only finished when you click on the **[Finish]**-button in the *InstallShield Wizard*. So please make sure to press this button!

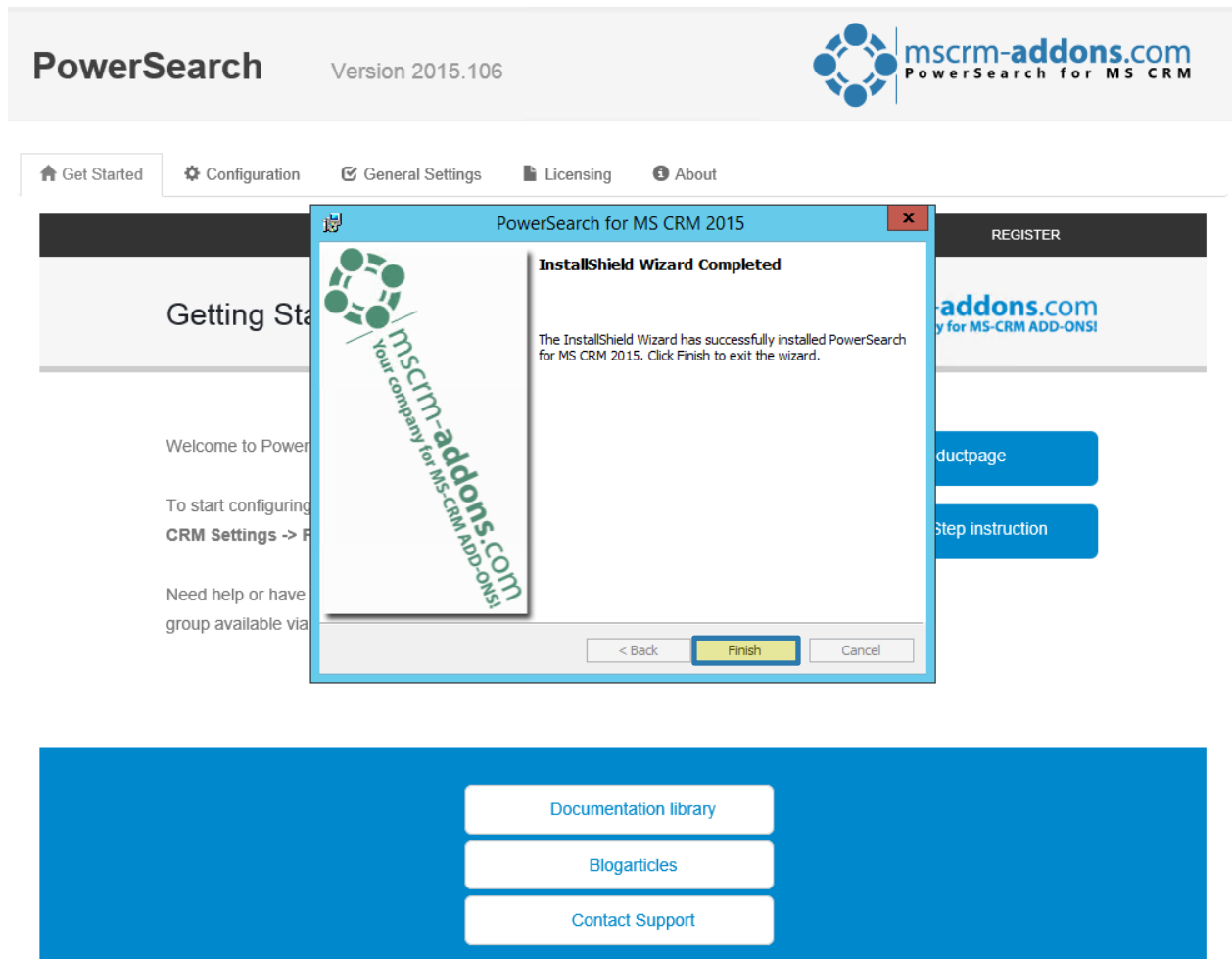


Figure 18: PowerSearch – Install Wizard Completed dialog plus Configuration Page in the background

That's it! You can start to configure PowerSearch now using the Configuration page or you could as well start working with our sample data. In the course of the next chapters, you will learn how to do so.



PowerSearch is delivered with optional sample data. If there does not exist any configuration, PowerSearch offers sample data, which you can, but do not have to make use of.

## 2 How to get started (brief overview)

1) In the *Configuration page*, which is automatically provided at the end of the installation process, navigate to the *Configuration*-tab and click on the **[Open Search Configuration]**-button. For further information on the Configuration, please have a look at chapter [3.2 THE CONFIGURATION – TAB, PAGE 18](#).

2) The so opened CRM grid provides you with an overview of the configuration. For further information on the configuration, please have a look at chapter [5 THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW, PAGE 25](#).



PowerSearch is delivered with optional sample data. If there does not exist any configuration, PowerSearch offers sample data, which you can, but do not have to make use of.

If the sample data fits your requirements, you can start to search with PowerSearch right away. If not, proceed with Step 3.

3) Click on the **[New]**-button in order to create a new record. For further information on how to create a new record, please have a look at chapter [9.2 HOW TO CONFIGURE AN ENTITY?, PAGE 60](#).

5) In the next window that opens, select an entity and a view (optional). For further information on how to add entities, have a look at chapter [9.2.2 SELECT THE ENTITY YOU WOULD LIKE TO ADD TO POWERSEARCH, PAGE 61](#). Click on the **[Save]**-button in order to proceed.

6) Add some search and result fields by using the corresponding sub-grids. Learn how to do so in chapter [9.3 HOW TO ADD FIELDS, PAGE 62](#).

7) Repeat 3 – 6 for each additional entity.

8) Open PowerSearch with a click on Sales -> PowerSearch and start finding items! Learn how to search with PowerSearch in chapter [9.1 HOW TO SEARCH WITH POWERSEARCH, PAGE 58](#).

### 3 Configuration Page

The configuration of PowerSearch is very simple. To open the configuration, navigate to *CRM -> Settings -> mscrm-addons -> PowerSearch*.

The window that opens now is the *PowerSearch Configuration*. Its functionalities will be explained in the course of the following chapters.

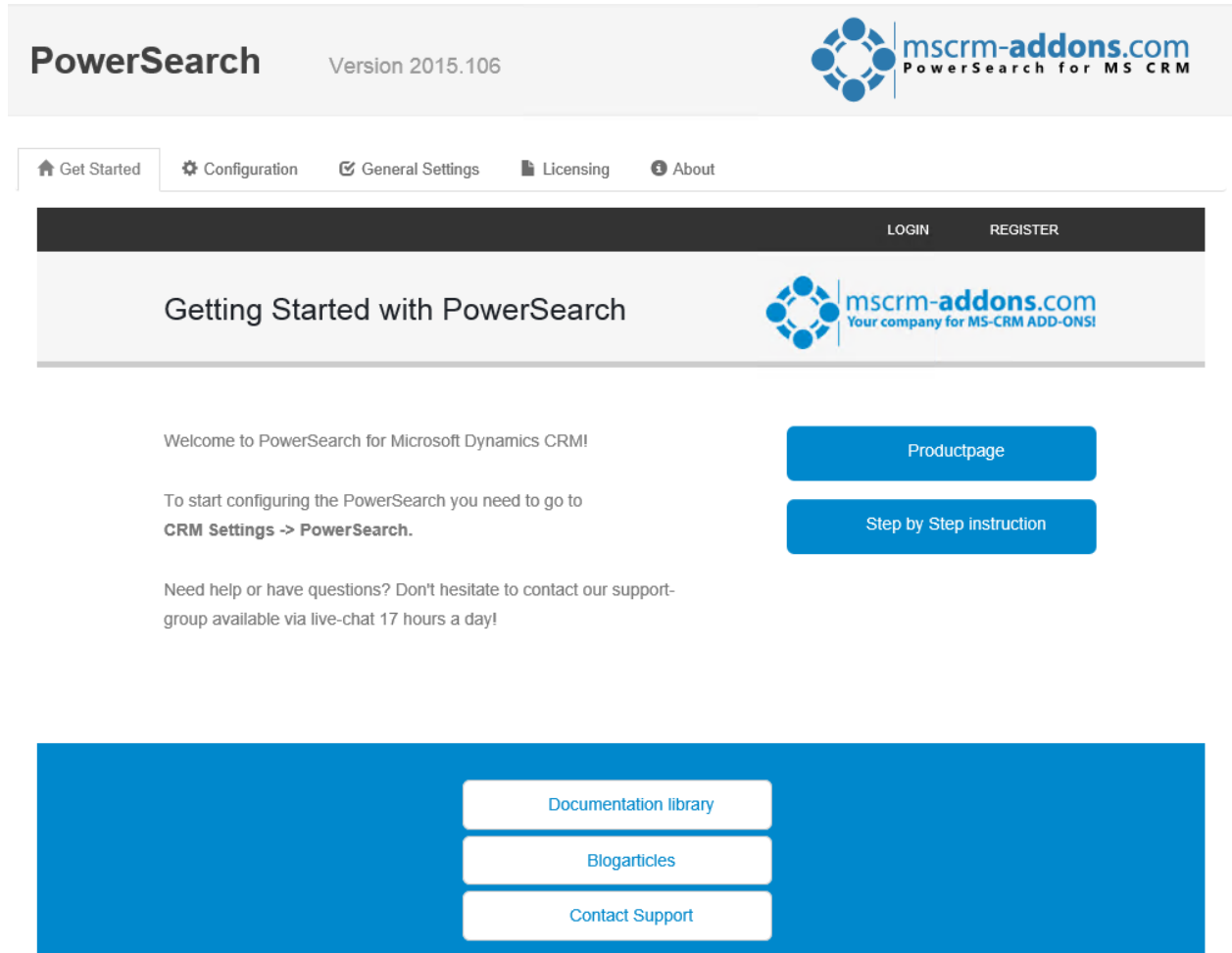


Figure 19: PowerSearch Configuration – Getting started tab



### 3.1 The Getting Started -Tab

This tab provides you with an overview, general information on PowerSearch and links to our website. All useful information about PowerSearch can be found here. If you scroll down the page, you might even find the different pricings for PowerSearch, a link to the documentation library, a link to some awesome blog articles and a contact button that links you directly with our support.

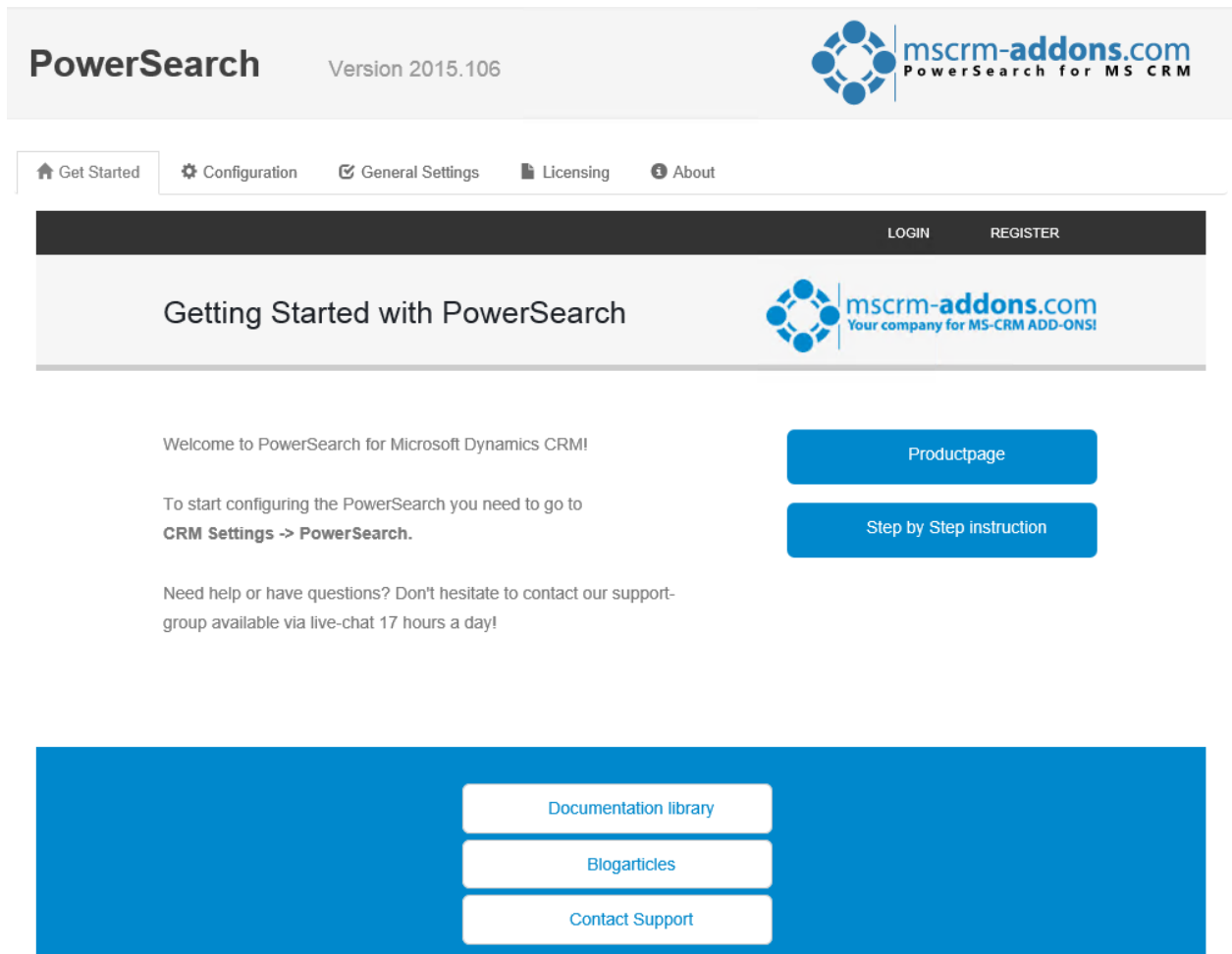
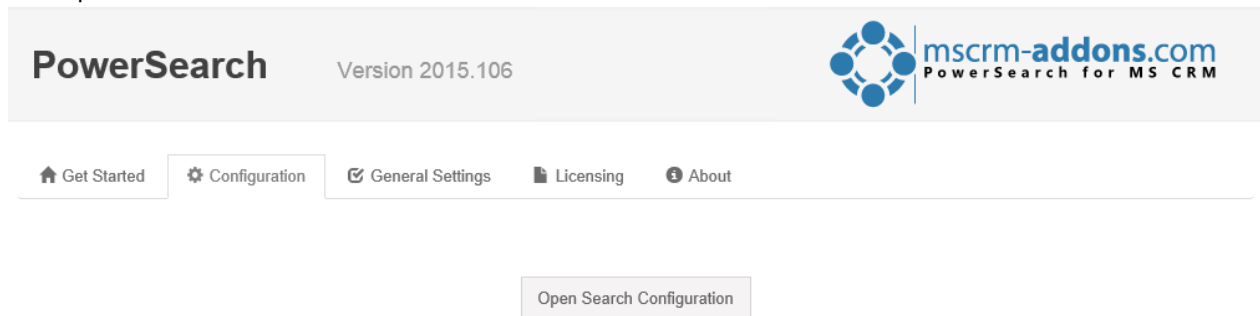


Figure 20: PowerSearch Configuration – Getting started tab

### 3.2 The Configuration – tab

Opening this tab provides you with a direct link to the PowerSearch Configuration Entity. Whenever you need to enter your Config, this is your tab. Learn more about the configuration of entities for PowerSearch in chapter [5.1 THE CONFIGURATION OF POWERSEARCH ON PAGE 26](#)




*Figure 21: PowerSearch Configuration – Configuration tab*

### 3.3 The General Settings – Tab

This tab allows you to change your general settings. Once changed, please do not forget to save the settings!

**PowerSearch**    Version 2016.121


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 PowerSearch for MS CRM

🏠 Get Started
⚙️ Configuration
📄 General Settings
📄 Licensing
ℹ️ About

⚙️ General Settings

<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">1</span> <div>           Debugging ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">2</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="checkbox"/> Disabled           </div> <div style="margin-left: 10px;">last X hours</div> <div style="margin-left: 10px;"> <input type="button" value="Show"/> <input type="button" value="Download"/> <input type="button" value="Delete"/> </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">3</span> <div>           Page Size ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">4</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="text" value="250"/> </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">5</span> <div>           Grid min height (px) ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">6</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="text" value="300"/> </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">7</span> <div>           Disable tab sorting ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">8</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="checkbox"/> Disabled           </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">9</span> <div>           Add tabkey navigation to operator ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">10</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="checkbox"/> Disabled           </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">11</span> <div>           Open PowerSearch with current Entity ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">12</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input checked="" type="checkbox"/> Enabled           </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">13</span> <div>           Show total record count ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">14</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input checked="" type="checkbox"/> Enabled           </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">15</span> <div>           Disable scrolling on subgrid area ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">16</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="checkbox"/> Disabled           </div> </div>
<div style="display: flex; align-items: center;"> <span style="background-color: #0070c0; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">17</span> <div>           Entity Preview for ?           <div style="background-color: #0070c0; color: white; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-left: 10px;">18</div> </div> </div>	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> <input type="text" value="account,contact"/> </div> <div style="margin-left: 10px;"> <input type="button" value="Update"/> </div> <div style="margin-left: 10px;"> <input type="button" value="LayoutDesigner"/> </div> </div>

Figure 22: PowerSearch Configuration – General Settings tab

#### 1 DEBUGGING

Set this option on *enabled* if you want to activate debugging. Once activated, you can use the buttons at the right side to modify the debugging process.

☒ Enabled

last 24 hours

Figure 23: PowerSearch Debugging enabled for the last 24 hours

Clicking on the **[Show]**-button displays all logs that were generated during the last xx hours (in this example 24 hours)

A click on the **[Download]**-button allows you to download the log-file (.xml).

The **[Delete]**-button enables you to delete the log-files.

#### 2 PAGE SIZE

This option allows you to modify how many records should be shown within the CRM grid.

### 3 GRID MIN HEIGHT (PX)

Define the minimum height of the grid (valid for e.g. entity preview) here.

### 4 DISABLE TAB SORTING

If this option is set to true, no user can change the tab order.

### 5 ADD TABKEY NAVIGATION TO OPERATOR

Once set on *enabled*, this option enables users to select operator picklists with the tab key.

### 6 OPEN POWERSEARCH WITH CURRENT ENTITY

If this option is set to true, the PowerSearch GlobalButton will open PowerSearch with the current entity as first tab.

### 7 SHOW TOTAL RECORD COUNT

If you receive more than 5000 search results, CRM usually provides you with 5000+ results. Once you enable this feature, you will be provided with the exact number of results. This feature is enabled per default.

### 8 DISABLE SCROLLING ON SUB-GRID AREA

Per default, every main grid shows 2 sub-grids. If you want to see more sub-grids (provided there are more than 2), you have to scroll down. Once this feature is enabled, all sub-grids are displayed permanently (for example, 4 sub-grids at once).



If you activate this setting, it is recommended to set the grid min height in pixels (please see point 3) to at least 600.

### 9 ENTITY PREVIEW FOR

Please activate the entity preview for a certain entity here 1. To do so, please insert the logical entity name here. If you want to use more than one entity, please separate the entities with commas. Don't forget to save your changes before you proceed. Once activated, PowerSearch will create a PowerSearch data set next to the usual entity system view.

If you apply changes to the system views in PowerSearch, you can update these changes with a click on the **[Update]**-button 2.

Figure 24 Entity Preview for

Using the Layout Designer 3, you can customize your preview's layout. For further information on the layout designer, please have a look at [CHAPTER 6, THE POWERSEARCH LAYOUT DESIGNER ON PAGE 40](#).

### 3.4 The Licensing-tab

This tab provides you with information regarding to the status of your license. Green checkmarks mean that your license is valid. Red crosses mean that your license is invalid.

The screenshot shows the PowerSearch application interface. At the top, there's a header with 'PowerSearch' and 'Version 2015.106'. To the right is the logo for 'mscrm-addons.com' with the tagline 'PowerSearch for MS CRM'. Below the header is a navigation bar with tabs: 'Get Started', 'Configuration', 'General Settings', 'Licensing' (which is active), and 'About'.

The 'Licensing' tab contains three main sections:

- License summary:** A table with 4 columns: Licenseinformation, LicenseValue, Systemvalue, and Status. The first row shows 'LicenseState' as 'trial' with a yellow warning icon in the Status column.
- General license information:** A table with 4 columns: Licenseinformation, LicenseValue, Systemvalue, and Status. It shows 'Licensekey' as 'Trialkey' with an information icon in the Status column.
- License validation information:** A table with 4 columns: Licenseinformation, LicenseValue, Systemvalue, and Status. It lists various validation details like 'BusinessUnit', 'Number of site licenses', 'Licenses for Readonly Users', 'Expiration', 'Support', 'Issued product', and 'Version upgrade covered till'. Most items have a green checkmark in the Status column, indicating they are valid.

At the bottom of the Licensing tab, there is a yellow button labeled 'Install license'.

Figure 25: PowerSearch Configuration - Licensing tab

The 'Install License' dialog box contains the following text:

This dialog can be used to install the license for PowerSearch.

If you already have received an email with the license key form "support@mscrm-addons.com", please follow the steps below to install the license.

If you don't have a license yet and want to purchase one, please click on [Online Shop](#). It will link you directly to our Online Shop.

Of course you can contact us directly: [Email to Support](#)

**Install the license:**

1. Please open the email with the license key. Copy the key and paste it into the following box:

Below the instruction is a text input field.

2. To finish the installation, hit the "Install"-button.

At the bottom right of the dialog are two buttons: 'Install' and 'Cancel'.

Figure 26: PowerSearch Install License dialog

If you click on the **[Install license]**-button, the *Install License dialog* opens.


Enter your license key here. To do so, simply follow the information provided by the dialog.

### 3.5 The About – Tab


The About – Tab provides you with general information regarding to your license and the Copyright.


**PowerSearch**


Version 2015.106





**mscrm-addons.com**  
PowerSearch for MS CRM

 Get Started

 Configuration

 General Settings

 Licensing

 About

PowerSearch for MS CRM	
Currently Installed Version	2015.106
Copyright (c) 2016 PTM EDV Systeme GmbH	

Figure 27: PowerSearch Configuration - Licensing tab

## 4 How to access PowerSearch from within Microsoft Dynamics CRM/Dynamics 365

There are three main ways to access PowerSearch once you have finished the installation and configuration process. Two of them offer access via the Microsoft Dynamics CRM/Dynamics 365 main menu.

### 4.1 How to access PowerSearch via the Sales tab

To access PowerSearch via the *Sales* tab, simply click on *Sales* in the main menu and then on PowerSearch in *My Work*.

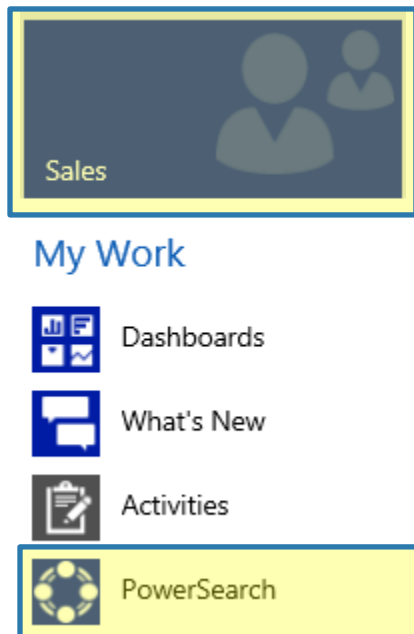


Figure 28: Access PowerSearch via Sales tab

### 4.2 How to access PowerSearch via the Service tab

To access PowerSearch via the *Service* tab, simply click on *Service* in the main menu and then on PowerSearch in *My Work*.



Figure 29: Access PowerSearch via Service tab

### 4.3 How to access PowerSearch via the GlobalButton

To access PowerSearch via the *GlobalButton*, simply click on the **[PowerSearch]**-button in the command bar in order to extend it. You will find the PowerSearch GlobalButton there. (If there are more tabs in the command bar, the button is sometimes hidden in the extension of the command bar, so you would have to click on the **[...]**-button in order to open it.

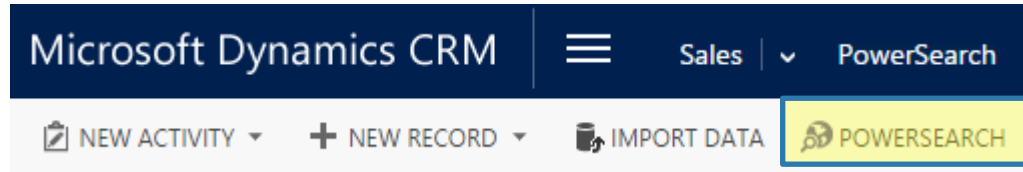


Figure 30: Access PowerSearch via GlobalButton



The access via GlobalButton is only possible if you have imported the solution previously. For more information, please have a look at [CHAPTER 1.1.1 HOW TO IMPORT POWERSEARCH SOLUTIONS ON PAGE 6](#).



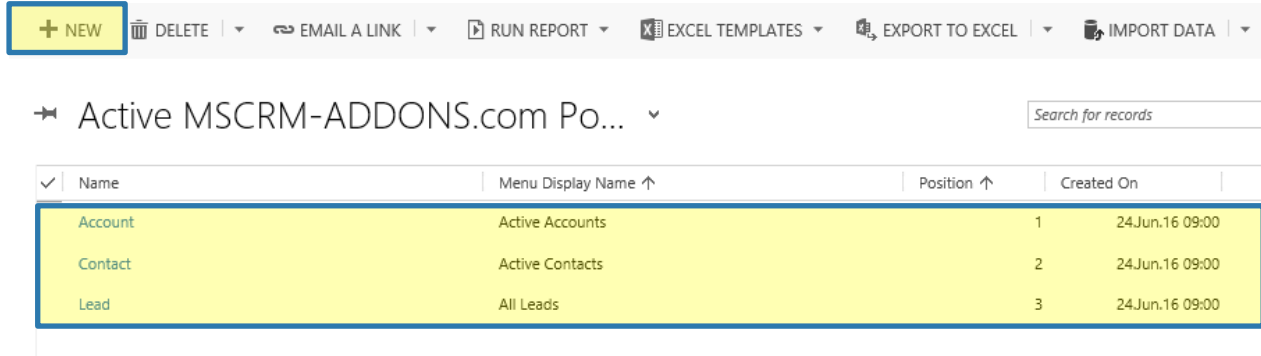
## 5 The PowerSearch entity configuration overview

To configure PowerSearch, we provide a custom entity called MSCRM-ADDONS.com PowerSearch config.

You can access the entity via the PowerSearch Configuration Page. For more information on the PowerSearch Configuration Page, please have a look at [CHAPTER 3 CONFIGURATION PAGE, PAGE 16](#).

If you have created the sample data, the grid provides you with a sample configuration, which consists of the entities *Account*, *Contact* and *Lead*.

Each record represents an entity which can be searched through with PowerSearch.



✓	Name	Menu Display Name ↑	Position ↑	Created On
	Account	Active Accounts	1	24.Jun.16 09:00
	Contact	Active Contacts	2	24.Jun.16 09:00
	Lead	All Leads	3	24.Jun.16 09:00

Figure 31: PowerSearch – Entity configuration overview

Whenever a new entity is added to PowerSearch, it will be visible here. Thus, the grid provides you with an overview of all your created records, as well as the default records. Both can be deleted anytime if they do not fit your requirements.

If you want to make an entity available for PowerSearch, simply click on the **[New]**-button in the left upper corner. This action opens the *PowerSearch Config*. [CHAPTER 9.2 HOW TO CONFIGURE AN ENTITY? ON PAGE 60](#) provides you with detailed information on the topic.

## 5.1 The configuration of PowerSearch entities

Entities for PowerSearch can be configured in the *PowerSearch Config*.

Besides the configuration of *Search* and *Result* fields, you can as well get additional information.

The *Config* provides you with the possibility to minimize the sections. Clicking on the arrows next to the sections extends them to their full size. Please find an overview below. Figures of the extended sections and a brief description of their functionalities can be found within the following pages.

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

### New MSCRM-ADDONS.com Powersearch Config

- ▶ General
- ▶ Input Fetch
- ▶ Search Fields
- ▶ Result Fields
- ▶ Additional Information

*Figure 32: PowerSearch Config - overview*

### 5.1.1 The General section

The fields of the general section support you in setting the general conditions of your future *Search and Result fields*.

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

## New MSCRM-ADDONS.com Powersearch Config

### General



Figure 33: PowerSearch Config – General tab extended

#### 1 ENTITY

Select the entity which should be configured for PowerSearch. All the entities that can be selected correspond to the existing entities in Microsoft Dynamics CRM/Dynamics 365.

#### 2 LOGICAL NAME

The logical name is automatically set as soon as an entity is selected.

#### 3 POSITION

The position is also set automatically, but you can rearrange the positions of the different entities. Learn how to do so in chapter [9.9 HOW TO REARRANGE CONFIG ENTITIES, PAGE 70](#).

#### 4 VIEW

Additionally to an entity, you can select a related system view in this field.

Once you have selected a certain view, the predefined result fields of the view are automatically applied to the *Result Fields* section. Of course you can also leave this field blank – in that case, you have to define your own result fields. But you can also select a view as a kind of “base” and then add or delete some of the predefined fields.

#### The 3 main advantages of using views:

- If you select a view, the view itself applies its general condition to the search.  
This means, that the different views include conditions that are combined with the criteria of the later search.
- The Result fields are automatically applied to the search, which saves valuable time.
- If the search criteria itself is not defined, the general conditions of the view apply to your search.

One remarkable functionality of PowerSearch is the **[Update-View]**-button. Use this button, if you have selected a view previously. Should the CRM view have been changed in your absence, you can update the view with a simple click on this button.



If you have not worked with a special view for a long time, we recommend you to use this button anyway, because it will provide you with the latest version of the view.

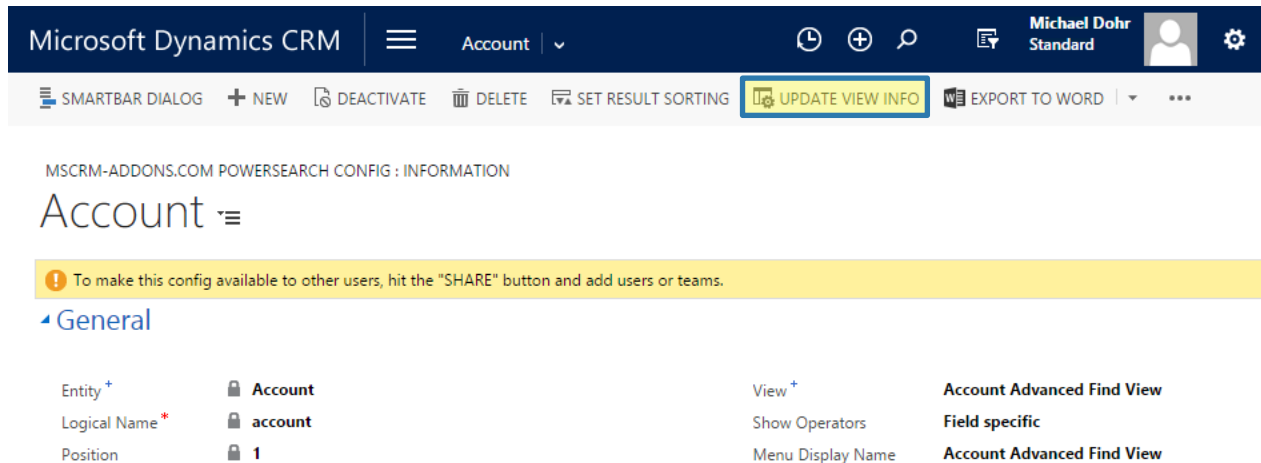


Figure 34: PowerSearch special buttons – the [Update View Info]-button

## 5 SHOW OPERATORS

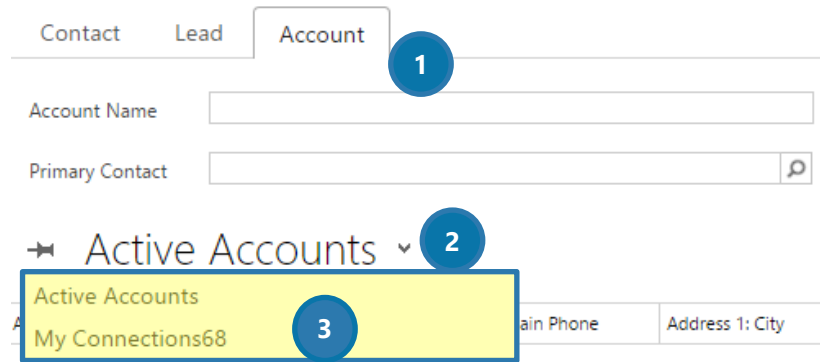
Use this field to define, if condition operators should be displayed on the PowerSearch interface.

SETTINGS	OUTPUT
<b>YES</b>	show operators for all search fields of this entity to the user.
<b>NO</b>	do not show operators for all search fields to the user.
<b>FIELD SPECIFIC</b>	it depends on your search field configuration settings, if the operator is displayed to the user or not.

Table 1: Show operator settings and outputs

## 6 MENU DISPLAY NAME

PowerSearch provides the possibility to save different searches within one entity. For example, you could have two searches running on the entity account: one that includes only all active accounts and one that includes all inactive accounts. To be able to distinguish the searches that you apply to the same entity from each other, you can give them a pretty name here. Per default, the entity name is inserted into this field. If you also select a view, the view name is used. But you can customize the Menu display name any time.



The screenshot shows the Microsoft Dynamics CRM interface for the 'Account' entity. At the top, there are tabs for 'Contact', 'Lead', and 'Account'. The 'Account' tab is selected. Below the tabs, there is a search bar with the label 'Account Name' and 'Primary Contact'. A dropdown menu is open, showing 'Active Accounts' and 'My Connections68'. The search bar is labeled 'Account Name' and 'Primary Contact'. The dropdown menu is labeled 'Active Accounts' and 'My Connections68'.

Figure 35: PowerSearch –Menu display name of more than one view in the entity account

#### 1 POWERSEARCH: REGULAR SEARCH FIELDS IN THE ENTITY ACCOUNT

#### 2 DROP DOWN MENU

With a click on the drop-down-arrow you open a menu that shows you all the searches that run within the entity account.

#### 3 DIFFERENT SEARCHES RUNNING ON ACCOUNT

Here, you have the possibility to display all your searches and to distinguish them, if you have previously set a pretty name in the *Menu display name* field. With a click on a certain view, you can switch to that view.

### 5.1.2 The Input Fetch Section

The FetchXML feature provides you with the possibility to customize your search query similar to an Advanced Find.

#### Input Fetch

```
<fetch mapping="logical" output-format="xml-platform" version="1.0" distinct="true">
  <entity name="account">
    <attribute name="name" />
    <attribute name="primarycontactid" />
    <attribute name="telephone1" />
    <attribute name="accountid" />
    <order descending="false" attribute="name" />
    <filter type="and">
      <filter type="or">
        <filter type="or">
```

Figure 36: PowerSearch Config – Input Fetch



In order to use this feature, you should at least be familiar to FetchXML.

The usage is very simple: Simply select the main entity in the *General*-section and insert a Fetch XML into the *Input Fetch*-field and

Please do not forget to save your changes!

If you save the record, the fetch creates search and result fields in the background. For every attribute, a result field is generated, while for every condition, a search field is generated.

A fetch can be created by using Advanced Find or manually by a FetchXML creator. After creating a fetch, it usually contains values in the *condition*-tags. If you include them into the FetchXML, they will be used as default search values. If you don't want to work with default values, please empty the *value*-property.

Once saved, the results of your changes are displayed in the PowerSearch surface:

NEW ACTIVITY + NEW RECORD IMPORT DATA

Accounts Contacts Leads

OR Account Name Address 1: Freight

OR AND Address 1: City Address 1: State/Pr

Contacts (Company Name)

Created By

OR Address 1: Street 1 Address 1: State/Pr

Activities (Regarding)

Activity

Cases (Customer)

Case

Accounts 1

Account Name	Primary Contact	Main Phone	Account
Blue Yonder Airlin...	Brian LaMee	555-0135	aca19c0d-8b0f-e...
City Power & Light	Walter Harp	425-485-7377	aea19c0d-8b0f-e...
Coho Diagnostic		425-821-4885	8392d735-16a2-e...
Coho Winery	Carl Francis	425-485-1235	b0a19c0d-8b0f-e...
Consolidated Me...	Pomest Chand	425-885-5323	b2a19c0d-8b0f-e...
Contoso Hospital		425-883-8335	7d92d735-16a2-e...
Contoso Pharmac...		425-649-2062	a592d735-16a2-e...
Contoso Pharmac...		425-882-2892	a792d735-16a2-e...
Contoso Suites		425-889-5817	b192d735-16a2-e...

Figure 37: Input Fetch – PowerSearch surface

But there's even more!

You are provided with more than simple results. Click on the main account and be rewarded with one sub-grid for each 1:N and N:N relationship (e.g. Accounts > Contacts/Cases > Activities).

Accounts 1

Account Name	Primary Contact	Main Phone	Account
Blue Yonder Airlin...	Brian LaMee	555-0135	aca19c0d-8b0f-e...
City Power & Light	Walter Harp	425-485-7377	aea19c0d-8b0f-e...
Coho Diagnostic		425-821-4885	8392d735-16a2-e...
Coho Winery	Carl Francis	425-485-1235	b0a19c0d-8b0f-e...
Consolidated Me...	Pomest Chand	425-885-5323	b2a19c0d-8b0f-e...
Contoso Hospital		425-883-8335	7d92d735-16a2-e...
Contoso Pharmac...		425-649-2062	a592d735-16a2-e...
Contoso Pharmac...		425-882-2892	a792d735-16a2-e...
Contoso Suites		425-889-5817	b192d735-16a2-e...

Contacts (Company Name)

Full Name
Carl Francis
Tomasz Bochenek
Karl Furse
Wilson Pax

Cases (Customer)

Case Title
Service call reque...
Product catalog r...
Product damage...

All entities can be opened with a double click from within the results overview.

### 5.1.3 The Search Fields

*Search fields* are the fields into which your future users will enter the search terms.



To add a search field, you first have to select and save your general settings (SEE CHAPTER 5.1.1 THE GENERAL SECTION, PAGE 27.)

Microsoft Dynamics CRM | Account | Michael Dohr Standard

SMARTBAR DIALOG | NEW | DEACTIVATE | DELETE | SET RESULT SORTING | UPDATE VIEW INFO | EXPORT TO WORD

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

## Account

To make this config available to other users, hit the "SHARE" button and add users or teams.

### General

Entity	Account	View	Active Accounts
Logical Name*	account	Show Operators	Field specific
Position	1	Menu Display Name	Active Accounts

### Search Fields

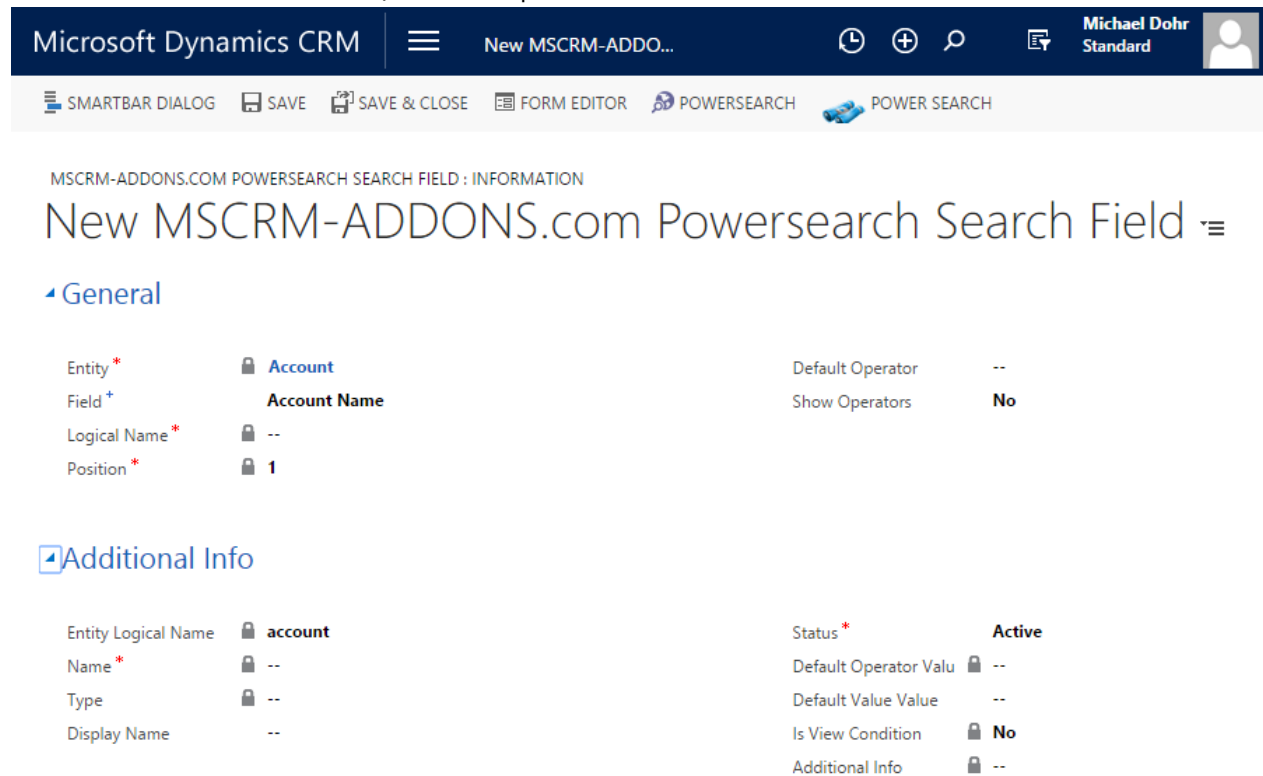
Name	Logical Name	Type	Position	Created On
No MSCRM-ADDONS.com Powersearch Search Field records found.				

Figure 38: PowerSearch Config – Search field extended with saved General tab configuration

However, in our example figure, we decided to go for *Account* and *field specific* for the show operator settings. We have also selected a view: The *Active Accounts* view. Afterwards, we saved our *General settings* which automatically provoked the **[+]**-button (highlighted above) to appear.



Clicking on the **[+]**-button opens the window below. It allows us to create our settings for the search fields. Learn how to add *Search fields* in chapter [9.3 HOW TO ADD FIELDS, PAGE 62](#).



Microsoft Dynamics CRM

New MSCRM-ADDONS.com Powersearch Search Field

SMARTBAR DIALOG SAVE SAVE & CLOSE FORM EDITOR POWERSEARCH POWER SEARCH

MSCRM-ADDONS.COM POWERSEARCH SEARCH FIELD : INFORMATION

## New MSCRM-ADDONS.com Powersearch Search Field

### General

Entity *	Account	Default Operator	--
Field *	Account Name	Show Operators	No
Logical Name *	--		
Position *	1		

### Additional Info

Entity Logical Name	account	Status *	Active
Name *	--	Default Operator Value	--
Type	--	Default Value Value	--
Display Name	--	Is View Condition	No
		Additional Info	--

Figure 39: PowerSearch Config – Search field customization surface

### 5.1.4 The Result Fields

*Result fields* are the fields in which your future users will find the results of their search.



The *Result Fields* settings work nearly similar to the *Search Fields* settings. This is why you will find some How-To-articles that are linked to both, the search, as well as the result fields chapter.

Name ↑	Logical Name	Type	Position ↑	Column Width	Created On
Account Name	name	String	1	300	06.Jul.16 09:32
Main Phone	telephone1	String	2	100	06.Jul.16 09:32
Address 1: City	address1_city	String	3	100	06.Jul.16 09:32
Primary Contact	primarycontactid	Lookup	4	150	06.Jul.16 09:32

Figure 40: PowerSearch Config – Result field extended with saved General tab configuration and example result fields

However, in our example figure, we decided use the same *General Settings* as for the *Search fields*. After we have saved our *General settings*, we added some Result fields as an example. Learn how to add result fields in chapter [9.3 HOW TO ADD FIELDS, PAGE 62](#)

Result fields are added and deleted in the same way as *Search fields* are. You can filter them as well by name and/or position and thus, change the order of the fields. (For more information, see chapter 9.8 [HOW TO REARRANGE THE ORDER OF FIELDS, PAGE 68](#))

Clicking on the **[+]**-button opens the *Result field* customization window. It allows us as well to create our settings for the *Result fields*.

Microsoft Dynamics CRM

New MSCRM-ADDONS.com Powersearch Result Field

SMARTBAR DIALOG SAVE SAVE & CLOSE FORM EDITOR POWERSEARCH POWER SEARCH

MSCRM-ADDONS.COM POWERSEARCH RESULT FIELD : INFORMATION

## New MSCRM-ADDONS.com Powersearch Result Field

### General

Entity*	Account
Field+	Account Number
Logical Name*	--
Column Width	--
Position	6

### Additional Info

Entity Logical Name	account	Status*	Active
Name*	--	Sort Order	--
Type	--		
Display Name	--		

Figure 41: PowerSearch Config – Result field customization surface

But of course, there are also some functionalities that are different to those of the *Search fields*. The PowerSearch *Result field* customization window enables you, for example, to set a column width (1).

## 5.2 How to share PowerSearch Config records

Once you have created some nice PowerSearch Config records, you may want to share them with other users.



It is crucial to share your Config records if you want others to work with them. Before you haven't shared them, the Config records will not be visible for others.

(The only exception are administrators – they can view and change Config records anyway)

To share your Config, please follow the below steps.

### 5.2.1 Open a random PowerSearch Config

Then, click on the **[Share]**-button. The button can be found in the *Command bar*.

Microsoft Dynamics CRM | Account | Michael Dohr Standard

SMARTBAR DIALOG | NEW | DEACTIVATE | DELETE | SET RESULT SORTING | UPDATE VIEW INFO | EXPORT TO WORD | ...

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

Account

To make this config available to other users, hit the "SHARE" button and add users or teams.

General

Entity *	Account	View *	--
Logical Name *	account	Show Operators	Field specific
Position	1	Menu Display Name	Account

Search Fields

Command Bar:

- Create Document
- Assign
- Share
- Email a Link
- Run Workflow
- Start Dialog
- Word Templates
- Run Report
- Form Editor
- PowerSearch
- PowerSearch (SL)
- Power Search

Figure 42: PowerSearch Config – Search button

## 5.2.2 The share mscrm-addons.com PowerSearch Config opens

This window enables you to select the users or teams you want to share the mscrm-addons.com PowerSearch Config with and to assign specific permissions to these users or teams.

To select a certain user or team, click on the **[Add User/Team]**-button on the left side.

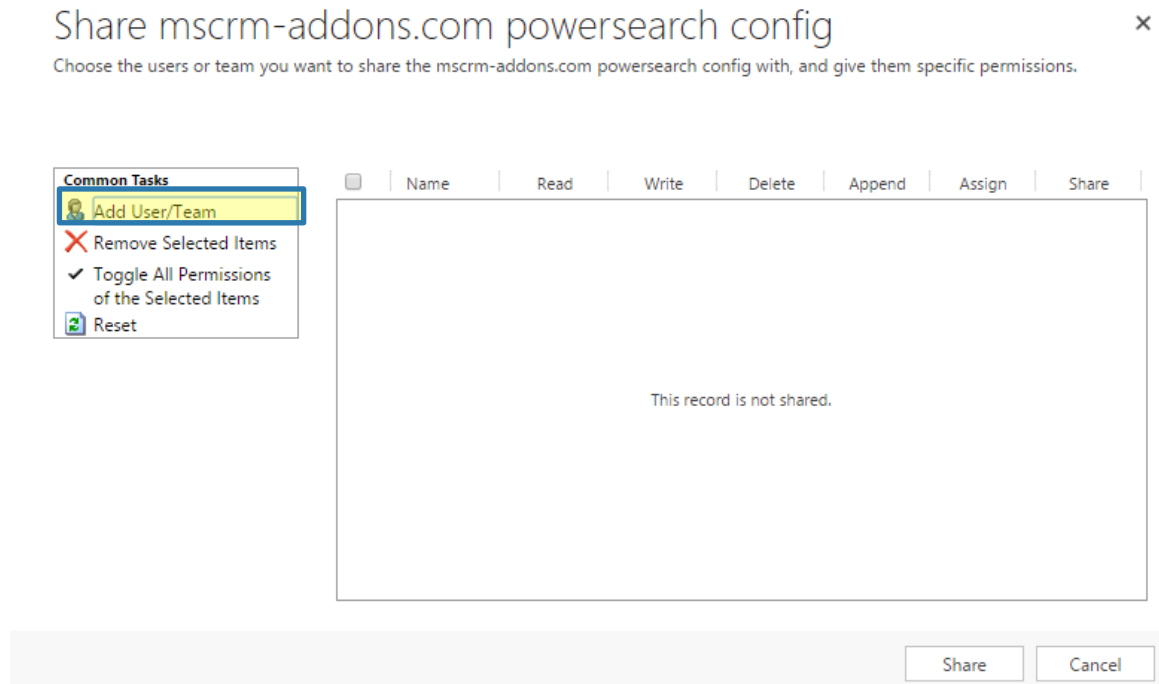


Figure 43: Share mscrm-addons.com PowerSearch Config

### 5.2.3 Look for a user or team

In the so opened *Look Up Records*-dialog, look for a user or a team you want to share your *PowerSearch Configuration* with. Once you have found a good match, mark it. Then click on the **[Select]**-button and it will show up in the *Selected records* list. Click on the **[Add]**-button in order to proceed.

Look Up Records

Enter your search criteria.

Look for: User

Look in: User Lookup View

Search: Search for records

✓	Full Name	Position	Main	
	Michael Dohr			
	Chris Preston			
✓	Max Mustermann			

1 - 7 of 7 (1 selected) Page 1

Selected records:

- Max Mustermann

Select Remove

New Add Cancel

Figure 44: Look up records window – select user or team

### 5.2.4 Assign permissions to selected users

Last but not least, you have to decide which permissions the selected users should get. You can select between the following possibilities:

Read  
Write  
Delete  
Append  
Assign  
Share

To assign a permission for a certain action, simply check the checkbox that is related to the action and click on the **[Share]**-button.

## Share mscrm-addons.com powersearch config

Choose the users or team you want to share the mscrm-addons.com powersearch config with, and give them specific permissions.

**Common Tasks**

- Add User/Team
- Remove Selected Items
- Toggle All Permissions of the Selected Items
- Reset

<input checked="" type="checkbox"/>	Name	Read	Write	Delete	Append	Assign	Share
<input checked="" type="checkbox"/>	Max Musterm...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Share

Cancel

Figure 45: Select permissions for users

## 6 The PowerSearch Layout Designer

The PowerSearch Layout Designer enables you to create, import, export or edit the PowerSearch entity preview.

### 6.1 How to start the PowerSearch Layout Designer

Please open the PowerSearch Configuration page and switch to the General Settings-tab. For further information on the General settings, please have a look at [CHAPTER 3.3, THE GENERAL SETTINGS – TAB ON PAGE 19](#). In the *Entity Preview for - section*, click on the **[LayoutDesigner]**-button **1** in order to open the Layout Designer.

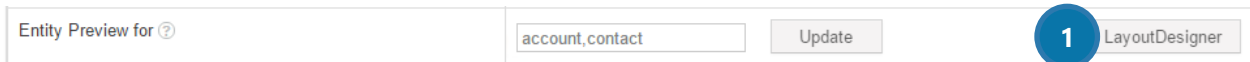


Figure 46 Open the Layout Designer

Once you have hit the button, the *Entity Layouts*-dialog opens. The dialog allows you to *create, import, export* or *edit* a layout in PowerSearch. To do so, check the default label and select the action you would like to take at the bottom of the window. The default entity depends on which entity you have enabled previously in the General Settings. With a click on the **[Edit]**-button (see below), you will be forwarded to the PowerSearch Layout Designer surface.

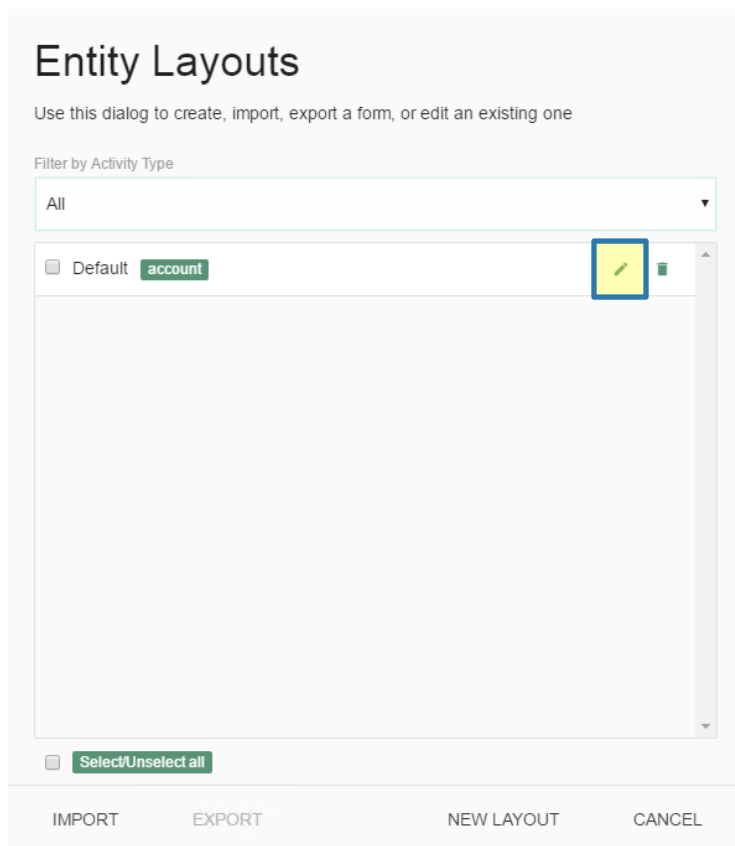


Figure 47 PowerSearch Entity Layouts



## 6.2 The PowerSearch Layout Designer surface

This chapter provides you with a brief overview of the PowerSearch Layout Designer surface and the Layout Designer's capabilities. The Layout Designer provides you with lots of possibilities to design the layout of PowerSearch, which will be explained more detailed within the next chapters.

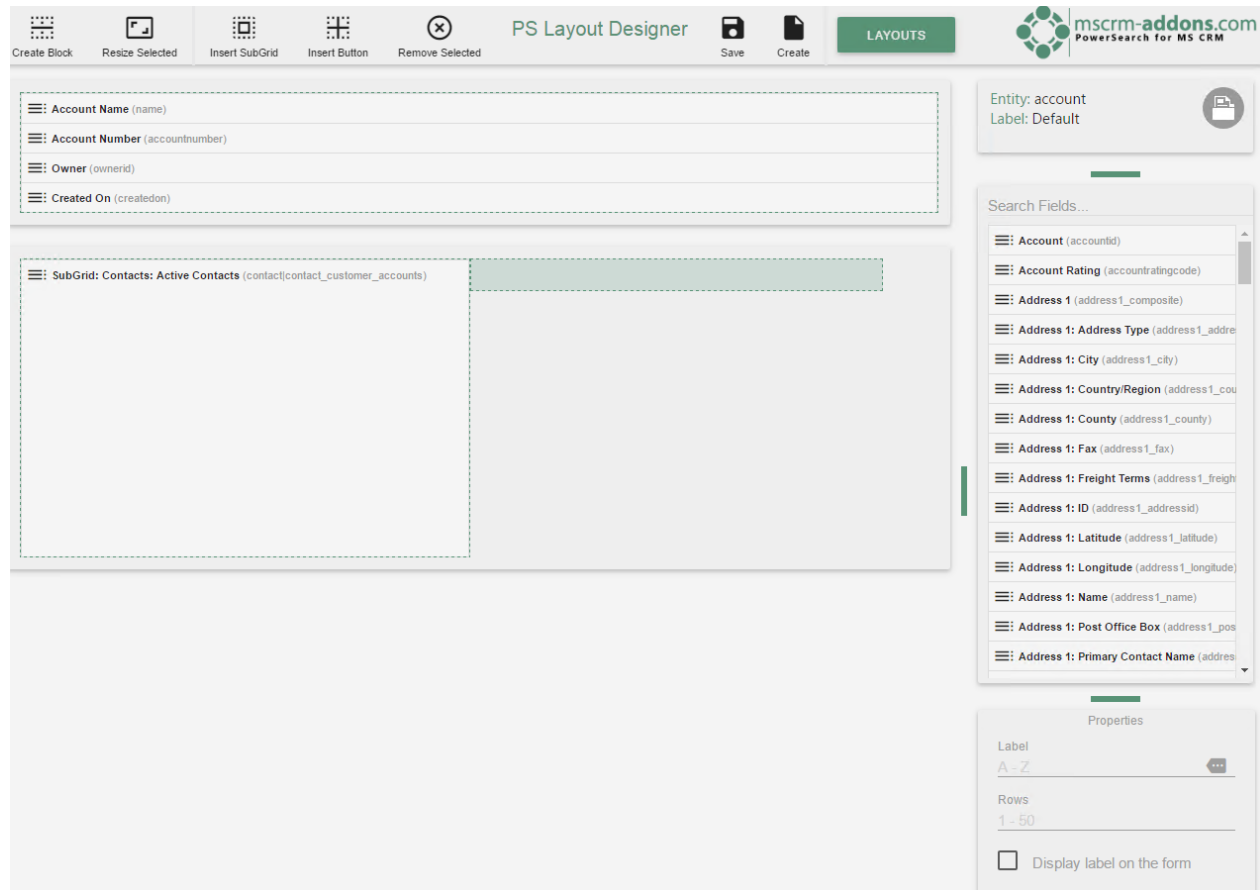


Figure 48 Layout Designer surface

### 6.2.1 How to customize layouts

A layout usually consists of various blocks, which can be split in up to three columns. By customizing these blocks and columns you can create your personal layout, which could look like the example below:

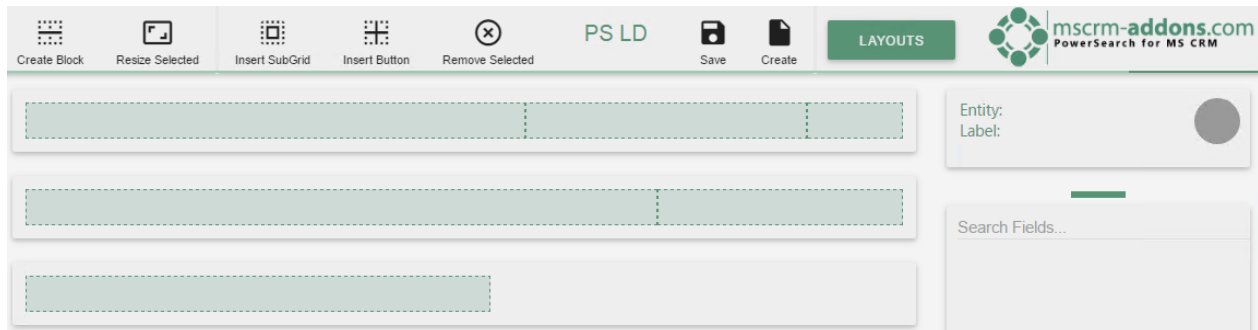


Figure 49 Columns and blocks

There are several icons that help you to customize blocks, columns and fields.



Figure 50 Customize blocks, columns and fields - buttons

In the course of this chapter, we will introduce you to the different functionalities of the buttons from left to right:

- 1) THE **[CREATE BLOCK]**-BUTTON
- 2) THE **[RESIZE SELECTED]**-BUTTON
- 3) THE **[INSERT SUBGRID]**-BUTTON
- 4) THE **[INSERT BUTTON]**-BUTTON
- 5) THE **[REMOVE SELECTED]**-BUTTON
- 6) THE **[SAVE]**- AND THE **[CREATE]**-BUTTON
- 7) THE **[LAYOUTS]**-BUTTON

Furthermore, you will be provided with information regarding the overviews on the right side:

- 1) SEARCH FIELDS
- 2) PROPERTIES

## THE **[CREATE BLOCK]**-BUTTON

At the very left, you are provided with the **[Create Block]**-button.



Figure 51 **[Create block]**-button

Click on the **[Create Block]**-button and a new window opens. You can create your block here by customizing its columns.

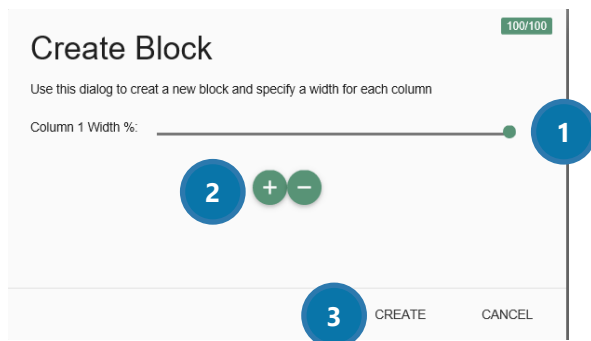


Figure 52 Create block functionalities

- ① Move the slider in order to determine which width you prefer for each column.
- ② Add or remove fields with a click on the **[+]**- or the **[-]**-button.
- ③ After you have created a block please save your settings with a click on the **[Create]**-button or cancel your actions with a click on the **[Cancel]**-button.



The overall percentage maximum for a block is 100 percent!

A possible result of three blocks with one to three fields could look like this:

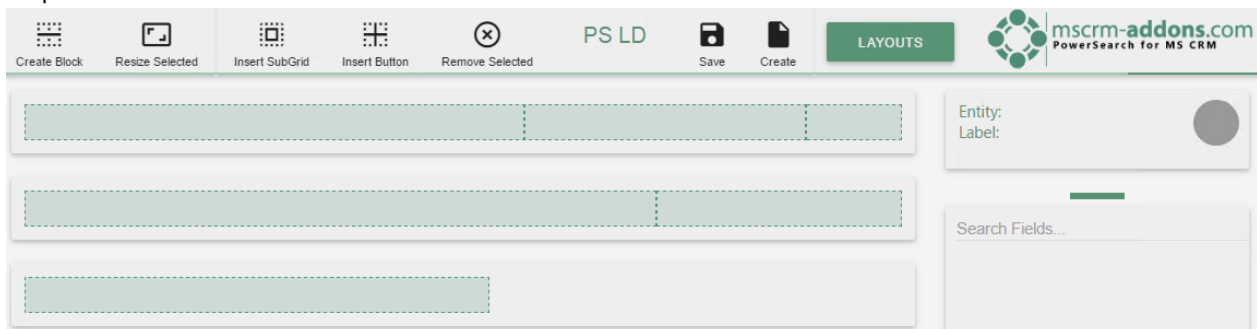


Figure 53 Blocks result

### 1) THE **[RESIZE SELECTED]**-BUTTON

With a click on this button, you have the possibility to resize a row in the *Edit Row*-dialog.

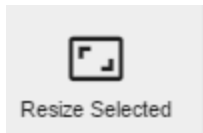


Figure 54 The **[Resize Selected]**-button

Simply select the row you would like to resize and edit the width of each column by moving the slider to the left or to the right. Once you have finished, do not forget to save your settings.

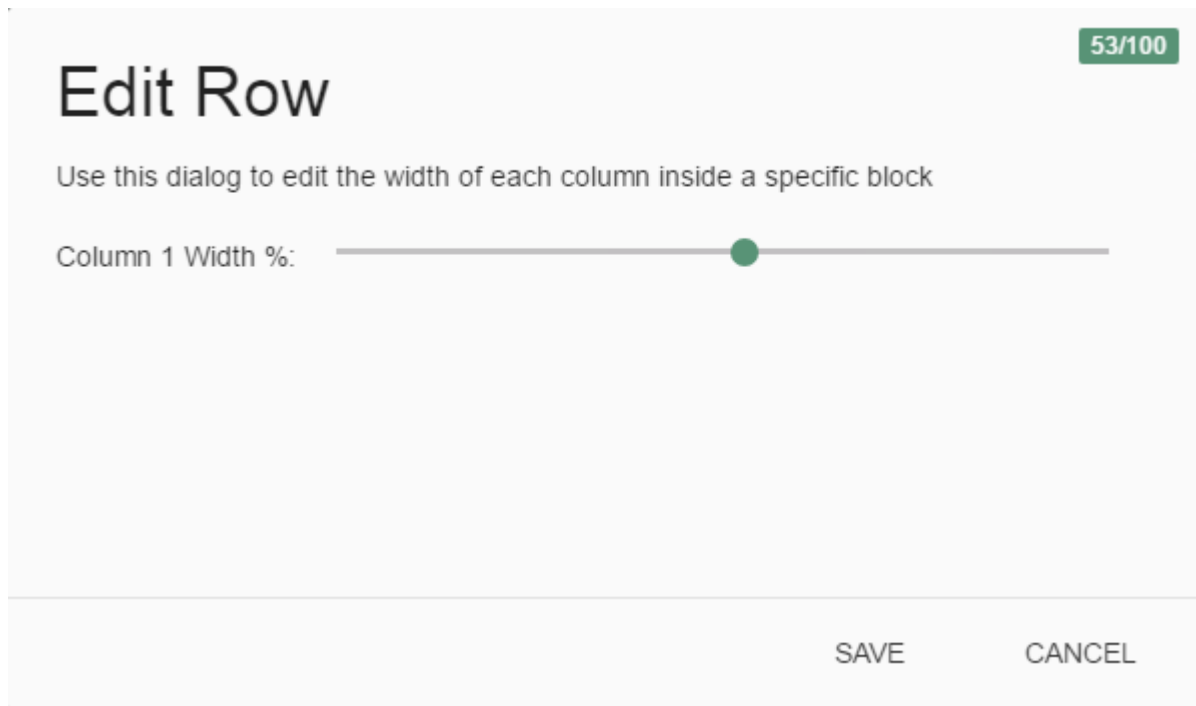


Figure 55 Edit row - dialog

In the right upper corner, there is a little overview that shows you how much space for this block is left. Please do not forget:



The overall percentage maximum for a block is 100 percent!

## 2) THE **[INSERT SUBGRID]**-BUTTON

Use this button to insert a new sub-grid.

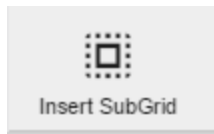


Figure 56 The **[Insert SubGrid]**-button



The sub-grid must be inserted into a new empty block with only one field.

Once you have clicked this button, you will be provided with a dialog that enables you to create a new sub-grid.

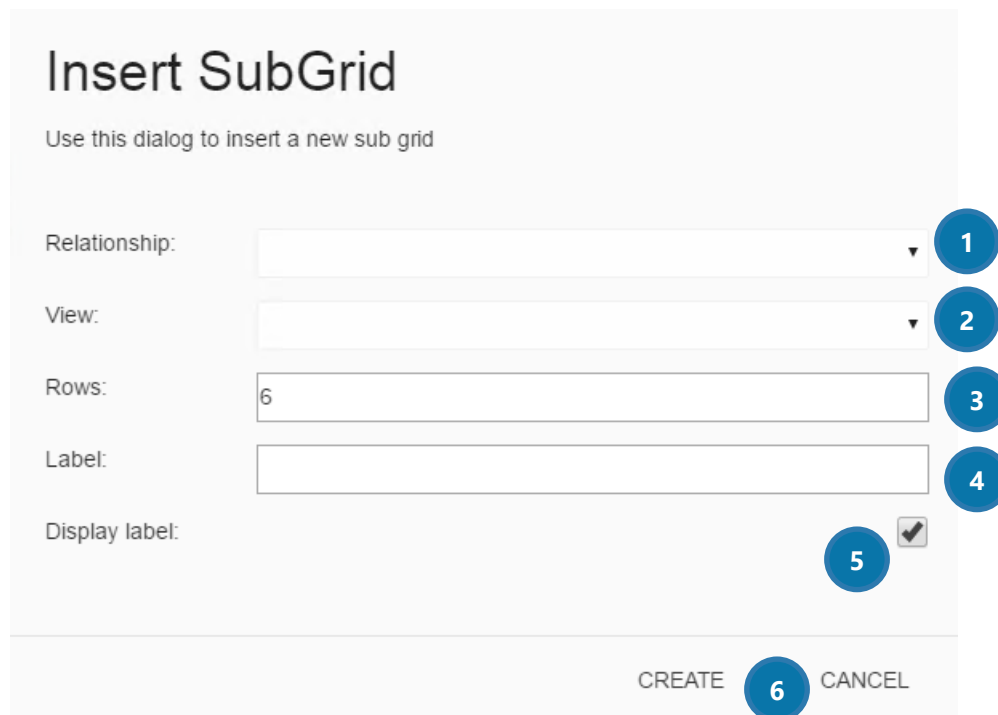
A dialog box titled "Insert SubGrid" with the subtitle "Use this dialog to insert a new sub grid". It contains five input fields: "Relationship:" (a dropdown menu), "View:" (a dropdown menu), "Rows:" (a text box containing the number "6"), "Label:" (a text box), and "Display label:" (a checkbox that is checked). Each input field is numbered with a blue circle: 1 for Relationship, 2 for View, 3 for Rows, 4 for Label, and 5 for Display label. At the bottom of the dialog, there are two buttons: "CREATE" and "CANCEL". The "CREATE" button is numbered with a blue circle containing the number "6".

Figure 57 Insert SubGrid - dialog

Please find a brief overview of this field's functionalities on the next pages.

## 1 RELATIONSHIP

Open this fields' drop down menu and select a relationship for your sub-grid. You can choose between 1:N and N:N (which are equal to M:M – many:many) relationships.

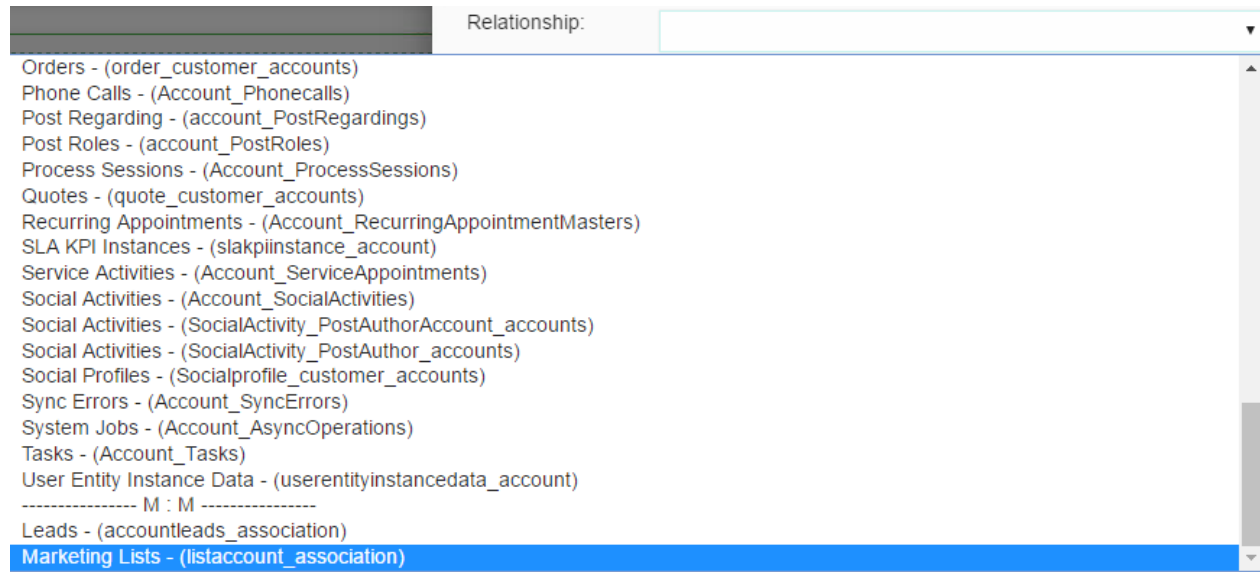
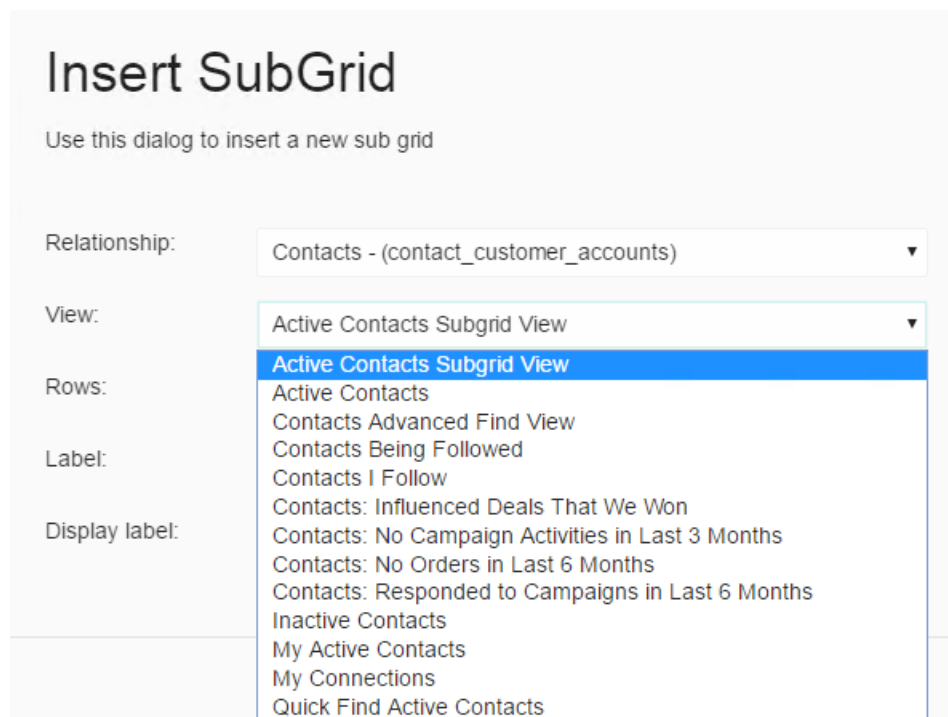


Figure 58 Select relationship

## 2 VIEW

Once you have selected a relationship for your sub-grid, you will be provided with the views that are related to your selected relationship and that are already saved in the system.



### 3 ROWS

Here, you can select how many rows should be displayed in your sub-grid. The number of rows must be bigger than 1, it must not be  $\leq 0$ !

### 4 LABEL

This field provides you with the possibility to rename your sub-grid label.

### 5 DISPLAY LABEL

Here, you can decide if you want the label to be displayed or not.

### 6 THE **[CREATE]**- AND THE **[CANCEL]**-BUTTON

Please save your settings with a click on the **[Create]**-button or cancel your actions with a click on the **[Cancel]**-button.

### 3) THE **[INSERT BUTTON]**-BUTTON

A click on this button enables you to insert a JavaScript-button.



Figure 59 The **[Insert Button]**-button

Once you click this button, the below dialog opens. Please fill in the corresponding information and click on the **[Create]**-button in order to create a JavaScript Button for your sub-grid.

## Insert JavaScript Button

Use this Dialog to insert a button with JavaScript functionality.

Logical Name

A-Z, 0-9

Title

A-Z, 0-9

Button Icon

JavaScript Webresource

Function Name

CREATE

CANCEL

Figure 60 JavaScript button



#### 4) THE **[REMOVE SELECTED]**-BUTTON

Please click on this button in order to remove a certain field, row or sub-grid.



You must select the area you would like to delete before you click on the **[Remove selected]**-button.

#### 5) THE **[SAVE]**- AND THE **[CREATE]**-BUTTON

Make sure that you save your changes as soon as possible with a click on the **[Save]**-button in the right upper corner.

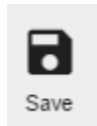


Figure 61 The **[Save]**-button

The **[Create]**-button in the right upper corner is a quick way to get to the *New Layout dialog*.

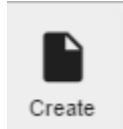


Figure 62 The **[Create]**-button

Once you click on the button, you are provided with the New Layout-dialog. This dialog allows you to create, export, import a form or to edit an existing one.

Figure 63 The *New Layout dialog*

6) THE **[LAYOUTS]**-BUTTON

The green **[Layouts]**-button in the right upper corner opens the *Entity Layouts Dialog*.

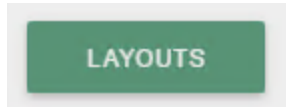


Figure 64 The **[Layouts]**-button

In contrary, the *Entity* and *Label* overview at the right side shows you which entity/label you are working on at the moment.

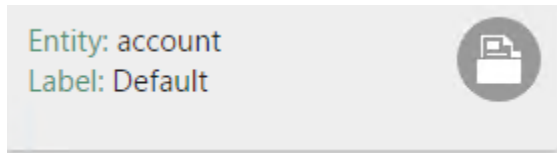


Figure 65 Entity and Label overview

## 1) THE SEARCH FIELDS

In the *Search Fields*-section you have the possibility to select which fields you want to add to which column. Simply drag and drop your preferred field from the *Search Fields*-section to the column you would like to place it.

## 2) THE POWERSEARCH LAYOUT DESIGNER PROPERTIES

In the Properties of the ActivityTools Layout Designer, you can edit your field labels in any activated Microsoft Dynamics 365 language.

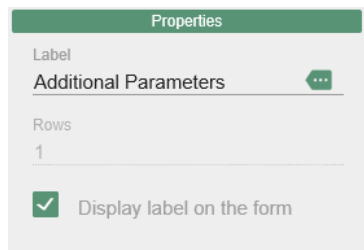


Figure 66: PowerSearch Layout Designer Properties

## 7 PowerSearch Surface: Special field functions and buttons

PowerSearch offers the Search and Result fields functionalities that most users already know from MS Dynamics CRM. However, there are some buttons and fields that have special functions or a special behavior.

### 7.1 Lookup fields

A click on a Lookup-field (e.g. *Primary contact*) will open the Standard MS Dynamics CRM/Dynamics 365 Lookup dialog.

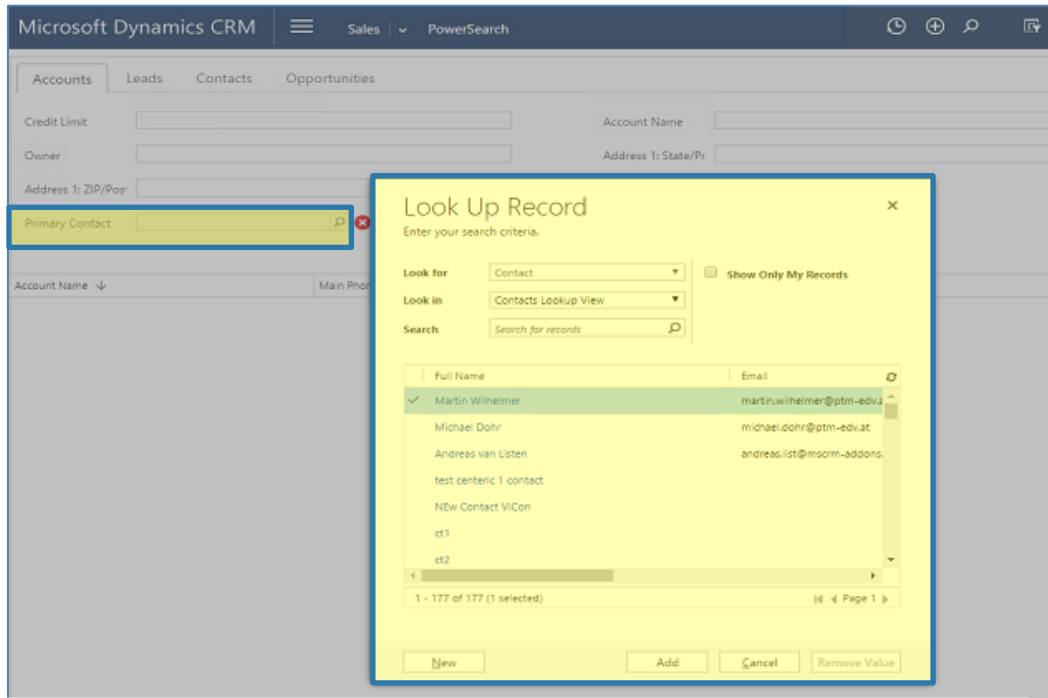


Figure 67: PowerSearch special fields – Primary Contact



Please note: Should you use another operator than "equals", (like e.g. "contains") the *Look up field* will be transformed into a regular text field.

## 7.2 Date related fields

Date related fields (e.g. *created on*) usually work with a data picker.

The screenshot shows the PowerSearch interface with tabs for Accounts, Leads, Contacts, and Opportunities. The form contains several input fields: Credit Limit, Owner, Address 1: ZIP/Post, Account Name, Address 1: State/Pr, and Created On. A date picker is open for the Created On field, displaying a calendar for May 2016. The date 12th is highlighted in the calendar.

Figure 68: PowerSearch special fields – date related fields

## 7.3 The [Open Config]-button

The **[Open Config]**-button is a kind of “shortcut” to the *Configuration*-tab for users and can be found at the PowerSearch user surface, in line with the **[Search]**-button. For more information on the Configuration Page, please [SEE CHAPTER 3 CONFIGURATION PAGE, PAGE 16](#).

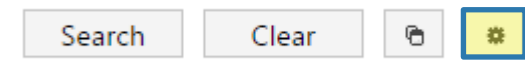


Figure 69: PowerSearch special buttons – the [Open Config]-button



While regular users are redirected to the *Configuration*-tab of the *Configuration Page*, users with admin rights are redirected to the *General Settings*-tab of the *Configuration Page*.

## 7.4 The [Clear] – button

The **[Clear]**-button enables you to clear your PowerSearch results and entries with a simple click on the button. It can be found directly next to the **[Search]**-button. So take good care which button you hit!

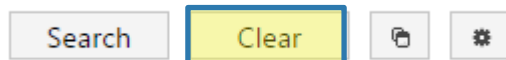


Figure 70: PowerSearch special buttons – the [Clear]-button

## 8 Ways to proceed with your search results

Once created, users of PowerSearch can proceed in various ways with the results.

Microsoft Dynamics CRM | Sales | PowerSearch



Accounts | Leads | Contacts | Opportunities

Account Name:

Owner:

Address 1: State/Pr:

Address 1: ZIP/Post:

Created On:   

Credit Limit:

Account Name ↓	Main Phone	Address 1: City ↑	Primary Contact	Email
The Croner Company		Kentfield		
TEST company TEST				
Sunset Development Company		San Ramon		
Orange Bicycle Company	555-0148	Chicago		
ISM eCompany		Rotterdam		
FEI Company		Hillsboro		
Economy Bikes Company	555-0165	Portland		
Coalition Bike Company	555-1010	Corvallis		
Brown Bicycle Company	555-0172	Downey		

Figure 71: PowerSearch with results

## 8.1 Open your record with a double click on them

## 8.2 Open your results with Microsoft Dynamics CRM/Dynamics 365

Once you have created some pretty results, you can also open them directly within Microsoft Dynamics CRM/Dynamics 365 using the **[Open the result in CRM-Grid]**-button.

The button can be found right next to the **[Clear]**-button at the right side of on top of your results.



To use this functionality of PowerSearch you have to select a view in the Config entity. For more information on views, please see chapter [5.1.1 THE GENERAL SECTION, PAGE 27](#).

Full Name ↑	Email	Company Name	Business Phone
Christian Ternek	christian.ternek@gmail.com	MSCRM-ADDONS.com	5551234
Josef Ternek	josef.ternek@mscrm-addon...	MSCRM-ADDONS.com	

Figure 72: [Open the result in CRM-Grid]-button

This action will open your results in a Microsoft Dynamics CRM/Dynamics 365-Grid in which you can apply all Microsoft Dynamics CRM/Dynamics 365 functionalities to the results, using the command bar.

Active Contacts ▾

✓	Full Name ↑	Email	Company Name	Business Phone
	Christian Ternek	christian.ternek@gmail.com	MSCRM-ADDONS.com	5551234
	Josef Ternek	josef.ternek@mscrm-addo...	MSCRM-ADDONS.com	

Figure 73: Apply all Microsoft Dynamics functionalities to the results

### 8.3 Jump from page to page

As per default, the standard page size delivers 250 results. If you receive more results, you can easily switch pages by clicking on the corresponding arrows in the right lower corner. You can as well change your page size. Learn how to do so in chapter [9.7 HOW TO CHANGE THE PAGE SIZE, PAGE 67](#). **Fehler!**

**Verweisquelle konnte nicht gefunden werden.**

Account Name ↑	Main Phone ↑	Address 1: City	Primary Contact	Email	
Another Bicycle Company	555-0127	Missoula			
Basic Bike Company	555-0116	Phoenix			
Blue Bicycle Company	555-0164	Lake Oswego			
Brown Bicycle Company	555-0172	Downey			
Coalition Bike Company	555-1010	Corvallis			
Economy Bikes Company	555-0165	Portland			
FEI Company		Hillsboro			
ISM eCompany		Rotterdam			
Orange Bicycle Company	555-0148	Chicago			
1 - 12 of 12					

Figure 74: PowerSearch – jump from page to page



## 8.4 Change the result order using the column header

PowerSearch allows single-column sorting by simply clicking on the term the results should be sorted after. In our example, we sort *Account Name* in a descending alphabetical order by clicking on *Account name*. The arrow next to account shows that we have sorted the results in a descending order.

Account Name ↓	Main Phone	Address 1: City	Primary Contact	Email
The Croner Company		Kentfield		
TEST company TEST				
Sunset Development Company		San Ramon		
Orange Bicycle Company	555-0148	Chicago		
ISM eCompany		Rotterdam		
FEI Company		Hillsboro		
Economy Bikes Company	555-0165	Portland		
Coalition Bike Company	555-1010	Corvallis		
Brown Bicycle Company	555-0172	Downey		

Figure 75: PowerSearch – change result order

PowerSearch also allows multi-column-sorting. In order to give a good example, we have added the field *Status* to our result fields. After clicking on *Status*, press and hold the **[Shift]**-button on your keyboard and click on *Account Name*. The same result order (in our example, ascending) will be applied to both columns.

The results are now sorted after active (1) and inactive (2) and furthermore, the active (3) and inactive (4) accounts are sorted in alphabetical order under Account Name.

Status ↑	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email
Active	Brown Bicycle Company	555-0172	Downey		
Active	Coalition Bike Company	555-1010	Corvallis		
Active	Economy Bikes Company	555-0165	Portland		
Active	FEI Company		Hillsboro		
Active	ISM eCompany		Rotterdam		
Active	Orange Bicycle Company	555-0148	Chicago		
Active	Sunset Development Company		San Ramon		
Active	TEST company TEST				
Active	The Croner Company		Kentfield		
Inactive	Another Bicycle Company	555-0127	Missoula		
Inactive	Basic Bike Company	555-0116	Phoenix		
Inactive	Blue Bicycle Company	555-0164	Lake Oswego		

Figure 76: PowerSearch – multi-column-sorting

## 9 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with PowerSearch efficiently.

### 9.1 How to search with PowerSearch

Once PowerSearch is configured, you can start with your search queries. Please follow our Tutorial on how to search with PowerSearch.

#### 9.1.1 Step 1: Open PowerSearch

To do so, simply navigate to the Microsoft Dynamics CRM/Dynamics 365 *Sales*, and click on *PowerSearch* in the *My work* section.

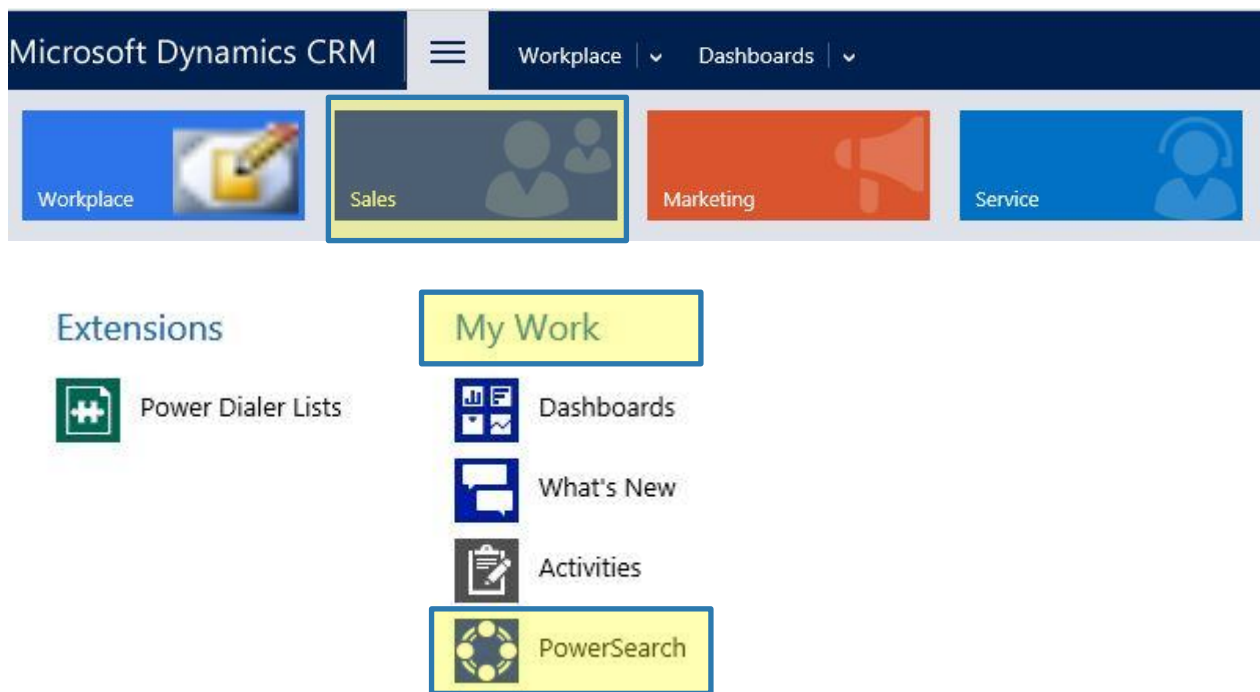


Figure 77: Open PowerSearch

This action automatically opens PowerSearch. If there does not exist any configuration, PowerSearch offers sample data, which you can, but do not have to make use of.

For more information on the configuration, please see chapter [5 THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW, PAGE 25](#).



If you want to create other search queries, please have a look at chapter [9.2 HOW TO CONFIGURE AN ENTITY?, PAGE 60](#).

### 9.1.2 Step 2: Select the entity you would like to apply the search on

You could run your search query in any of the entities – to switch between them, simply click on the entity you would like to start your query. As soon as you have selected one, please proceed as shown in the next steps. For illustration purposes, we will proceed with the entity *Contact*.

Figure 78: Select the entity you would like to apply the search on

#### i. Step 3: Enter your search term

Once you have entered your search term in the fields that are relevant for your search query (1), click on the **[Search]**-button or press enter. It is not necessary, but you can enter a term in every provided fields. The more fields you use for your query, the more precise the results.

We decided to enter only one term. The results are displayed regarding to your result field configuration. For more information on the result field configuration, please see chapter 5.1.4 THE RESULT FIELDS, PAGE 34.

The search query results are displayed in the result field. (2)

Full Name ↑	Email	Company Name	Business Phone
Christian Ternek	christian.ternek@gmail.com	MSCRM-ADDONS.com	5551234
Josef Ternek	josef.ternek@mscrm-addon...	MSCRM-ADDONS.com	

Figure 79: How to enter a search term

That's it! For more information on how to proceed with search queries, please have a look at chapter 8 WAYS TO PROCEED WITH YOUR SEARCH RESULTS, PAGE 54.

## 9.2 How to configure an entity?

PowerSearch allows you to add as many entities to your search as you wish. This tutorial shows you how to configure an entity ("Invoice") with one view ("All Invoices") and two search fields ("Account, Created on"). Our result fields are automatically applied due to the view that we have selected before ("All Invoices"). However, you could as well add or delete some result fields. This works exactly like adding or deleting search fields.

### 9.2.1 Open the PowerSearch Config

If you are not familiar with the PowerSearch Config, please see chapter 5 [THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW, PAGE 25](#).

Please click on the **[New]**-button in the left upper corner. In the so opened window, you can customize your entity.

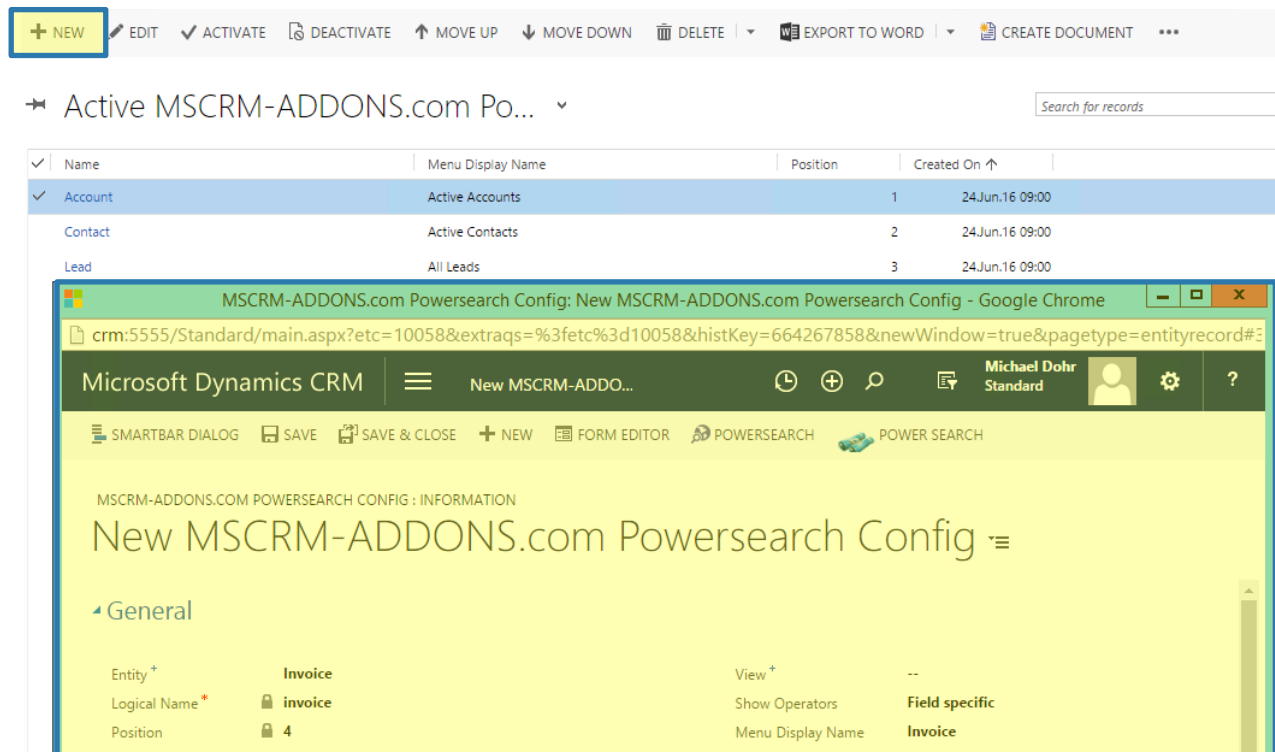
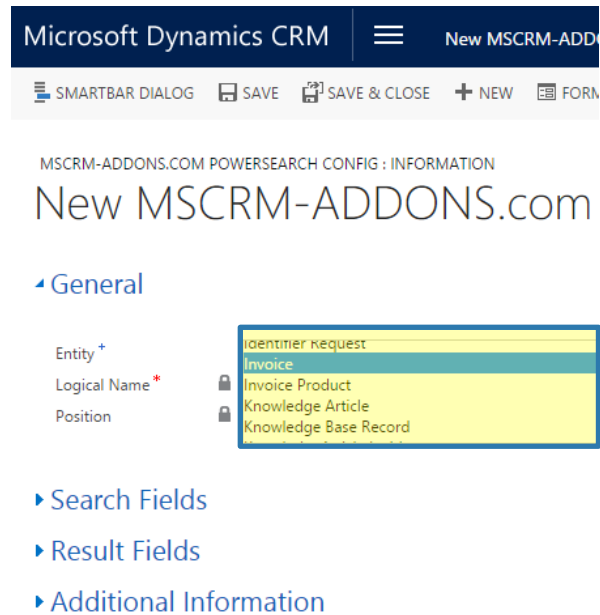


Figure 80: New MSCRM-ADDONS.com PowerSearch Config

## 9.2.2 Select the entity you would like to add to PowerSearch



Microsoft Dynamics CRM | New MSCRM-ADDONS.com

SMARTBAR DIALOG | SAVE | SAVE & CLOSE | NEW | FORM

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

### New MSCRM-ADDONS.com

General

Entity \*  
Logical Name \*  
Position

Identifier request  
Invoice  
Invoice Product  
Knowledge Article  
Knowledge Base Record

Search Fields  
Result Fields  
Additional Information

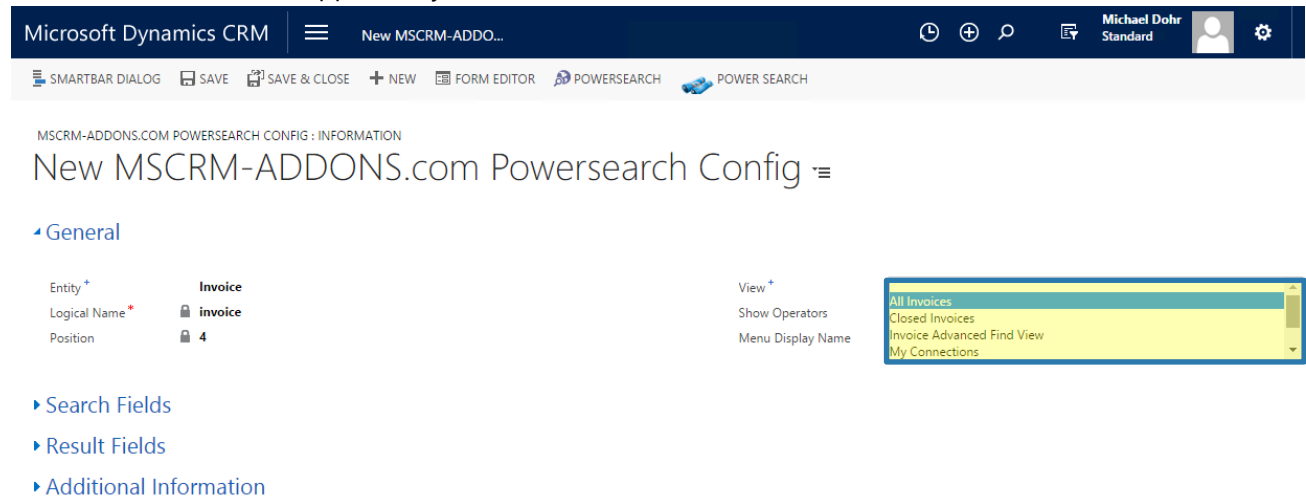
Before you can add Search – and Result fields, you must set the general settings of your search.

In our example, we want to add the entity *Invoice*. This is why we select the corresponding entity in the entity-field.

Figure 81: New MSCRM-ADDONS.com PowerSearch Config – add entity

## 9.2.3 Select a view (optional)

Select a view that will be applied to your future result fields. We decided to add *All Invoices*.



Microsoft Dynamics CRM | New MSCRM-ADDONS.com

SMARTBAR DIALOG | SAVE | SAVE & CLOSE | NEW | FORM EDITOR | POWERSEARCH | POWER SEARCH

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

### New MSCRM-ADDONS.com Powersearch Config

General

Entity \*  
Logical Name \*  
Position

Invoice  
invoice  
4

View \*  
Show Operators  
Menu Display Name

All Invoices  
Closed Invoices  
Invoice Advanced Find View  
My Connections

Search Fields  
Result Fields  
Additional Information

Figure 82: New MSCRM-ADDONS.com PowerSearch Config – select view (optional)

## 9.3 How to add fields



Please note: The Search Fields settings ALWAYS overrule the view settings. In case you should have added a field that overrules a certain view, you will be notified.

Figure 83: New MSCRM-ADDONS.com PowerSearch Config – add search fields

For our example, we decided to add only field specific show operators. Have a look at chapter [9.5 HOW TO SET A DEFAULT OPERATOR, PAGE 65](#) for more information on the functionalities of operators. For details on the Menu Display name, please have a look at chapter [3.3 THE GENERAL SETTINGS – TAB, PAGE 19](#).

Now we want to add two search fields. To do so, we click on the **[+]**-button highlighted in [FIGURE 83: NEW MSCRM-ADDONS.COM POWERSEARCH CONFIG – ADD SEARCH FIELDS](#).

This action enables us to define the settings of our future search fields. In order to save our settings, we press on the **[Save]**-button in the right lower corner. We repeat this step twice, because we want to add two different Search fields, but you could add as many fields as you wish.

Figure 84: New MSCRM-ADDONS.com PowerSearch Config – add search fields

### 9.3.1 The results

Once you have configured your search and result fields, do not forget to save them. To see the results, navigate to PowerSearch and refresh the page, if necessary.

Provided that you followed the steps correctly, your entity should look similar to the below figure.

The screenshot shows the Microsoft Dynamics CRM interface with the PowerSearch module active. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', and 'PowerSearch'. Below this, a toolbar contains buttons for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', 'POWERSEARCH', 'SMARTBAR DIALOG', and 'POWER SEARCH'. The main content area features a tabbed interface with 'Contact', 'Lead', 'Account', and 'Invoice' tabs. The 'Account' tab is selected, displaying a search form with fields for 'Account' and 'Created On'. Below the search form, a table header is visible with columns: 'Name', 'Status Reason', 'Total Amount', 'Customer', and 'Email'.

Figure 85: New MSCRM-ADDONS.com PowerSearch Config – add search fields

Now that's it! But of course, our "How-to"-section provides you with more information on PowerSearch.


## 9.4 How to delete Search and Result Fields

If you have added a wrong Search or Result field, you can delete it.

To do so, navigate to the Search- or Result Field Configuration (corresponding to which field you would like to delete). For more information on the configuration fields, see chapter [5.1 THE CONFIGURATION OF POWERSEARCH ENTITIES, PAGE 26](#).

In our example, we would like to delete "Address 2".

To do so, we select the field in the corresponding field configuration. Once the field is selected, a garbage bin appears at the right side. Click on it and the field will be deleted.

<a href="#">Address 2: ZIP/Postal Code</a>	address2_postalcode	String	3	06.Mai.16 13:13	
--	---------------------	--------	---	-----------------	---

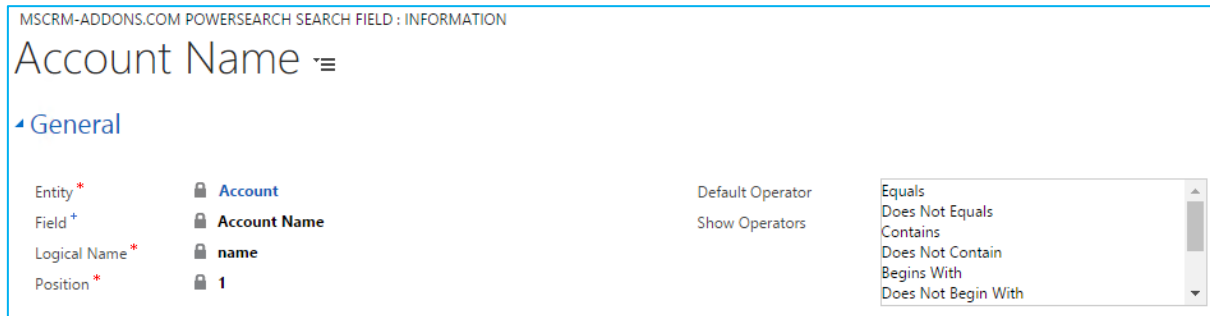
*Figure 86: Delete (search or result) field*



## 9.5 How to set a default operator

The *Default Operator field* sets the default settings for operator fields.

When you open the drop down menu of the *Default operator-field* you get the opportunity to select between various options that depend on the entity/field you have chosen before.



The screenshot shows the 'Account Name' configuration page in the PowerSearch tool. At the top, it says 'MSCRM-ADDONS.COM POWERSEARCH SEARCH FIELD : INFORMATION'. Below this, the title 'Account Name' is followed by a hamburger menu icon. A 'General' tab is selected. On the left, there are four fields: 'Entity\*' (set to 'Account'), 'Field+' (set to 'Account Name'), 'Logical Name\*' (set to 'name'), and 'Position\*' (set to '1'). On the right, there is a 'Default Operator' section with a 'Show Operators' button and a dropdown menu. The dropdown menu is open, showing a list of operators: 'Equals', 'Does Not Equals', 'Contains', 'Does Not Contain', 'Begins With', and 'Does Not Begin With'.

Figure 87: Set default operator



The default operators vary depending on the entity/fields you select.

For the *Account name*-field you can, for example, select between

*Equals, Does Not Equal, Contains, Does Not Contain, Begins With, Does Not Begin With, Ends With, Does Not End With, Contains Data, Does Not Contain Data.*

If you do not set a *Default Operator*, the first operator of the list is selected automatically (only if the operator is visible). Per default, users cannot change the operators, but you can give them the opportunity to do so.

## 9.6 How to enable users to choose between operators

You can enable your users to choose between operators each time they run a search.

To do so, simply set the *Show operators-field* on *YES*.

If you do not want your users to use this option, select *No*.

Default Operator  
Show Operators **Equals**  
**Yes**

Figure 88: Show Operators



Please note: The functionality of this option is only applied to your Search field, if the *Show operator field* is set on *Field specific* in the main entity. For more information, have a look at chapter [5 THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW, PAGE 25](#).

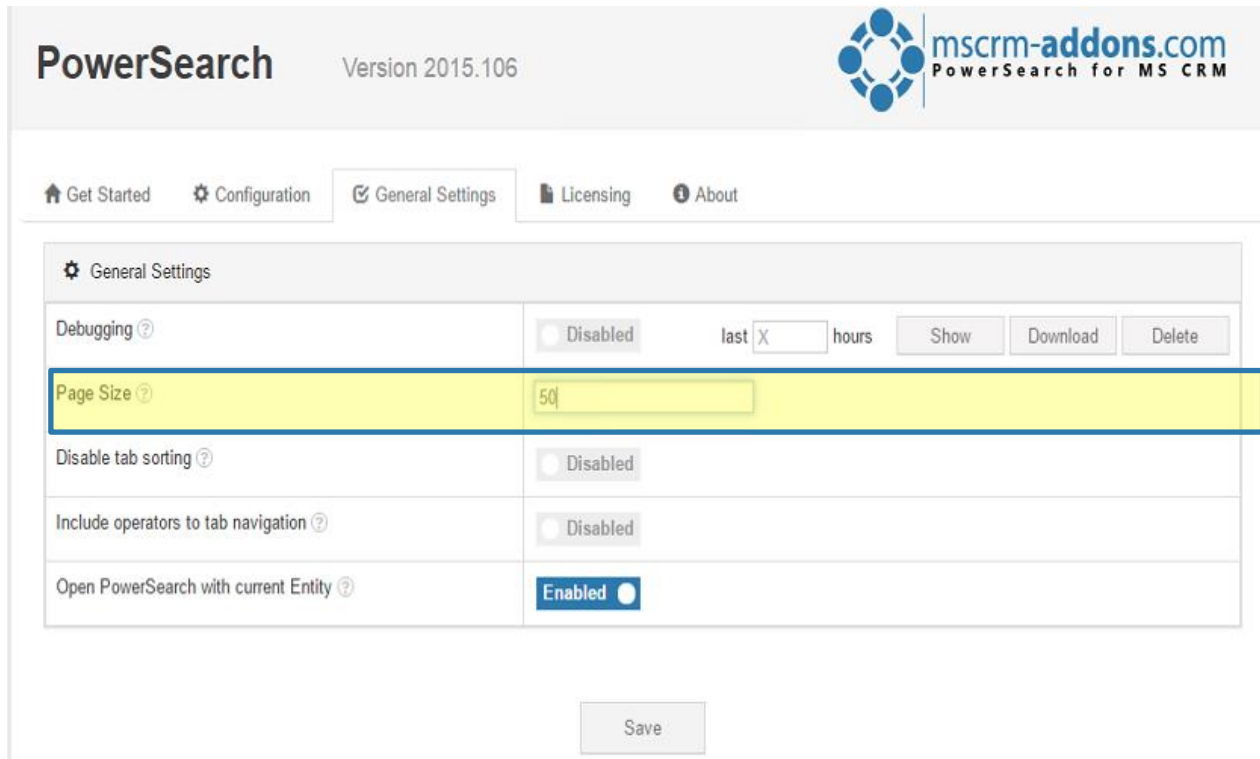
Once configured like this, users get the following options:


Figure 89 Show operator functionality applied to account name field

## 9.7 How to change the page size

PowerSearch also allows to change the size of pages.

To do so, enter the PowerSearch General Settings. If you are not familiar with them, have a look at chapter [3.3 THE GENERAL SETTINGS – TAB, PAGE 19](#). Now simply enter the page size you would like to have applied to PowerSearch.



**PowerSearch** Version 2015.106  mscrm-addons.com  
PowerSearch for MS CRM

Get Started Configuration **General Settings** Licensing About

**General Settings**

Debugging ?	<input type="checkbox"/> Disabled	last <input type="text" value="X"/> hours	Show	Download	Delete
Page Size ?	<input type="text" value="50"/>				
Disable tab sorting ?	<input type="checkbox"/> Disabled				
Include operators to tab navigation ?	<input type="checkbox"/> Disabled				
Open PowerSearch with current Entity ?	<input checked="" type="checkbox"/> Enabled				

Save

Figure 90: How to change the page size

That's it! Don't forget to save your changes!

## 9.8 How to rearrange the order of fields

Search and result fields can be rearranged easily. The steps shown in this tutorial can be applied to search fields, as well as to result fields. Please follow our tutorial to learn more about the topic.

### 9.8.1 Step 1: Enter the PowerSearch field configuration

Once you have opened the PowerSearch field configuration (see chapter 5 [THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW, PAGE 25](#) for more information on the configuration), open the entity you would like to change with a double click on it (1). The MSCRM-ADDONS.com PowerSearch Config Account – window opens (2).



The window provides you with the possibility to modify the search fields and the result fields of the corresponding entities. Simply scroll up or down in order to select which fields you would like to apply your changes.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a toolbar with various actions like NEW, EDIT, ACTIVATE, DEACTIVATE, MOVE UP, MOVE DOWN, DELETE, EXPORT TO WORD, and CREATE DOCUMENT. Below the toolbar, the breadcrumb navigation shows 'Active MSCRM-ADDONS.com Po...'. A table lists entities: Account, Contact, and Lead. The 'Account' entity is highlighted with a blue circle containing the number '1'. Below this, a window titled 'MSCRM-ADDONS.com Powersearch Config: Account - Google Chrome' is open. This window shows the 'Account' configuration page with a yellow background. A blue circle with the number '2' highlights the 'Account' configuration window. The window contains a table with the following data:

Name	Logical Name	Type	Position	Created On
Account Name	name	String	1	24Jun.16 09:00
Created On	createdon	DateTime	2	24Jun.16 09:00
Primary Contact	primarycontactid	Lookup	3	24Jun.16 09:00

Figure 91: MSCRM-ADDONS.com PowerSearch Config Account – window

## 9.8.2 Step 2: Rearrange the fields

Once you have selected the fields you would like to modify, click on the grid next to the **[+]**-button.



Figure 92: PowerSearch Config Account – window grid

In the so opened window, mark the field you would like to rearrange (1) and click on the **[Move UP]**-button (2) in order to move it up or the **[MOVE DOWN]**-button (3) in order to move it down.

Microsoft Dynamics CRM Account

MSCRM-ADDONS.COM POWERSEARCH CONFIG : INFORMATION

Account

To make this config available to other users, hit the "SHARE" button and add users or teams.

MSCRM-ADDONS.com Powersear... 2 3

+ ADD NEW MSCRM-ADDON... EDIT ACTIVATE DEACTIVATE MOVE UP MOVE DOWN DELETE MSCRM-ADDONS... BULK DELETE

✓	Name ↑	Logical Name	Type	Position ↑	Column Width	Created On
	Account Name	name	String	1	300	24Jun.16 09:00
✓	Main Phone	telephone1	String	2	100	24Jun.16 09:00
	Address 1: City	address1_city	String	3	100	24Jun.16 09:00
	Primary Contact	primarycontactid	Lookup	4	150	24Jun.16 09:00
	Email	a_63de850830b742ce94b999b367a...	String	5	150	24Jun.16 09:00

Figure 93: PowerSearch Config Account – rearrange the order of fields



The **[Move up]**-, as well as the **[Move down]**-button are invisible unless you have marked a field.

## 9.9 How to rearrange Config entities (for administrators)

Next to the order of fields, you can also change the order of the different Config entities. In our example, *Account* is in the first place. But we want it to be placed in the second place.

Figure 94: PowerSearch surface

To do so, simply enter the Main Config, select the entity you would like to rearrange and then click on the **[MOVE UP]**-button or the **[MOVE DOWN]**-button in the command bar and save the changes.

Name	Position	Created On
Lead	1	09.Mai.16 15:02
Account	2	09.Mai.16 15:02
Contact	3	09.Mai.16 15:02
Opportunity	4	09.Mai.16 15:02

Figure 95: PowerSearch Main Config – rearrange the order of Config entities

That's it! We have successfully switched the entity *Account* to another. Have a look at the result:

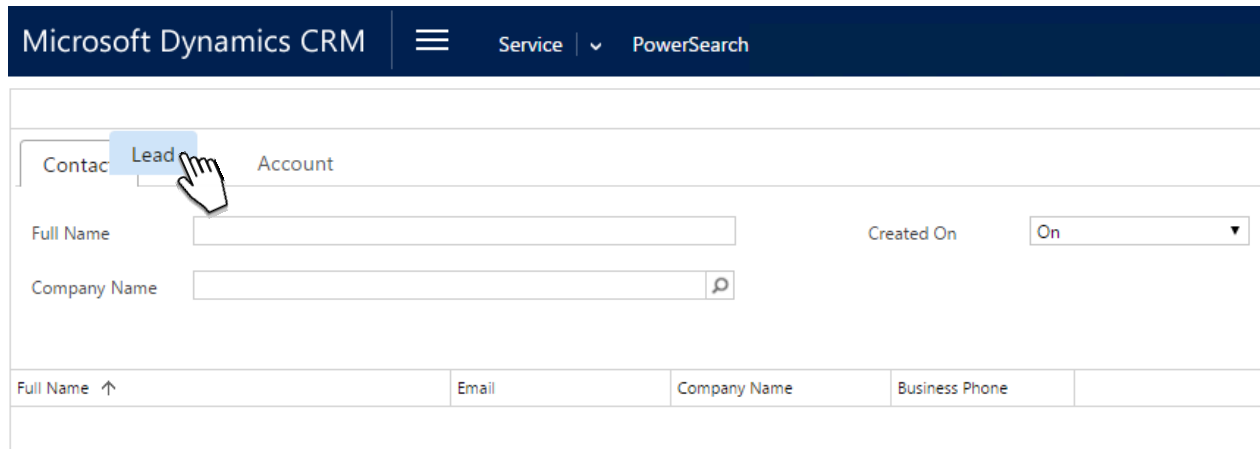
Figure 96: PowerSearch surface with rearranged Config entities

## 9.10 How to rearrange Config entities (for users)

Because we want to provide our customers with the most comfortable user experience possible, we decided to create a simple way to rearrange Config entities for PowerSearch users.

### 9.10.1 How to drag and drop Config entities

To use this functionality, simply click on the Config entity you would like to rearrange and drop it at the position that fits your requirements more.



The screenshot shows the Microsoft Dynamics CRM interface with the PowerSearch configuration page. The top navigation bar includes 'Microsoft Dynamics CRM', a menu icon, 'Service', and 'PowerSearch'. Below the navigation bar, there are three tabs: 'Contact', 'Lead', and 'Account'. The 'Lead' tab is currently selected, and a hand icon is shown dragging it. Below the tabs, there are input fields for 'Full Name' and 'Company Name', and a 'Created On' dropdown menu set to 'On'. At the bottom, there is a table with columns: 'Full Name' (with an up arrow), 'Email', 'Company Name', and 'Business Phone'.

Figure 97: PowerSearch Main Config – rearrange the order of Config entities with drag & drop

That's it! Do not forget to save your settings!

## 9.11 How to set result sorting

PowerSearch enables you to set a default result order. If you are not pleased with the default order, you can change it.

To do so, open an entity and click on the **[Set Result Sorting]**-button in the CommandBar.

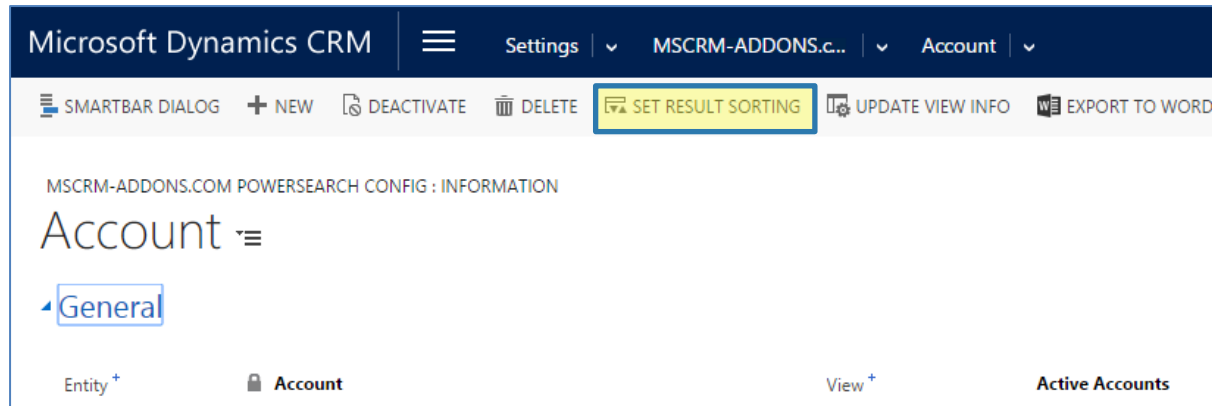


Figure 98: PowerSearch Config: Account

The *Configure Sort Order dialog* opens, which enables you to customize the default order.

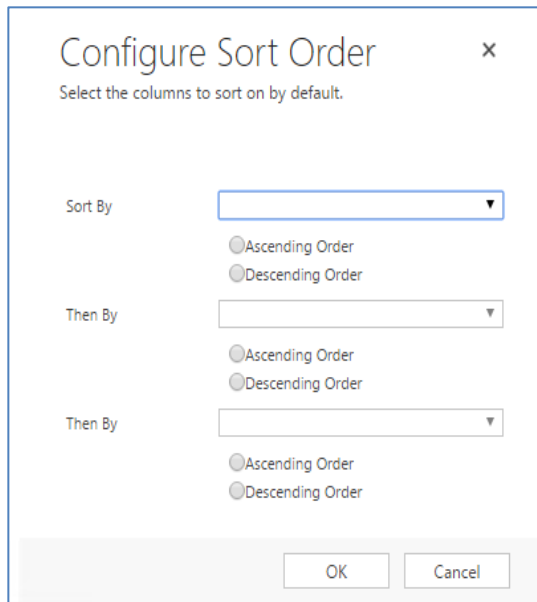


Figure 99: Configure Sort Order dialog



In our example, we sort our results first by *Account Name* and then by *Address 1: City*. You can as well define, if you want the order to be ascending or descending. Hit the **[OK]**-button in order to proceed.

Configure Sort Order

Select the columns to sort on by default.

Sort By: Account Name (Descending Order selected)

Then By: Address 1: City (Ascending Order selected)

Then By: (empty)

OK Cancel

Figure 100: Filled Configure Sort Order dialog

Microsoft Dynamics CRM | Sales | PowerSearch

NEW ACTIVITY | NEW RECORD | IMPORT DATA | SMARTBAR DIALOG

Accounts | Leads | Contacts | Opportunities

Account Name: company

Address 1: State/Pr:

Address 1: ZIP/Pos:

Owner:

Credit Limit:

1 2

Account Name ↓	Main Phone	Address 1: City ↑	Prim
The Croner Company		Kentfield	
TEST company TEST			
Sunset Development Company		San Ramon	
Orange Bicycle Company	555-0148	Chicago	
ISM eCompany		Rotterdam	
FEI Company		Hillsboro	
Economy Bikes Company	555-0165	Portland	

The result fields are now sorted by

- (1) ACCOUNT NAME (descending) and
- (2) ADDRESS 1: CITY (ascending)

As you can see, all the companies that start with a "T" are additionally sorted by *Address 1: City* in ascending order.

Figure 101: Filled Configure Sort Order dialog

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