

PowerSearch -Installation and User Guide for Dynamics 365

June 2023



Table of Contents

 HOW TO INSTALL POWERSEARCH FOR MICROSOFT DYNAMICS 365	
 How to install PowerSearch via .exe file	4
 1.3. How to install PowerSearch via solution import (manually) 2. CONFIGURATION PAGE	
 2. CONFIGURATION PAGE 2.1. The Get Started tab. 2.2. The Configuration tab 2.3. The General Settings tab. 2.4. The Licensing tab 2.5. The About tab 2.6. Connection Setup 3. HOW TO EMBED POWERSEARCH IN MICROSOFT DYNAMICS 365 4. HOW TO ACCESS POWERSEARCH FROM WITHIN MICROSOFT DYNAMICS 365 4.1. How to access PowerSearch via the GlobalButton 4.2. Via Sitemap link 	8
 2.1. The Get Started tab	12
 2.1. The Get Started tab	16
 2.2. The Configuration tab	
 2.3. The General Settings tab	
 2.4. The Licensing tab	
 2.5. The About tab	
 2.6. Connection Setup 3. HOW TO EMBED POWERSEARCH IN MICROSOFT DYNAMICS 365 4. HOW TO ACCESS POWERSEARCH FROM WITHIN MICROSOFT DYNAMICS 365 4.1. How to access PowerSearch via the GlobalButton 4.2. Via Sitemap link 	
 4. HOW TO ACCESS POWERSEARCH FROM WITHIN MICROSOFT DYNAMICS 365 4.1. How to access PowerSearch via the GlobalButton	
4.1. How to access PowerSearch via the GlobalButton	26
4.2. Via Sitemap link	30
	30
	30
5. THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW	31
5.1. The configuration of PowerSearch entities	31
5.1.1. The General section	32
5.1.2 The Input Fetch Section	34
5.1.3 The Search Fields	36
5.1.4 The Result Fields	37
5.2 How to share PowerSearch Configuration records	38
5.2.1 Open a random PowerSearch Configuration	38
5.2.2 The Share records in mscrm-addons.com PowerSearch Configuration opens	38
5.2.3 Look for a user or team	
5.2.4 Assign permissions to selected users	39
6 THE POWERSEARCH LAYOUT DESIGNER	41
6.1 How to start the PowerSearch Layout Designer	
6.2 The PowerSearch Layout Designer surface	
6.2.1 How to customize Layouts	
7 POWERSEARCH SURFACE: SPECIAL FIELD FUNCTIONS AND BUTTONS	49
7.1 Look up field	
7.2 Date related fields	
7.3 The Open Configuration button	
7.4 The Clear button	
8 WAYS TO PROCEED WITH YOUR SEARCH RESULTS	51
8.1 Open the record with a double click on them	
8.2 Open your results with Microsoft Dynamics 365	
8.3 Jump from page to page	
8.4 Change the result or using the column header	



9.	TUTORIALS (HOW TO'S)	
9.1.	How to search with PowerSearch	
9.2.	How to configure an entity/table	
9.3.	How to add Fields	59
9.4.	The results	60
9.5.	How to delete Search and Result Fields	
9.6.	How to set an operator	
9.7.	How to enable users to choose between operators	
9.8.	How to change the page size	
9.9.	How to rearrange the order of fields	
9.10.		
9.11.	How to rearrange Configuration entities (for users)	65
9.	11.1. How to drag and drop Configuration entities	65
9.	11.2. How to set result sorting	65
10.	LIST OF FIGURES	68
11	CONTACT	71

Preamble

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

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

Target Audience

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

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

Supported Web Browsers and versions

Supported Web Browsers:



- Chrome
- Edge
- Firefox

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

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics On Premise Version 9.0

Purpose of PowerSearch

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

PowerSearch allows its users to use multiple fields for search queries that are frequently used. This allows the user to search multiple fields simultaneously, 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 to save valuable time.



1. How to install PowerSearch for Microsoft Dynamics 365

PowerSearch is very easy to install and integrate into Microsoft Dynamics 365. There are different ways how to install PowerSearch in your environment.

1.1. How to install PowerSearch via AppSource

By leveraging Microsoft AppSource, businesses can find, and implement our applications like <u>PowerSearch</u> that align with their requirements and help them streamline processes.

After accessing the app on AppSource, check the compatibility and requirements of your Microsoft software, sign into your Microsoft account, and install the app by clicking Free Trial. Make sure you select the environment you want to install PowerSearch in case you have different environments.

Follow any on-screen instructions or prompts to complete the installation process. You may be asked to grant certain permissions or provide additional information during the installation.

Once the app is successfully installed, you should receive a confirmation message or notification. The app should now be accessible within the chosen Microsoft environment.

Follow this article for post AppSource installation.

1.2. How to install PowerSearch via .exe file

PowerSearch can be installed and integrated into Microsoft Dynamics 365 Via an .exe file.

You can find the required data for the installation on our homepage <u>www.mscrm-addons.com</u> in the <u>Download</u> section.



Download PowerSearch for Dynamics 365



This is the download for Dynamics 365 Version 9.x Please check your Dynamics 365 Version before downloading. See Tutorial.

Need Help?: If you run into troubles when installing/configuring our solutions dont hesitate to get in touch with us via our Help-Center.

Installer						
	Title	Category	Modified Date			
	PowerSearch for Dynamics 365 (EXE Installer + Solutions)	v.2020.16	8/25/2022	Download		

Figure 1: Download section for PowerSearch on www.mscrm-addons.com

With a click on the **Download** button, you will receive a .zip file.

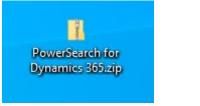


Figure 2: .zip file for PS installation in Dynamics 365

Regardless of the method you select, the .zip file serves as the initial step for your installation. Ensure that you unpack the downloaded .zip file. Once unzipped, the solution package will appear as depicted below.

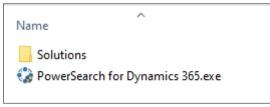


Figure 3: Unzip the PS .exe file



In the folder where you have unzipped the PowerSearch installation file, make doubleclick on the .exe file and the InstallShield Wizard opens.



Figure 4: InstallShield Wizard

Click the **Next** button. Now check to accept the terms in the license agreement.

🔀 PowerSearch for Dynamics 365			Х
License Agreement Please read the following license agree carefully.	ement	PowerSearch	for Dynamics 365
FORM OF END U	SER LICENSE A	GREEMENT	^
MSCRM-ADDONS.COM SOFT	WARE LICEN	SE AGREEMEN	т
IMPORTANT: THIS SOFTWARE AGREEMENT") IS A LEGAL AGR MSCRM-ADDONS.COM. READ I SOFTWARE. IT PROVIDES A L CONTAINS WARRANTY INFORM	REEMENT BETV IT CAREFULLY ICENSE TO US	EFORE USING	AND G THE ARE AND
I accept the terms in the license agree I do not accept the terms in the license			Print
InstallShield			
	< Back	Next >	Cancel

Figure 5: Accept terms of license agreement



Click **Next** to install to this folder or click **Change** to install to a different folder.

PowerSe	arch for Dynamics 365			×
Click Nex	on Folder (t to install to this folder, or clic to install to a different folder.	k 🍕	PowerSearch	ddons.com for Dynamics 365
	Install PowerSearch for Dyna C:\Program Files (x86)\PTM E Dynamics 365\		H\PowerSearch for	Change
InstallShield -		< Back	Next >	Cancel

Figure 6: Select the destination folder

Click **Next** and subsequently click **Install** to begin the installation.

🔀 PowerSearch for Dynamics 365			×
Ready to Install the Program The wizard is ready to begin installation.		PowerSearch	ddons.com
Click Install to begin the installation.			
If you want to review or change any of y exit the wizard.	our installation se	ttings, <mark>c</mark> lick Back. C	lick Cancel to
InstallShield			
	< <u>B</u> ack	Install	Cancel

Figure 7: Install the program



The installation of PowerSearch for Dynamics 365 may take several minutes. You can see it on the status.

👷 PowerSea	arch for Dynamics 365		-	-	×
	PowerSearch for Dynamic ram features you selected are		PowerSear	addon	S.COM
17	Please wait while the InstallSł 365. This may take several m		lls PowerSearch fo	r Dynamics	
	Status:				
].
InstallShield —					
		< Back	Next >	Ca	ncel
Figure 8: Insta	lling PowerSearch				

1.2.1. Connection Setup

This window opens during installation. Please make the connection setup as described.

Select your **1** Existing Profile or create a new profile and select your **2** Dynamics **365 type**. Choose the **3** Dynamics **365 Server-URL**. Click on the **4** Retrieve all button and as soon as the organizations are retrieved, choose the respective one and press the **5** OK button.

Please note: A login with your Dynamics 365 credentials is required.



Logon information - PowerSearch

Welcome to your Dynamics 365 Connection setup.

Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

xisting Profiles	1			•	Manage	New
Select your Dynami	cs 365 Type		2			
C OnPremise	C IFD/I	Hosted	Online		C AppAccess	
Dynamics 365 Serve	er-Url:					-
https://or_	3.crm4.dynan	nics.com				3 🗸
Authenticated as:						
Prefer Server2Ser	rver authentication					
	to server authentic					
			NO WINDOW TROPP M			
N	lote, that a seperat You must co					
N			on window from M gon and consent p			
N		mplete the lo	gon and consent p	process to cont		
Ν		mplete the lo		process to cont		
	You must co	mplete the lo	gon and consent p	process to cont		
Organization infor	You must co mation:	A Re	gon and consent p	process to cont		
	You must co	A Re	gon and consent p trieve all Organiza	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		
Organization infor	You must co mation: Unique name	Re	gon and consent p trieve all Organiza riceURL	process to cont		

Figure 9: Connection setup

After the Connection setup, please click the **Save** button when this window opens.

Save Profile		x
Profilename:	https://orgcaddf5e8.cm4.dynamics.com - CRM168820	
	Save Cancel	

Figure 10: Save the profile from the setup



The InstallShield Wizard has completed the installation of PowerSearch to Dynamics 365. Please click **Finish**.

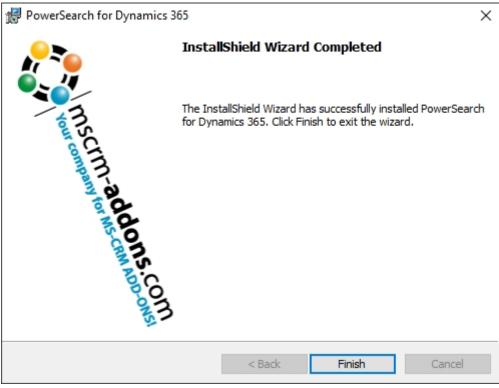


Figure 11: Finish installation

The PowerSearch configuration page opens. To begin configuring PowerSearch, you have two options. You can either utilize the Configuration page or start working with our provided sample data. Throughout the upcoming chapters, you will acquire the necessary knowledge to perform these tasks effectively.

Please note: PowerSearch includes optional sample data for your convenience. In the absence of any existing configuration, PowerSearch offers this sample data, which you can choose to utilize or not.



owerS	Version 2020.16	PowerSearch for Dynamics 3			
Get Started	🌣 Configuration 🛛 🧭 General Settings 📑 Licensi	ng 🚯 About			
		Ogris Klaudia			
	Getting Started with PowerSearch	mscrm-addons.com			
	Welcome to PowerSearch for Microsoft Dynamics CR	IMI			
		environment. To finalize the setup please perform the			
	following actions:				
	1 Assign the following security roles to your users: "Mandatory security roles" 2				
	2 Embed PowerSearch into your Dynamics	365. Take a look into our "Step-by-Step video" 🖸			
		na Santa (1993), Sa Salaka (1997), Santa Antonio (1999), Santa (1997), Santa (1997), Santa (1997), Santa (1997)			
	That's it! If you have any questions don't hesitate to a day!	contact our support-group available via live-chat 17 hours			
	PowerS	earch Pricing			
	Check out pricing and lic	ensing options for our solution			
		Buy Now!			
	🕒 Documentation library 🔊 B	logarticles 🕜 Contact Support			

Figure 12: PowerSearch Configuration page



1.3. How to install PowerSearch via solution import (manually)

In some cases, it is necessary to install our mscrm-addons.com solutions manually. Here is shown how this can be done in Dynamics 365.

Navigate in Dynamics 365 to **Settings** and to **Solutions**.

Dynamics 365 Settings ~ Solutions	Ŷ					م
Settings						
Business	Customization	System		Process Center	SignNow	Application
Business Manageme ငိုင် Sync Error	Customizations	Administration	Email Configuration	Processes	GignNow app	Apps
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows		
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules			
2 Unified Service Desk	← ■ Plug-In Trace Log	System Jobs	Dynamics 365 App f			
Yo Service Management	Solutions History	Document Manage	Sales Insights			
Mobile Offline		Auditing				

Figure 13: Dynamics 365 > Settings > Solutions

In the All Solutions overview select Import.

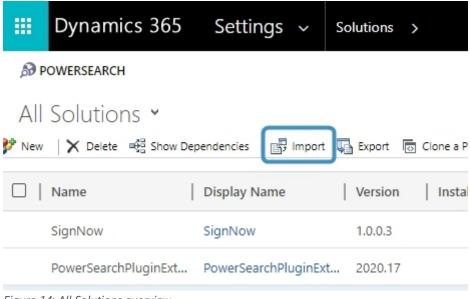


Figure 14: All Solutions overview

Select the Solution Package like in the Figure below and continue with Next.



Please note: It is of upmost importance to upload the two mandatory files in the following order!

1 MSCRMADDONScomGeneral

2 PowerSearchPluginCore

3 PowerSearchPluginConfig (optional: embeds links in SiteMap and adds a dashboard)

4 PowerSearchPluginGlobalButton (optional: adds the global button to PowerSearch)

5 PowerSearchPluginExtension

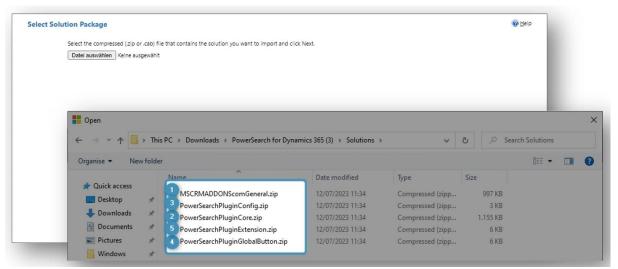


Figure 15: Select Solution Package

After a double-click on **MSCRM-ADDONScomGeneral.zip** this window is shown. Continue with **Next**.



Figure 16: Solution information

Enable any SDK message processing steps included in the solution. Click on Import.



Import Options	@Help
Post Import Actions	
Enable any SDK message processing steps included in the solution	
NOTE: New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.	
<u>B</u> ack Imp	ort <u>C</u> ancel

Figure 17: Import options

The solution gets imported. Please wait for the operation to complete.

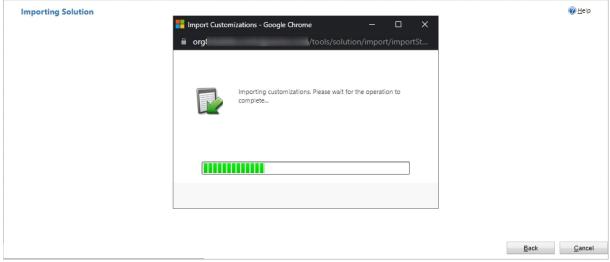


Figure 18: Importing Solutions

The import of the solution **MSCRM-ADDONS.com General** is completed successfully. The ribbon client metadata is being refreshed in the background.



The import of s	olution: PowerSearchF	PluginExtension by m	scrm-addons.com c	ompleted successfu	ully. Ribbon client metadata is being refreshed in the backgr	ound.
Date Time ↓	Туре	Display Name	Name	Status	Description	D
13:54:50.43	Dependencie					Noi
13:54:47.81	Web Resourc	ptm_PowerSe	ptm_PowerSe			No
13:54:43.42	Solution	PowerSearch				Noi
13:54:36.90	Labels	Labels			Display strings and localized labels.	Noi
13:54:09.85	Transform Pa	Transform Pa	UpdateMobil		Transform Package	Noi 🗸
						•
					A Pag	e 1 🕨

Figure 19: Imported solution

Now repeat the procedure for

- MSCRMADDONScomGeneral
- PowerSearchPluginCore
- **PowerSearchPluginConfig** (optional: embeds links in SiteMap and adds a dashboard)
- **PowerSearchPluginGlobalButton** (optional: adds the global button to PowerSearch)
- PowerSearchPluginExtension



2. Configuration page

The configuration of PowerSearch is very simple. To open the configuration, navigate to **Dynamics 365** > **Settings** > **mscrm-addons** > **PowerSearch**. The window that opens now is the PowerSearch Configuration. Its functionalities will be explained during the following chapters.

Dynamics 36	5 Settings ~ PowerSearc	h					C Q	+ 7 0 ?
Settings								
Business Business Manage Templates Curified Service D Product Catalog Service Manager Mobile Offline	vesk	Customization Customizations Solutions Microsoft AppSource Plug-In Trace Log Solutions History	System Administration Security Security Data Management System Jobs Cocument Management Audding	Email Configuration Activity Feeds Confi Activity Feeds Rules Dynamics 365 App f Sales Insights	Process Center	Application Apps	DocuSign DocuSign Admin DocuSign Users Burk Send Lists	MSCRM-ADDONS Products AttachmentExtractor DocumentsCorePack PowerSearch
Figure 20:	Dynamics 365	> Settings > I	PowerSearch					
Powe	rSearch	Version 2	2020.16				mscrm- add PowerSearch for	ONS.COM Dynamics 365
A Get Start	ed 🌣 Configurati	on 🕑 Genera	l Settings 📑	Licensing 🚯 A	bout			
	Getting	Started with Po	owerSearch		with the second	Crm- add company for MS	ONS.COM	
				nics CRM! o your environmer	nt. To finalize the	setup please p	erform the	
	0			to your users: "M		Sec. 1. Sec. Sec. Sec. Sec.		
	2 That's it! If a day!			namics 365. Take a ate to contact our				
			Po	werSearch Pri	cing			
		Chec	k out pricing a	nd licensing op	tions for our s	olution		
			O	Buy Now!				

Figure 21: PowerSearch Configuration page



2.1. The Get 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.

PowerSearch	Version 2020.16					
♠ Get Started ✿ Configure	ation 🕑 General Settings 🔹 Licensing 🚯 About					
Gettir	g Started with PowerSearch					
The so	Welcome to PowerSearch for Microsoft Dynamics CRM! The solution has been successfully deployed to your environment. To finalize the setup please perform the following actions:					
	Assign the following security roles to your users: "Mandatory security roles" 🛛					
	2 Embed PowerSearch into your Dynamics 365. Take a look into our "Step-by-Step video" 🕑					
That's a day!	If you have any questions don't hesitate to contact our support-group available via live-chat 17 hours					
	PowerSearch Pricing					
	Check out pricing and licensing options for our solution					
	Buy Now!					
Figure 22: the Get Start	d tab					



2.2. 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.

PowerSearch	Version 2020.16		PowerSearch for Dynamics 365
A Get Started	General Settings	Licensing I About	
	(Open Search Configuration	

Figure 23: The Configuration tab

Please note: PowerSearch includes optional sample data for your convenience. In the absence of any existing configuration, PowerSearch offers this sample data, which you can choose to utilize or not.

If the sample data fits your requirements, you can start searching with PowerSearch immediately.

With the **New** button you can create a new record. Within this process you can select an entity and a view.

You can add some search and result fields by using the corresponding sub-grids.

During this documentation, you will learn in detail how to search with PowerSearch.



	Dynamics 365	
() For t	he best experience viewing this content, open it in a specific application.	
← E	🛛 Show Chart 🕂 New 🛍 Delete 🗸 🖒 Refresh 🛛 Email a Link 🗸 🔊 Flow 🖓	🗸 🔟 Run Report \vee 🛛 🕮 Excel Templates 🗸
Act	ive MSCRM-ADDONS.com Powersearch Config \sim	
\bigcirc	Name Y	Menu Display Name ↑ ∽
	Account	Active Accounts
	Contact	Active Contacts
	Lead	All Leads
	Opportunity	Opportunities

Figure 24: PowerSearch Configuration

2.3. The General Settings tab

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

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.

- **Show** button: Displays all logs that were generated during the last xx hours (in this example 24 hours)
- Download button: Allows you to download the log-file (.xml). The
- Delete button enables you to delete the log-files.



2 Page Size: Define how many records should be displayed in the 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 setting is set to true, no user can change the tab order.

5 Add tabkey navigation to operator: If this setting is set to true, operator picklist can be selected with tab key.

6 Open PowerSearch with current Entity: If this setting is set to true, the PowerSearch Global button will open PowerSearch with the current entity as active tab.

7 Show total record count: By default, the total record count shows a maximum number of 5000. If this setting is activated, it shows the record number up to 50.000.

8 Disable scrolling on sub-grid area: Per default, every main grid shows 2 subgrids. 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).

Please note: If you activate this setting, it is recommended to set the grid min. height in pixels to at least 600.

9 Minimum Search Criteria: Enable this setting to force every user on every search to enter a minimum one value for one search field.

10 Trim Search Fields: Enable this setting to remove empty spaces at a search text's beginning and end.

U Custom Width for Search Fields (px): Define here a custom width for each part of the search field.

12 Entity preview for: Define the entity for which you want to define the EntityPreview.

(B) Show CRM views for: Here you can define for which entities CRM views would be created. You can also automatically share these views with one or more teams. Therefore, click on the textbox on the right and choose your teams.



Search Fields Inline Filter: Enable this setting to activate the inline filter for each text field. This is only available for text fields.

Hide default buttons: Here you can type a comma separated list of button names which should not be shown (e.g., btCreate, btclearFields, btSave). Available button names: **btStartSearch**, **btCreate**, **btclearFields**, **btEntityPreview**, **btOpenCRMGrid**, **btOpenConfig**, **cbGridSelectAll**;

(16) Show 'checkbox' to ignore 'Search Fields': If activated, a checkbox in front of each 'Search Field' is shown. It can be used to ignore that field for searching.

Show 'Tolerance' control for number fields: Show the 'Tolerance' control. 'Search Fields' of type 'number' and 'money' can be marked as Tolerance Field. This must be done on the 'Search Fields' records directly.

Get Started Configuration 🗹 General Settin	gs 🖹 Licensing 🛛 About
General Settings	
Debugging 📀	Disabled last X hours Show Download Delete
Page Size 🕐	e.g. 250
Grid min height (px) ③	e.g. 300
Disable tab sorting ⊘	Disabled
Add tabkey navigation to operator 💿	Disabled
Open PowerSearch with current Entity ②	Enabled
Show total record count \circledcirc	Enabled
Disable scrolling on subgrid area (?)	Disabled
Minimum Search Criteria ⊘	Disabled
Trim Search Fields ②	Disabled
Custom Width for Search Fields (px) \textcircled{O}	Label Operator Input Field Distance to next Field
Entity Preview for ②	account,contact,opportunity Designer
Show CRM Views for ⑦	e.g. account,lead Update
Search Fields Inline Filter (2)	Operator (AND): && Operator (OR):
Hide default buttons (?)	e.g. btCreate,btclearFields,btSave
Show 'checkbox' to ignore 'Search Fields' \textcircled{O}	Enabled
Show 'Tolerance' control for number fields ③	Disabled Default Value (%): 10

Figure 25: The General Setting tab



2.4. 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.

General Settings Licensing 4 About		
LicenseValue	Systemvalue	Status
	valid	1
perSite		
23054.212)		
CsBE1Ht4gXVSnnAc0gld17SAcNxjrx	Licensekey installed	()
LicenseValue	Systemvalue	Status
unqfe9a36ddb2d3ed11aed0000d3a64d	unqfe9a36ddb2d3ed11aed0000d3a64d	1
10	1	1
0	0	1
9/17/2023 12:00:00 AM	86 days left	1
9/17/2023 12:00:00 AM	86 days left	1
PowerSearch	PowerSearch	1
9/17/2023 12:00:00 AM	8/9/2022 4:11:12 PM	1
	23054.212) LicenseValue perSite CsBE1Ht4gXVSnnAc0gld17SAcNxjrx LicenseValue unqfe9a36ddb2d3ed11aed0000d3a64d 10 0 9/17/2023 12:00:00 AM 9/17/2023 12:00:00 AM 9/17/2023 12:00:00 AM PowerSearch	LicenseValue Systemvalue perSite Licensekey installed CSBE1Ht4gXVSnnAc0gld17SAcNxjrx Licensekey installed unqfe9a36ddb2d3ed11aed0000d3a64d unqfe9a36ddb2d3ed11aed0000d3a64d 10 1 0 0 9/17/2023 12:00:00 AM 86 days left 9/17/2023 12:00:00 AM 86 days left

Figure 26: the Licensing tab

Click on the **Install License** button and the **Install License** dialog opens. Enter your license key or the subscription number that you received from our <u>support team</u>.



Use this dialog to install the license for Pow	erSearch.
If you already have received an email with the li addons.com", please follow the steps below.	cense key form "support@mscrm-
If you don't have a license yet and want to purc Shop. It will link you directly to our Online Shop	Base we consider a special strategies a second strategies and the
Of course you can contact us directly: Email to	Support
Install the license:	
Of course you can contact us directly: Email to Install the license: 1. Please open the email with the license k Next select the unzipped text-file via the following text box.	ey and extract the attached zip-file.
Install the license: 1. Please open the email with the license k Next select the unzipped text-file via the	ey and extract the attached zip-file.
Install the license: 1. Please open the email with the license k Next select the unzipped text-file via the	ey and extract the attached zip-file. file dialog or copy its content into the select file

Figure 27: Install license kex or subscription number dialog

2.5. The About tab

The **About** tab provides you with general information regarding to your license and the Copyright.

PowerSearch	Version 2020.16		PowerSearch for Dynamics 365
A Get Started Started	C General Settings	Licensing (9 About	
PowerSearch for Dynamics 365			
Currently Installed Version		2020.16	
Copyright (c) 2022 PTM EDV System	ie GmbH		

Figure 28: The About tab



2.6. Connection Setup

This window opens during installation. Please make the connection setup as described.

Select your **1** Existing Profile or create a new profile and select your **2** Dynamics **365 type**. Choose the **3** Dynamics **365 Server-URL**. Click on the **4** Retrieve all button and as soon as the organizations are retrieved, choose the respective one and press the **5** OK button.

Please note: A login with your Dynamics 365 credentials is required.

lease specify your co		5 Connection se	atun	
	1		.up.	
	t your system adminis		5. If you do not know the	connection
Dynamics 365 Connecti	on Advanced Settings	Log		
Existing Profiles 🦳			✓ Manage	New
Select your Dynamics	365 Type	2		
C OnPremise	C IFD/Hosted	Online	C AppAccess	
Dynamics 365 Server-	Url:			
https://or_	3.crm4.dynamics.cor	n		3 🖌
Organization information	4	Retrieve all Organiza	ess to continue.	
Friendly name	Unique name	ServiceURL		
CRM1 0	unqfe 3	or 8		
			5 ок	Cancel

Figure 29: Connection setup



After the Connection setup, please click the **Save** button when this window opens.

Save Profile		x
Profilename:	https://orgcaddf5e8.cm4.dynamics.com - CRM168820	
	Save Cancel	

Figure 30: Save the profile from the setup

The InstallShield Wizard has completed the installation of PowerSearch to Dynamics 365. Please click **Finish**.

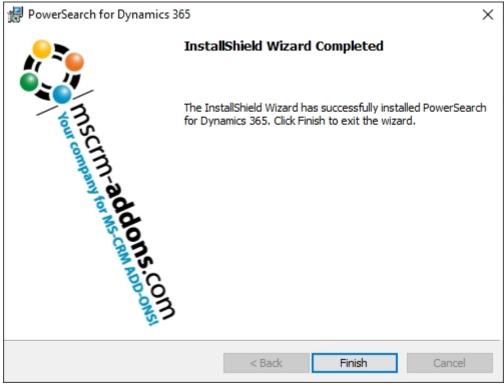


Figure 31: Finish installation



3. How to embed PowerSearch in Microsoft Dynamics 365

Please follow the post App Source installation steps.

Assign the PowerSearch Security Role. Please add the **MSCRM-ADDONS.com PowerSearch** security role to your users.

Manage User Roles What roles would you like to app	× bly to the 1 User you have selected?
Role Name	Business Unit
MSCRM-ADDONS.com ActivityTools	^
MSCRM-ADDONS.com AutoMerge	
MSCRM-ADDONS.com PowerSearch	
MSCRM-ADDONS.com SmartBar	
Office Collaborator	
Omnichannel administrator	
Omnichannel agent	-
	OK Cancel

Figure 32: Assigning Role

To embed PowerSearch into your Microsoft Dynamics 365 environment, sign in and open the <u>PowerApps Studio</u>.



III Power Apps		Search
=	+ New solution \mathscr{D} Edit \mapsto Export solution $\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}}{\overset{\mathfrak{g}}}}}}}}}}$	ependencies 🗚 Translations 🗠
合 Home	Core Service Scheduling Helper Solution	: msdynce_CSS_Helper
+ Create	Customer Service AI Conversation Summarizati	msdyn_Conversation
🛄 Learn	Customer Service Workspace plus Omichannel	msdyn_CustomerSer
🕀 Apps	Oefault Solution	Default
□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□	DocumentsCorePack by mscrm-addons.com	AutoMergeServerCore
₀∕ ^a Flows	Dynamics Unified Service Desk	DynamicsUnifiedSer
Solutions	Fabrikam Manufacturing Demo Data	ProjectServiceDemo
··· More	Field Service	FieldService
Power Platform	Field Service	msdyn_FieldService

Figure 33: Select in Power Apps Default Solution

On the following screen, select **Dashboards** under **Objects.** Then, locate and click on the dashboard you would like to customize.

III Power Apps		∠ Search
=	Objects <	$+$ New \vee \mathscr{O} Edit gå Enable security roles 🗔 Publish 🎬 Advanced \vee
\leftarrow Back to solutions	✓ Search	រាំរ៍ Microsoft Dynamics 365 Social Overview Micros
Default Solution	🗀 Custom API Reque (647)	MSCRM-ADDONS.com PowerSearch : MSCRI
Overview	Custom API Respo (383)	រាំរ៍ My Knowledge Dashboard : My Kn
t Objects	ាំរ៍ Dashboards (38)	រងរ៍ My Work Dashboard : My Wo
() History	Data Processing conf (6)	iii Omnichannel Agent Dashboard : Omnic
	 Decision contract (19) Decision rule set (1) 	Omnichannel Ongoing Conversations Dashboa : Omnic
	Dialogs (313)	រដាំ Organization Insights Dashboard : Organi
	Duplicate Detection (9)	វជ៍ Overview : Overvi
	 Email templates (50) Entity link chat conf (14) 	រដ៍ Practice Management Dashboard : Practic
	🖾 Environment variab (15)	រវារ៍ Resource Manager Dashboard : Resour
	FeatureControlSet (103)	Sales Activity Dashboard
	Flow Machine Image (2)	ش Calar Activity Casial Darkhaard : Salar /

Figure 34: Select the dashboard you want to customize



Within the select dashboard, click on the **Web Resource** button. In the window that appears, add **ptm_PowerSearch/MainPage.html** as a web resource and fill in the **Name** and **Label** under the **Field and Name Properties**. Click **OK** once you are finished, then **Save** and **Close**.

Power Apps	
🖶 SAVE 🗙 CLOSE 🏟 PROPERTIES 🏟 EDIT COMPONENT 🏨 CHART 🗮 LIST 🔀 WEB RESOURCE 🔮 TIMELINE 🔲 IFRAME 🚥	
Solution: Default Solution B Dashboard : Sales Activity Dashboard	
Name: * Sales Activity Dashboard	
Figure 35: Click web resource button	
Add Web Resource 2 ×	
Add an existing web resource to the Dashboard.	
Web resource	
Web resource *	
Field Name and Properties	
Name * WebResource_ PowerSearch	
Label * PolverSearch	
Display label on the Dashboard	
Visibility	
Visible by default	
Web Resource Properties	
Custom Parameter(data)	
Restrict cross-frame scripting, where supported.	
Pass record object-type code and unique identifier as parameters.	
OK Cancel	
Figure 36: Add Web Resource	

Click the **Publish** button in your solution to publish your customizations.

Bower Apps	s		
=	Objects	<	$+$ New \vee \mathscr{O} Edit $ g^{Q}_{\Theta} $ Enable security roles 🗖 Publish $ H $ Advanced $ imes $
Figure 27. Dubli	ich Customizations		

Figure 37: Publish Customizations



Finally, to configure PowerSearch, click on the gear icon in your PowerSearch tile as shown below.

Contacts Acco	ounts Leads	Opportunities	Invoices				
Full Name							
Created On	On or After	~					
🗹 Company Name			Q				
Address 1: Country	Contains	♥					
Address 1: City	Contains	~					
Status	Active						
			₽ Search +	New	× Clear	Save	

Figure 38: Open Gear symbol to configure PowerSearch

Alternatively, you can configure PowerSearch by accessing our app through Dynamics 365 > **Settings** > **MSCRM-ADDONS** > **PowerSearch** and selecting the **Configuration** tab.



4. How to access PowerSearch from within Microsoft Dynamics 365

There are two ways to access PowerSearch once you have finished the installation and configuration process.

4.1. How to access PowerSearch via the GlobalButton

To access **PowerSearch** through the **GlobalButton**, click on the **1** button located in the command bar to expand it. The PowerSearch GlobalButton can be found there. In case there are additional tabs in the command bar, the button may be concealed within the extension of the command bar. In such cases, you can click on the [...] button to reveal it.

Please note: The access via GlobalButton is only possible if you have imported the solution previously.

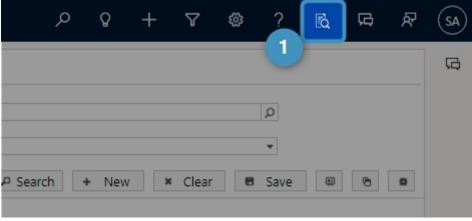


Figure 39: Access PowerSearch via GlobalButton

4.2. Via Sitemap link

Unlike the automated **GlobalButton**, an alternative option is available using a sitemap link. Nevertheless, this alternative requires manual installation. You can find instructions on how to implement it <u>here</u>.



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.

If you have created the sample data, the grid provides a sample configuration consisting of the entities Account, Contact, and Lead. Each record represents an entity that can be searched through with PowerSearch.

Dynamics 365	
) For the best experience viewing this content, open it in a specific application.	
- 🕼 Show Chart 🕂 New 🗊 Delete 🗸 💍 Refresh 🛛 🖙 Email a L	ink 🗸 📨 Flow 👋 🔟 Run Report 🖂 🕮 Excel Templates 🔗
Active MSCRM-ADDONS.com Powersearch Config \sim	
Name ~	Menu Display Name ↑ 🜱
Account	Active Accounts
Contact	Active Contacts
Lead	All Leads
Opportunity	Opportunities

Figure 40: 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.

5.1. The configuration of PowerSearch entities

Entities for PowerSearch can be configured in the PowerSearch Configuration. Besides the configuration of the Search and Result fields, you can also get additional information.

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



Entities for PowerSearch can be configured in the PowerSearch Config. You can also get additional information besides the configuration of the Search and Result fields.

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.

Name ✓ Menu Display Name ↑ ✓ Account Account - Saved MSCRM-ADDONS.com Powersearch Config MSCRM-ADDONS.com Powersearch Config General Input Fetch Search Fields Previews Additional Information Lead Lead	
Contact Contact General Input Fetch Search Fields Result Fields Previews Additional Information Related ~	
Opportunity 1 A Entity Account 4 View Active 2 A Logical Name account 5 Show Operators Field st	Accounts

Figure 41: General tab in the PowerSearch configuration

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.

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 Info** button. Use this button if you have selected a view previously. Should the Dynamics 365 view have been changed in your absence, you can update the view with a simple click on this button.

+	🔛 Save	🗗 Sa	ve & Clo	se + Ne	ew 🗋 Deactiva	ate 🗊 Delei	te 🔹 Set F	Result Sorting	Opdate View Info	
	fo make this co	nfig availa	able to oth	er users, hit th	e "SHARE" button ar	nd add users or te	ams.			
A	count - s	aved								
MS	CRM-ADDO	NS.com	Powerse	arch Config						
Ge	eneral Inp	ut Fetc	h Sea	rch Fields	Result Fields	Previews	Additional	Information	Related \sim	
-	_									
1	🗄 Entity			Account						
i	🗄 Logical Na	me	*	account						
-	0									
	🗄 Position			1						

Figure 42: The Update View Info button

5 Show Operators: Use this field to define if condition operators should be displayed on the PowerSearch interface.

View	Active Accounts
Show Operators	Field specific IV
Menu Display Name	Select Yes No Field specific

Figure 43: 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.



Accounts 1 tacts Leads Opportunities		
Account Name Contains	Created On On or After V	
Primary Contact	Ø Owner	
Category 👻		
⋆ Active Accounts √2		P Search + New × Clear B Save B 6 0
Active Accounts		F Sedicit T IVEW A Clean B Save W C W
Active Accounts 3 Main Phone Address 1: City My Active Accounts		
iny Bure Booling		
0-0 of 0 H 4 Page 1 H H		

Figure 44: PowerSearch – Menu display name of more than one view in the entity account

PowerSearch: Regular Search Fields in the entity/table Account
 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.

Accoun MSCRM-A		wersearch Config				
General	Input Fetch	Search Fields	Result Fields	Previews	Additional Information	Related $ \smallsetminus $
	- the second					
<en< th=""><th>tity name='acco</th><th>unt'></th><td></td><th></th><th></th><td></td></en<>	tity name='acco	unt'>				
	tribute name='ac tribute name='pr	:countid'/> 'imarycontactid'/>				
	tribute name='na ntity>	ame'/>				
	etch>					

Figure 45: PowerSearch Config - Input Fetch



Please note: 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 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.

Account	Primary Contact	Account Name	
93c71621-bd9f-e711-8122-000d3a2ba2ea		test_Se09f2e6-1b93	
3344fd92-121a-ee11-9cbd-000d3a4a78a6	Yvonne McKay (sample)	Fourth Coffee (sam)	
3544fd92-121a-ee11-9cbd-000d3a4a78a6	Susanna Stubberod (sample)	Litware, Inc. (sample	
3744fd92-121a-ee11-9cbd-000d3a4a78a6	Nancy Anderson (sample)	Adventure Works (s	
3944fd92-121a-ee11-9cbd-000d3a4a78a6	Maria Campbell (sample)	Fabrikam, Inc. (sam)	
3b44fd92-121a-ee11-9cbd-000d3a4a78a6	Sidney Higa (sample)	Blue Yonder Airline:	
3d44fd92-121a-ee11-9cbd-000d3a4a78a6	Scott Konersmann (sample)	City Power & Light	
3f44fd92-121a-ee11-9cbd-000d3a4a78a6	Robert Lyon (sample)	Contoso Pharmacei	
4144fd92-121a-ee11-9cbd-000d3a4a78a6	Paul Cannon (sample)	Alpine Ski House (s.	
4344fd92-121a-ee11-9cbd-000d3a4a78a6		A. Datum Corporati	
4544fd92-121a-ee11-9cbd-000d3a4a78a6	Jim Glynn (sample)	Coho Winery (samp	
a16b3f4b-1be7-e611-8101-e0071b6af231		A Datum Corporatie	
a56b3f4b-1be7-e611-8101-e0071b6af231		A Datum Fabricatio	
ad6b3f4b-1be7-e611-8101-e0071b6af231		A Datum Integratio	
af6b3f4b-1be7-e611-8101-e0071b6af231	Amos Conger	Adventure Works	
b16b3f4b-1be7-e611-8101-e0071b6af231	Eva Colon	Adventure Works Er	
b56b3f4b-1be7-e611-8101-e0071b6af231	Brandie Diaz	Adventure Works El	

Figure 46: FetchXML results in 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).



Conta	acts Acc	ounts	Leads	Opportunit	ties	Invoid	ces							
							P Search	h + N	ew	× Clear E	Save		•	
Acco	ount	Primary	Contact 🛧	Account Name			Account Name	A. Datum	Corporatio	or Website		http://ww	w.adatu	ım.
93c7	71621-bd9f-e71	1		test_5e09f2e6-1	1b93	-	Street 1	2137 Birch	wood Dr	Main Phone		555-0158		
4344	14fd92-121a-ee1	1		A. Datum Corpo	orati		City	Redmond	I	Email		someone	9@exam	npl
a168	ib3f4b-1be7-e61	1		A Datum Corpo	oratic		ZIP/Postal Code	78214		Fax				
a56	ib3f4b-1be7-e61	1		A Datum Fabrica	atio		Country/Region	U.S.		No. of Employee	25	6,200		
ad6	5b3f4b-1be7-e61	1		A Datum Integra	atio		Primary Contact			Owner		System	h Admin	ist
bd6	5b3f4b-1be7-e61			Blue Yonder Airl										
	ib3f4b-1be7-e61			City Power & Lig										
					-									
cd6	ib3f4b-1be7-e61	1		City Power & Lig	ght									
	5b3f4b-1be7-e61			City Power & Lig City Power & Lig	-		Active Contacts			Cases: Active	Cases			
d16		1			ght		Active Contacts			Cases: Active	e Cases			
d16	5b3f4b-1be7-e61	1 1		City Power & Lig	ght ght									
d16 d36 d56	5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1		City Power & Lig	ght ght ght		Full Name		Î	Case Title	sample)	ed (sample)		Î
d16 d36 d56 d76	5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1 1		City Power & Lig City Power & Lig City Power & Lig	ght ght ght		Full Name Klaudia Ogris		Ĵ	Case Title Missing parts (s Operating man Required Servic	sample) ual require			ĺ
d16 d36 d56 d76 d96	5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1 1 1		City Power & Lig City Power & Lig City Power & Lig City Power & Lig	ght ght ght ght tics		Full Name Klaudia Ogris Rene Valdes (sample)		, ,	Case Title Missing parts (s Operating man	sample) ual require		•	Î
d16 d36 d56 d76 d96 e96	5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1 1 1 1		City Power & Lig City Power & Lig City Power & Lig City Power & Lig Fabrikam Robot	ght ght ght ght tics		Full Name Klaudia Ogris Rene Valdes (sample) Susan Burk (sample)	1 Opportuniti	•	Case Title Missing parts (s Operating man Required Servic	sample) ual require ce (sample)		•	
d16 d36 d56 d76 d96 e96 eb6	50344b-1be7-e61 50344b-1be7-e61 50344b-1be7-e61 50344b-1be7-e61 50344b-1be7-e61	1 1 1 1 1		City Power & Lig City Power & Lig City Power & Lig City Power & Lig Fabrikam Robot Contoso Pharma	ght ght ght tics ia Er		Full Name Klaudia Ogris Rene Valdes (sample) Susan Burk (sample)	n Opportuniti	•	Case Title Missing parts (s Operating man Required Servic 4	sample) ual require ce (sample)		Þ	Ĵ
d16 d36 d56 d76 d96 e96 e96 eb6 ed6	5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1 1 1 1 1 1		City Power & Lig City Power & Lig City Power & Lig City Power & Lig Fabrikam Robot Contoso Pharm Contoso Pharm	ght ght ght tics ia Er ia Fa		Full Name Klaudia Ogris Rene Valdes (sample) Susan Burk (sample) Opportunities: Open	1 Opportuniti	•	Case Title Missing parts (s Operating man Required Servic Invoice: All In	sample) ual require ce (sample)		•	ļ
d16i d36i d56i d76i d96i e96i eb6i e66i	5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1 1 1 1 1 1		City Power & Lig City Power & Lig City Power & Lig City Power & Lig Fabrikam Robot Contoso Pharmi Contoso Pharmi	ght ght ght ght tics ia Er ia Fa ia Fa		Full Name Klaudia Ogris Rene Valdes (sample) Susan Burk (sample) Opportunities: Open	1 Opportuniti	•	Case Title Missing parts (s Operating man Required Servic Invoice: All In Name	sample) ual require ce (sample)		•	ļ
d16i d36i d56i d76i d96i e96i e66i ef6i f16i	5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61 5b3f4b-1be7-e61	1 1 1 1 1 1 1 1		City Power & Lig City Power & Lig City Power & Lig City Power & Lig Fabrikam Robot Contoso Pharma Contoso Pharma Contoso Pharma Contoso Pharma	ght ght ght tics la Er la Er la El la In		Full Name Klaudia Ogris Rene Valdes (sample) Susan Burk (sample) Opportunities: Open	a Opportuniti	•	Case Title Missing parts (s Operating man Required Servic Invoice: All In Name	sample) ual require ce (sample)		Þ	ļ

Figure 47: Opened entity from within the results

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.

Please note: To add a search field, you first have to select and save your general settings.



5.1.4 The Result Fields

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

eral Input Fetch S	earch Fields Result Fields Previews Additional Information	Related \vee				
			1	+ New MSCRM-ADDON	🖒 Refresh 🜼	^a Flow ∨ III Run Report
◯ Name ↑ ~	Logical Name ~	Type ~	Position \uparrow ~	Column Width ~ C	reated On ~	Link Entity ~
	entityimage_url	String	1	100 6	/27/2023 10:18 AM	
Parent Account	parentaccountid	Lookup	2	100 6	/27/2023 10:18 AM	
Account Name	name	String	3	100 6	/27/2023 10:18 AM	
Address 1: City	address1_city	String	4	100 6	/27/2023 10:18 AM	
Primary Contact	primarycontactid	Lookup	5	100 6	/27/2023 10:18 AM	
Main Phone	telephone 1	String	6	100 6	/27/2023 10:18 AM	

Figure 48: Result Field

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.

With the **1** +**MSCRM-ADDONS.com PowerSearch field** you can add a new PowerSearch Field or add a related PowerSearch Field to the record.

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 2 column width.

eneral Additional	Info	New MSCRM-ADDONS.com Powersearch Result Field - Uns General Additional Info			
🔒 Entity	* 🖾 Account				
Field	- Account Number	A Entity Logical Name account			
A Logical Name	* accountnumber	Account Number			
Column Width		☐ Type String			
A Position	9	Display Name <langs> <dn id="1033">Account Number</dn> </langs>			

Figure 49: PowerSearch - Result Field with Additional Info



5.2 How to share PowerSearch Configuration records

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

Please note: 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 Configuration records anyway)

5.2.1 Open a random PowerSearch Configuration

Click in the Command bar on the **Share** button and select **Manage access**.

						Q	Ø	+	7	ŝ	?	Ŕ	SA
											Le	arn More	
Create Document	🖔 Refresh	🔍 Check Access	A, Assign	🔊 Flow 🗸	🗐 Word Te	mplates	\sim	🔟 Run	Report	\sim		🖻 Sha	are \sim
									🖾 Em				
									<u>ම</u> (0				
									Ø Ma	inage ad	cess		
												,	



5.2.2 The Share records in mscrm-addons.com PowerSearch Configuration opens

This window enables you to select the users or teams you want to share the **mscrm-addons.com PowerSearch Configuration** 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.

Share records		×
Manage who can see your record and how much acces Changes made to all users or teams will be shared and		
Add user/team		
م	Recent records All records	
	SA System Administrator	
	+ New Record	

Figure 51: Share records in mscrm-addons.com PowerSearch Configuration



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 to proceed.

Alternativ: Click the magnifying glass to open the Look Up Records dialog to look for a user or a team to share the PowerSearch configuration with. Open the Advanced lookup. Select between the tables Teams and Users with whom you want to share the PowerSearch Configuration.

Choose records for		Choose records for	Choose records for						
		ßearch	Jearch						
E Tables M Teams A Uten	Teams Lookup View (default) V Team Name V Copcaid268	E Tables M Rems.	User Lookup View (Sefault) > Rill Kare 1 > # Albulder/tod # Albulder/tod # AppOxploymet(Cr/chestration # CCASICINACIENT # CCASICINACIENT # CCASICINACIENT # CCSSICINACIENT # CCSSIcinfishappOlicial #	Pation *	Main Phone	Burines Stat * orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568 orgcadd568	58 °		
Selected records (1 selected	1	Selected records (1 selected) 1/ orgcadd15e8 ×							

Figure 52: Look up records window - select team or user

5.2.4 Assign permissions to selected users

After you have decided with whom you want to share the PowerSearch Configuration, now also assign the rights that everyone should have. Like

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



team			orgcaddf5e8
		Q	Grant this user or team access to this record by assigning them permissions
e share	access		Permissions Read
0	orgcaddf5e8	×	Write Delete
A	# AriaMdIExporter	×	Append Append to
С	# CDSReportService-CAN	×	Assign Share
С	# CDSGlobalDiscovery	×	
С	# CDSAcisInfraAppGlobal	×	
С	# CCADataAnalyticsML	×	
	e share 0 A C C C C	e share access orgcaddf5e8 A # AriaMdlExporter C # CDSReportService-CAN C # CDSGlobalDiscovery C # CDSAcisInfraAppGlobal	e share access o orgcaddf5e8 × A # AriaMdlExporter × C # CDSReportService-CAN × C # CDSGlobalDiscovery × C # CDSGlobalDiscovery ×

Figure 53: Select permissions for users with who you share the PS configuration



6 The PowerSearch Layout Designer

The PowerSearch Layout Designer is providing functionality for designing and manipulating the visual layout of the PowerSearch entity, giving you the ability to customize its appearance and behavior.

6.1 How to start the PowerSearch Layout Designer

In Dynamics 365 navigate to PowerSearch and open it. Select the **General Settings** tab and look for Entity Preview for. Enter your preferred entity. To open the **Layout Designer**, click the **1 Designer** button.

PowerSearch Version 2020.16	PowerSearch for Dynamics 365
✿ Get Started ♥ Configuration ♥ General Settings	Licensing O About
General Settings	
Debugging 🕜	Disabled last X hours Show Download Delete
Page Size ③	e.g. 250
Grid min height (px) ③	e.g. 300
Disable tab sorting 🤊	Disabled
Add tabkey navigation to operator ③	Disabled
Open PowerSearch with current Entity ③	Enabled
Show total record count ③	Enabled
Disable scrolling on subgrid area ⑦	Disabled
Minimum Search Criteria 💿	Disabled
Trim Search Fields ⑦	Disabled
Custom Width for Search Fields (px) ⑦	Label Operator Input Field Distance to next Field
Entity Preview for ③	account,contact,opportunity 1 Designer
Show CRM Views for ③	e.g. account,lead Update Update
Search Fields Inline Filter ③	Enabled Operator (AND): && Operator (OR):
Hide default buttons ⑦	e.g. btCreate,btclearFields,btSave
Show 'checkbox' to ignore 'Search Fields' (2)	
Show 'Tolerance' control for number fields ②	Disabled Default Value (%): 10
	Reversion Save Configuration

Figure 54: Open the Layout Designer



After clicking the button, the Entity Layouts dialog will open, providing you with options to **create**, **import**, **export**, or **edit** a layout in PowerSearch.

To proceed, check the default label and choose the desired action from the options available at the bottom of the window. The default entity displayed depends on the entity you have previously enabled in the General Settings. By clicking the **Edit** button (as shown in Figure 37), you will be redirected to the PowerSearch Layout Designer surface.

Entity Layouts	
Use this dialog to create, import, export a f	form, or edit an existing one
Filter by Activity Type	
All	~
Default account	1/1
Default contact	Z . 1
Default opportunity	Z. 1
Select/Unselect all	
IMPORT EXPORT	NEW LAYOUT

Figure 55: PowerSearch Layout Designer



6.2 The PowerSearch Layout Designer surface

In this chapter, you will find a short introduction to the PowerSearch Layout Designer surface and its capabilities. The Layout Designer offers numerous options for designing the layout of PowerSearch, which will be further elaborated on in subsequent chapters, providing a more detailed explanation.

Craste Brook Press Selected Inset Buddel Inset Buddel Inset Buddel Inset Buddel	th Layout Designer	mscrm-addons.com
Account Name (serve) El Address 1 Stret 1 (advent_lor1)	El Waske (westward) El Main Peore Selections)	Entity: account Label: Default
E: Address 1: City (address 1_oity)	Email (emailaddress1)	
Address 1: ZP/Postal Code (address1_postalcode)	El Fax (lix)	Search Fields
Address 1: Country/Region (address1_country)	Immber of Employees (numberofemployees)	
E Primary Contact (primarycontactid)	E Owner (ownerid)	(Deprecated) Process Stage (stageid)
		(Deprecated) Traversed Path (traversedpat)
		Account (accountid)
E: Description (description)		E Account Number (accountnumber)
		Account Rating (accountralingcode)
		Address 1 (address1_composite)
		E Address 1: Address Type (address 1_addre
		Address 1: County (address1_county)
	T	Address 1: Fax (address 1_fax)
SubGrid: Active Contact(contact_oustomer_accounts)	E: SubGrid: Cases: Addve Cases (incident[incident_oustomer_accounts)	E Address 1: Freight Terms (address1_freigh
		Address 1: ID (address1_addressid)
		E Address 1: Latitude (address1_latitude)
		Address 1: Longitude (address 1_longitude)
		Address 1: Name (address1_name)
		E Address 1: Post Office Box (address1_pos
E: SubGrid: Opportunities: Open Opportunities (opportunity_oustomer_accounts)	El SubGrid: Invoice: All Invoices (invoice/invoice_customer_accounts)	E Address 1: Primary Contact Name (addres
		E Address 1: Shipping Method (address1_sh
		Address 1: StateProvince (address1_state
		E Address 1: Street 2 (address 1_line2)
		E: Address 1: Street 3 (address1_line3)
		Lated Email Con Rove 1 Display label on the form
Figure FG: Lawout Designer surface		

Figure 56: Layout Designer surface



6.2.1 How to customize Layouts

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

Create Block Resca Setected Inset SubOrd Inset SubOrd Remove Setected	ch Layout Designer
Ei Account Name (name)	E: Website (website.uri)
E: Address 1: Street 1 (address1_line1)	E: Main Phone (talephone 1)
E: Address 1: City (address 1_city)	Email (emailaddress1)
E: Address 1: ZIP/Postal Code (address 1_postalcode)	E: Fax (fax)
E: Address 1: Country/Region (address1_country)	E: Number of Employees (numberofemployees)
E: Primary Contact (primarycontactid)	E: Owner (ownerid)
El: SubOrid Opportunities: Open Opportunities (opportunity_continuity_continuity_continuity_continuity)	SubGrid. Cases: Active Cases (incident[.notioneraccounts)
Isubdrid: Active Contacts (contact/contact_costonere_secounts)	E SubGrid Involce: All Involces (Involce)_subtame_secounts)
	Add

Figure 57: Design your PowerSearch Layout with the Layout Designer

With this icons you can customize blocks, columns and fields.



Figure 58: customize with these buttons blocks, columns and fields

1 Create Block button: click on the button and a new window opens. You can create your block here by customizing its columns. With the slider you can determine the width for the column. Add or remove fields with **•** or **•**. To save your settings, click **CREATE**.

Create Block Use this dialog to create a new block and specify a width Column 1 Width %:	for each column	100/100
	CREATE	CANCEL

Figure 59: Create Block window



2 Resize Selected button: With a click on this button, you can resize a row in the **Edit Row** dialog. 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.

Edit Rov	${f V}$ it the width of each column inside a specific block	99/100
Column 1 Width %: Column 2 Width %: Column 3 Width %:		
	SAVE	CANCEL

Please Note: The overall percentage maximum for a block is 100 percent!
Insert SubGrid button: Once you have clicked this button, you will be provided with a dialog that enables you to create a new sub-grid.

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

		SubGrid		
	Use this dialog to	insert a new sub grid		
а	Relationship:			~
0	View:			~
С	Rows:	6		
d	Label:			
е	Display label:			\checkmark
			f CREATE	CANCEL

Figure 61: Insert SubGrid Dialog

Figure 60: Edit Row dialog:



- a) 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.
- b) **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.
- c) **Rows**: Here, you can select how many rows should be displayed in your subgrid. The number of rows must be bigger than 1, it must not be < = 0!
- d) **Label**: This field provides you with the possibility to rename your sub-grid label.
- e) **Display label**: Here, you can decide if you want the label to be displayed or not.
- f) **Create and Cancel button**: Save or Cancel your actions with these buttons.

4 Insert button: Enables you to insert a JavaScript button. Fill in the open dialog the corresponding information and confirm with **CREATE**.

Insert JavaScript Butto		
Logical Name A-Z, 0-9		
Title A-Z, 0-9		
Button Icon		
JavaScript Webresource		•
Function Name		
Show for		
Single Selection		*
	CREATE	CANCEL

Figure 62: Insert JavaScript

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

Please note: You must select the area you would like to delete before you click on the **Remove selected** button.



6 Save and Create button: To Save and Create the PowerSearch Layout.

7 Layouts button: To open the Entity Layouts dialog. In contrary the Entity and Label overview at the top right shows you with which entity/label/table you are working on now.

Entity: account Label: Default	0
-----------------------------------	---

Figure 63: Entity and Label overview

1. The Search Field

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.

=	(Deprecated) Process Stage (stageid)
=:	(Deprecated) Traversed Path (traversedpat
=:	Account (accountid)
=:	Account Number (accountnumber)
=:	Account Rating (accountratingcode)
=:	Address 1 (address1_composite)
=:	Address 1: Address Type (address1_addre
≡:	Address 1: County (address1_county)
=:	Address 1: Fax (address1_fax)
=	Address 1: Freight Terms (address1_freigh
=:	Address 1: ID (address1_addressid)
=:	Address 1: Latitude (address1_latitude)
=:	Address 1: Longitude (address1_longitude
=:	Address 1: Name (address1_name)
=:	Address 1: Post Office Box (address1_pos
=:	Address 1: Primary Contact Name (addres
=:	Address 1: Shipping Method (address1_sh
=:	Address 1: State/Province (address1_state
=:	Address 1: Street 2 (address1_line2)
=:	Address 1: Street 3 (address1_line3)

Figure 64: The Search Field section



2. The PowerSearch Layout Designer Properties

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

Properties	
Label	
A-Z	
Rows 1 - 50	
Display label on the form	
Figure 65: 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 365. However, there are some buttons and fields that have special functions or a special behavior.

7.1 Look up field

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

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.

	Dynamics 365 Sa	les Hub	O Search						okup Records	×
		Accounts	Contacts	Opportunities	Leads	Cases	Email Me	Sele	ect record	
ଇ	Home							K	or records	Q
6	Recent 🗸	Account Name	Contains	~				All	Contacts	
\$2	Pinned 🗸	Created On	On or After	~			•	All	Contacts	-
	Work	Primary Contact					Q	Ø		
10	GroupCalendar	Owner					Q	R	Adobe Sign ech n.com	\sim
Ea	PowerSearch	Category					*		Ale ciano	
Ŕ	Activities	Status	Active				*	R	nac , s.com	~
	Dashboards					م	Search		Al- gar	
		Account Name 🛧						Ø	ale: crm- addons.com	\sim
Cu	stomers	Adler								
	Accounts	Dublin Super Store	House					Ø	Ale strategy strateg	\sim
8	Contacts	Dunder Mifflin Fledermaus							addons.com	
		Fluss						Ø	amo nen amo	
Sal	es	L'Italiano Ltd.								
So	Leads	mscrm-addons.com						Ø	Ar	
ŀ	Opportunities	Mustermann GmbH							Androas Fächer	
R	Competitors	My First Account						R	Ar ons.com	
		NDA Account							+ New Contact Advance	d lookup
Col	lateral	PowerAddons AG								
8	Quotes	PTM GmbH								
S	Sales 🗘		I ◀ Page 1 ► H						Add	Cancel

Figure 66: Open Lookup records

7.2 Date related fields

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



Account Name	Contains	~														
Created On	On or After	~						× 8								
Primary Contact			0	Jul	•	✔ 2023	3	~	0							
Owner			Su	Мо	Tu	We	Th	Fr	Sa 1							
Category			2	3	4	5	6	7	8							
Status	Active		9	10	11	12	13	14	15							
			16	17	18	19	20	21	22							
			23	24	25	26	27	28	29 +	New	×	Clear	Save	.	۵	3
Account Name 🛧			30	31												

Figure 67: Date related field

7.3 The Open Configuration 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.

P Search	+ New	× Clear	Save	•	•
Figure 68: Open c	onfig button				

7.4 The Clear button

The Clear button enables you to clear the PowerSearch results and entries with a simple click on the button.





8 Ways to proceed with your Search results

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

Owner	Equals Current	t User 🛛 💙									
Status	Equals	✓ Ac	tive	•							
							1	1			
				P Se	arch	+ New	* Clear	Save		0	
	Parent Account	Account Name	Address 1: City	Account Name	Wi	ngtip Toys Inte	gratic Website				
		Wingtip Toys Inte	egr Santa Clara 📫	Address 1: Street 1			k Blv Main Phone	2	08-555-01	46	
		Wingtip Toys Inst	Address 1: City		nta Clara	Email					
		Wingtip Toys Fab	ric Roseville	Address 1: ZIP/Posta Address 1: Country/F			Fax Number of	Conclourer 1	50		
		Wingtip Toys Elec	ttn Corte Madera	Primary Contact	(egic US)	A	Owner	1111111011 1 112118	System A	dminist	tra
		Trey Research Inst	tru Seattle	Description			- Office		- System y		
		Trey Research Fab	ori [,] Sammamish								
		Trey Research Eng	gir Seattle								
		Trey Research Ele	cti Seattle								
/image/download.a	Trey Research Ass	ser Sammamish	Active Contacts			Cases: A	ctive Cases				
	Trey Research	Seattle	Full Name			Case Title					
	The Phone Comp	ar Seattle									
		The Phone Comp	ar Arlington								
		The Phone Comp	ar Alpharetta								
		The Phone Comp	ar Broomfield	4			•				+
		test_5e09f2e6-1b	93	Opportunities: Ope	n Oppo	rtunities	Invoice:	All Invoices			
		Tailspin Toys Integ		Торіс			Name				
			rur Downers Grove								
		Tailspin Toys Fabr									
		Tailspin Toys Elect	241212 2022								
		Southridge Video		4			•				F
		Southridge Video									
		Southridge Video	- And the second se								
		Southridge Video	o Bellevue								



8.1 Open the record with a double click on them

Simply double click the record if you want to open it.



8.2 Open your results with Microsoft Dynamics 365

Once you have created some pretty results, you can also open them directly within Microsoft Dynamics 365 using the **Open 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.

Please note: To use this functionality of PowerSearch you have to select a view in the Config entity.

Accounts Cor	tacts Leads Oppo	ortunities		
Full Name	Abraham McCormick			
Created On	On or After 🗸 🗸			
Company Name			Q	
Address 1: Country	Contains 🗸			
Address 1: City	Contains 🗸			
Status	Active		•	
			P Search	n + New 🗶 Clear 🖪 Save 🐵 🙆 🏟
Full Name Abraham McCormick		Full Name Account Job Title	Abraham McCormick	Street 1 City ZIP/Postal Code
		Business Phone Mobile Phone	425-555-7700	Country/Region Owner 🌡 System Administrator
		Description	Operations Analyst	
		Opportunities: Oper	n Opportunities	Cases: Active Cases
		Торіс		Case Title (
		4		•
Eiguro 71: Opon	the recult in the CE	DMCrid		

Figure 71: Open the result in the CRM Grid

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



Abraham McCo Contact · ActivityToo	
General Details Related	$1 \sim$
First Name +	Abraham
Last Name *	McCormick
Company Name	A Fabrikam Robotics
Email	abraham_mccormick@fabri 🖙
Business Phone	425-555-7700 %
Mobile Phone	12121
Address 1: Street 1	
Address 1: City	
Address 1: ZIP/Postal Code	
Address 1: County	

Figure 72: Open result from PowerSearch in Dynamics 365

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 navigate through pages by clicking on the corresponding arrows in the lower right corner. Additionally, you have the option to change the page size.

0	Parent Account	Account Name 🛧	Address 1: City	Primary Contact	Main Phone	Account	Email (Primary C
		A Datum Corporatio	Redmond		425-555-0182	a16b3f4b-1be7-e	*
		A Datum Fabricatio	Denver		303-555-0134	a56b3f4b-1be7-e	
		A Datum Integratio	Austin		512-555-0163	ad6b3f4b-1be7-e	
		A. Datum Corporati	Redmond	Rene Valdes (sampl	555-0158	3c12eb53-d2d3	kogris@mscrm-add
		Adventure Works	Bloomington	Amos Conger	812-555-0175	af6b3f4b-1be7-e	amos.conger@adve
		Adventure Works (s	Santa Cruz	Nancy Anderson (sa	555-0152	3012eb53-d2d3	someone_c@exam;
		Adventure Works El	Tampa	Brandie Diaz	305-555-0118	b56b3f4b-1be7-e	
		Adventure Works Er	New York	Eva Colon	917-555-0127	b16b3f4b-1be7-e	
		Adventure Works Ir	Tampa	Consuelo Moses	813-555-0127	b76b3f4b-1be7-e	
		Adventure Works In	Pittsburgh	Pearlie Blackburn	412-555-0145	bb6b3f4b-1be7-e	
		Alpine Ski House (s	Missoula	Paul Cannon (samp	555-0157	3a12eb53-d2d3	someone_h@examj
		Blue Yonder Airline	Darie		+33 123456789	bd6b3f4b-1be7-e	

Figure 73: Page jumping



8.4 Change the result or using the column header

PowerSearch enables easy single-column sorting by simply clicking on the term you want the results to be sorted by. In our example, we sort the account names in descending alphabetical order by clicking on **Account Name**. The arrow next to **Account Name** indicates that the results have been sorted in descending order.

Parent Account	Account Name 🔸 Address 1: City	Primary Contact	Main Phone	Account	Email (Primary C	
	Wingtip Toys Integr Santa Clara		408-555-0146	4d6c3f4b-1be7-e		-
	Wingtip Toys Instru Atlanta		678-555-0149	496c3f4b-1be7-e		
	Wingtip Toys Fabric Roseville		916-555-0153	456c3f4b-1be7-e		
	Wingtip Toys Electri Corte Madera		415-555-0181	476c3f4b-1be7-e		
	Trey Research Instru Seattle	Alexis Fry	206-555-0872	036c3f4b-1be7-e		
	Trey Research Fabrie Sammamish	Jodi Ferrell	425-555-9441	ff6b3f4b-1be7-e6		
	Trey Research Engir Seattle	Freida Farley	206-555-9480	fd6b3f4b-1be7-e		
	Trey Research Electi Seattle	Ora Rodriguez	206-555-7041	016c3f4b-1be7-e		
	Trey Research Asser Sammamish	Andrew Book	425-555-2567	056c3f4b-1be7-e		
/Image/download.a	Trey Research Seattle	Maynard Lafferty	206-555-4077	f96b3f4b-1be7-e		
	The Phone Compar Seattle		206-555-0118	5b6c3f4b-1be7-e		
	The Phone Compar Arlington		703-555-0164	576c3f4b-1be7-e		
4						*
1 - 81 of 81					H 🖣 Page 1	▶ H

Figure 74: Change result order

PowerSearch also provides the ability to perform multi-column sorting. To illustrate this, we have added the field **Address 1: City** to our result fields. To achieve multi-column sorting, click on **Address 1: City** and then press and hold the **Shift** button on your keyboard while clicking on **Account Name**. This will apply the same result order (in our example, ascending) to both columns.

In Figure 71 you can see that both columns are sorted.



Account Name 🔱	Main Phone	Address 1: City 🛧	Primary Contact	Email (Prin
The Phone Company Engineering	404-555-0116	Alpharetta		
The Phone Company Instrumentation	703-555-0164	Arlington		
Wingtip Toys Instrumentation	678-555-0149	Atlanta		
A Datum Integration	512-555-0163	Austin		
Southridge Video	425-555-9533	Bellevue	Bette Goodman	
Northwind Traders Integration	425-555-4831	Bellevue	Clay Clemente	
Northwind Traders Engineering	425-555-1596	Bellevue	Everett Fielder	
Northwind Traders Electronics	425-555-5371	Bellevue	Margarita Russo	
Litware Engineering	425-555-0554	Bellevue	Eloise Steele	
Contoso Electronics	425-555-4773	Bellevue	Calvin Conte	
Coho Winery	425-555-0137	Bellevue		
Tailspin Toys Electronics	301-555-0127	Bethesda	Susanne Holcomb	
Adventure Works	812-555-0175	Bloomington	Amos Conger	
Contoso Pharma Integration	206-555-5112	Bothell		
Contoso Pharma Instrumentation	206-555-0585	Bothell		
Contoso Pharma Fabrication	425-555-7825	Bothell		
Contoso Pharma Engineering	425-555-7548	Bothell		
City Power & Light Integration	425-555-4885	Bothell		
The Phone Company	303-555-0130	Broomfield		
Wingtip Toys Electronics	415-555-0181	Corte Madera		

Figure 75: 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.

Step 1: Open PowerSearch in Dynamics 365. 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.

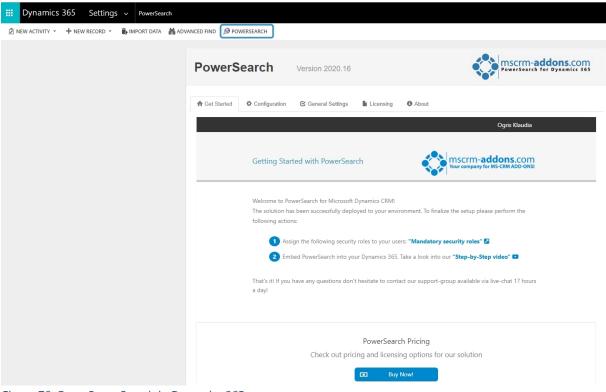


Figure 76: Open PowerSearch in Dynamics 365

Step 2: 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**.



III Dynamics 365 Settings ~	PowerSearch				
🖄 NEW ACTIVITY 👻 🕂 NEW RECORD 👻 🐻 IMP	ORT DATA 🛛 🛔 ADVANCEI	D FIND 🛛 🔊 POWERSEARCH	ł		
Accounts Contacts Leads Opportu	nities				
🗹 Full Name		Create	d On On or Af	fter 🗸	
Address 1: Country Contains		Addre	ss 1: City Contains	s v	
Full Name 1	Email	Company Name	Business Phone		

Figure 77: Select entity for applying search

Step 3: After entering your **1 Search Term** in the relevant fields for your query, you can click on the **2 Search** button or simply press Enter. While it's not necessary, you have the option to enter a term in every provided field. Using more fields for your query will yield more precise **3 Results**.

In our case, we have chosen to enter only one term. The displayed results are based on your result field configuration, and they will appear in the designated result field.

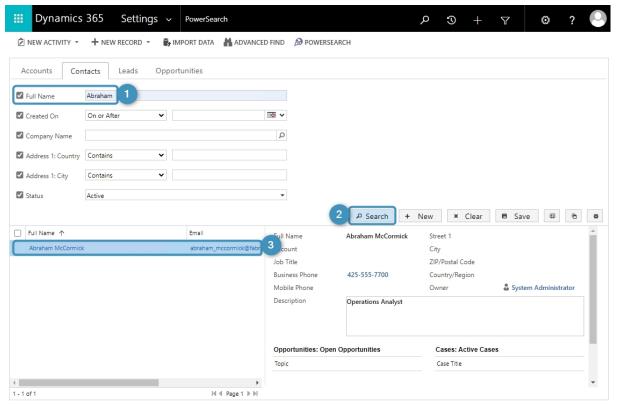


Figure 78: How to enter a search term



9.2. How to configure an entity/table

PowerSearch allows you to add as many entities to your search as you wish. This tutorial shows you how to configure the 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.

Step 1: Open PowerSearch configuration and click the **New** button.

	Dynamics 365	
()	For the best experience viewing this content, open it in a specific application.	
÷	☞ Show Chart + New 🛍 Delete ∨ 🖒 Refresh 🖾 Email a Link ∨ 🏷 Flow	◇ ・ ¹ III Run Report ◇ ¹ III Excel Templates
1	Active MSCRM-ADDONS.com Powersearch Config \vee	
\bigcirc	Name ~	Menu Display Name ↑ ~
	Account	Active Accounts
	Contact	Active Contacts
	Lead	All Leads
	Opportunity	Opportunities

Figure 79: New PowerSearch Configuration

Step 2: Now select the entity you would like to add to PowerSearch.

	Dynamics 365		
!	For the best experience viewing this content, open it in a specific application.		
\leftarrow	🗑 Save 📲 Save & Close 🕂 New 🔊 Flow 🗸		
\wedge	Please create the record to enable additional options.		
	lew MSCRM-ADDONS.com Powersearch Config - Unsaved eneral Input Fetch Search Fields Result Fields Previews Additional Information		
6			
	Entity * Invoice IV	∆ View +	
	A Logical Name * invoice	Show Operators	Field specific
	A Position 5	Menu Display Name	Invoice

Figure 80: Select table

Step 3: Select a view that will be applied to your future result fields. We decided to add Active Accounts.



ce Invoices	All Invoices Select Active Invoices Active Project Service In	-		+ Invoice	ntity
ce Invoices	Active Invoices Active Project Service In				inty
ce Invoices		and the second		* invoice	ogical Name
	All Invoices All Project Service Invoid All Service-Maintenance	Menu Display Name		5	osition
Service Invoices	Closed Invoices Closed Project Service Ir Invoice Advanced Find V	C C C C C C C C C C C C C C C C C C C			
	My Connections My Invoices My Project Service Invoi	Ν			
ice Invoices ntenance Based Invoice	My Project Service Invoi My Service-Maintenance	N N			
ice Invoi ntenance nvoices nvoices		N F C			

Figure 81: Select View

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.

Navigate to the **1** Search Fields tab and **2** Add another Search Field to this table/entity. Don't forget to Save.

Please note: You can add more than one Search Field.

	content, open it in a specific application				Choose an a
🗄 🔚 Save 👹 Save	& Close 🕂 New 🗋 Deacti	vate 📋 Delete 🔹 Set Re	sult Sorting 🔹 Update View Info	Create Document	🔄 Sha
To make this config 3 le to othe	r users, hit the "SHARE" button and add	users or teams.			
eneral Input Fetch Sea	rch Fields Result Fields Pr	eviews Additional Informa	2 + New M	ISCRM-ADDON 🕐 Re	efresh :
Name 1 Y	Logical Name Y	Туре 🗸	Position ↑ ∽ Created On ∽	Filter Level ∽ Link Er	ntity ~
		No data availab			

Figure 82: Add Search field



9.4. 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.

Accounts Contacts Leads Opportu	nities Invoi	ces						
					₽ Search	+ New	× Clear	Save 🕤
] Name ↑	Status Reason	Total Amount	Customer	Email (Custor	ner)			
Bestinvoice	New	\$0.00	A Datum Corporation					
Invoice	New	\$0.00	A Datum Fabrication					
Invoice23	New	\$0.00	Adventure Works Electronics					
TestInvoice1	New	\$0.00	A. Datum Corporation (samp	li i				

Figure 83: New Table added to PowerSearch

9.5. How to delete Search and Result Fields

If you have added a wrong Search or Result field, you can delete it. Navigate to the Search- or Result Field Configuration (corresponding to which field you would like to delete).

neral	Input Fetch Search Fie	elds Result Fields Preview	s Additional Information	Rela	ted ∨	
					🖉 Edit 🖪 Activ	ate
0	Name ↑ ∽	Logical Name প	Type ∽ Positi	C.	Deactivate	
\bigcirc	Account Name	name	String	٥	Move Up	
	Main Phone	telephone1	String	\$	Move Down	
	Address 1: City	address1_city	String	Ŵ	Delete MSCRM-ADDO	NS.c,
	Primary Contact	primarycontactid	Lookup	C,	Create Document	
				٨,	Assign MSCRM-ADDO	NS.c
	Email (Primary Contact)	accountprimarycontactidc	String	Ŕ	Share	
1.4	of 5 (1 Selected)			R	Email a Link	
1	or 5 (1 selected)			₀⁄ ^a	Flow	1
				(d)	Run Report	0
				¢	Word Templates	2
				X	Export to Excel	

Figure 84: Delete a Field



9.6. How to set an operator

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 operators are depending on the field type (e.g., Money fields, DateTime fields or like in Figure 80 a Text field offer different operator).

	m Powersearch Search Field nal Info Related ∽			
A Entity	* 🖾 Account	Default Operator	Contains	
₿ Field	- Account Name	Show Operators	Select Equals Does Not Equal	
🗄 Logical Name	* name		Contains Does Not Contain	
A Position	* 1		Begins With Does Not Begin With Ends With Does Not End With Contains Data	

Figure 85: Set an operator

Please note: 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.

Faquak Current User OF His Reporting Hierarchy And Their Team one Account Email Primary C Account Name A Datum Corporation Weishe Faquak Current User OF His Reporting Hierarchy And Their Team 5.0182 at683460-1be7.4 Account Name A Datum Corporation Weishe Faquak Current User OF His Reporting Hierarchy And Their Teams 5.0182 at683460-1be7.4 Account Name A Datum Corporation Weishe Equakis 5.0183 at683460-1be7.4 Action Singer									voices	Leads Opportunities Inv	Accounts Co
Does Not Equal Current Uter Equals Current User AcH is Fans Dr His Reporting Hierschy Equals Current User AcH is Fans Dr His Reporting Hierschy And Their Team Equals Current User AcH is Teams Soll 2 stead Stds-Ibe? Account Name A Datum Corporation Website 425:555-018 Equals Current User AcH is Fans Dr His Reporting Hierschy Soll 2 stead Stds-Ibe? Account Name A Datum Corporation Website 425:555-018 Equals Current User AcH is Fans Soll 2 stead Stds-Ibe?.e Address 1: City Redmond Main Phone 425:555-018 Equals Current User AcH is Fans Soll 3 address 1: City Redmond Main Phone 425:555-018 Dees Not Contain Data Contains Data Contains Soll 3 address 1: City Redmond Equals Number of Employees 50 Dees Not Contain Begin With Dees Not Contain Soll 3 address 1: City Redmond Equals Number of Employees 50 Does Not Contain Begin With Dees Not Contain Mither Soll 3 address 1: City Redires 1: Contry/Regic USA Number of Employees 50 Dees Not Contain Begin With Dees Not Edwidth Soll 3 Soll 3 address 1: City Redires 1: City Redires 1: City Redires 1: City Redires 1:				-	Active	ials 🗸	s Eq	Statu		urrent User 🗸	Owner
Fougak Current User And His Teams Or His Reporting Hierarchy. And Their Team Orne Sortes Account Account Account Account	e @ 6	ar 🛢 Save	+ New × Clear	P Search						ot Equal Current User	
Equals 5.0154 35653/4d> 35653/4d> Address 1.C if y Redmond Email Does Not Contain Data 5.0153 add053/db0-1bd7.e., Address 1.C if y Redmond Email Does Not Contain Data 5.0153 add053/db0-1bd7.e., Address 1.C if y Redmond Email Does Not Contain Data 5.0153 add053/db0-1bd7.e., Address 1.C if y Redmond Number of Employees 50 Does Not Contain Data 5.0175 4603/db0-1bd7.e., amosconge@adv Difter of Employees 50 Does Not Contain 5.0175 4603/db0-1bd7.e., amosconge@adv Deriver of Employees 50 Does Not Regin With 5.0115 b565/sti-1bd7.e., smeane_c@example Deriver of Employees 50 Does Not Regin With 5.0115 b565/sti-1bd7.e., smeane_c@example Deriver of Employees 50 Dest Not Regin With 5.0115 b565/sti-1bd7.e., smeane_c@example Deriver of Employees 50 Dest Not Regin With 5.0115 b565/sti-1bd7.e., b165/sti-1bd7.e., Deriver of Employees 50 Dest Not Regin With 5.0115 b565/sti-1bd7.e., b165/sti-1bd7.e., Deriver of Employees 0	82	425-555-0182				Email (Primary C			ing Hierarchy And The	urrent User And His Teams Or His Reporti urrent User's Teams	
Contains 58 3 c12e33-2425 kug/mg/msom.add Primary Contact Owner \$ System A Dees Nuc Contain 5-0175 46034b-1be7-e amosconge@adva Description \$ Description Begin With 5-0175 3012e853-42d3 kg/mg/contact Description Description Does Nuc Regin With 3-0115 sosteat-be7-e Description Description Does Nuc Regin With 3-0115 b6564b-1be7-e Description Description			Fax		Address 1: ZIP/Postal Coc 98052 Fax					ot Equal	
Begins With 5-017.9 atbcs/340-10er.4 Description Does Not Begin With 52 3012ebs3-2423 someone_c@example Does Not Begin With 5-0119 sostata-1ber.4 Description	Administrator	es 50 & System Adm		gic USA		the state of the s				5	
Does Not End With S-0118 b56034b-1bc?-4c Adventure Works 5i New York: Eva Colon 917-353-0127 b16034b-1bc?-4c					Description					With ot Begin With	
										ot End With	
Adventure Works in Tampa Consuelo Moses 813-555-0127 b76b3f4b-1be7-e Active Contacts Cases: Active Cases		ises	Cases: Active Cases		Active Contacts		b16b3f4b-1be7-e	917-555-0127 813-555-0127	Eva Colon Consuelo Moses	Adventure Works Ei New York Adventure Works Ir Tampa	
Achienture Works in Pittsburgh Peerlie Blackstum 412-555-0145 b066346-16e7-e Ful Name Cose Trite			Case Title		Full Name		bb6b3f4b-1be7-e.	412-555-0145	Pearlie Blackburn	Adventure Works Ir Pittsburgh	
Alpine Ski House (s Missoula Paul Cannon (samp 555-0157 3a12eb53-e22d3 someone.h@exam)						someone_h@examp	3a12eb53-d2d3	555-0157	Paul Cannon (sam)	Alpine Ski House (s. Missoula	



9.7. How to enable users to choose between operators

In the configuration settings for an entity's search functionality, you can determine how the search operator is presented: universally for all search fields (**Yes/No**), or **Field Specific**. If you choose the field-specific approach, you can directly define this within the configuration of the entity's individual search fields.

rch Config			
ch Fields Result Fields Previews A	Additional Information Relat	ed \sim	
ccount	View	Active Accounts	
ccount	Show Operators	Field specific	v
	Menu Display Name	Select Yes No	
	ccount	ccount Ccount Show Operators	ccount Count

Figure 86: Show 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**.

Account Name	e - Saved om Powersearch Search Field	
General Additio	onal Info $~$ Related \sim	
A Entity	* 🖾 Account	Default Operator Contains
₿ Field	Account Name	Show Operators Yes IV
A Logical Name	* name	No Yes
	name	162
A Position	* 1	

Figure 87: Show Operators in PS Search Field

9.8. How to change the page size

PowerSearch also allows to change the size of pages. Enter the PowerSearch General Settings navigate to Page Size and enter how many records should be displayed in the grid. Don't forget to **Save** the **Configuration**!



PowerSearch	Version 2020.17				Powe	crm-addo	ns.com
Get Started 🔅 Configuration	C General Settings	Licensing	About				
General Settings							
Debugging ③		Disabled	last X	hours	Show	Download	Delete
Page Size 🕜		e.g. 250					
Grid min height (px) ③		e.g. 300					
Disable tab sorting ⑦		Disabled					

Figure 88: Change the page size

9.9. How to rearrange the order of fields

Search and result fields can be rearranged easily. This tutorial can be applied to search fields, as well as to result fields.

Simply navigate to the **1** Search Field tab click on the **2** entity you want to rearrange and press the **3** Move Up or Move Down button.

Please note: When you click on the **4** three little dots, the option **Move Down** is shown.

eneral	Input Fetch Search Fields	Result Fields Previews Additio	nal Information $$ Related $$ $\!\sim$			
					🖉 Edit 🖪 Activate	Deactivate 3 Over Up
	Name 1 ~	Logical Name Y	Туре ~	Position \uparrow ~	Created On Y Fi	ilte 🐼 Move Down
0	Account Name	name	String	1	7/12/2023 12:34 PM	Delete MSCRM-ADDONS.c
	Primary Contact	primarycontactid	Lookup	2	7/12/2023 12:34 PM	Create Document
	Created On	createdon	DateTime	3	7/12/2023 12:34 PM	A, Assign MSCRM-ADDONS.c
	Owner	ownerid	Owner	4	7/12/2023 12:34 PM	ාස් Share
	Category	accountcategorycode	Picklist	5	7/12/2023 12:34 PM	□⊠ Email a Link
	Status	statecode	State	6	7/12/2023 12:34 PM	III Run Report
1 - 6	5 of 6 (1 Selected)					Word Templates

Figure 89: Rearrange Fields

9.10. How to rearrange the Configuration entities (for administrators)

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



Accounts Co	ntacts Leads	Opportunities In	ivoices		
 Account Name Owner 	Contains	•	۵	 Primary Contact Category 	
Account Name 1		Main Phone	Address 1: City		

Figure 90: Change order of fields

To do so, simply enter the Main Configuration, 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.

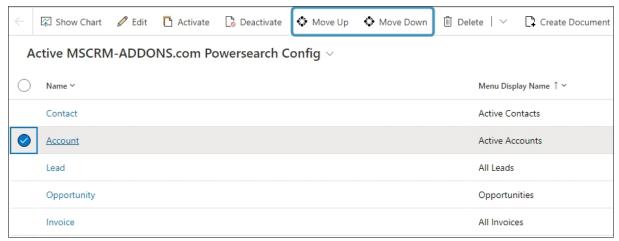


Figure 91: Change order of fields

We have successfully switched the entity Account to another. Have a look at the result:

Contacts	Accounts	Leads	Opportunities	Invoices		
Account Nar	ne Contair	15	•		Q	 Primary Contact Category

Figure 92: Changed order of fields



9.11. How to rearrange Configuration 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.

9.11.1. How to drag and drop Configuration entities

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

Contacts Acco	ounts Leads Oppor	tunities Invoi	ices		
Account Name Owner	Contains		٥	 Primary Contact Category 	
Account Name 🛧		Main Phone	Address 1: City		

Figure 93: Drag and drop

Don't forget to save your changes!

9.11.2. 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.

\leftarrow	🔒 Sav	/e	³ Save &	Close	+ New	🗋 De	eactivate	🗎 De	lete	🗘 Se	et Result Sc	orting	Update View Info
<u>∧</u> To	o make thi	is config	available t	o other u	sers, hit the '	SHARE" bu	itton and a	dd users or	teams.				
	count CRM-AD			ersearc	n Config								
Gei	neral	Input <mark>F</mark>	etch	Search	Fields	Result F	ields I	Previews	Ad	dition	al Inform	ation	Related \checkmark
E	Entity			+ Acc	ount								
E	Logical	Name		* acc	ount								
E	2 Positio	n		2									

Figure 94: Set result sorting



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

_	re Sort Order Imns to sort on by default.
Sort By	Account Name
	Ascending Order Object Order
Then By	Address 1: City
	Ascending Order Obscending Order
Then By	✓
	OAscending Order
	OK Cancel

Figure 95: Configure Sort Order dialog

In our example, we sort our results first by

- Account Name and then by
- Adress 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.



Contacts	Acc	counts Lead	s Oppo	ortunities Invo	ices		
Account Nan	ne	Contains	~	company		Primary Conta	ct
Owner					Q	Category	
1					2		
Account Nam	ne 🛧			Main Phone	Address 1: City	Primary Contact	Email (F
The Phone C	ompan	ν		303-555-0130	Broomfield		
The Phone C	ompan	y Engineering		404-555-0116	Alpharetta		
The Phone C	ompan	y Instrumentation		703-555-0164	Arlington		
		y Integration		206-555-0118	Seattle		

Figure 96: Sort order result

The result fields are now sorted by **1** Account name and **2** Address 1: City. As you can see, all the companies are sorted by Address 1: City.



10. List of Figures

Figure 1: Download section for PowerSearch on www.mscrm-addons.com	5
Figure 2: .zip file for PS installation in Dynamics 365	5
Figure 3: Unzip the PS .exe file	5
Figure 4: InstallShield Wizard	
Figure 5: Accept terms of license agreement	6
Figure 6: Select the destination folder	7
Figure 7: Install the program	7
Figure 8: Installing PowerSearch	8
Figure 9: Connection setup	9
Figure 10: Save the profile from the setup	9
Figure 11: Finish installation	
Figure 12: PowerSearch Configuration page	11
Figure 13: Dynamics 365 > Settings > Solutions	
Figure 14: All Solutions overview	12
Figure 15: Select Solution Package	
Figure 16: Solution information	13
Figure 17: Import options	14
Figure 18: Importing Solutions	
Figure 19: Imported solution	
Figure 20: Dynamics 365 > Settings > PowerSearch	
Figure 21: PowerSearch Configuration page	
Figure 22: the Get Started tab	
Figure 23: The Configuration tab	
Figure 24: PowerSearch Configuration	
Figure 25: The General Setting tab	
Figure 26: the Licensing tab	
Figure 27: Install license kex or subscription number dialog	
Figure 28: The About tab	
Figure 29: Connection setup	
Figure 30: Save the profile from the setup	
Figure 31: Finish installation	
Figure 32: Assigning Role	
Figure 33: Select in Power Apps Default Solution	
Figure 34: Select the dashboard you want to customize	
Figure 35: Click web resource button	
Figure 36: Add Web Resource	
Figure 37: Publish Customizations	
Figure 38: Open Gear symbol to configure PowerSearch	
Figure 39: Access PowerSearch via GlobalButton	
Figure 40: Entity configuration overview	
Figure 41: General tab in the PowerSearch configuration	
Figure 42: The Update View Info button	33



Figure 43: Show Operator - settings and outputs	33
Figure 44: PowerSearch - Menu display name of more than one view in the	entity
account	
Figure 45: PowerSearch Config - Input Fetch	34
Figure 46: FetchXML results in PowerSearch surface	35
Figure 47: Opened entity from within the results	
Figure 48: Result Field	
Figure 49: PowerSearch - Result Field with Additional Info	37
Figure 50: Search button in PowerSearch Config	38
Figure 51: Share records in mscrm-addons.com PowerSearch Configuration	38
Figure 52: Look up records window - select team or user	39
Figure 53: Select permissions for users with who you share the PS configuration	40
Figure 54: Open the Layout Designer	41
Figure 55: PowerSearch Layout Designer	42
Figure 56: Layout Designer surface	43
Figure 57: Design your PowerSearch Layout with the Layout Designer	44
Figure 58: customize with these buttons blocks, columns and fields	44
Figure 59: Create Block window	44
Figure 60: Edit Row dialog:	45
Figure 61: Insert SubGrid Dialog	45
Figure 62: Insert JavaScript	46
Figure 63: Entity and Label overview	47
Figure 64: The Search Field section	
Figure 65: Layout Designer properties	48
Figure 66: Open Lookup records	49
Figure 67: Date related field	50
Figure 68: Open config button	50
Figure 69: Clear button	
Figure 70: PowerSearch with results	51
Figure 71: Open the result in the CRM Grid	52
Figure 72: Open result from PowerSearch in Dynamics 365	53
Figure 73: Page jumping	53
Figure 74: Change result order	
Figure 75: Multi-column sorting	
Figure 76: Open PowerSearch in Dynamics 365	56
Figure 77: Select entity for applying search	57
Figure 78: How to enter a search term	57
Figure 79: New PowerSearch Configuration	58
Figure 80: Select table	58
Figure 81: Select View	59
Figure 82: Add Search field	
Figure 83: New Table added to PowerSearch	60
Figure 84: Delete a Field	60
Figure 85: Set an operator	61



62
62
63
63
64
64
64
65
65
66
67



11 Contact

For further technical questions, please visit our <u>blog</u> or contact <u>support@mscrm-addons.com</u>. For sales and licensing questions please contact <u>office@mscrm-addons.com</u> or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH Bahnhofgürtel 59 A-8020 Graz Austria Headquarter – US mscrm-addons.com Corp

1860 North Rock Springs Rd Atlanta, GA 30324 United States

Tel Austria +43 316 680-880-0 Fax +43 316 680-880-25

Support: 7AM - 7PM GMT+1 (Monday-Friday)

Sales:

<u>+43 316 680 880 14</u> sales@mscrm-addons.com

www.ptm-edv.at www.mscrm-addons.com Tel US +14047206066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046 ussales@mscrm-addons.com

www.mscrm-addons.com