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PowerSearch 2.0
for
Microsoft Dynamics CRM

Searching for Data in Microsoft Dynamics CRM

Different ways to search:



- A simple search based on Quick Find forms
- Cross-Entity
- Hard to find what you are looking for:
- limited # of results (mobile)
- limited result attributes

- Easy to find what you are looking for
- Predefine search parameters using the precision of Advanced Find

- Most powerful CRM search
- Can be complicated for non-power users to understand
- Must save the search to a view with no option to change the search data

PowerSearch 2.0 combines the simplicity of the CRM search with the features of an Advanced Find!

PowerSearch 2.0

Features & Capabilities

Search Features

- Multiple fields
 - Create complex, yet easy to use advanced searches in multiple columns
- All CRM attribute types supported
- Fields connected by logical “and” condition
- Supports all operators from CRM

Global configuration

- Define search and result fields
 - They can be pulled directly from the user- or system views.
- Automation of frequent search queries by administrators

Working with results

- Open directly from the result window
- Search results can be opened in a CRM Grid providing extended CRM features
 - Export to Excel or Word
 - Bulk edit

The screenshot displays the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Microsoft Dynamics CRM', 'SALES', and 'Dashboards'. Below it, a toolbar contains 'SAVE AS', 'NEW', 'EDIT', 'DELETE', 'SHARE DASHBOARD', 'ASSIGN', and 'REFRESH ALL'. The main area shows a search configuration window for 'Accounts'. It has tabs for 'Accounts', 'Contacts', 'Leads', and 'Opportunities'. The configuration includes fields for 'Account Name' (Contains, sample), 'Account Rating' (Equals), 'Created On' (On or After, 3/1/2016), 'Created On' (On or Before, 3/8/2016), 'Owner' (Equals, Otis Temler), and 'Status Reason' (Equals, Active, Inactive). A 'Search' button is at the bottom right. Below the configuration is a table of search results with columns: Account Name, Main Phone, Address 1: City, Primary Contact, and Email. The results list several accounts like 'A. Datum Corporation', 'Adventure Works', 'Alpine Ski House', 'Blue Yonder Airlines', 'City Power & Light', and 'Coho Winery'. Two blue callout boxes provide additional information: one says 'Define an unlimited number of fields that allow a search in Microsoft Dynamics CRM entities. There is no limitation on the entities you want to apply the search on!' and the other says 'Open search results directly from the result window with a simple click on the result. Save tons of time and preconfigure searches according to your needs! There is no reason to repeatedly insert every single search parameter anymore!'.

Account Name	Main Phone	Address 1: City	Primary Contact	Email
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_l@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House (sample)	555-0157	Missoula		
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	test@test.com
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com

Getting Started with PowerSearch

How to

- Once installed embed the PowerSearch Web Resource to a Dashboard or Entity Form
- Configure PowerSearch
 - Search fields are configured for custom entities

The image displays a screenshot of the MS CRM configuration interface. A central dialog box titled 'Web Resource Properties' is open, showing the configuration for a web resource. The 'Web resource' field is set to 'ptm_PowerSearch/MainPage.html'. Under 'Field Name and Properties', the 'Name' is 'WebResource_PowerSearch' and the 'Label' is 'PowerSearch'. The 'Display label on the Dashboard' checkbox is unchecked. The 'Visibility' section has 'Visible by default' checked. The 'Web Resource Properties' section includes three checkboxes: 'Restrict cross-frame scripting, where supported.' (unchecked), 'Pass record object-type code and unique identifier as parameters.' (unchecked), and 'Enable for tablet' (unchecked). The background shows the 'Account' entity configuration with 'Search Fields' set to 'My Active Accounts'. A list of search results is visible, including 'Account Name', 'Insurance Outsourcing Manager', 'IOM Leasing (Pty) Ltd', 'IOM Leasing Ltd', and 'ST&R'. The 'Account Advanced Find View' is also visible on the right.

Live Demo

CRM 2016, SP 2013

- Use Case 1: Look & Feel
 - Using PowerSearch 2.0 to show Accounts owned by a user created between a specific date range.
- Use Case 2: Configuration
 - Setup PowerSearch 2.0 to find Invoices that are past 30 days
- Use Case 3: Working with results
 - Use the results from Use Case 2 to send an Overdue Notice.

Roadmap

Upcoming Features

Coming Soon:

- User specific search configuration
- Multiple configurations per entity
- Support of Party List Attribute
 - For example: Attendees of Meeting

Further on down the Road:

- Quick View of results
 - Hover and show (maybe)



Thank You

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Resources:

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

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