



**mscrm-addons.com**  
**PowerSearch for MS CRM 2015**

# PowerSearch

## for MS CRM 2015

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v.2015.2 - January 2015

### **User and Installation Guide**

(How to install/uninstall and use PowerSearch for MS CRM 2015)

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## 1 Common Information

Before installing PowerSearch for MS CRM 2015, please read this document and follow the steps carefully. If you upgrade PowerSearch for MS CRM 2013 to 2015 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 2015
2. Configuring the Search –criteria

## 2 PowerSearch for Microsoft Dynamics CRM 2015 Prerequisites

Microsoft Silverlight has to be installed

Supported versions of Internet Explorer

PowerSearch can run on following Internet Explorer versions:

- Internet Explorer 10 and higher

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

- On-premises editions of Microsoft Dynamics CRM Server 2015
- Microsoft Dynamics CRM Online

Any one of the following operating systems is required:

- Windows 8 (64-bit and 32-bit versions)
- Windows 8.1 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

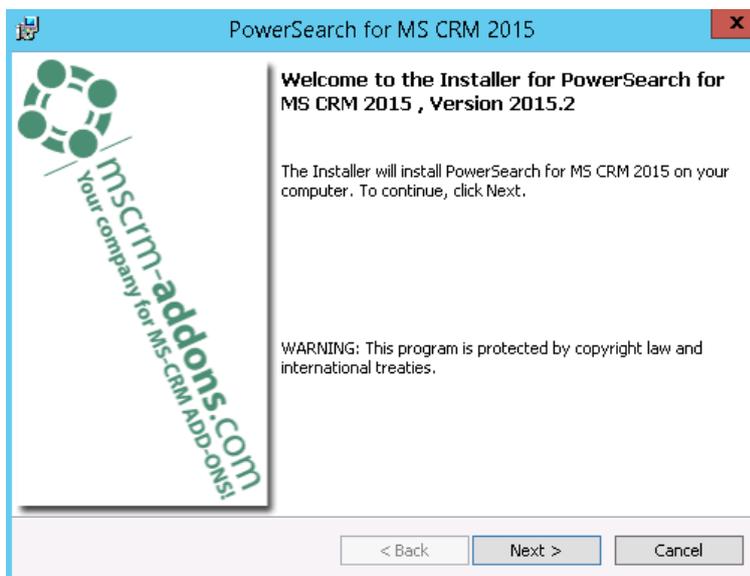
## 3 Installation

You could install PowerSearch for Microsoft Dynamics CRM 2015 on any supported operating system which is able to connect to your CRM 2015 Server.

### 3.1 Introduction

Run the Power Search for MS CRM 2015 Setup file.

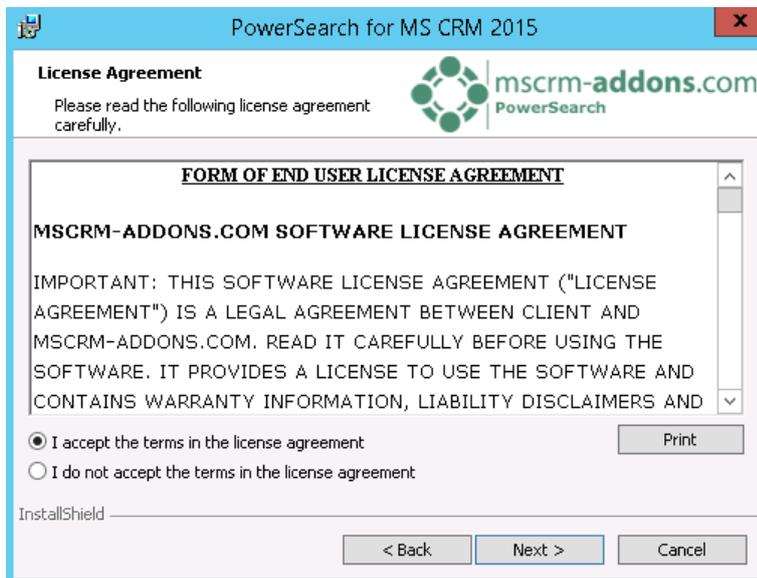
The following window appears:



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



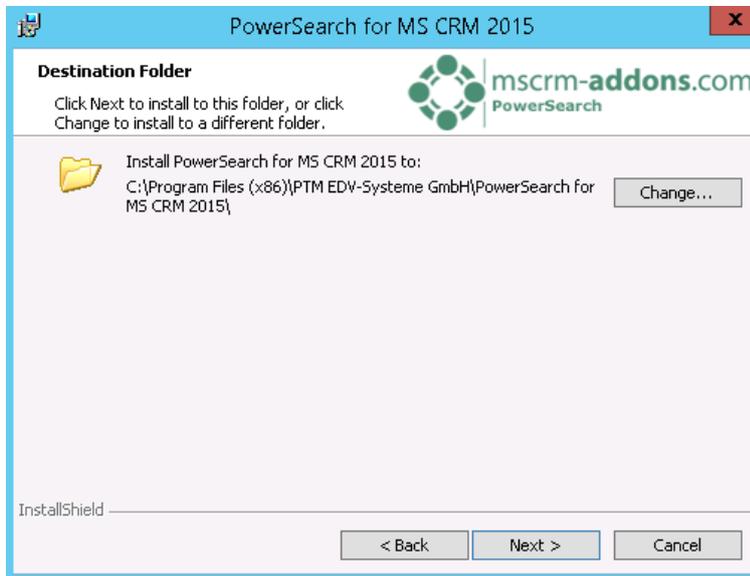
Accept the terms in the license agreement and click [Next] to proceed.

### 3.1.2 Language Selection

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

### 3.1.3 Folder Selection

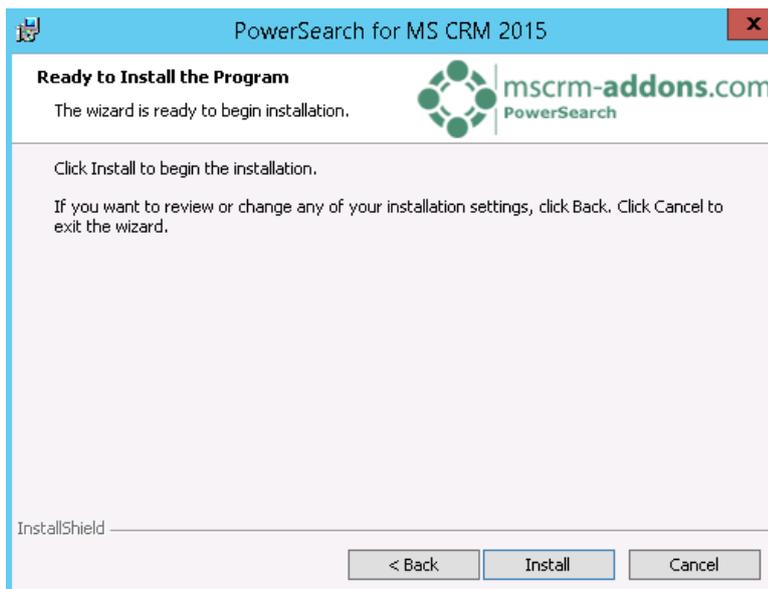
Here it's possible to set the installation directory.



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

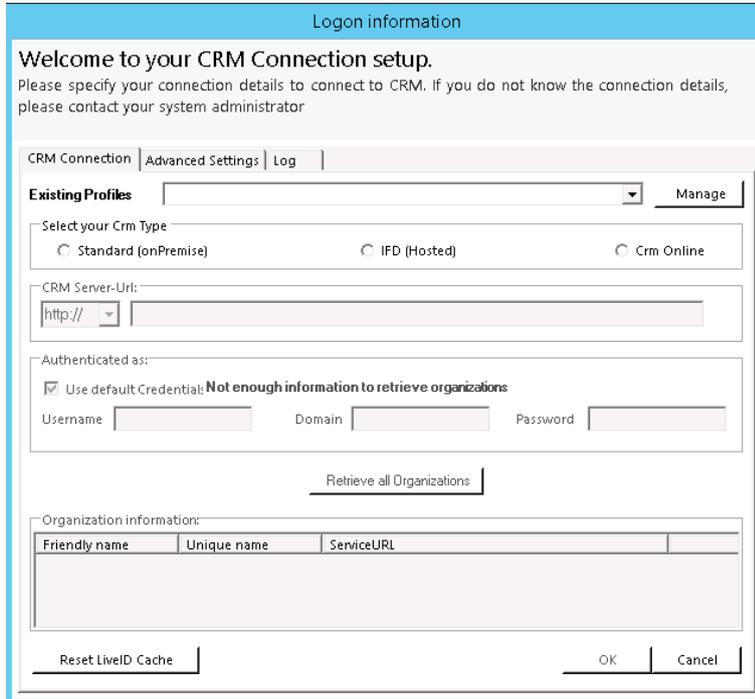
### 3.1.4 Confirm Installation

To start the installation, click on [Install].  
To change the settings, click on [Back].

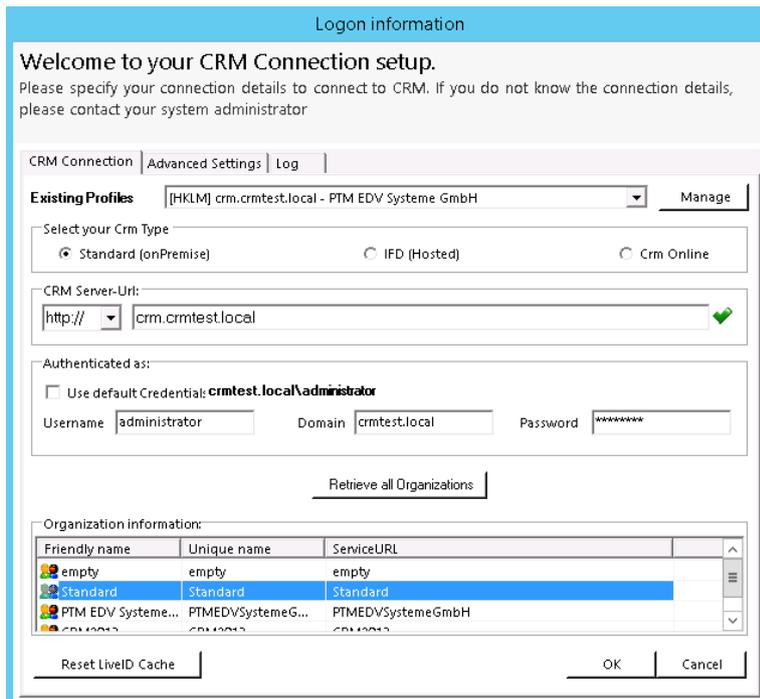


### 3.1.5 Configure CRM Server

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



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.



Friendly name	Unique name	ServiceURL
empty	empty	empty
Standard	Standard	Standard
PTM EDV Systeme...	PTMEDVSystemeG...	PTMEDVSystemeGmbH

### 3.1.6 Security Roles

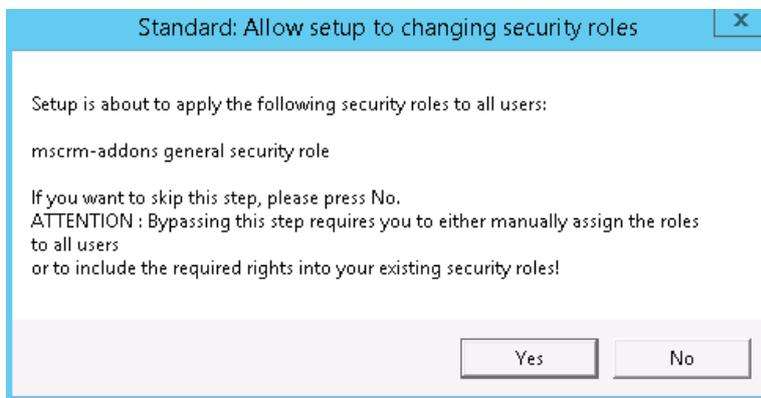
#### General security roles for all products:

The following security role is required by all our products.

- MSCRM-Addons General Security Role

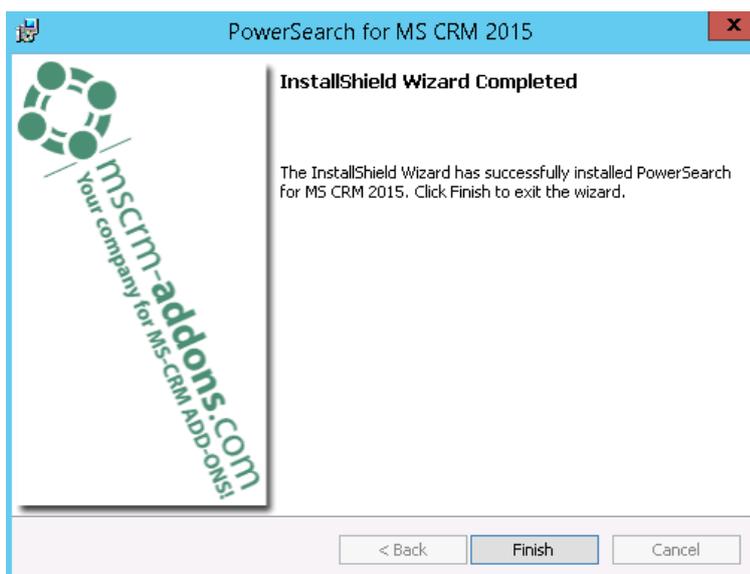
This security role contains the basic requirements for using the product itself and to be able to perform the license check.

Click on [Yes] to apply "mscrm-addons.com general security role" to all users. Press [No] to skip this step.



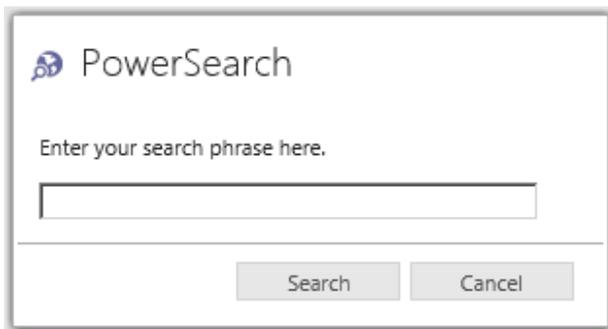
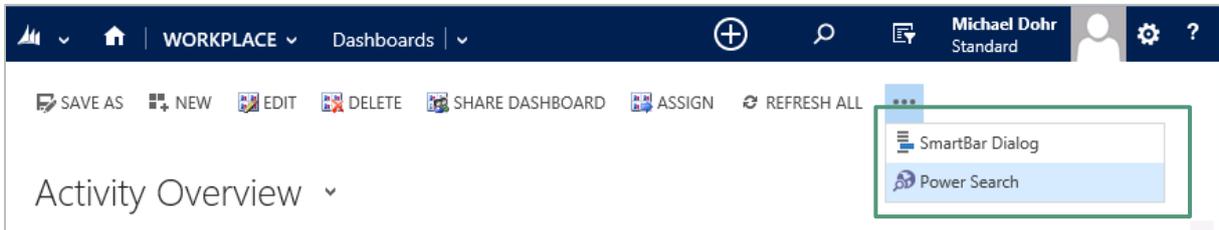
### 3.1.7 Finish

Click on [Finish] to complete the installation.



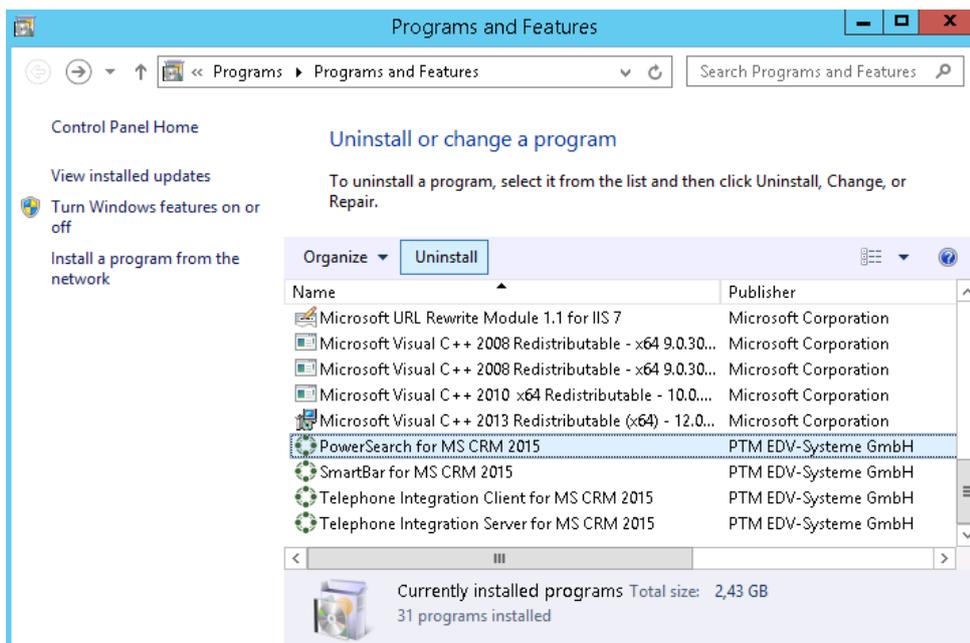
A new entry has been created in the CRM ribbon.

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)

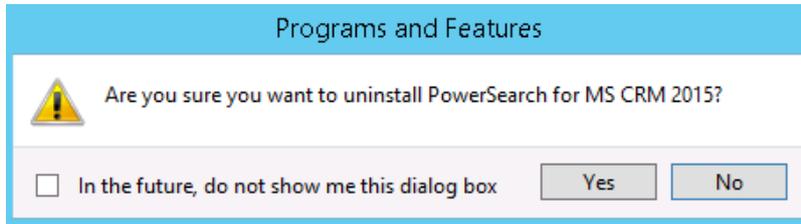


### 3.1.8 Uninstall

To uninstall PowerSearch select "Programs and Features" in the Control Panel, search for PowerSearch CRM 2015 and click on [Uninstall].



Following window appears:

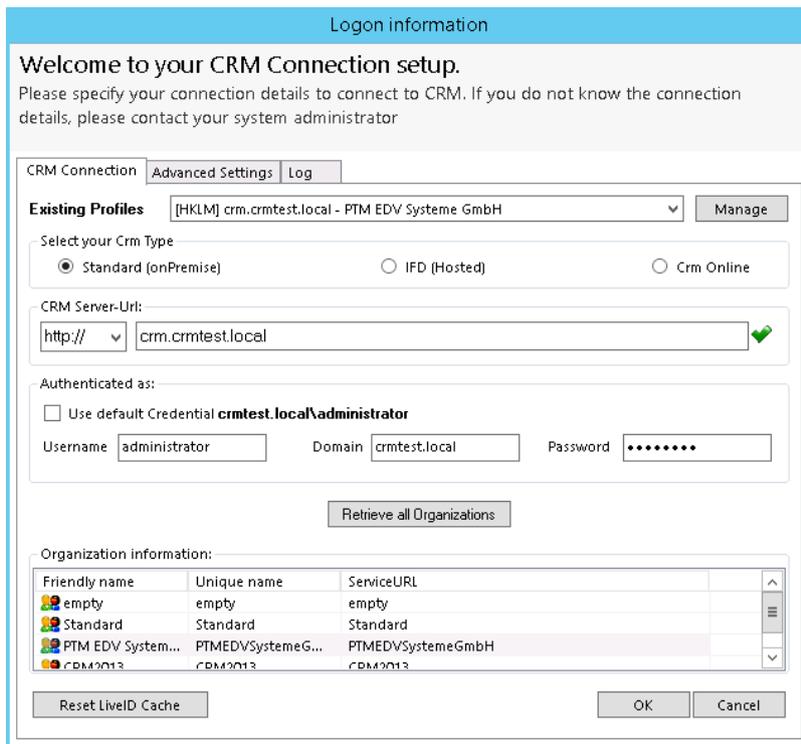


Click on [Yes] to uninstall PowerSearch for MS CRM 2015.  
Click on [No] if you don't want to uninstall PowerSearch for MS CM 2015.

## 4 License Management

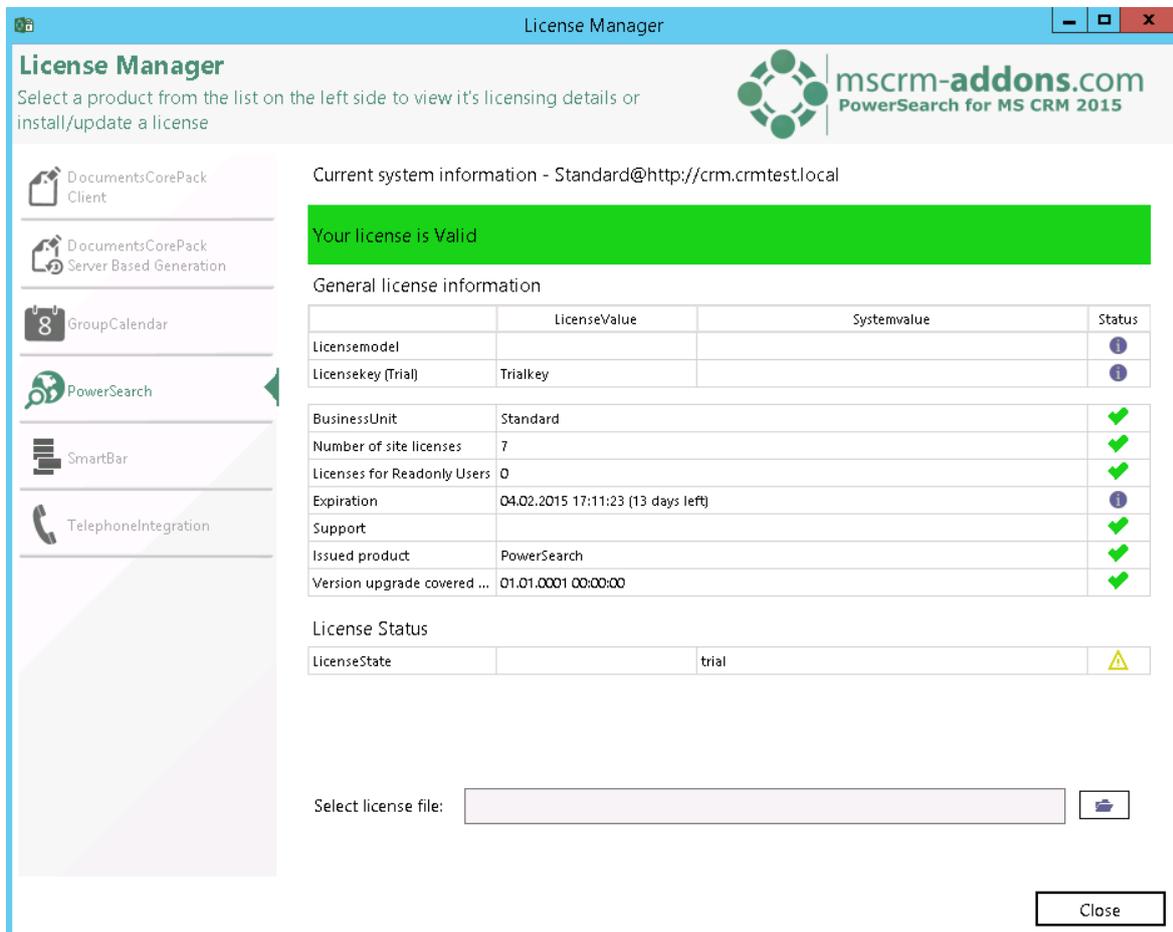
### 4.1 License Manager

Open "License Manager – PowerSearch for MS CRM 2015" from the start menu ([www.mscrm-addons.com](http://www.mscrm-addons.com)). The CRM connection window appears:



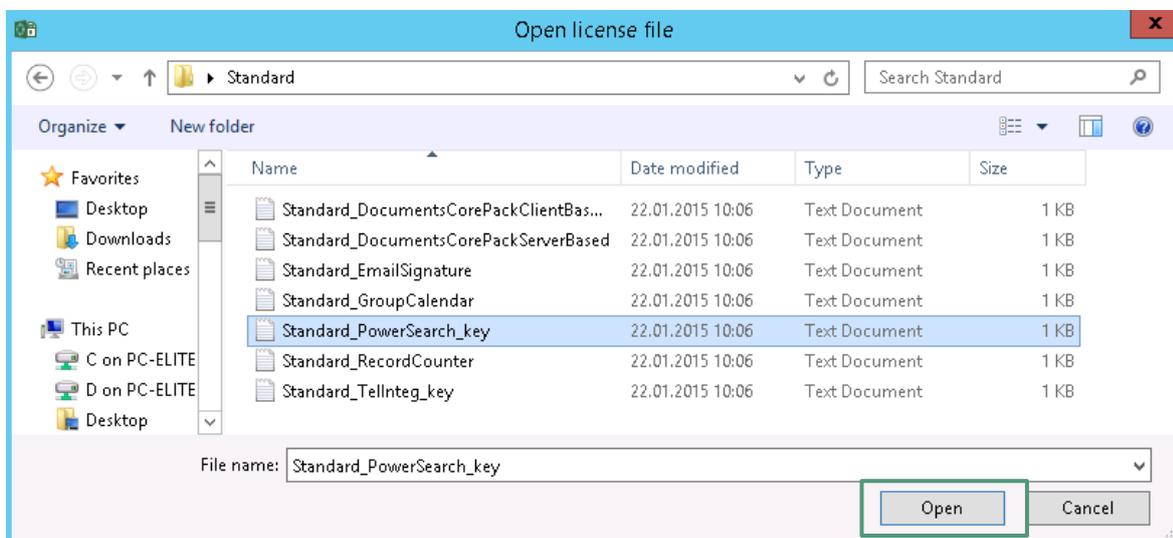
Choose the connection (usually you just need to hit OK).

The License Manager Overview appears:

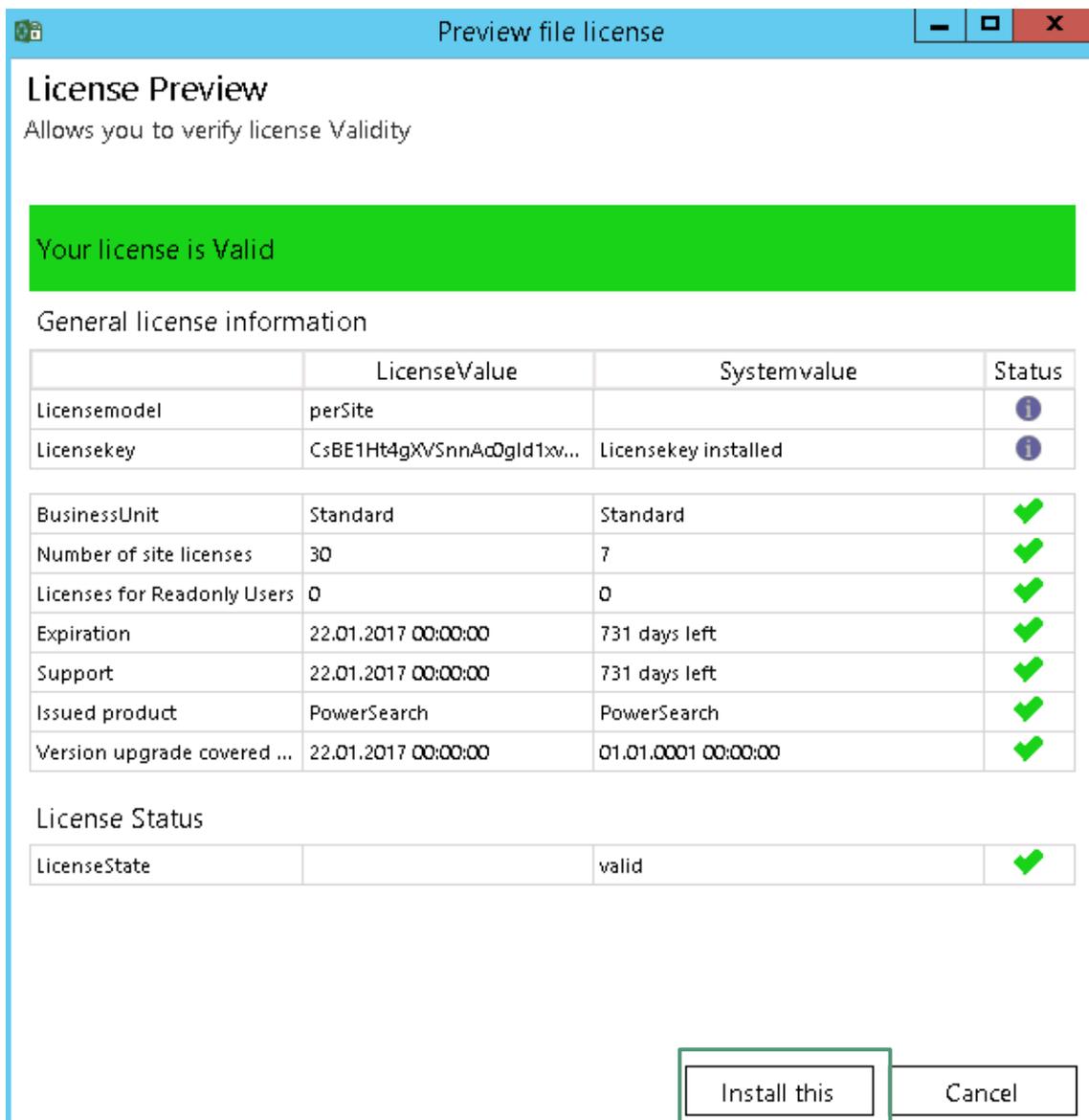


While the Trial version is enabled you will see the above screen.

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

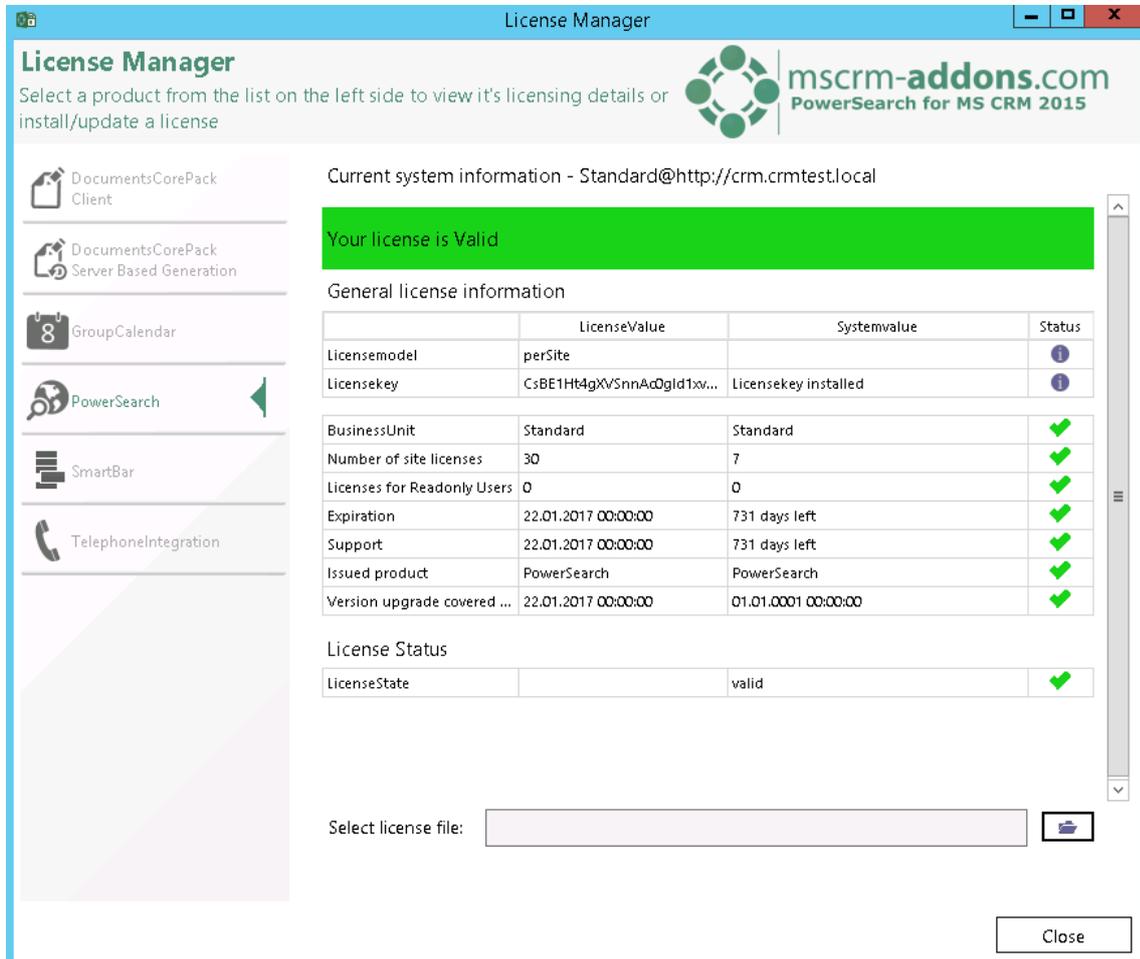


Once the correct license file is opened, following window appears:



Click on [Install this] to complete the license installation process.

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:



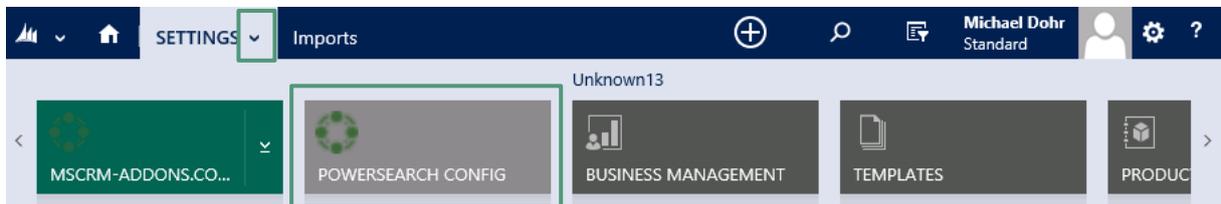
In the example above you can see a valid license.

## 6 Configuration

The PowerSearch for MS CRM 2015 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:



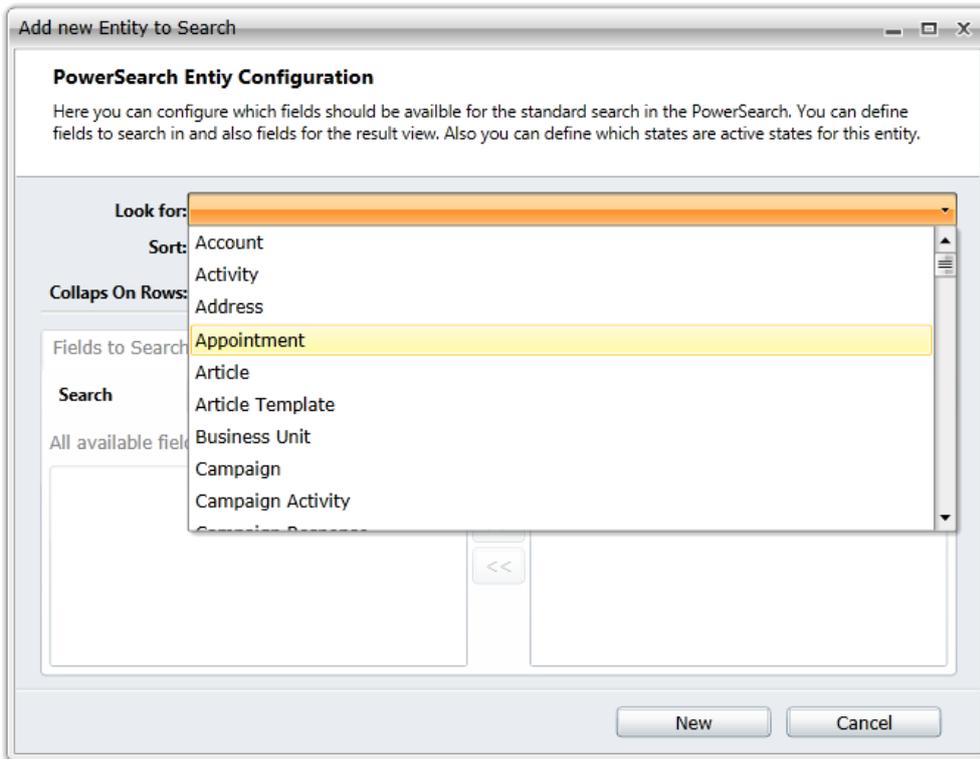
Following window appears:

Name	Searchfields	Resultfields	SelectedStates	Sort	Collaps
Account	Email,Account Name,Primary Contact	Account Name,Address 1: Country/Region,Address 1: City,Adc	Active	0	-1
Case	Case Title,Subject,Responsible Contact,Customer,Contract	Case Title,Subject,Responsible Contact,Product,Description,Cu	Active	0	-1
Contact	Company Name,First Name,Full Name,Last Name,Email	Company Name,Full Name,Email,Address 1: City,Address 1: C	Active	0	-1
Invoice	Opportunity,Invoice ID,Name,Customer	Opportunity,Invoice ID,Customer,Total Amount,Order	Active,Paid	0	-1
Lead	First Name,Name,Last Name,Customer,Email	Street 1,Name,Customer,Company Name,Email	Open	0	-1
Order	Quote,Opportunity,Description,Customer	Total Amount,Ship To Contact Name,Quote,Opportunity,Descri	Submitted,Fulfilled,Activ	0	-1
Quote	Name,Potential Customer	Description,Name,Potential Customer,Total Amount,Total Tax	Won,Active	0	-1

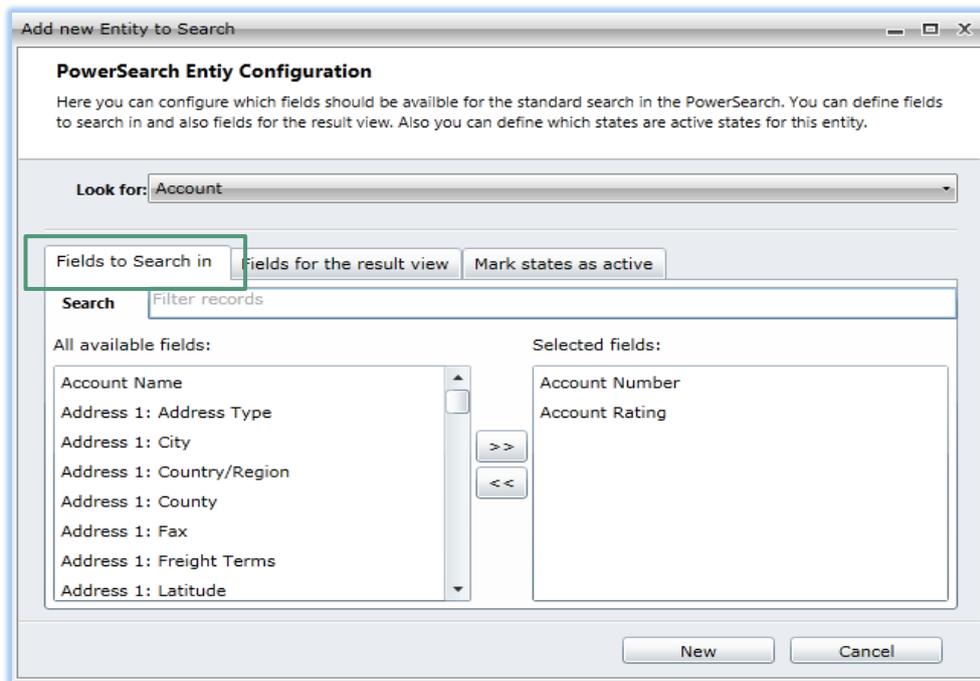
To select new entities, click the "new"-button in the task bar (see screenshot below).

Name	Searchfields
Account	Email,Account Name,Primary Contact
Case	Case Title,Subject,Responsible Contact,Customer,Contract
Contact	Company Name,First Name,Full Name,Last Name,Email
Invoice	Opportunity,Invoice ID,Name,Customer
Lead	First Name,Name,Last Name,Customer,Email
Order	Quote,Opportunity,Description,Customer
Quote	Name,Potential Customer

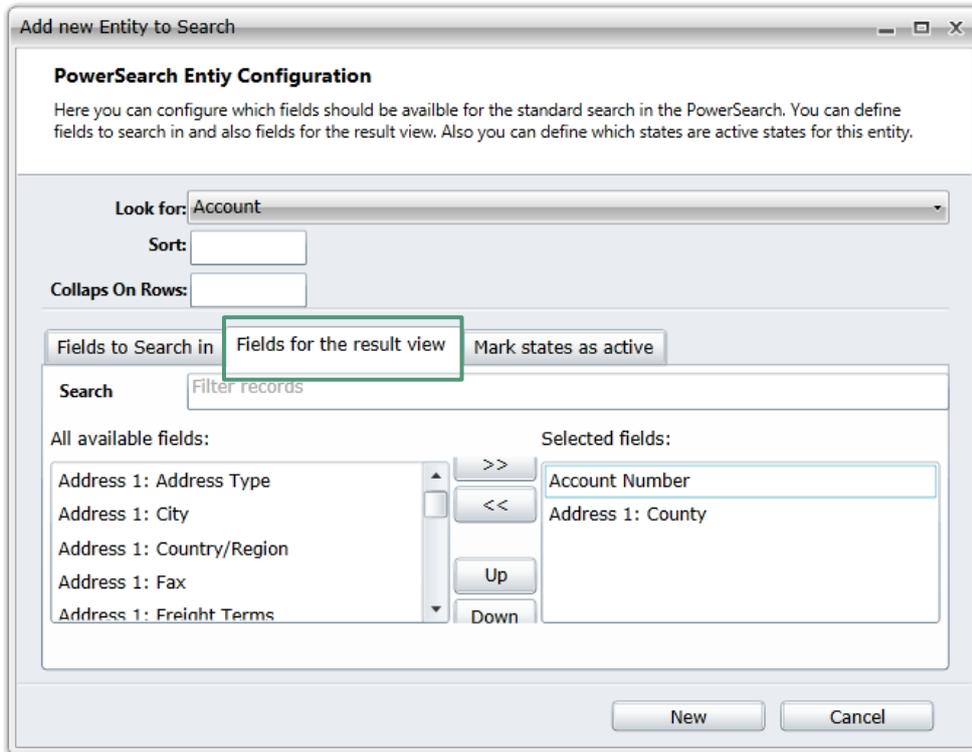
The following form will open; click "look for" to select new entities:



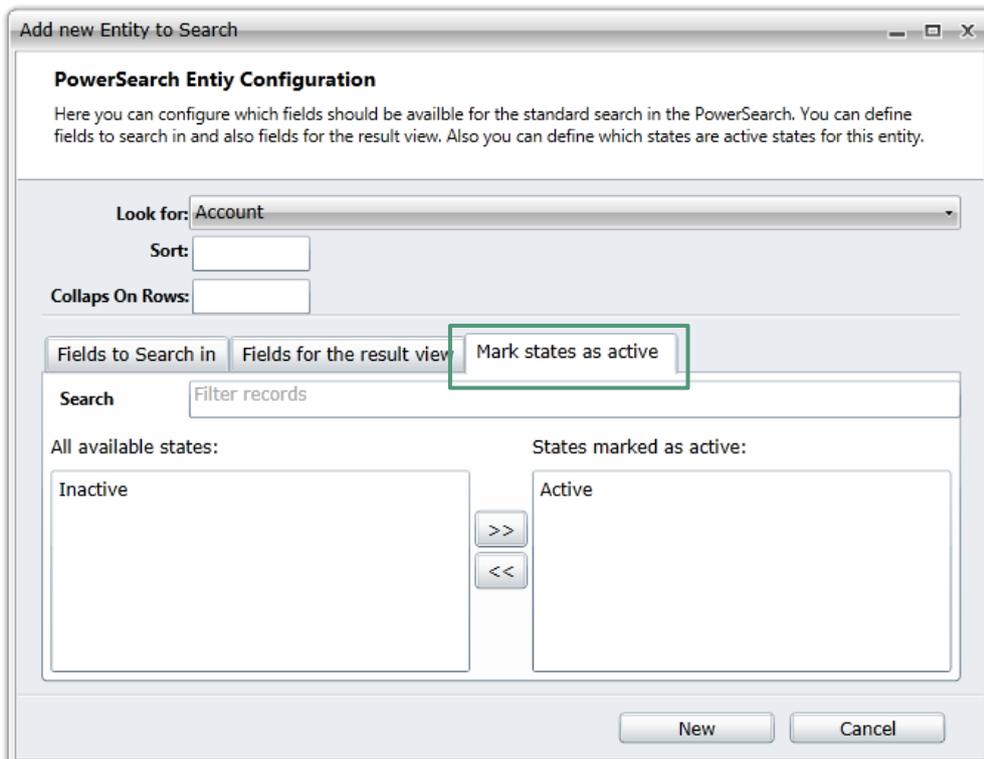
With these two buttons you can select and unselect entities in "Fields to search in":



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:



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



## 7 How to activate debugging

Debugging for Power Search is very easy to understand.

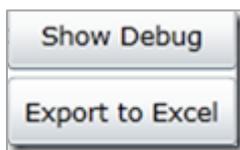
For Example:

crm:5555/PTMEDVSystemeGmbH + the following link

[Servername+Organisation]/webresources/ptm\_mscrmaddons/PSSStartPage.html#debug=true

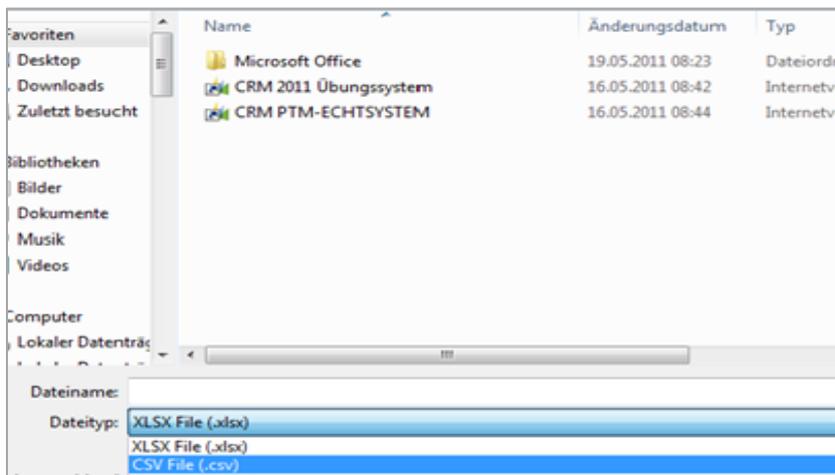
Once the error message appears, please continue with the following steps.

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.

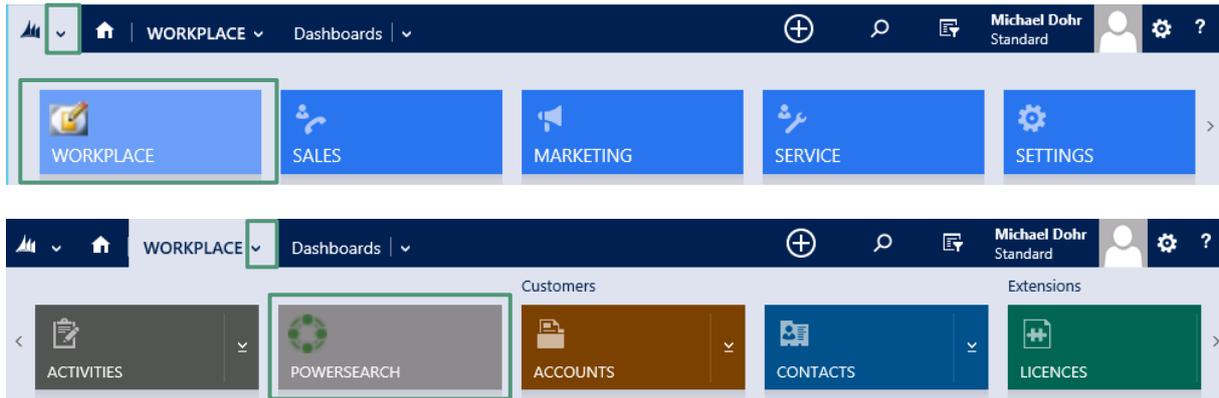
(see screenshot above).

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.

WORKPLACE PowerSearch

NEW ACTIVITY + NEW RECORD IMPORT DATA ADVANCED FIND POWER SEARCH

PowerSearch msd Favorites:

Account(1) Add Filter: Type Here To Filter Result 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: Type Here To Filter Result

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: Type Here To Filter Result

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

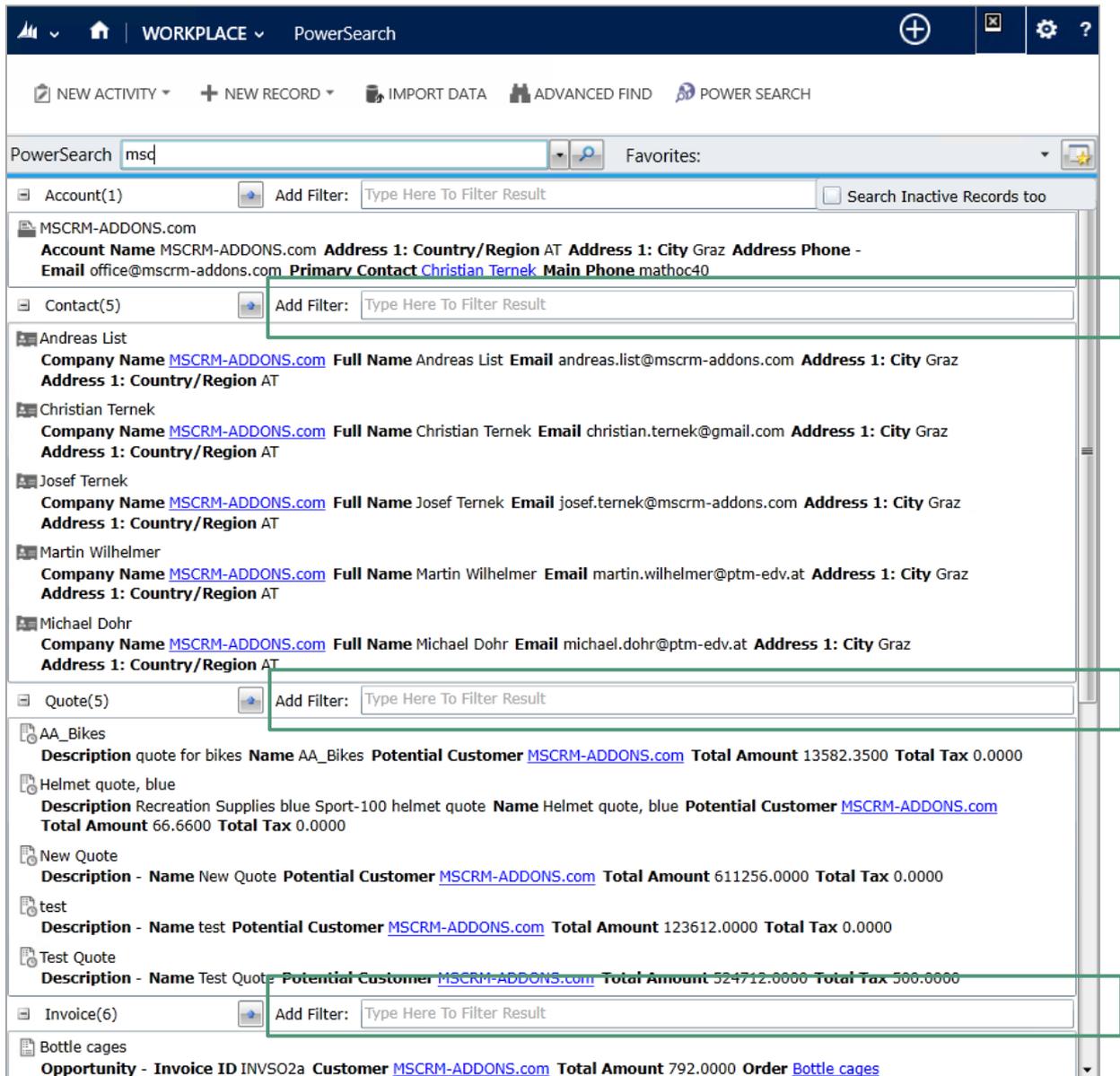
Test Quote  
**Description - Name** Test Quote **Potential Customer** [MSCRM-ADDONS.com](#) **Total Amount** 524712.0000 **Total Tax** 500.0000

Invoice(6) Add Filter: Type Here To Filter Result

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' entered. The results are categorized into Account(1), Contact(5), Quote(5), and Invoice(6). Green boxes highlight the 'Add Filter' input fields for the Contact, Quote, and Invoice categories.

**Account(1)**  
 Add Filter: Type Here To Filter Result  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: Type Here To Filter Result

**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: Type Here To Filter Result

**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

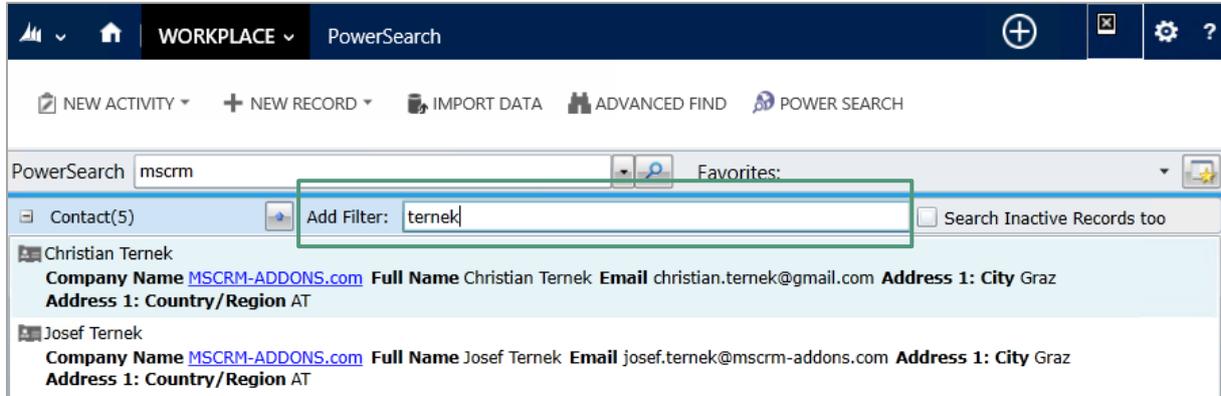
**test**  
**Description - Name** test **Potential Customer** [MSCRM-ADDONS.com](#) **Total Amount** 123612.0000 **Total Tax** 0.0000

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

**Invoice(6)**  
 Add Filter: Type Here To Filter Result

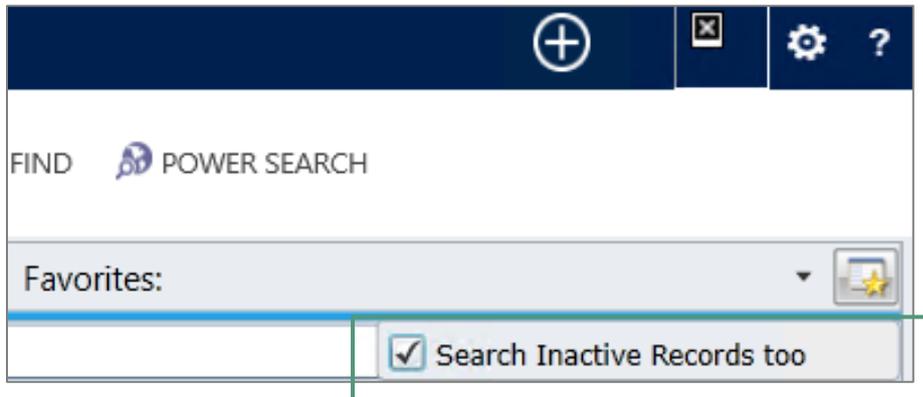
**Bottle cages**  
**Opportunity - Invoice ID** INVS02a **Customer** [MSCRM-ADDONS.com](#) **Total Amount** 792.0000 **Order** [Bottle cages](#)

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

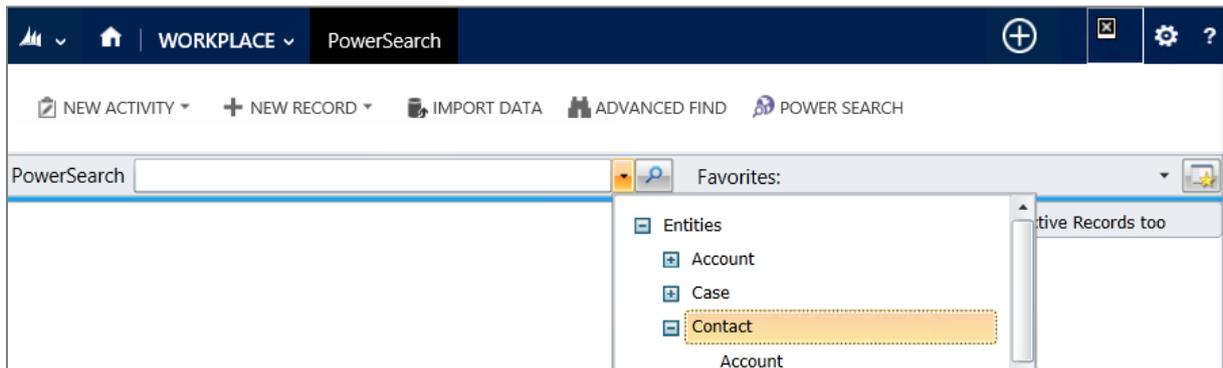
Within the PowerSearch Main Form you can also use the checkbox on the right to search for inactive records too. The PowerSearch filter will immediately filter your results. See screenshots below:



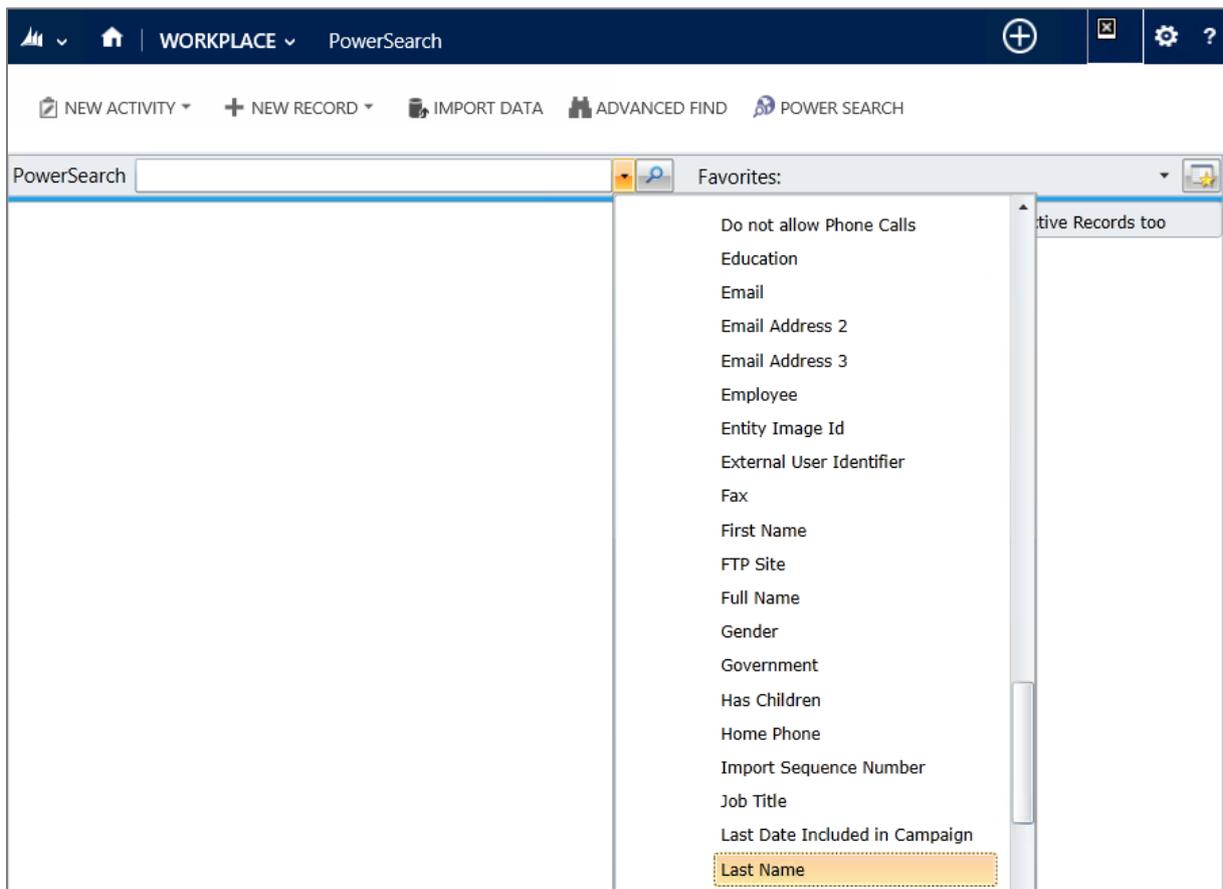
### 8.3 Search for different attributes

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

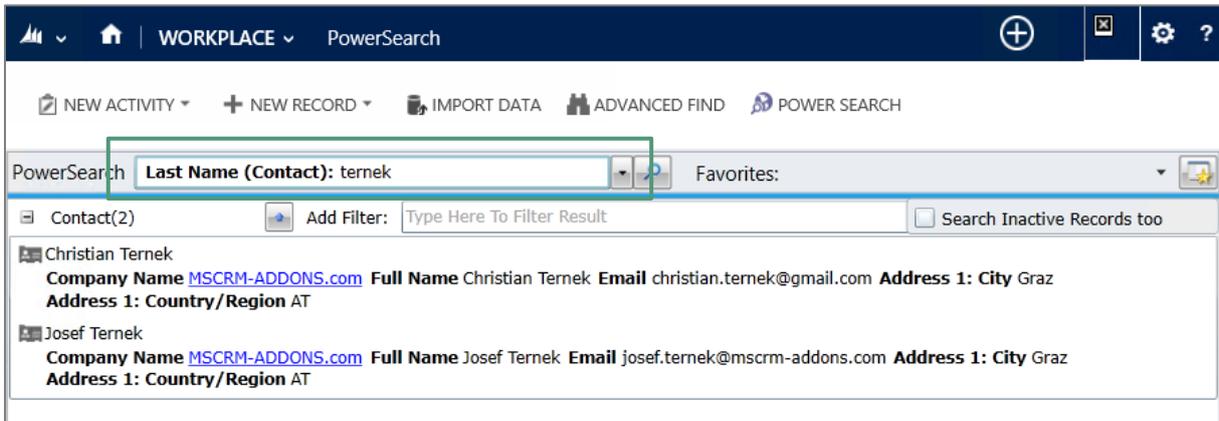
To see the different attributes you can search for, click on the dropdown-button next to the PowerSearch search field. E.g. if you want to search for the contacts click on the plus sign and define for which attribute you want to look for. See screenshots below:



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:



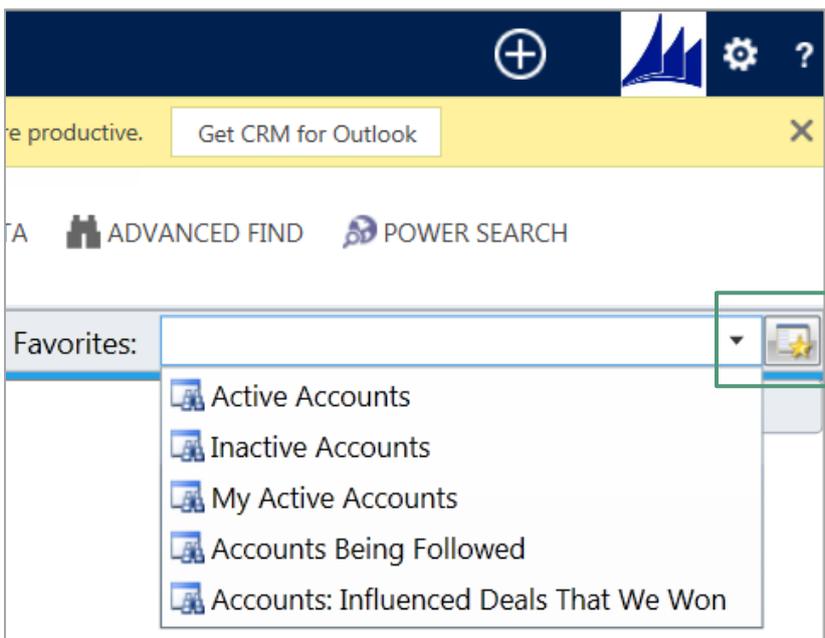
In our case we want to search for all contacts with the last name "ternek". See screenshot below:



## 9 Favorites

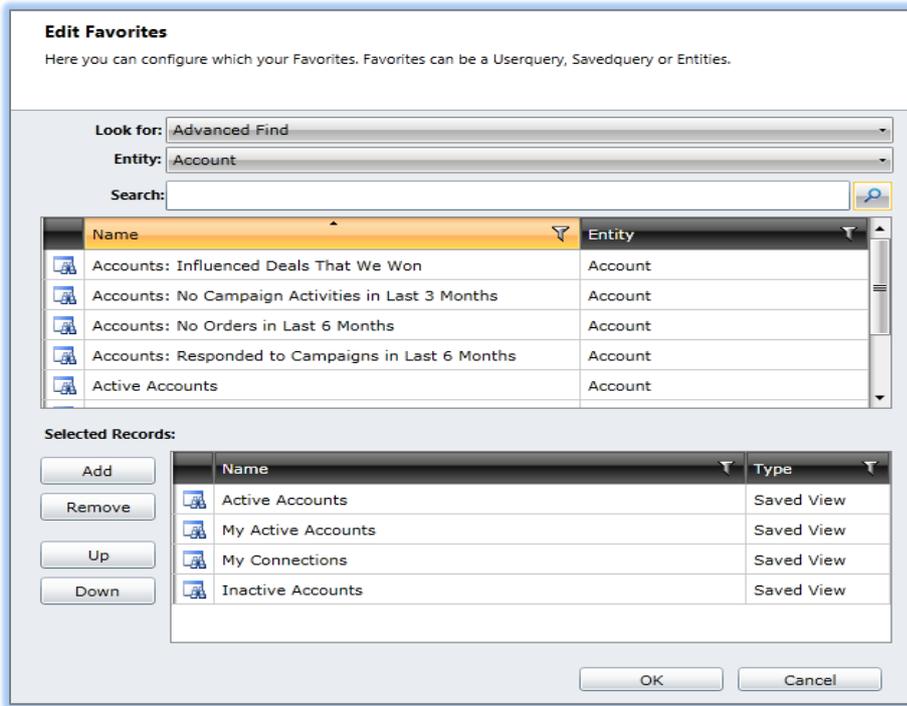
### 9.1 How to edit your favorites (Personal Favorites)

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.

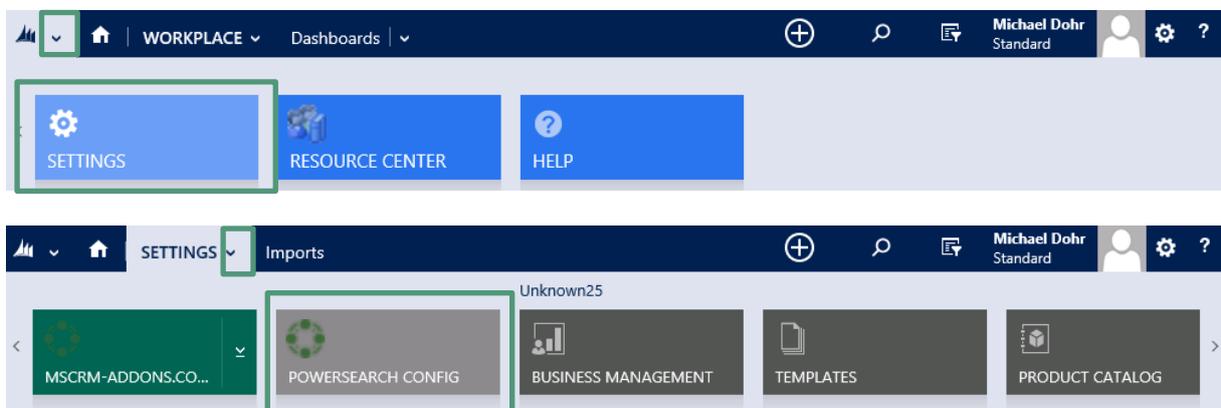
The following window appears:



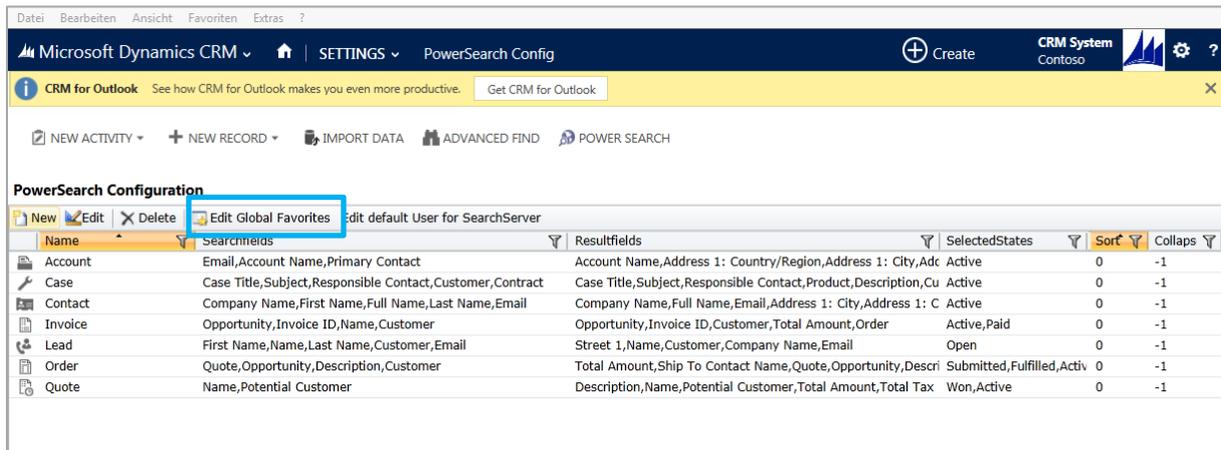
Select the entries that you are looking for (Entities or Advanced Search) and in which entities (activities, accounts, contacts, etc.) you want to search for with a double-click. After searching for entities add the entities you want to search in with the [Add]-button, remove entities with the [Remove]-button 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.

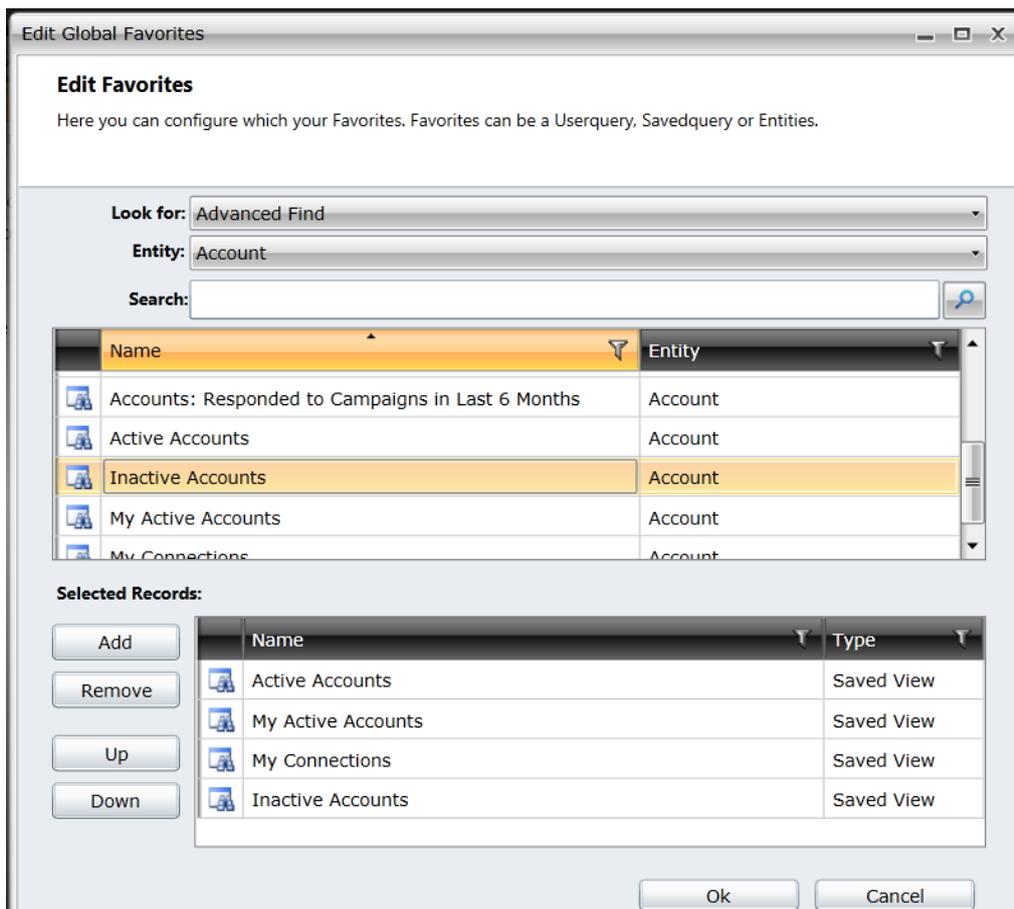


Within the PowerSearch Configuration click "Edit Global Favorites".



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](mailto:support@mscrm-addons.com)

or visit our blog

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

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Tel Austria +43 316 680-880-0

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