



PowerSearch for MS CRM 2011

Version 5.0

Installation Guide

(How to install/uninstall PowerSearch for MS CRM 2011)

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1 Common Information

Before installing PowerSearch for MS CRM 2011, please read this document and follow the steps carefully.

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 2011.
2. Configuring the Search –criteria

2 PowerSearch for Microsoft Dynamics CRM 2011 Beta Prerequisites

Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

Supported CRM Versions

Microsoft Dynamics CRM 2011 Beta OnPremise Version 5.0.9585.110

Microsoft Dynamics CRM 2011 Beta Online Version 5.0.9585.216

Microsoft Dynamics CRM 2011 RC1 Version 5.0.9688.34

Windows Identity Foundation

Will be installed as part of the DocumtsCorePack Server Setup

Supported Operating Systems

Windows 7 32/64bit

Windows Vista 32/64bit

Windows Server 2008 32/64bit

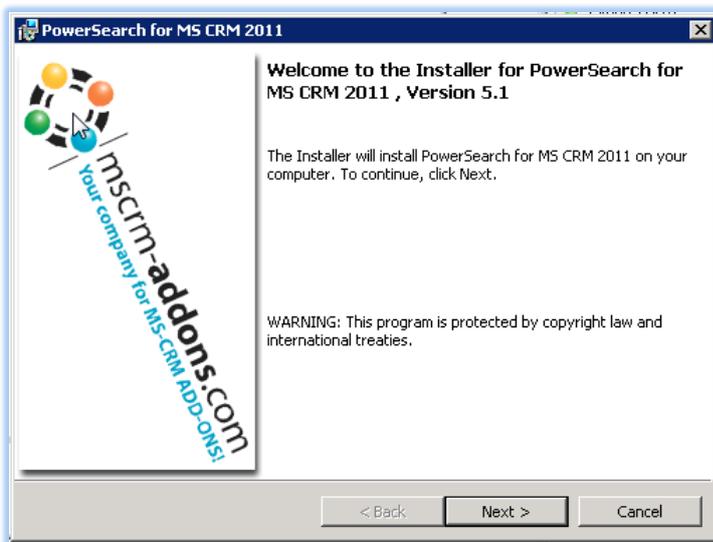
Windows Server 2008 R2 32/64bit

3 Installation

You could install PowerSearch for Microsoft Dynamics CRM 2011 Beta on any supported operating system which is able to connect to your CRM 2011 Server.

3.1 Introduction

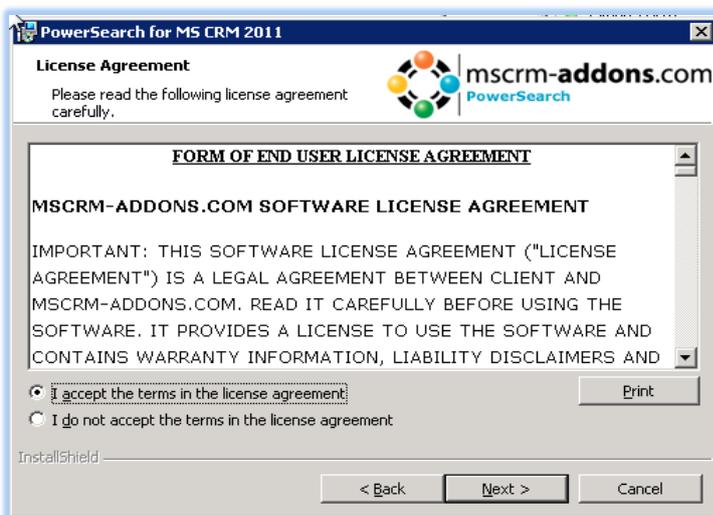
Run the Power Search for MS CRM 2011 Setup file.
The following window will appear:



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



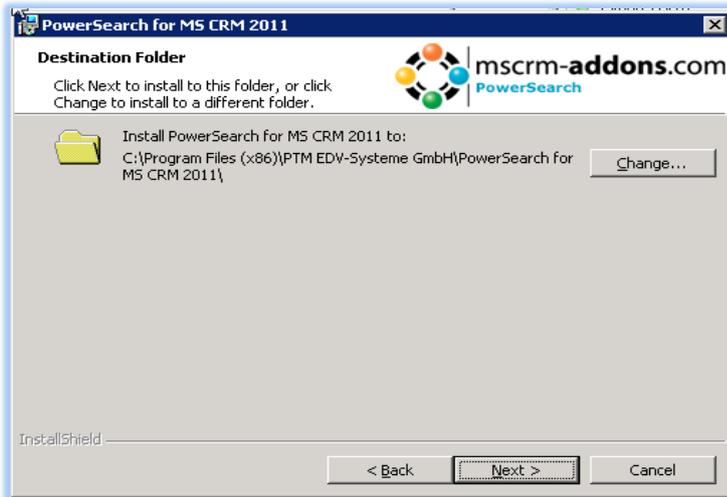
Click [Next] to proceed.

3.1.2 Language Selection

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

3.1.3 Folder Selection

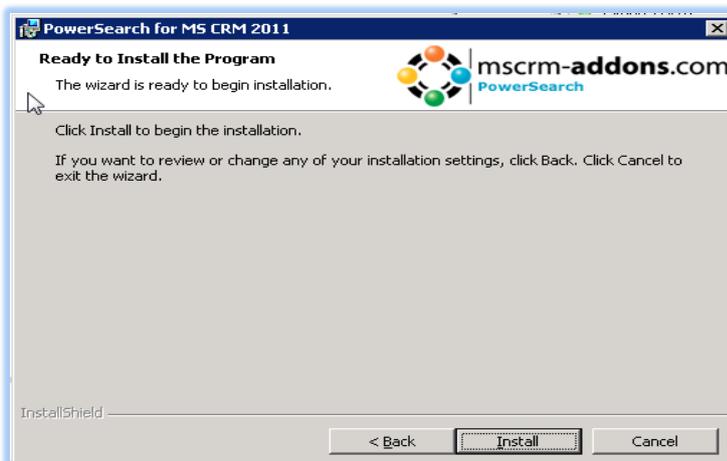
Here it's possible to set the installation directory



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

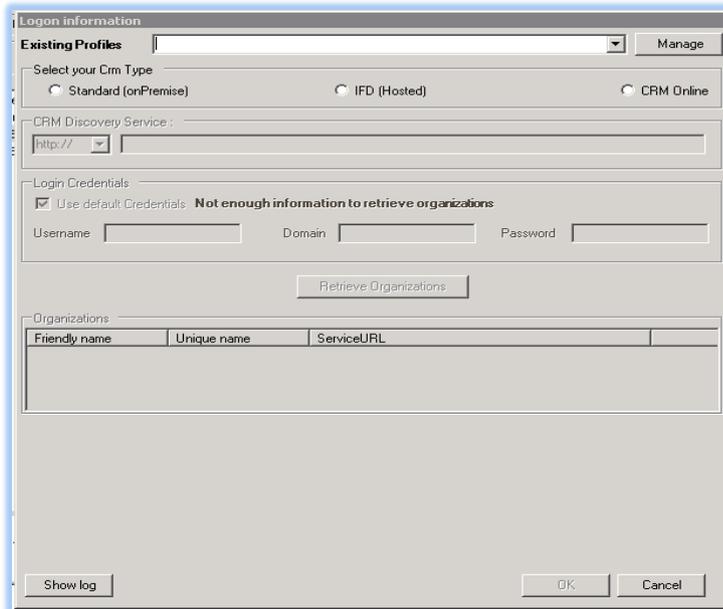
3.1.4 Confirm Installation

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:



Logon information

Existing Profiles: [] Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service: [http://]

Login Credentials

Use default Credentials **Not enough information to retrieve organizations**

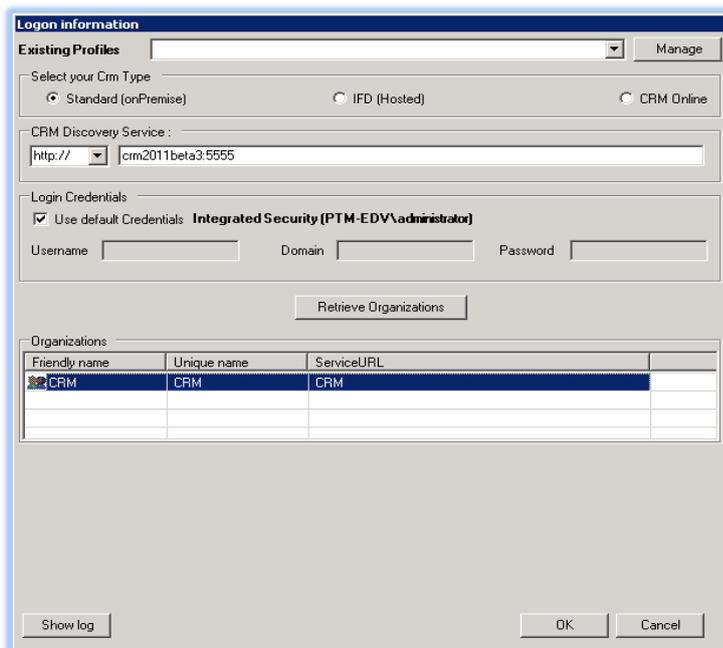
Username: [] Domain: [] Password: []

Retrieve Organizations

Friendly name	Unique name	ServiceURL

Show log OK Cancel

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.



Logon information

Existing Profiles: [] Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service: [http://] [crm2011beta3:5555]

Login Credentials

Use default Credentials **Integrated Security (PTM-EDV\administrator)**

Username: [] Domain: [] Password: []

Retrieve Organizations

Friendly name	Unique name	ServiceURL
CRM	CRM	CRM

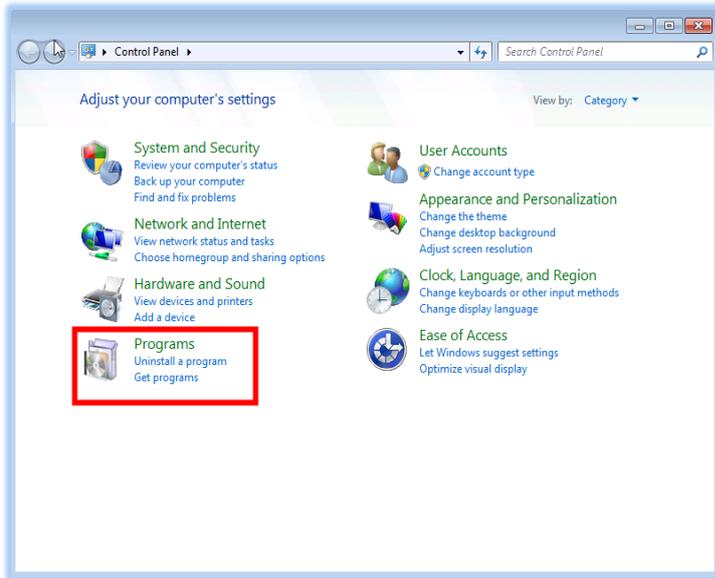
Show log OK Cancel

3.1.6 Finish

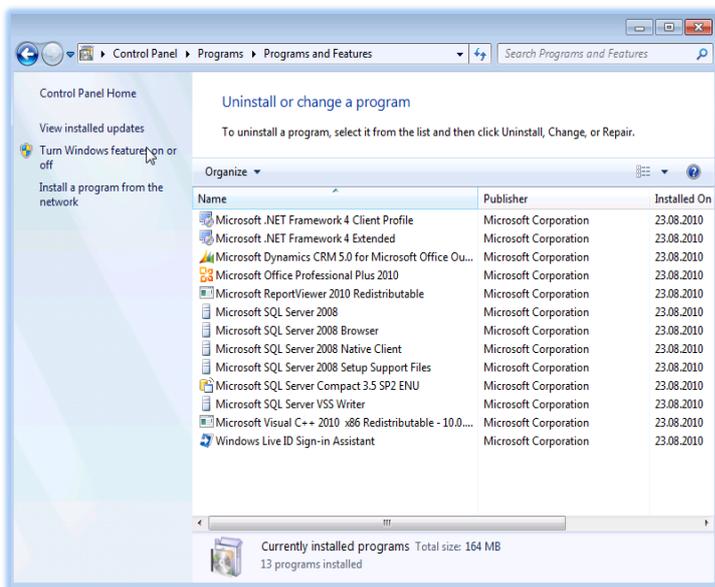
A new entry has been created in the sitemap. You will see a new menu item under "Workspace" in CRM called "Power Search".

3.1.7 Uninstall

To uninstall PowerSearch select Programs in Control Panel.



Search for PowerSearch CRM 2011 in “Uninstall or change a program” to uninstall PowerSearch. Follow the instructions to uninstall PowerSearch.



4 Security Roles

General security roles for all products:

The following security role is required by all our products.

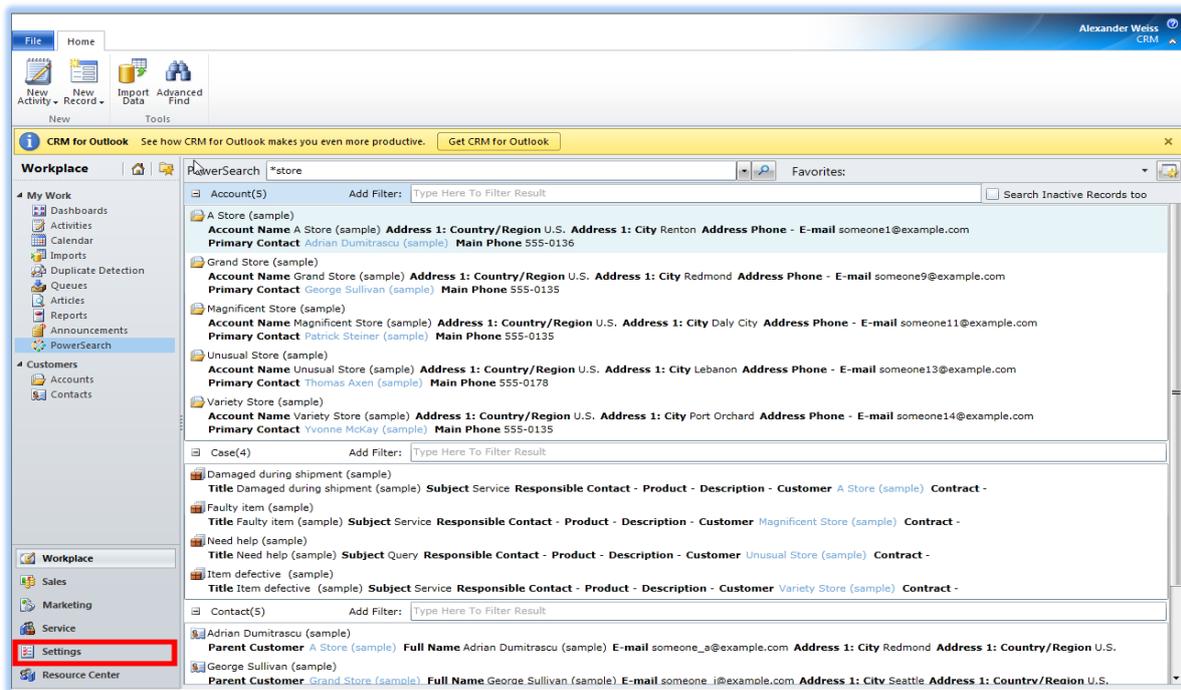
- MSCRM-Addons General Security Role

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

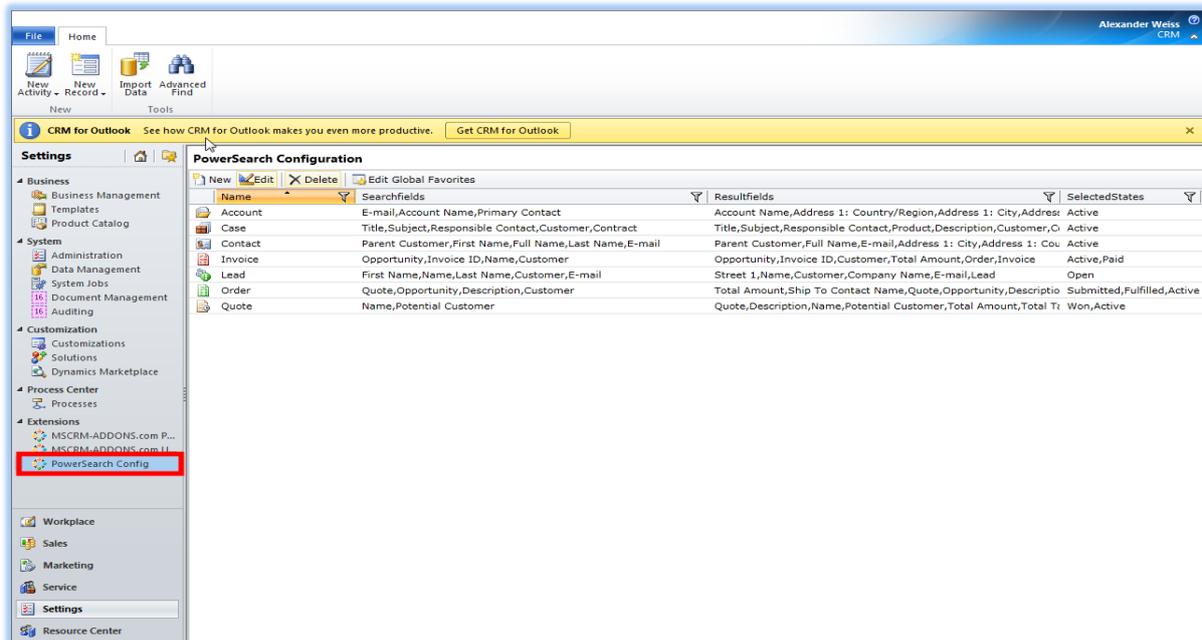
5 Configuration

The PowerSearch for MS CRM 2011 configuration allows you to specify all entities that should be included in your search.

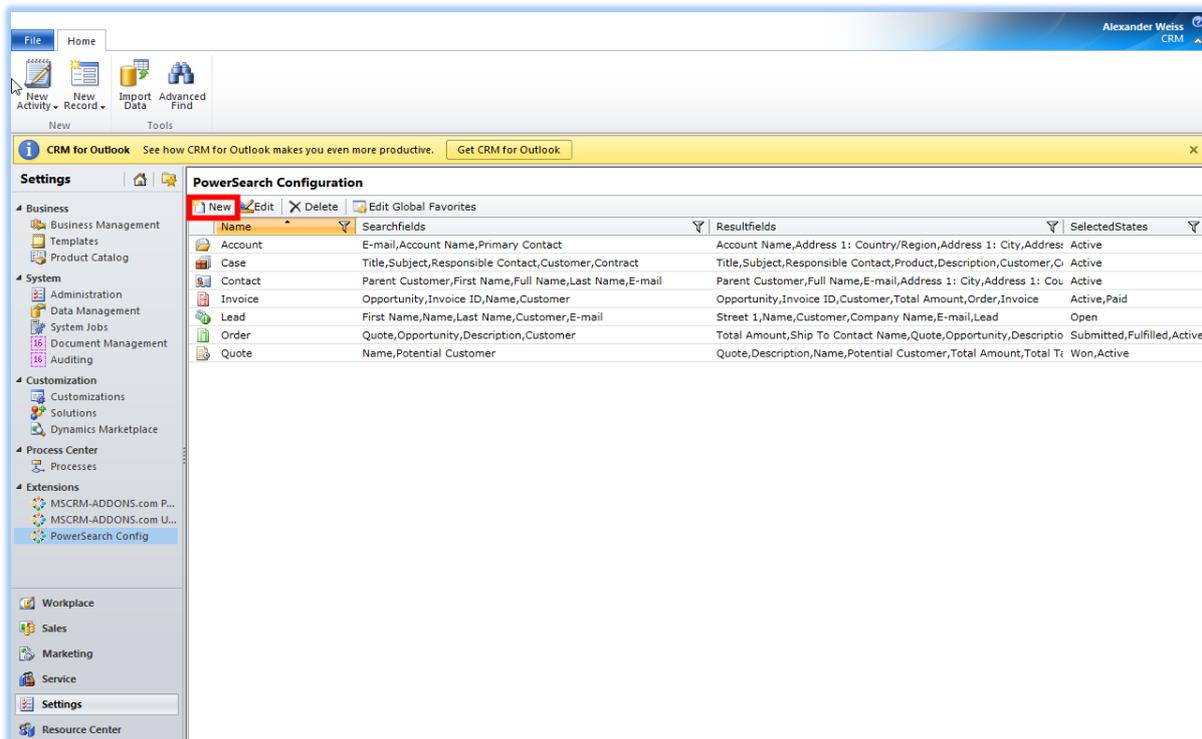
To access the PowerSearch settings click on Settings:



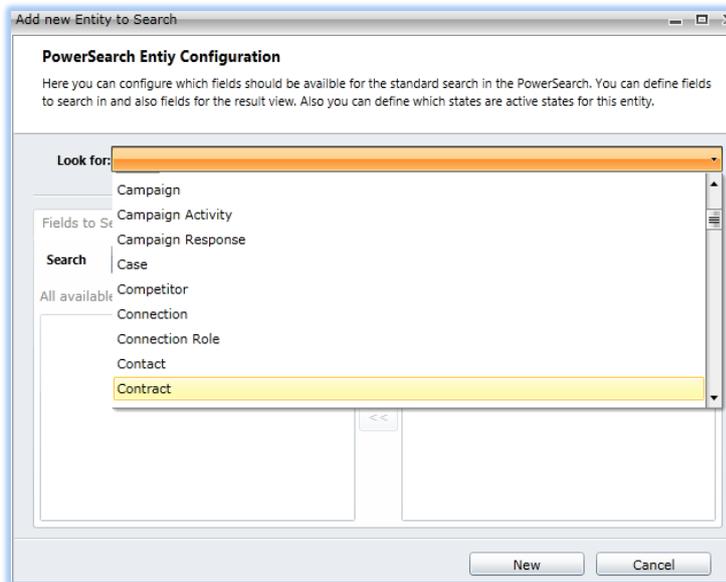
Select the PowerSearch configurator in the extensions menu in the settings option:



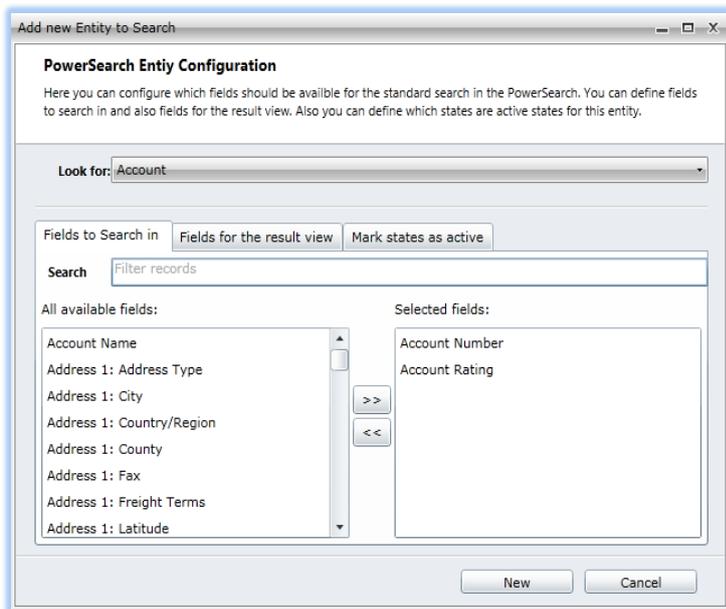
To select new entities, click the "new"-button in the task bar:



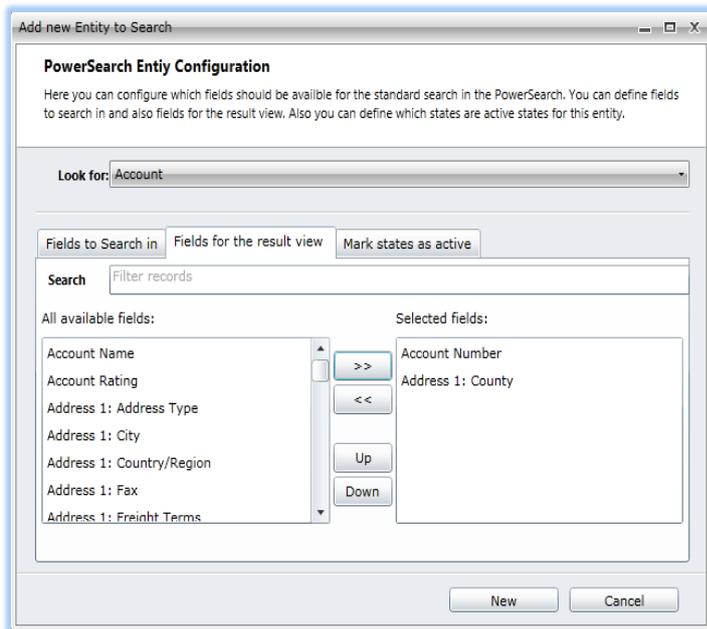
This form will open; click “look for” to select new entities:



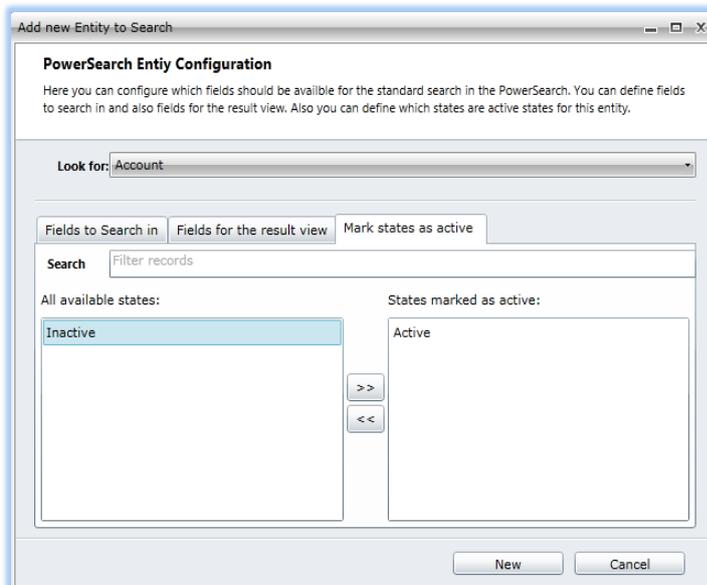
With these two buttons you can select and unselect entities in “Fields to search in”:



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:



6 How to activate debugging

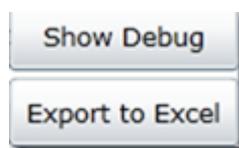
Debugging for Power Search is very easy to understand.

For Example:

crm:5555/PTMEDVSystemeGmbH + the following link

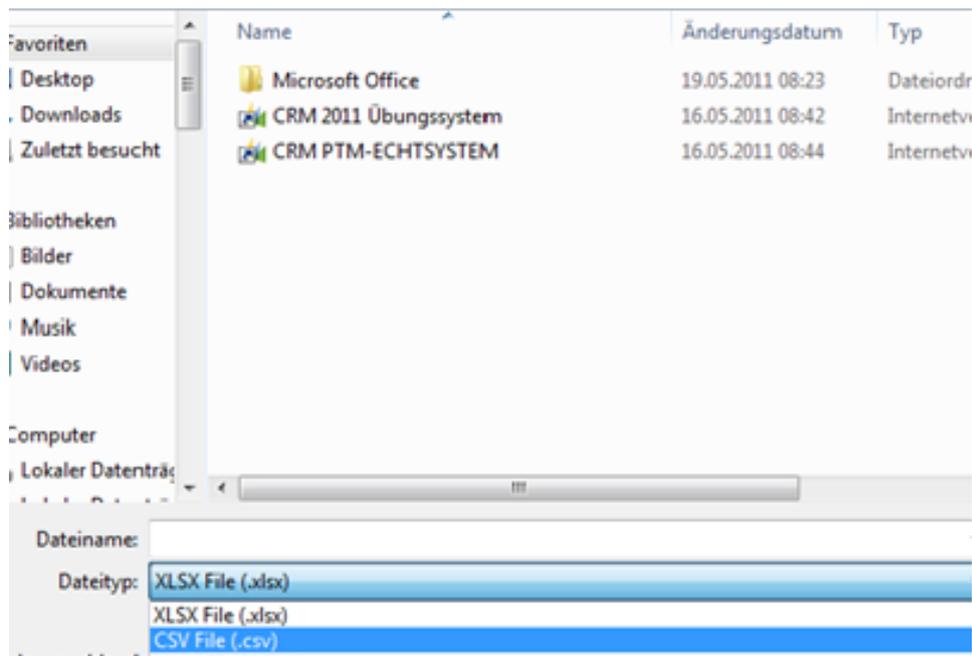
[Servername+Organisation]/webresources/ptm_mscrmaddons/PSStartPage.html#debug=true

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

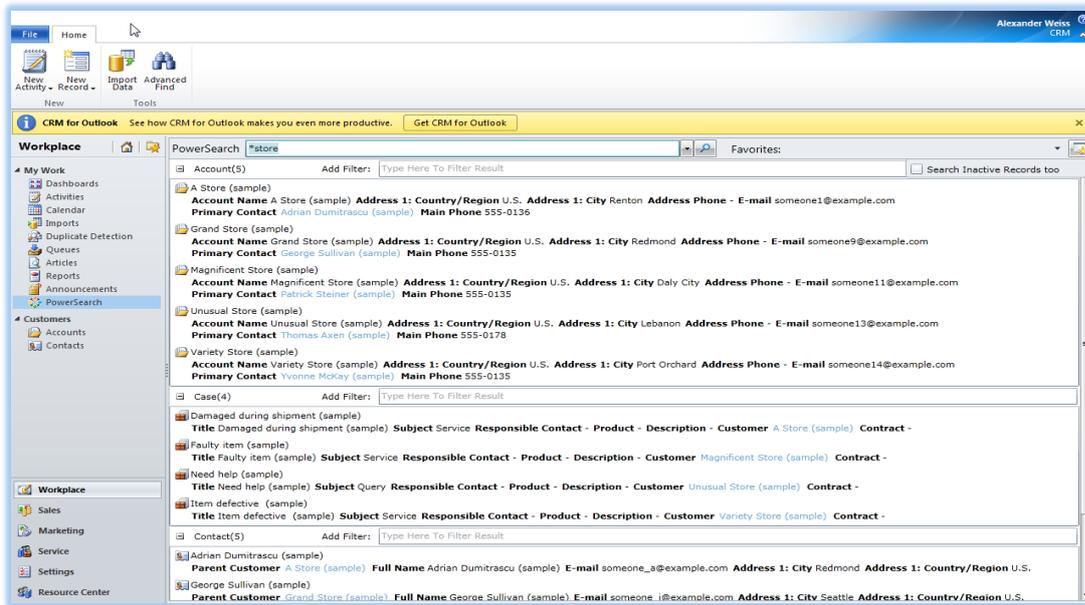
[Servername+Organisation]/webresources/ptm_mscrmaddons/PSConfigPAge.html#debug=true

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).

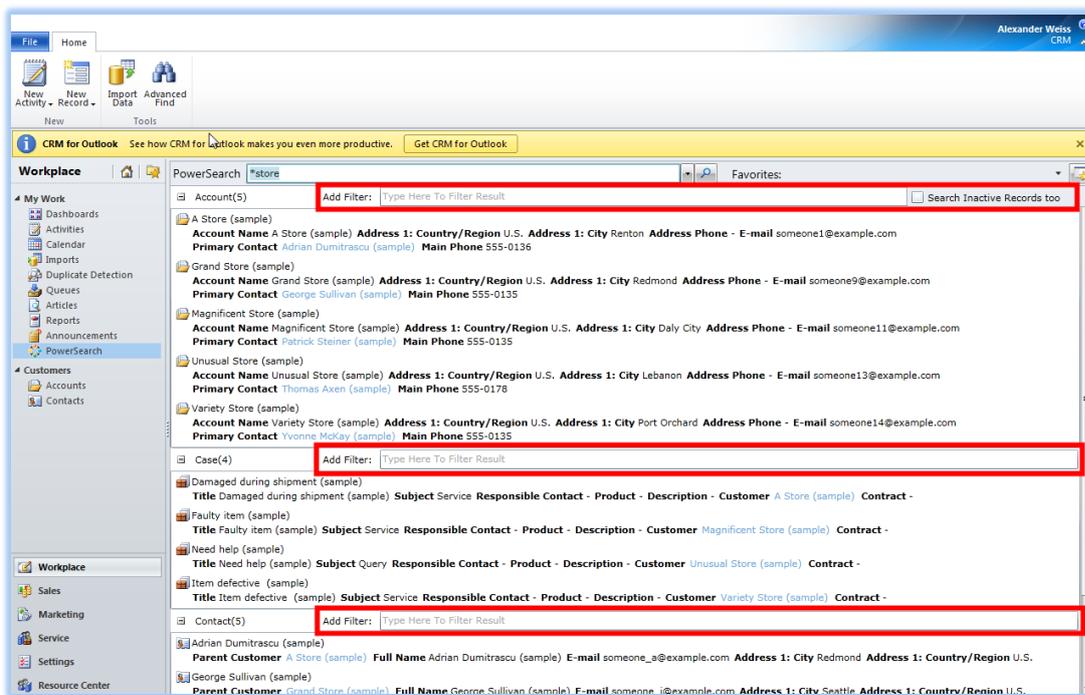
Important: You should store the file as a CSV file instead of a XLSX file.

7 PowerSearch-Main Form

In the PowerSearch-main form you can search for different entities and filter your searched entities. You can also select your favorites or create new favorites.



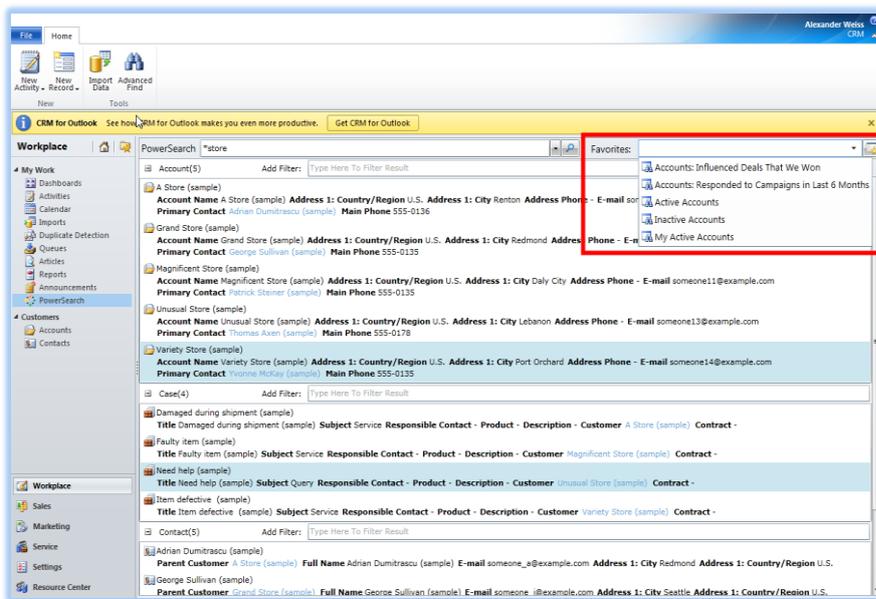
Open the entities with a double click. To filter your entities after a search click in one of the filter-search bars and type the word you want to filter your results on. You can also use the checkbox on the right to search for inactive records too. The PowerSearch filter will immediately filter your results.



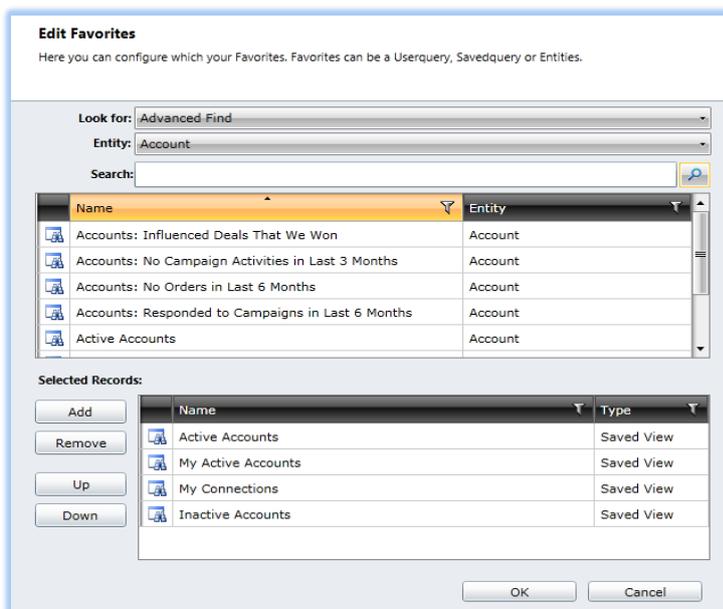
8 Favorites

8.1 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.



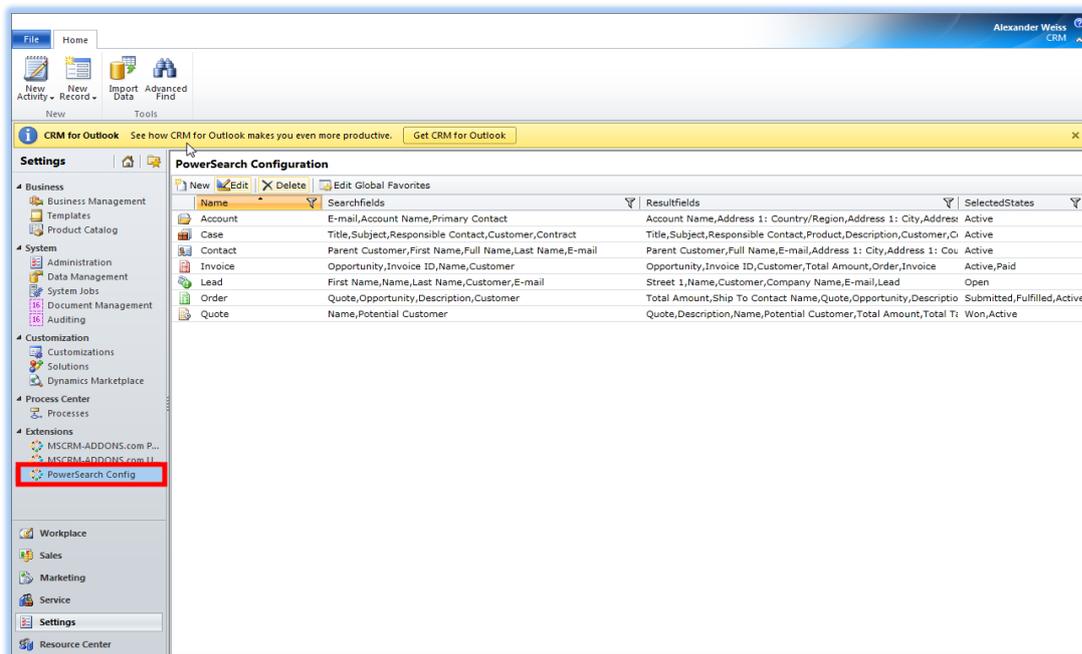
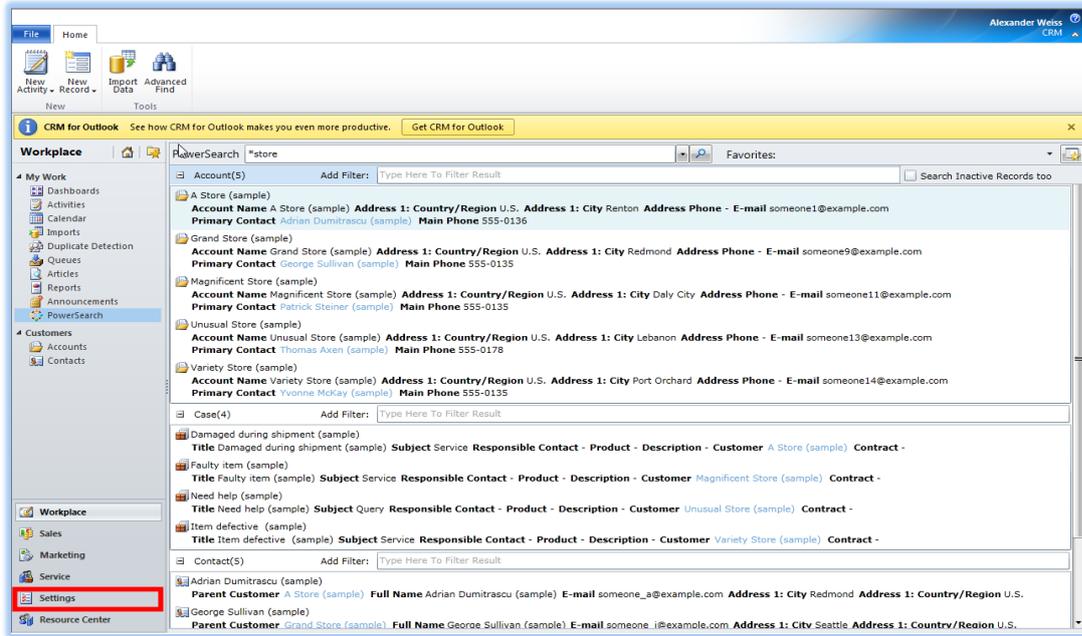
If you dont have any favorites, and want to create new Favorites click on the right of the favorites field. The following window will appear:



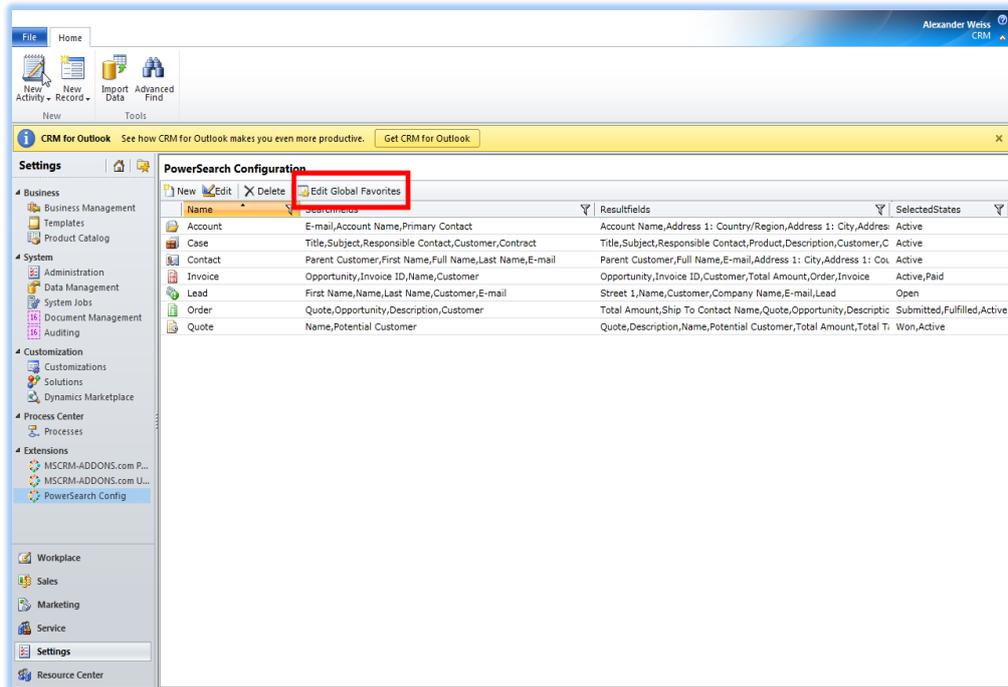
Select the entries that you are looking for (Entities or Advanced Search) and in which entities (activities, accounts, contacts, etc.) you want to search for. After searching for entities add the entities you want to search in with the "Add"-button, remove entities with the "Remove"-button and choose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

8.2 How to edit your favorites (Global Favorites)

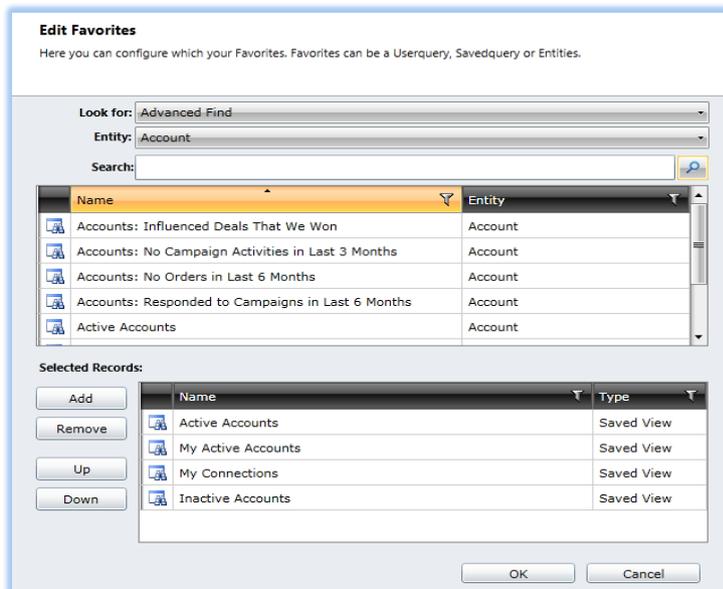
Select "Settings" and click "PowerSearch Config" in the Extensions menu.



When in 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.



9 Contact

If you have questions to the product send an Email to
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