



mscrm-addons.com
PowerSearch for MS CRM 2013

PowerSearch for MS CRM 2013

Version 6.6, March 2014

Installation and User Guide

(How to install/uninstall and use PowerSearch for MS CRM 2013)

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1 Common Information

Before installing PowerSearch for MS CRM 2013, please read this document and follow the steps carefully. If you upgrade PowerSearch for MS CRM 2011 to 2013 please click [here](#) for detailed information.

1.1 Intended Audience

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

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

The installation consists of the following steps:

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

1. Installing PowerSearch for MS CRM 2013.
2. Configuring the Search –criteria

2 PowerSearch for Microsoft Dynamics CRM 2013 Prerequisites

Microsoft Silverlight has to be installed

Supported versions of Internet Explorer

PowerSearch can run on following Internet Explorer versions:

- Internet Explorer 8 and higher

One of the following editions of Microsoft Dynamics CRM must be available:

- On-premises editions of Microsoft Dynamics CRM Server 2013
- Microsoft Dynamics CRM Online

Any one of the following operating systems is required:

- Windows 8 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Vista SP2 (6-bit and 32-bit versions)
- Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

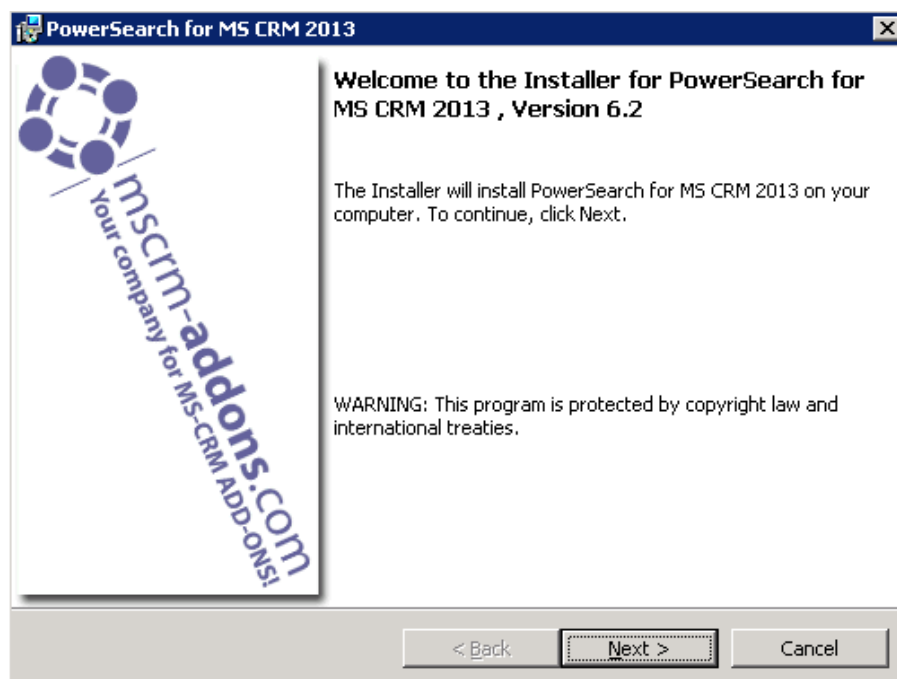
3 Installation

You could install PowerSearch for Microsoft Dynamics CRM 2013 on any supported operating system which is able to connect to your CRM 2013 Server.

3.1 Introduction

Run the Power Search for MS CRM 2013 Setup file.

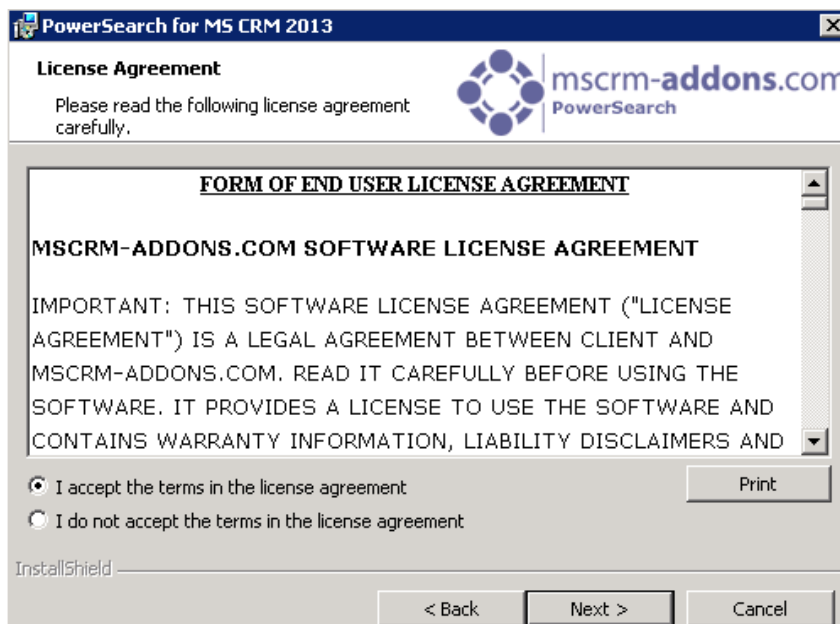
The following window appears:



Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to [Step 3.1.4](#) directly after accepting the EULA ([Step 3.1.1](#))

3.1.1 EULA



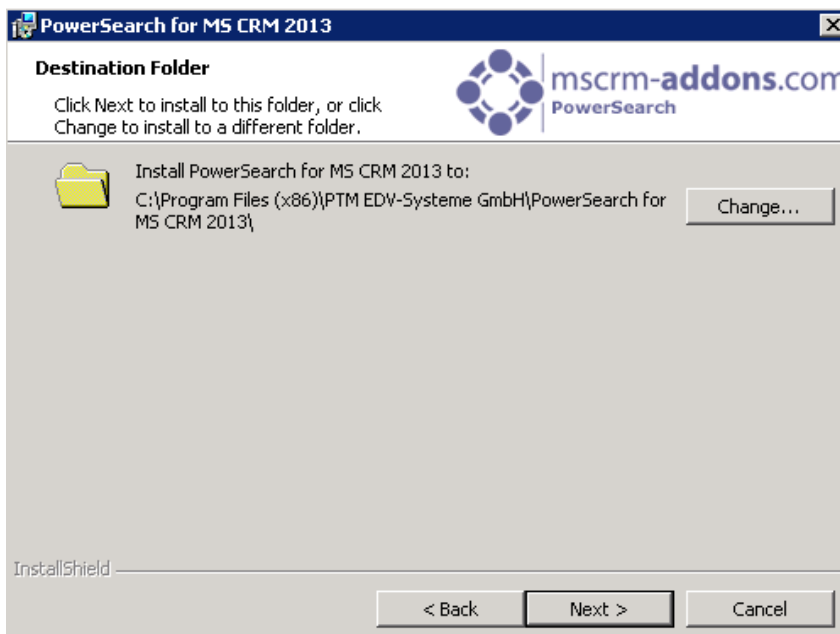
Accept the terms in the license agreement and click [Next] to proceed.

3.1.2 Language Selection

Choose your preferred language and proceed with a click on [Next].

3.1.3 Folder Selection

Here it's possible to set the installation directory.

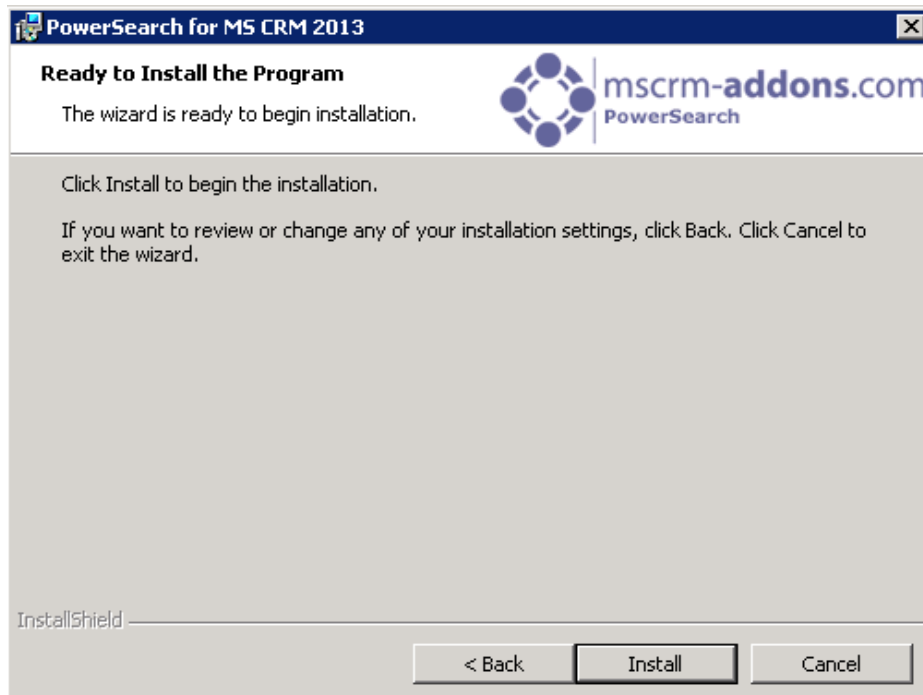


Click [Change] to specify a different installation path.
Click [Next] to proceed.

3.1.4 Confirm Installation

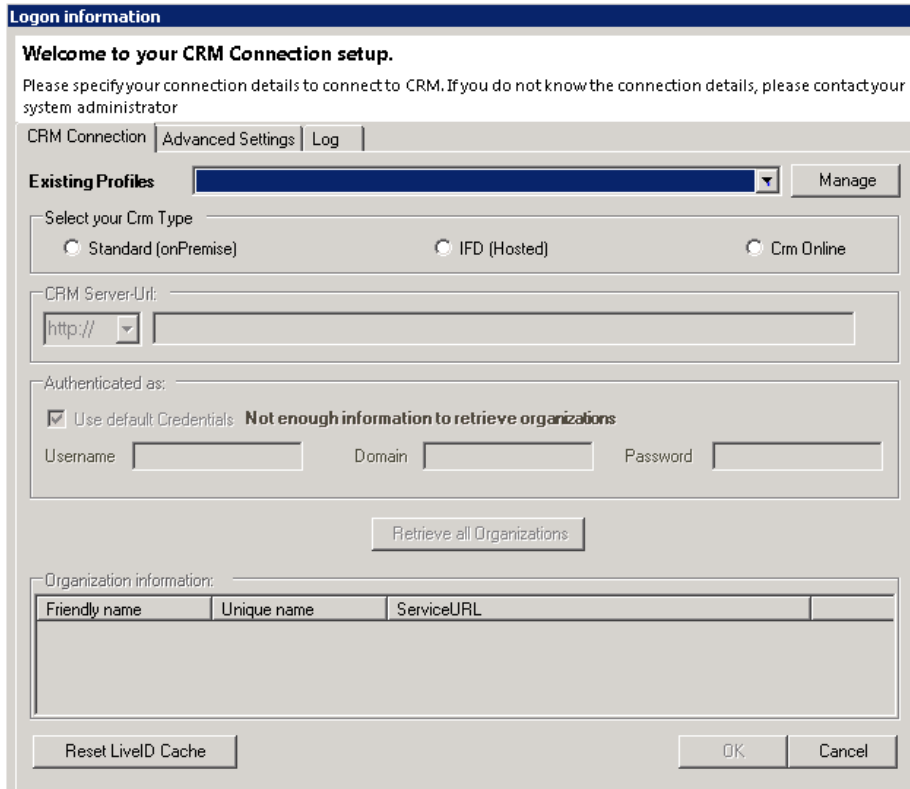
To start the installation, click on [Install].

To change the settings, click on [Back].



3.1.5 Configure CRM Server

To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type:



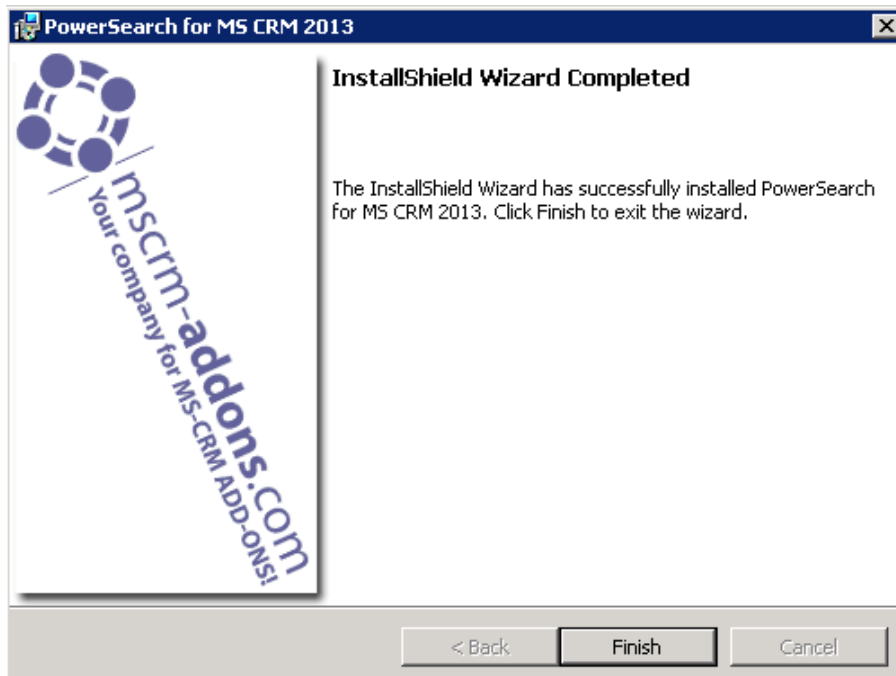
The screenshot shows a 'Logon information' dialog box titled 'Welcome to your CRM Connection setup.' It contains a 'CRM Connection' tab, 'Advanced Settings', and 'Log' sub-tabs. Under 'Existing Profiles', there is a dropdown menu and a 'Manage' button. The 'Select your Crm Type' section has three radio buttons: 'Standard (onPremise)', 'IFD (Hosted)', and 'Crm Online'. The 'CRM Server-Url:' section has a dropdown menu showing 'http://' and a text input field. The 'Authenticated as:' section has a checked checkbox for 'Use default Credentials' and a message 'Not enough information to retrieve organizations'. Below this are input fields for 'Username', 'Domain', and 'Password'. A 'Retrieve all Organizations' button is located below the authentication section. The 'Organization information:' section contains a table with columns 'Friendly name', 'Unique name', and 'ServiceURL'. At the bottom, there are buttons for 'Reset LiveID Cache', 'OK', and 'Cancel'.

Friendly name	Unique name	ServiceURL
---------------	-------------	------------

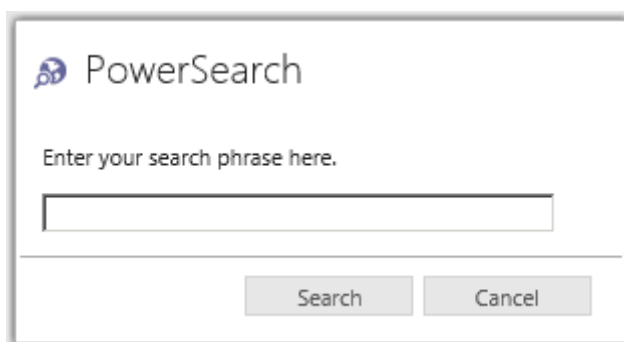
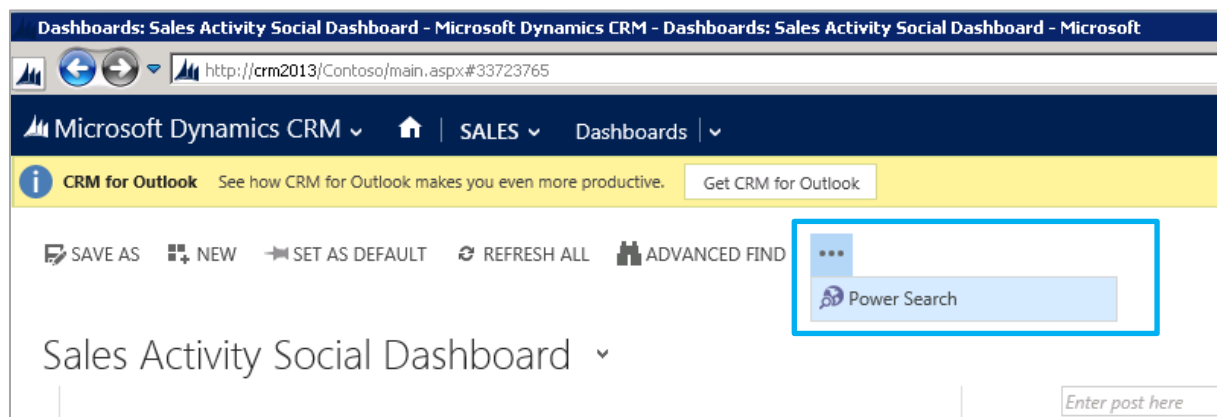
Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. As soon as the Organizations are retrieved press the [OK]-button.

3.1.6 Finish

A new entry has been created in the sitemap.

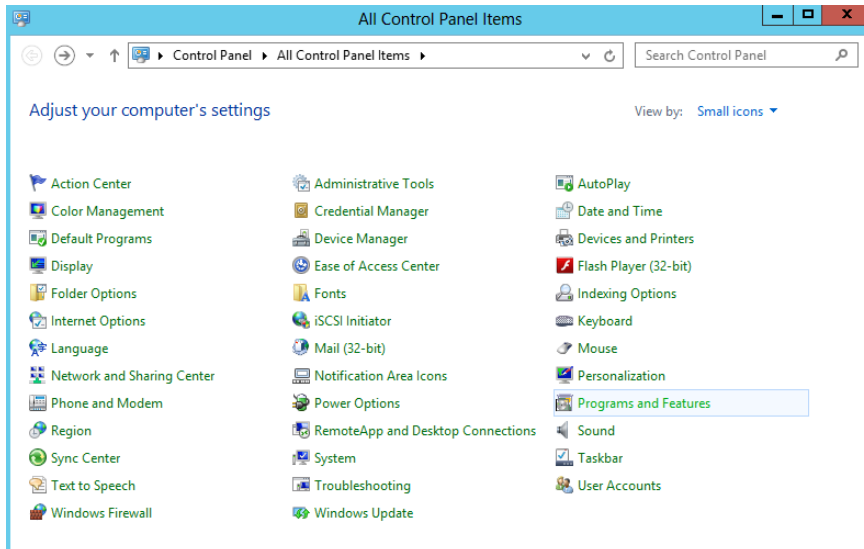


To access the PowerSearch, open your CRM and click on the '...' -sign. You will see a new menu item in CRM called "Power Search". (See screenshot below)

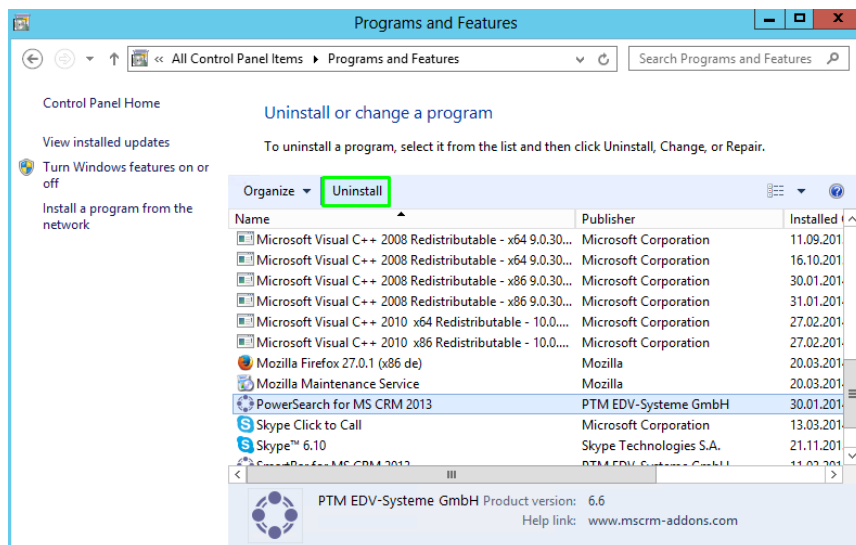


3.1.7 Uninstall

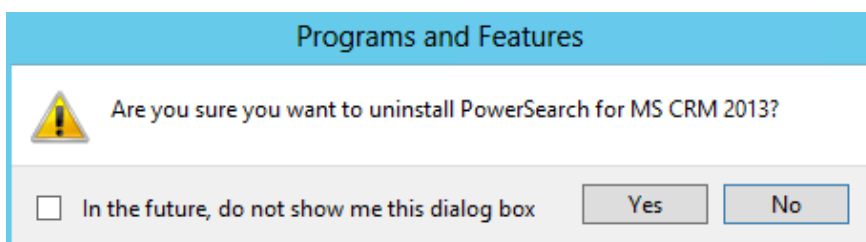
To uninstall PowerSearch select “Programs and Features” in the Control Panel.



Search for PowerSearch CRM 2013 in “Uninstall or change a program” and click on [Uninstall].



Following window appears:



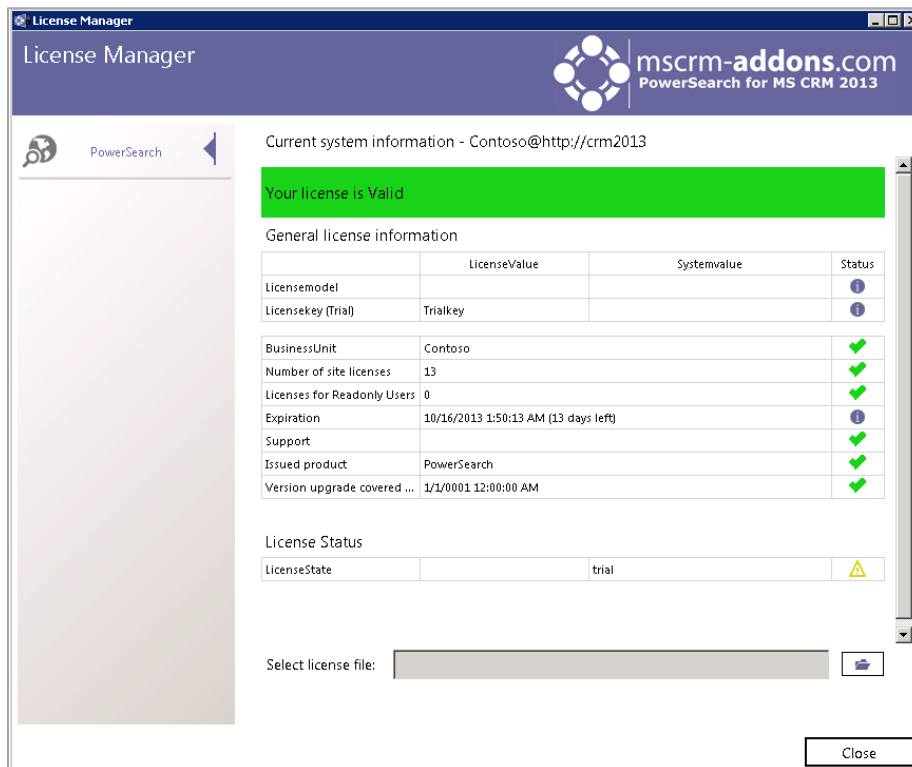
Click on [Yes] to uninstall PowerSearch for MS CRM 2013.

Click on [No] if you don't want to uninstall PowerSearch for MS CM 2013.

4 License Management

4.1 License Manager

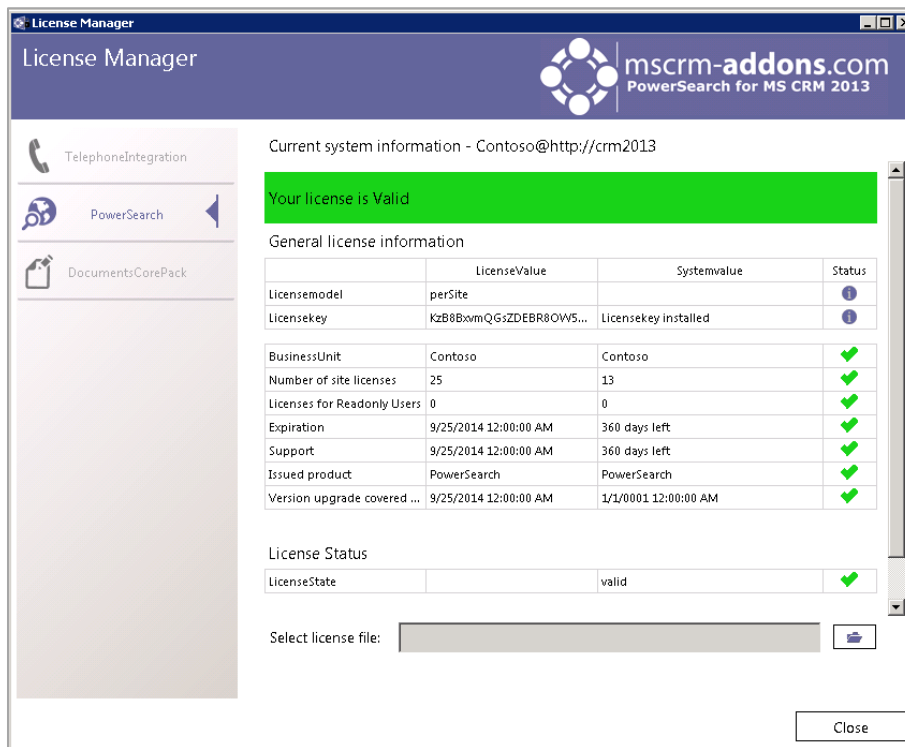
Open PowerSearch License Manager from the start menu (www.mscrm-addons.com) and choose the connection (usually you just need to hit OK).



While the Trial version is enabled you will see the above screen.

To install a license select the "Open"-button (folder icon) and you will be prompted to install the license file. Open and install the license file.

The selected license is valid and contains a support contract for further 361 days. Then hit the "Install this license" to complete the installation process. After installing, the license Manager will display the license as shown in the next picture:



In this example you can see a valid license.

5 Security Roles

General security roles for all products:

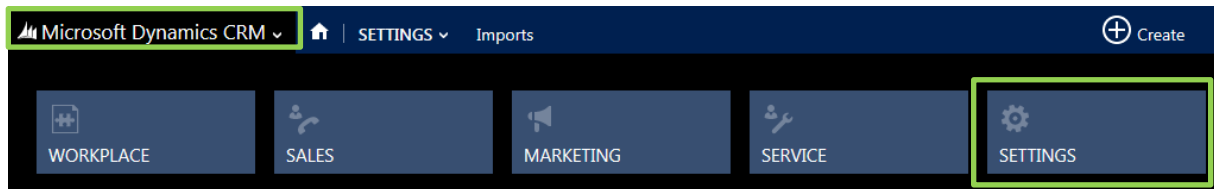
The following security role is required by all our products.

- MSCRM-Addons General Security Role

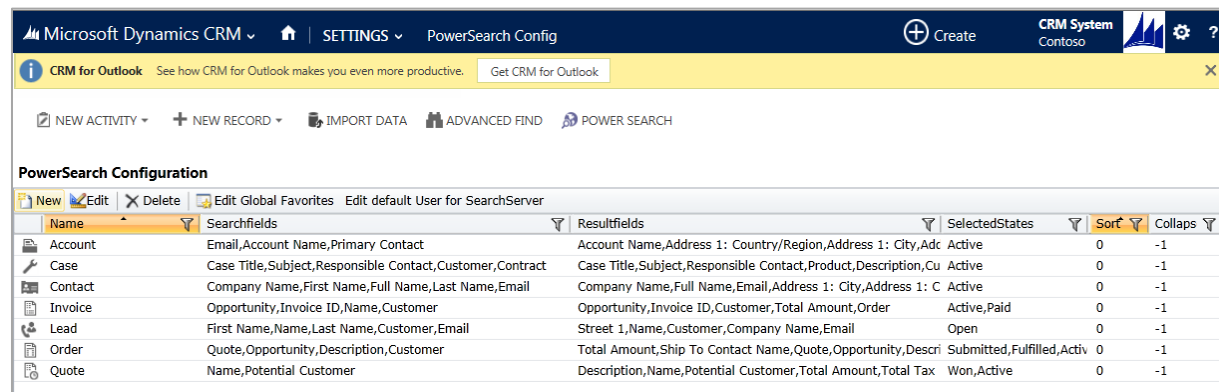
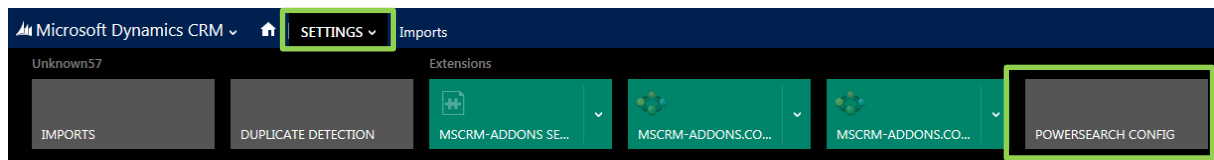
This security role contains the basic requirements for using the product itself and to be able to perform the license check.

6 Configuration

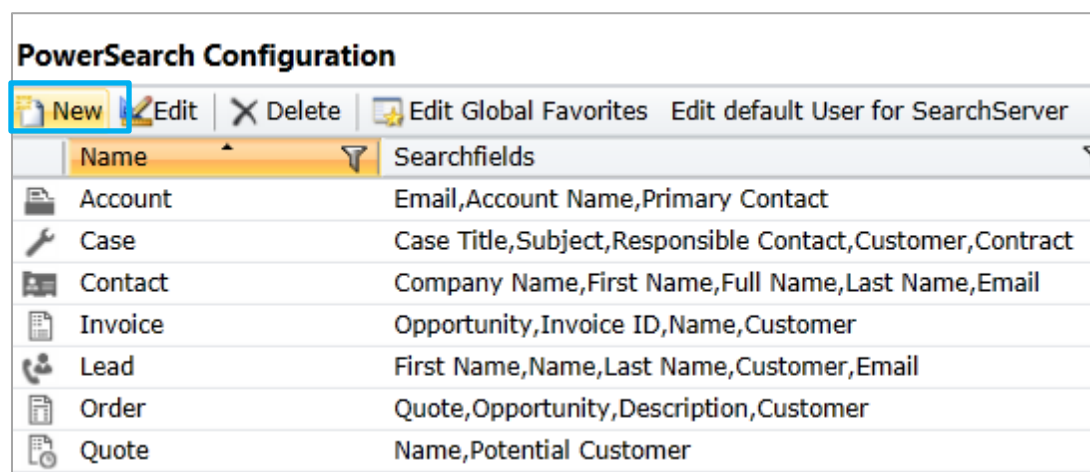
The PowerSearch for MS CRM 2013 configuration allows you to specify all entities that should be included in your search. See screenshots below:



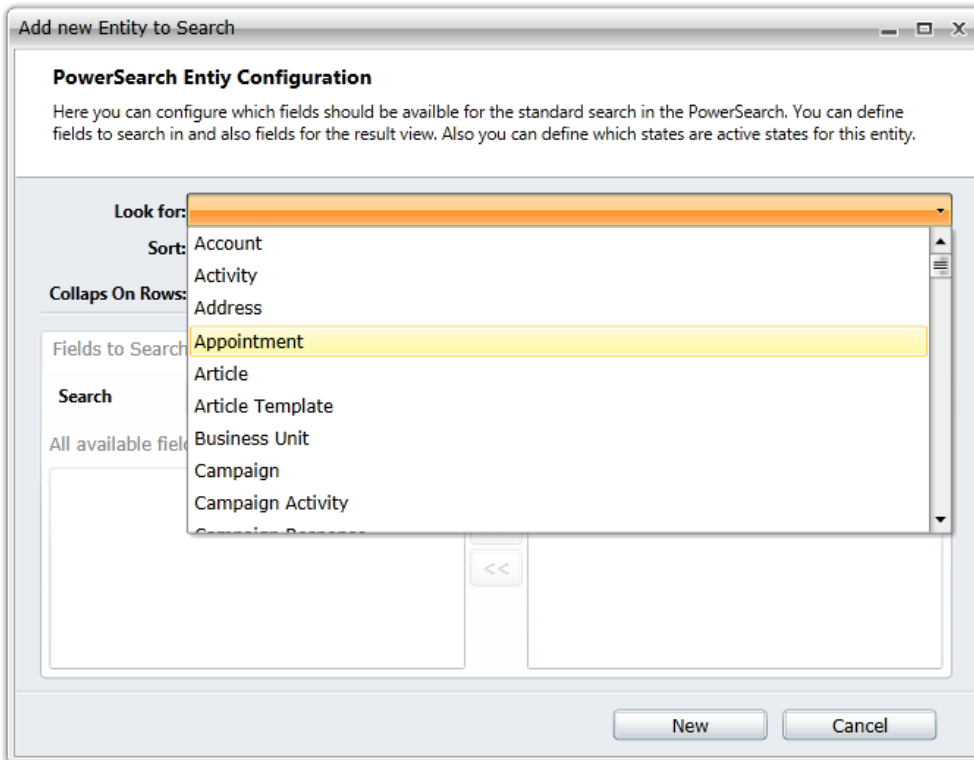
Click on the dropdown-button on the ribbon and you will find the PowerSearch Configuration in the extensions:



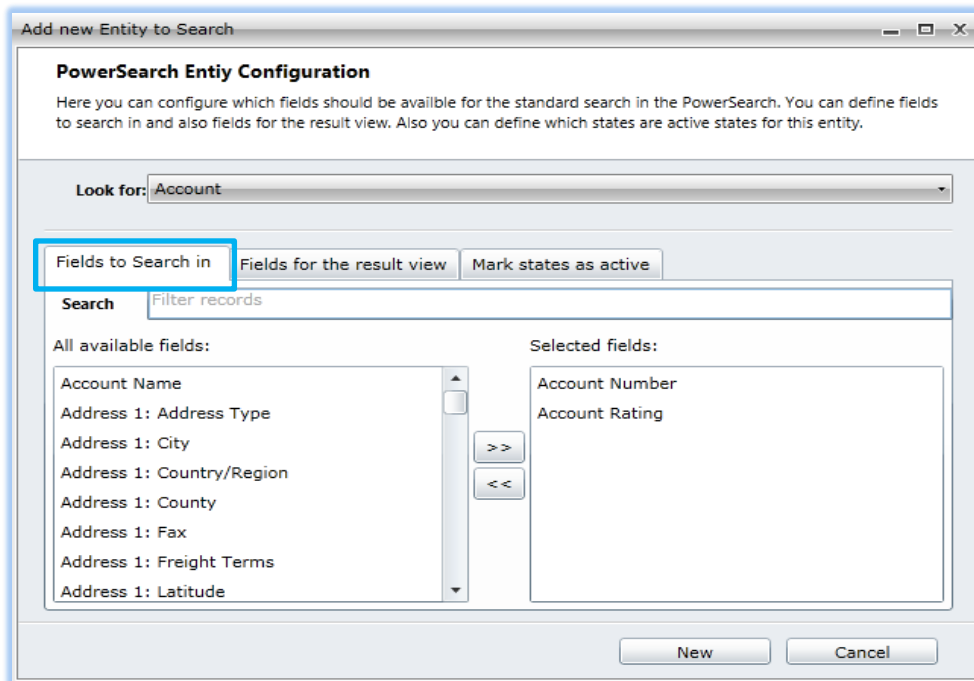
To select new entities, click the "new"-button in the task bar (see screenshot below).



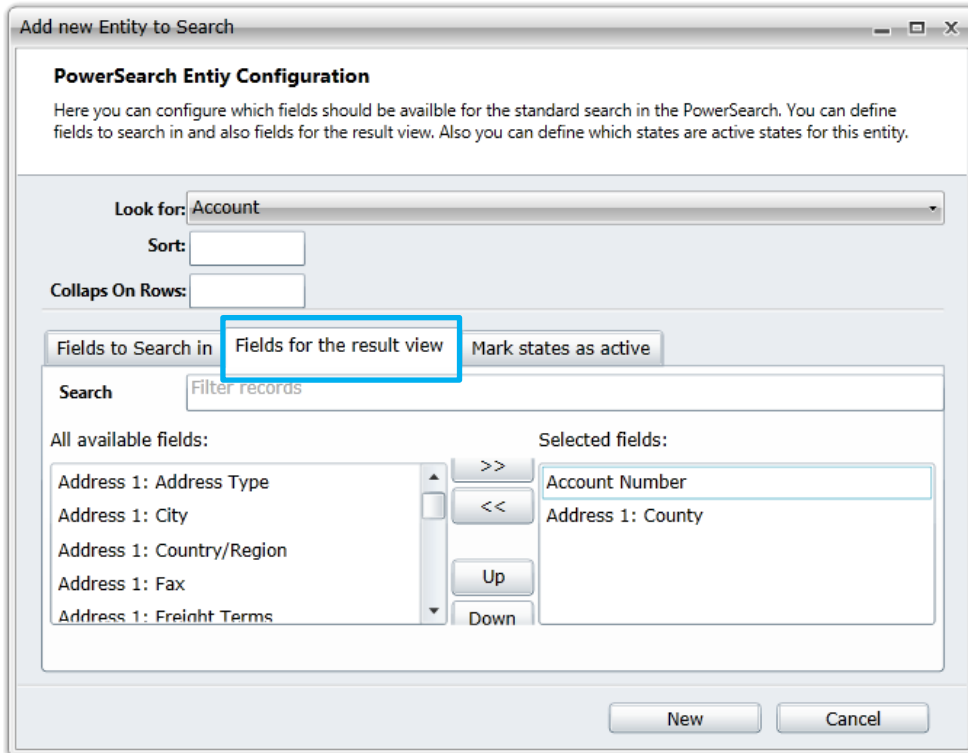
The following form will open; click "look for" to select new entities:



With these two buttons you can select and unselect entities in "Fields to search in":

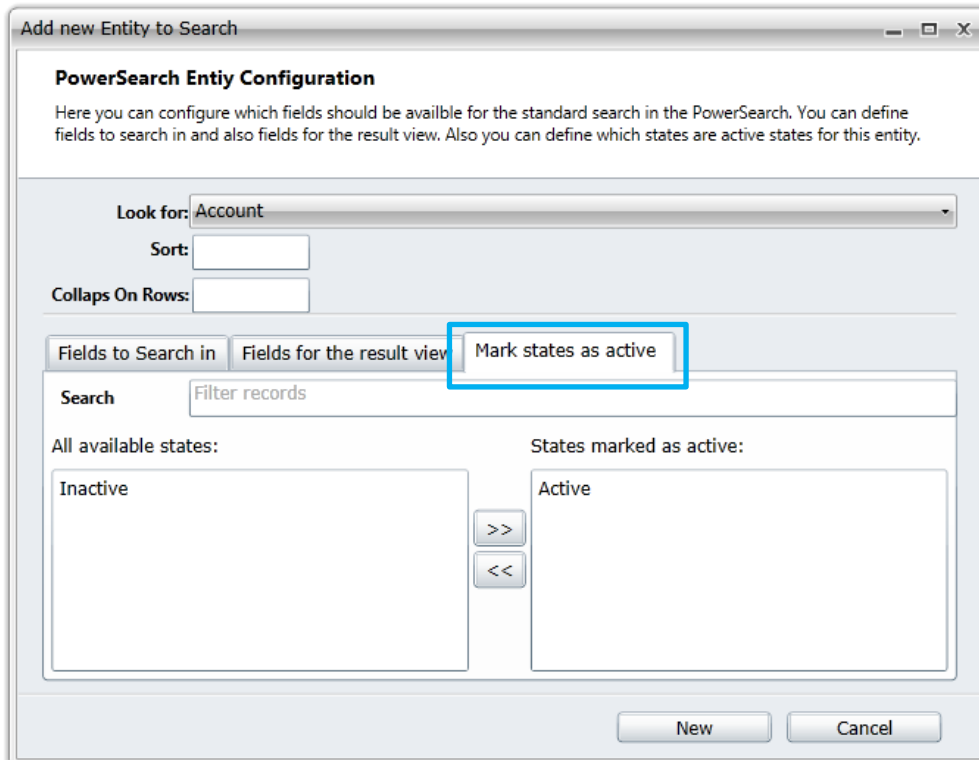


To define entities for the result view select those in the same way in "Fields for the result view", with up and down you set the priority of the entities in result view:



The screenshot shows the "Add new Entity to Search" dialog box. The "PowerSearch Entity Configuration" section is visible. The "Look for:" dropdown is set to "Account". The "Sort:" and "Collaps On Rows:" fields are empty. The "Fields to Search in" tab is selected, and the "Fields for the result view" sub-tab is highlighted with a blue box. The "Search" field contains "Filter records". The "All available fields:" list includes "Address 1: Address Type", "Address 1: City", "Address 1: Country/Region", "Address 1: Fax", and "Address 1: Freight Terms". The "Selected fields:" list includes "Account Number" and "Address 1: County". The "Up" and "Down" buttons are visible between the lists. The "New" and "Cancel" buttons are at the bottom.

With "Mark states as active" you can search for active or inactive entities:



The screenshot shows the "Add new Entity to Search" dialog box. The "PowerSearch Entity Configuration" section is visible. The "Look for:" dropdown is set to "Account". The "Sort:" and "Collaps On Rows:" fields are empty. The "Fields to Search in" tab is selected, and the "Mark states as active" sub-tab is highlighted with a blue box. The "Search" field contains "Filter records". The "All available states:" list includes "Inactive". The "States marked as active:" list is empty. The ">>" and "<<" buttons are visible between the lists. The "New" and "Cancel" buttons are at the bottom.

7 How to activate debugging

Debugging for Power Search is very easy to understand.

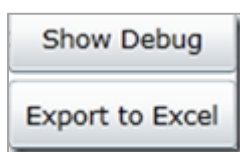
For Example:

crm:5555/PTMEDVSystemeGmbH + the following link

[Servername+Organisation]/webresources/ptm_mscrmaddons/PSStartPage.html#debug=true

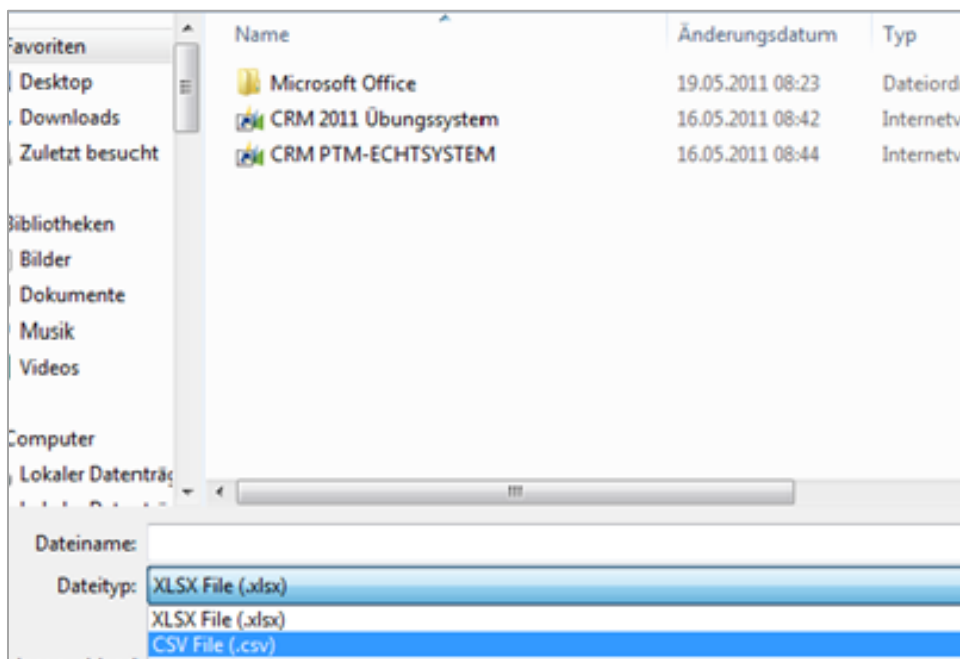
Once the error message appears, please continue with the following steps.

Click the Export to Excel Button on the right hand side of your screen.



Now you can save the file.

Important is: You should store the file as a CSV file instead of a XLSX file.



2. example:

crm:5555/PTMEDVSystemeGmbH + the following link

example: crm:5555/PTMEDVSystemeGmbH + the following link

[Servername+Organisation]/webresources/ptm_mscrmaddons/PSConfigPAge.html#debug=true

Once the error message appears, please continue with the following steps.

Click the Export to Excel Button on the right hand side of your screen.

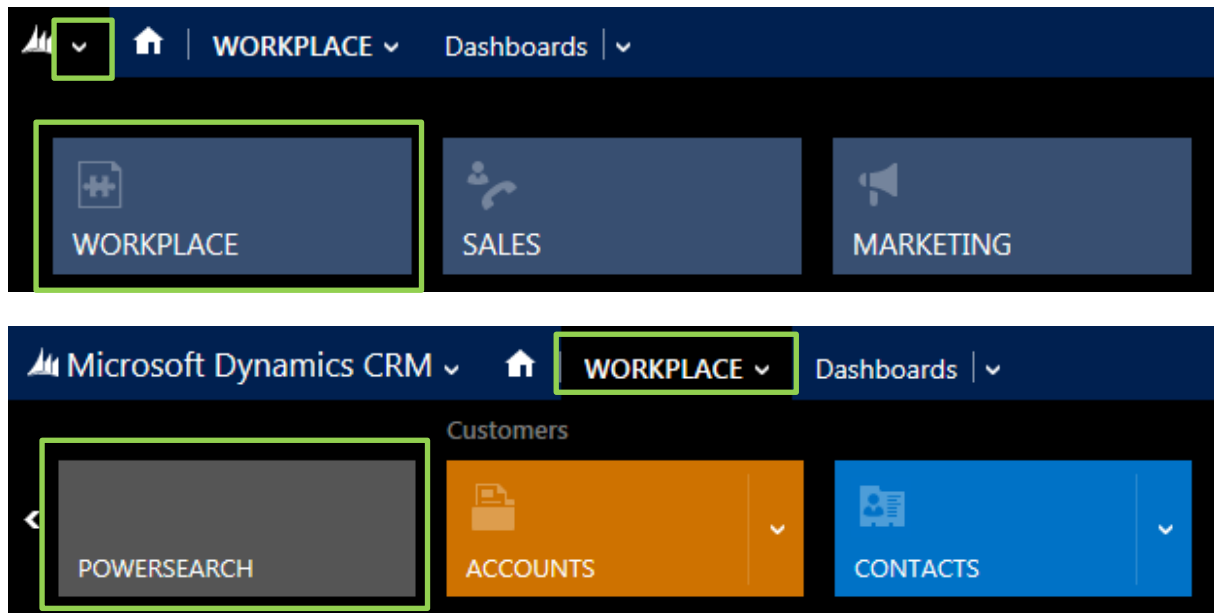
(see screenshot above).

Important: You should store the file as a CSV file instead of a XLSX file.

8 PowerSearch Main Form

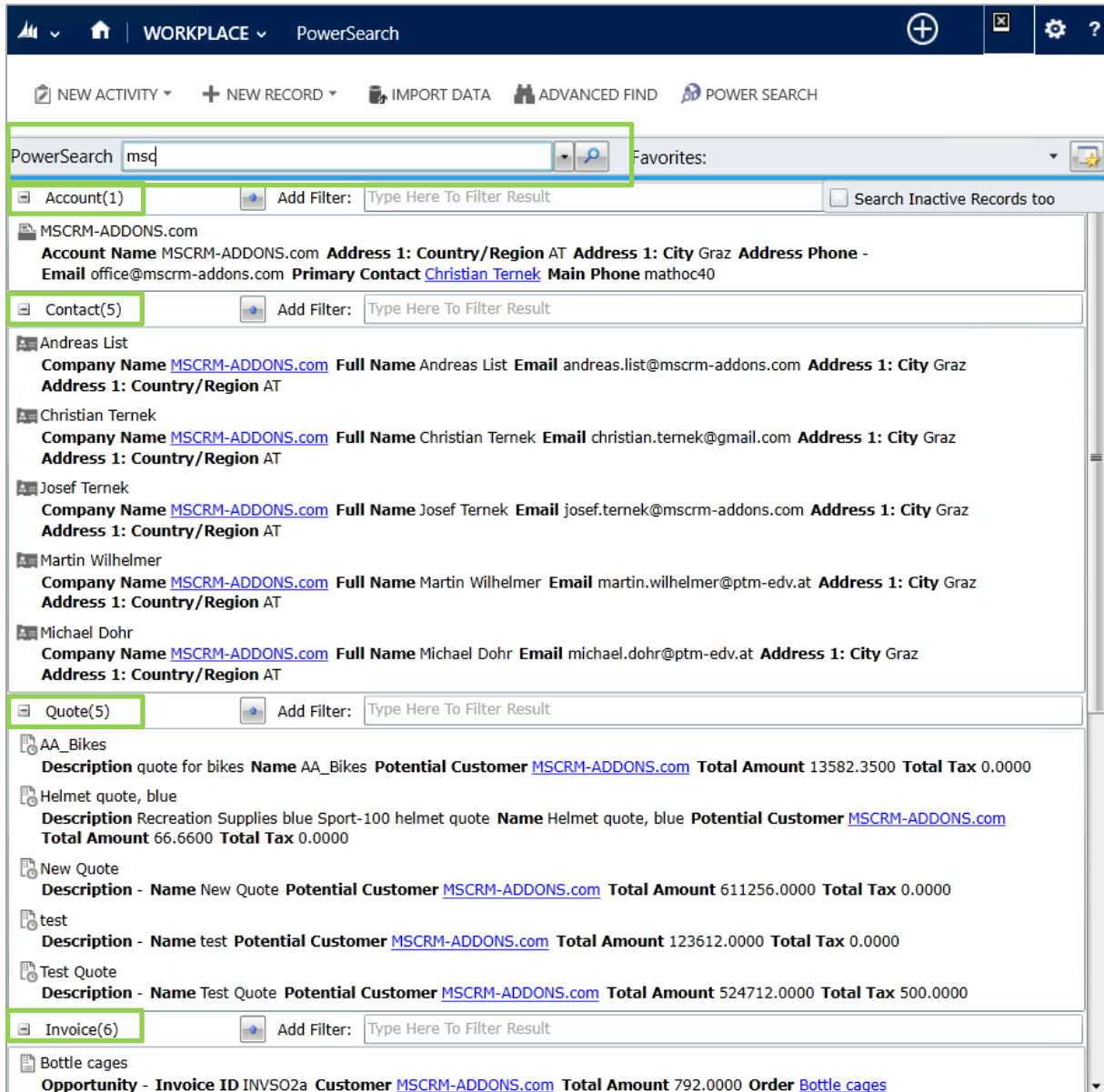
PowerSearch provides a powerful search routine as it allows a quick and easy search across several entities and multiple fields. It helps to simplify the use of CRM by providing one page where all records can be found and favorites can easily be accessed.

To get to the PowerSearch Main form, open your CRM and go to "Workplace" and click on "PowerSearch". See screenshots below:



The PowerSearch Main Form appears. Here you can search for all entities which have been set in the configuration. Type in the name you want to look for. It is possible to type in the first 3 characters of the entity you are looking for.

As a result you get an overview of e.g. all accounts that starts with "msc" within the entities you configured before. (For more information, please read [chapter 6 "Configuration"](#)). The number in the bracket shows the amount of the saved entities. (See screenshot below). Entities can be opened with a double-click.



PowerSearch | WORKPLACE | PowerSearch

NEW ACTIVITY | NEW RECORD | IMPORT DATA | ADVANCED FIND | POWER SEARCH

PowerSearch: | Favorites:

Account(1) | Add Filter: | ☐ Search Inactive Records too

MSCRM-ADDONS.com
Account Name MSCRM-ADDONS.com **Address 1: Country/Region** AT **Address 1: City** Graz **Address Phone - Email** office@mscrm-addons.com **Primary Contact** [Christian Ternek](#) **Main Phone** mathoc40

Contact(5) | Add Filter:

Andreas List
Company Name [MSCRM-ADDONS.com](#) **Full Name** Andreas List **Email** andreas.list@mscrm-addons.com **Address 1: City** Graz
Address 1: Country/Region AT

Christian Ternek
Company Name [MSCRM-ADDONS.com](#) **Full Name** Christian Ternek **Email** christian.ternek@gmail.com **Address 1: City** Graz
Address 1: Country/Region AT

Josef Ternek
Company Name [MSCRM-ADDONS.com](#) **Full Name** Josef Ternek **Email** josef.ternek@mscrm-addons.com **Address 1: City** Graz
Address 1: Country/Region AT

Martin Wilhelmer
Company Name [MSCRM-ADDONS.com](#) **Full Name** Martin Wilhelmer **Email** martin.wilhelmer@ptm-edv.at **Address 1: City** Graz
Address 1: Country/Region AT

Michael Dohr
Company Name [MSCRM-ADDONS.com](#) **Full Name** Michael Dohr **Email** michael.dohr@ptm-edv.at **Address 1: City** Graz
Address 1: Country/Region AT

Quote(5) | Add Filter:

AA_Bikes
Description quote for bikes **Name** AA_Bikes **Potential Customer** [MSCRM-ADDONS.com](#) **Total Amount** 13582.3500 **Total Tax** 0.0000

Helmet quote, blue
Description Recreation Supplies blue Sport-100 helmet quote **Name** Helmet quote, blue **Potential Customer** [MSCRM-ADDONS.com](#)
Total Amount 66.6600 **Total Tax** 0.0000

New Quote
Description - Name New Quote **Potential Customer** [MSCRM-ADDONS.com](#) **Total Amount** 611256.0000 **Total Tax** 0.0000

test
Description - Name test **Potential Customer** [MSCRM-ADDONS.com](#) **Total Amount** 123612.0000 **Total Tax** 0.0000

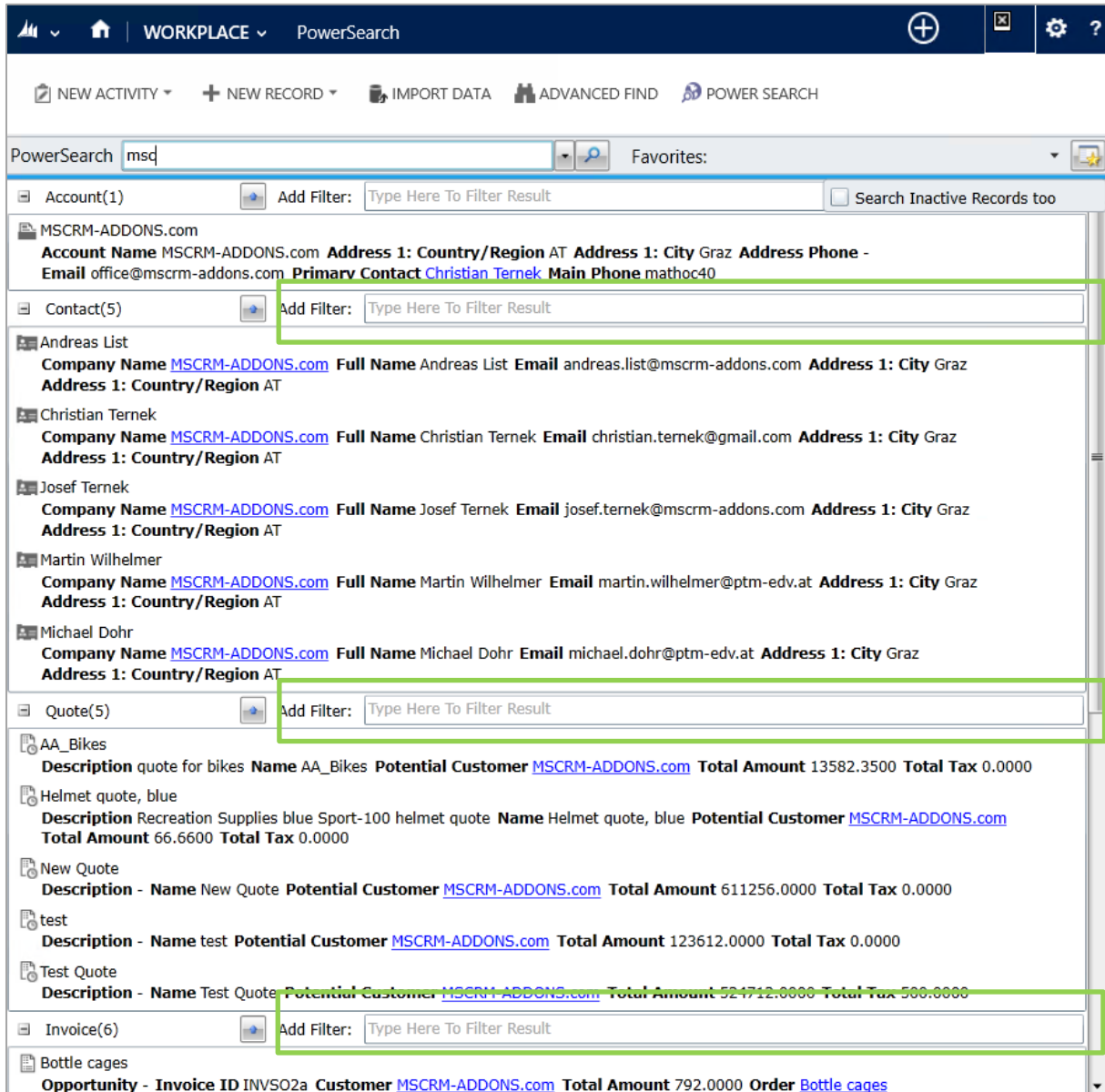
Test Quote
Description - Name Test Quote **Potential Customer** [MSCRM-ADDONS.com](#) **Total Amount** 524712.0000 **Total Tax** 500.0000

Invoice(6) | Add Filter:

Bottle cages
Opportunity - Invoice ID INVS02a **Customer** [MSCRM-ADDONS.com](#) **Total Amount** 792.0000 **Order** [Bottle cages](#)

8.1 Subfilter your search result

To filter your entities after a search, click in one of the filter-search bars and type in the word you want to filter your results on. See screenshot below:



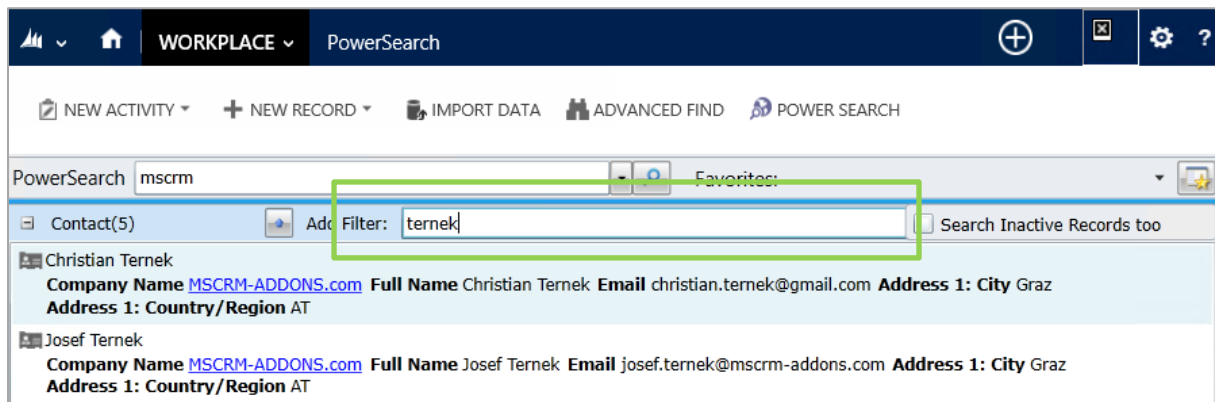
The screenshot shows the PowerSearch interface with the search term 'msd'. The results are categorized by entity type, each with an 'Add Filter' button highlighted by a green box:

- Account(1)**: Add Filter: Type Here To Filter Result
- Contact(5)**: Add Filter: Type Here To Filter Result
- Quote(5)**: Add Filter: Type Here To Filter Result
- Invoice(6)**: Add Filter: Type Here To Filter Result

The search results for 'msd' are as follows:

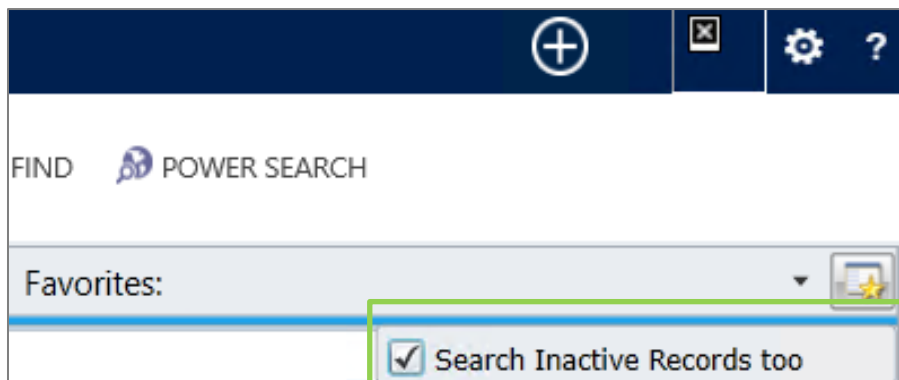
- Account**: MSCRM-ADDONS.com
Account Name MSCRM-ADDONS.com **Address 1: Country/Region** AT **Address 1: City** Graz **Address Phone -**
Email office@mscrm-addons.com **Primary Contact** Christian Ternek **Main Phone** mathoc40
- Contact**:
 - Andreas List
Company Name MSCRM-ADDONS.com **Full Name** Andreas List **Email** andreas.list@mscrm-addons.com **Address 1: City** Graz
Address 1: Country/Region AT
 - Christian Ternek
Company Name MSCRM-ADDONS.com **Full Name** Christian Ternek **Email** christian.ternek@gmail.com **Address 1: City** Graz
Address 1: Country/Region AT
 - Josef Ternek
Company Name MSCRM-ADDONS.com **Full Name** Josef Ternek **Email** josef.ternek@mscrm-addons.com **Address 1: City** Graz
Address 1: Country/Region AT
 - Martin Wilhelmer
Company Name MSCRM-ADDONS.com **Full Name** Martin Wilhelmer **Email** martin.wilhelmer@ptm-edv.at **Address 1: City** Graz
Address 1: Country/Region AT
 - Michael Dohr
Company Name MSCRM-ADDONS.com **Full Name** Michael Dohr **Email** michael.dohr@ptm-edv.at **Address 1: City** Graz
Address 1: Country/Region AT
- Quote**:
 - AA_Bikes
Description quote for bikes **Name** AA_Bikes **Potential Customer** MSCRM-ADDONS.com **Total Amount** 13582.3500 **Total Tax** 0.0000
 - Helmet quote, blue
Description Recreation Supplies blue Sport-100 helmet quote **Name** Helmet quote, blue **Potential Customer** MSCRM-ADDONS.com
Total Amount 66.6600 **Total Tax** 0.0000
 - New Quote
Description - Name New Quote **Potential Customer** MSCRM-ADDONS.com **Total Amount** 611256.0000 **Total Tax** 0.0000
 - test
Description - Name test **Potential Customer** MSCRM-ADDONS.com **Total Amount** 123612.0000 **Total Tax** 0.0000
 - Test Quote
Description - Name Test Quote **Potential Customer** MSCRM-ADDONS.com **Total Amount** 524712.0000 **Total Tax** 500.0000
- Invoice**:
 - Bottle cages
Opportunity - Invoice ID INVS02a **Customer** MSCRM-ADDONS.com **Total Amount** 792.0000 **Order** Bottle cages

Type in the subfilter for the entry you want to look for. E.g. all contacts which contains "Ternek". See screenshot below:



8.2 Search for inactive records

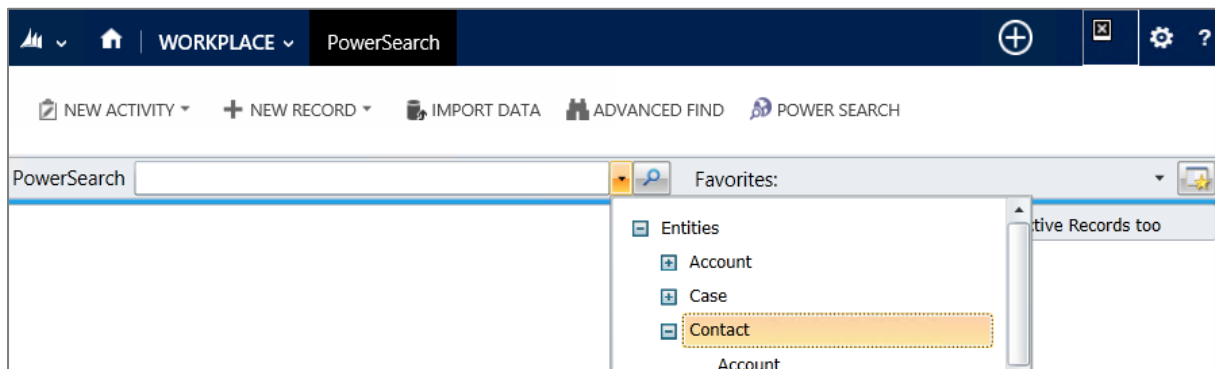
Within the PowerSearch Main Form you can also use the checkbox on the right to search for inactive records too. The PowerSearch filter will immediately filter your results. See screenshots below:



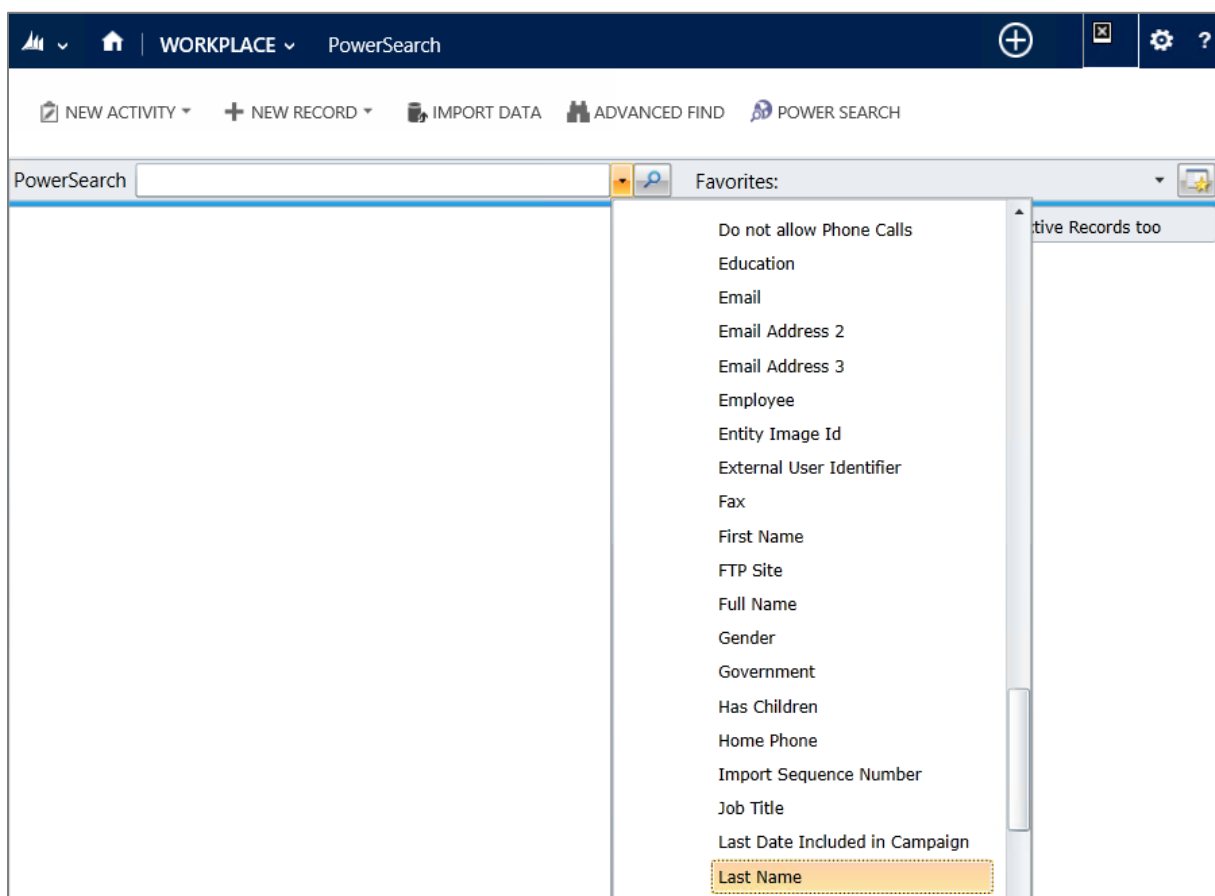
8.3 Search for different attributes

In the PowerSearch-main form, the "attribute search" allows to search for specific values of a certain CRM attribute.

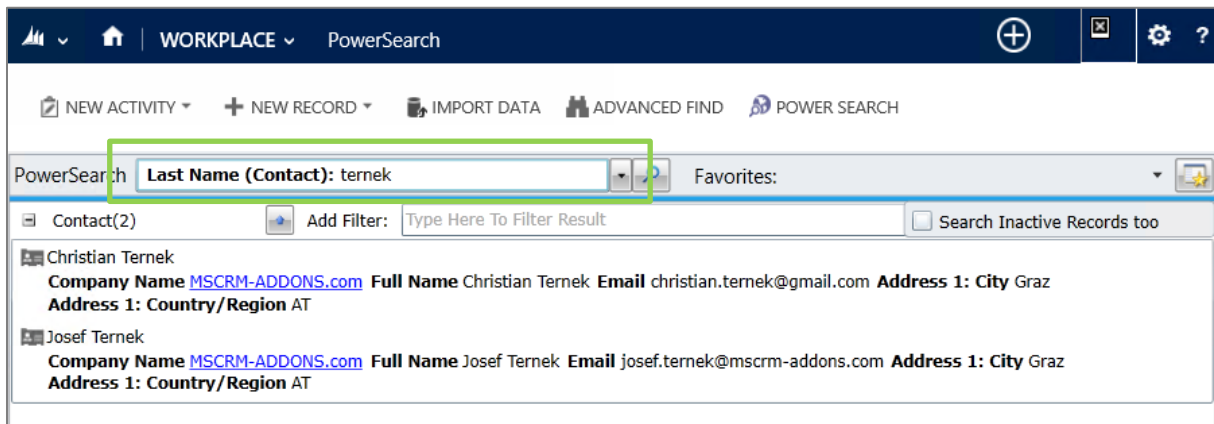
To see the different attributes you can search for, click on the dropdown-button next to the PowerSearch search field. E.g. if you want to search for the contacts click on the plus sign and define for which attribute you want to look for. See screenshots below:



Scroll down and search e.g. for the last name of your contact and type in the name in the search field. See screenshots below:



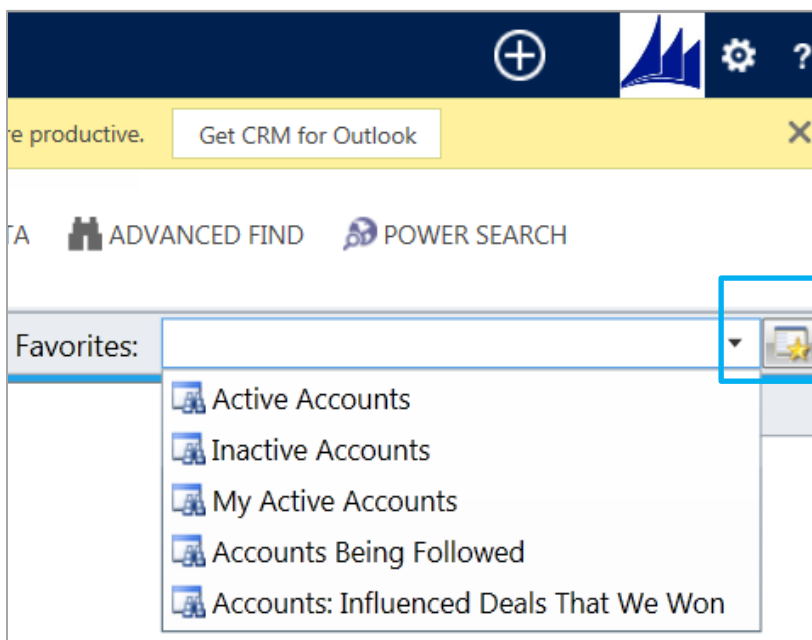
In our case we want to search for all contacts with the last name "ternek". See screenshot below:



9 Favorites

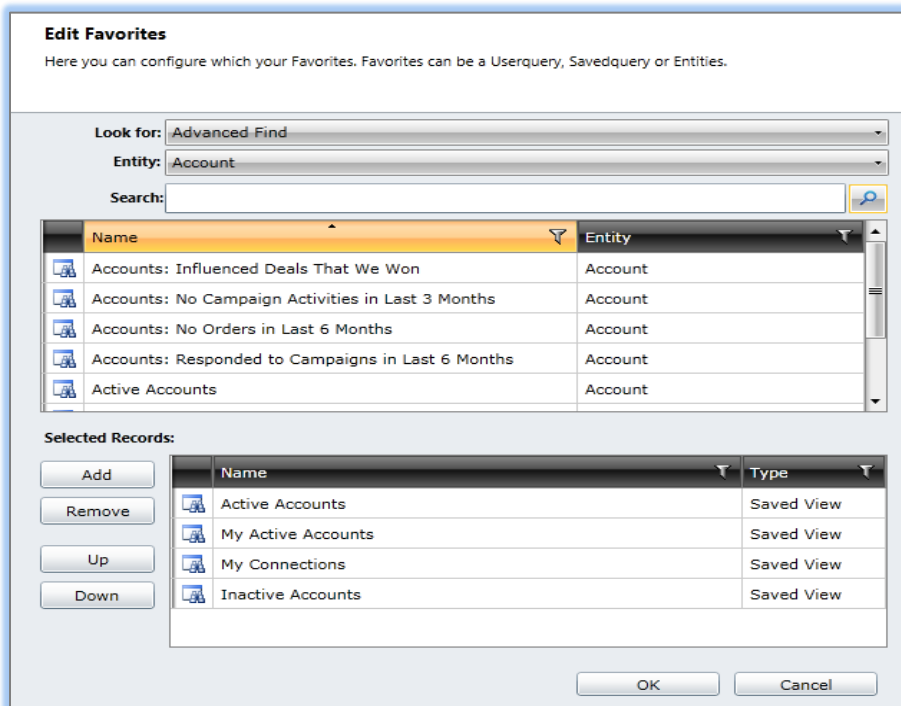
9.1 How to edit your favorites (Personal Favorites)

Selecting your personal favorites is done by clicking the arrow next to favorites and scrolling down until you find the favorites you want to see.



If you don't have any favorites, and want to create new Favorites click on the right of the favorites field.

The following window appears:



Edit Favorites
 Here you can configure which your Favorites. Favorites can be a Userquery, Savedquery or Entities.

Look for: **Advanced Find**

Entity: **Account**

Search:

Name	Entity
Accounts: Influenced Deals That We Won	Account
Accounts: No Campaign Activities in Last 3 Months	Account
Accounts: No Orders in Last 6 Months	Account
Accounts: Responded to Campaigns in Last 6 Months	Account
Active Accounts	Account

Selected Records:

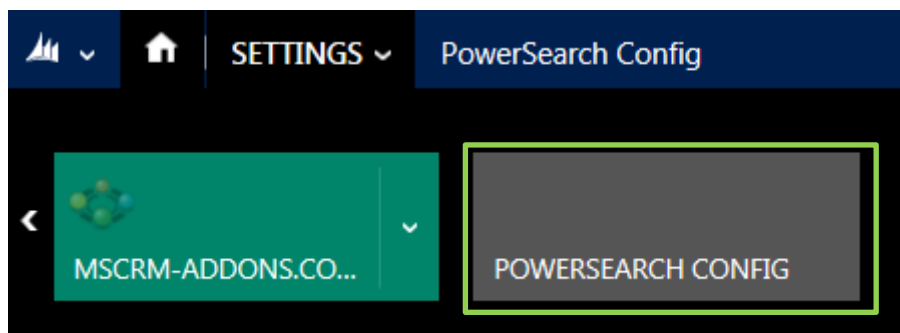
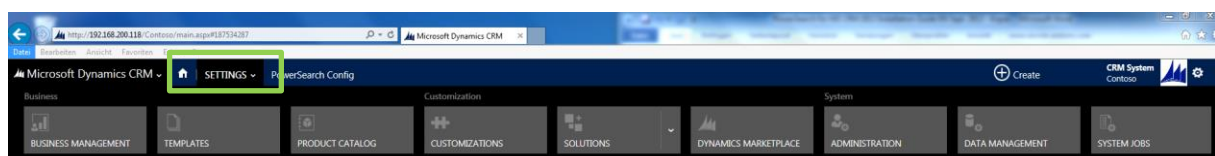
Name	Type
Active Accounts	Saved View
My Active Accounts	Saved View
My Connections	Saved View
Inactive Accounts	Saved View

OK Cancel

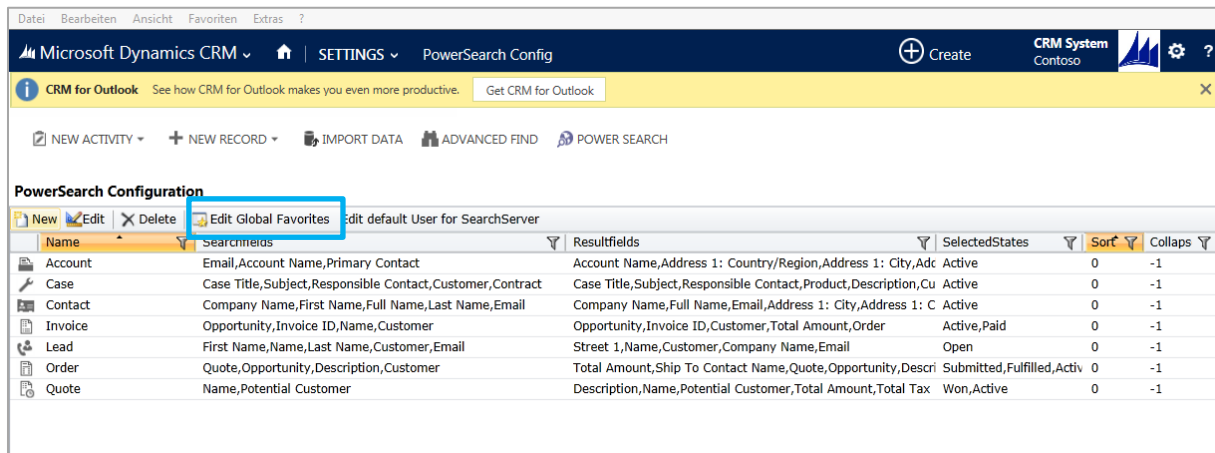
Select the entries that you are looking for (Entities or Advanced Search) and in which entities (activities, accounts, contacts, etc.) you want to search for with a double-click. After searching for entities add the entities you want to search in with the [Add]-button, remove entities with the [Remove]-button and choose the priority with the [Up]- and [Down]-buttons. Click on [OK] to save your settings.

9.2 How to edit your favorites (Global Favorites)

Select "Settings" and click "PowerSearch Config" in the Extensions menu.

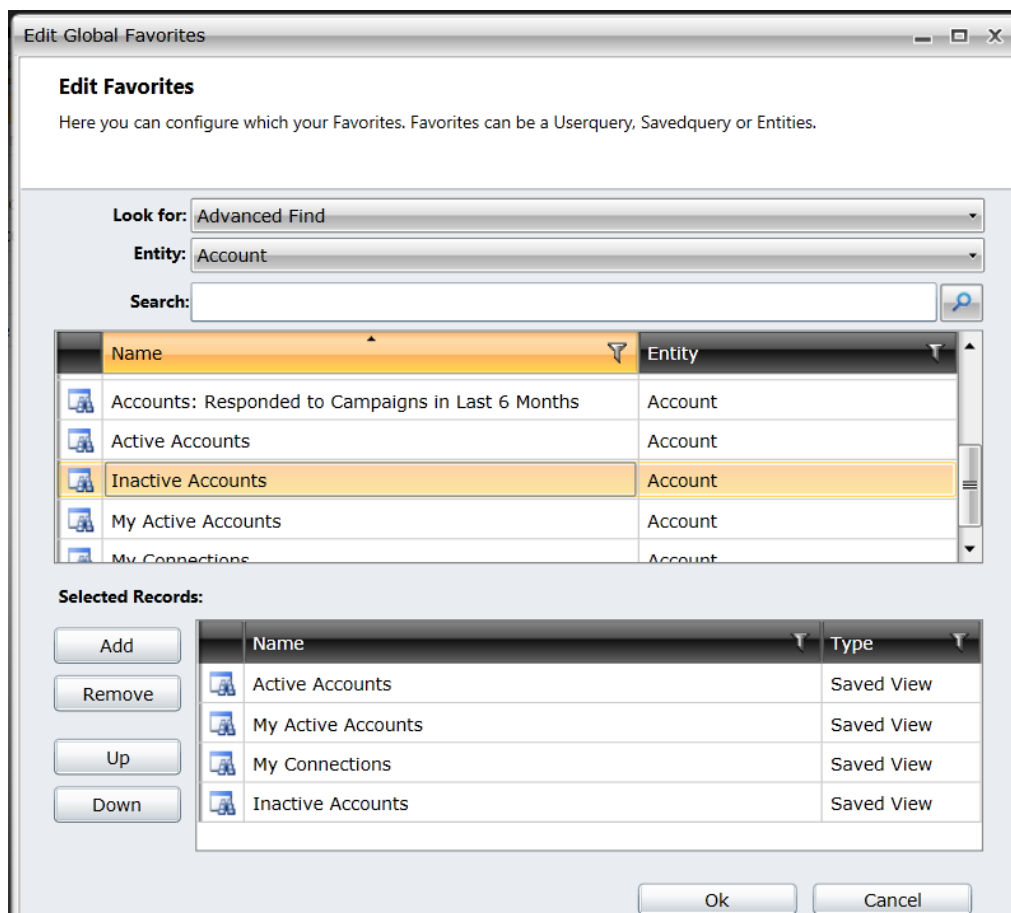


Within the PowerSearch Configuration click "Edit Global Favorites".



This window will pop up. Select the entries that you are looking for (Entities or Advanced Search) and in which entities (activities, accounts, contacts, etc.) you want to search for.

After searching for entities add the entities you want to search in with the [Add]-button, remove entities with the [Remove]-button and choose the priority with the [Up]- and [Down]-buttons. Click on [OK] to save your settings (see screenshot below).



10 Contact

If you have questions to the product send an email to

support@mscrm-addons.com

or visit our blog

<http://blogs.mscrm-addons.com>

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