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PowerSearch 2.0

for

Microsoft Dynamics CRM

Searching for Data in Microsoft Dynamics CRM

Different ways to search:

Microsoft Dynamics CRM

Search CRM data

Built-in Search

Microsoft Dynamics CRM

Advanced Find

- 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!

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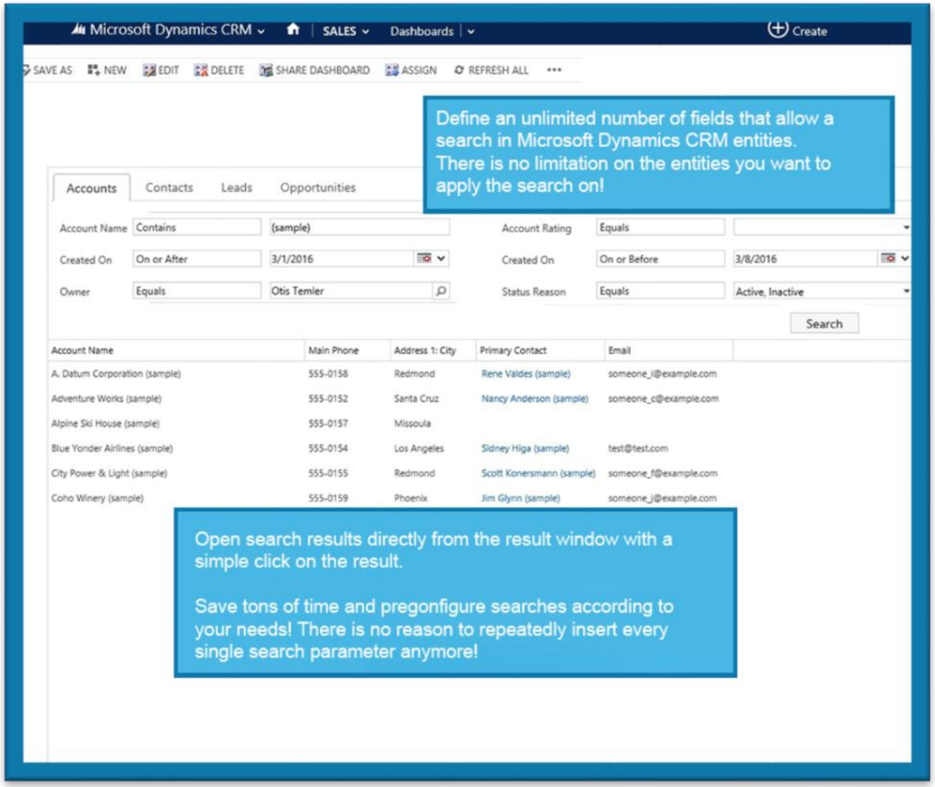
PowerSearch 2.0

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

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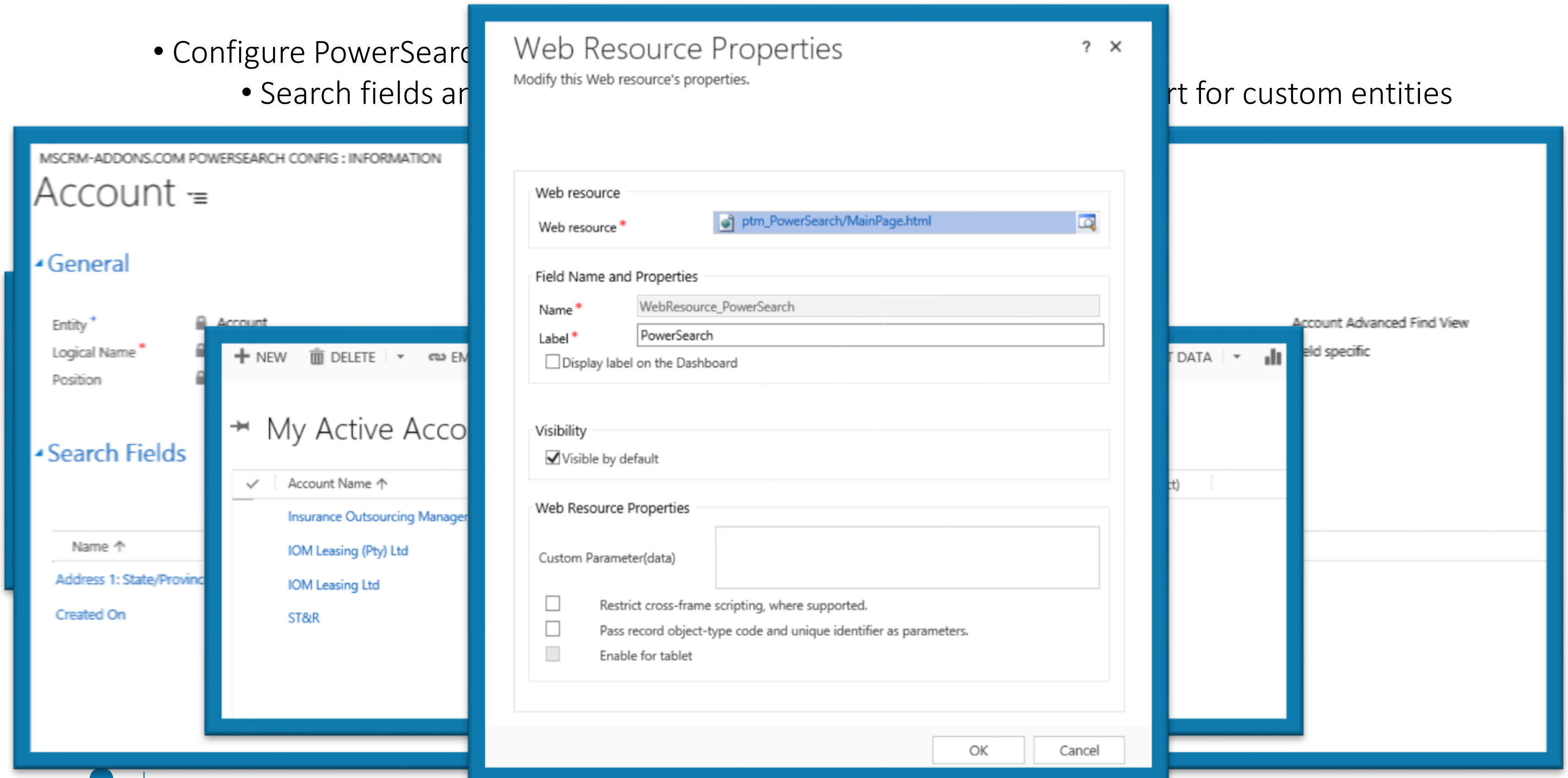
Getting Started with PowerSearch

How to

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



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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

Feel free to join our upcoming Webinars!
http://www.mscrm-addons.com/Support/Webinars.aspx

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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