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PowerSearch - Installation and User Guide for Dynamics 365

June 2023

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Table of Contents

1. HOW TO INSTALL POWERSEARCH FOR MICROSOFT DYNAMICS 365 4
1.1. How to install PowerSearch via AppSource 4
1.2. How to install PowerSearch via .exe file 4
1.2.1. Connection Setup 8
1.3. How to install PowerSearch via solution import (manually) 12

2. CONFIGURATION PAGE 16
2.1. The Get Started tab 17
2.2. The Configuration tab 18
2.3. The General Settings tab 19
2.4. The Licensing tab 22
2.5. The About tab 23
2.6. Connection Setup 24

3. HOW TO EMBED POWERSEARCH IN MICROSOFT DYNAMICS 365 26

4. HOW TO ACCESS POWERSEARCH FROM WITHIN MICROSOFT DYNAMICS 365 30
4.1. How to access PowerSearch via the GlobalButton 30
4.2. Via Sitemap link 30

5. THE POWERSEARCH ENTITY CONFIGURATION OVERVIEW 31
5.1. The configuration of PowerSearch entities 31
5.1.1. The General section 32
5.1.2 The Input Fetch Section 34
5.1.3 The Search Fields 36
5.1.4 The Result Fields 37
5.2 How to share PowerSearch Configuration records 38
5.2.1 Open a random PowerSearch Configuration 38
5.2.2 The Share records in mscrm-addons.com PowerSearch Configuration opens 38
5.2.3 Look for a user or team 39
5.2.4 Assign permissions to selected users 39

6 THE POWERSEARCH LAYOUT DESIGNER 41
6.1 How to start the PowerSearch Layout Designer 41
6.2 The PowerSearch Layout Designer surface 43
6.2.1 How to customize Layouts 44

7 POWERSEARCH SURFACE: SPECIAL FIELD FUNCTIONS AND BUTTONS 49
7.1 Look up field 49
7.2 Date related fields 49
7.3 The Open Configuration button 50
7.4 The Clear button 50

8 WAYS TO PROCEED WITH YOUR SEARCH RESULTS 51
8.1 Open the record with a double click on them 51
8.2 Open your results with Microsoft Dynamics 365 52
8.3 Jump from page to page 53
8.4 Change the result or using the column header 54

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9. TUTORIALS (HOW TO´S) 56
9.1. How to search with PowerSearch 56
9.2. How to configure an entity/table 58
9.3. How to add Fields 59
9.4. The results 60
9.5. How to delete Search and Result Fields 60
9.6. How to set an operator 61
9.7. How to enable users to choose between operators 62
9.8. How to change the page size 62
9.9. How to rearrange the order of fields 63
9.10. How to rearrange the Configuration entities (for administrators) 63
9.11. How to rearrange Configuration entities (for users) 65
9.11.1. How to drag and drop Configuration entities 65
9.11.2. How to set result sorting 65

10. LIST OF FIGURES 68

11 CONTACT 71

Preamble

This documentation is intended to guide you through the generation of searches with PowerSearch in Microsoft Dynamics 365.

Please read this document carefully and follow the steps described to achieve the results.

Target Audience

This guide is intended for users applying search queries with PowerSearch who have the following minimum skills:

- Basic Microsoft Dynamics 365 knowledge
- Maintaining and configuring a Microsoft Dynamics 365 Organization

Supported Web Browsers and versions

Supported Web Browsers:

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- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics 365 must be available:

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics On Premise Version 9.0

Purpose of PowerSearch

PowerSearch facilitates – among other things – search queries in Microsoft Dynamics 365. It is the perfect mix between Microsoft Dynamics 365 Standard Search and Microsoft Dynamics 365 Advanced Find.

Thus, PowerSearch provides a powerful search routine. In addition to the standard search functionality, users can predefine common queries and save tons of time on finding records in Dynamics 365.

PowerSearch allows its users to use multiple fields for search queries that are frequently used. This allows the user to search multiple fields simultaneously, for example, to filter a view based on the account name and the city.

There is no need to repeatedly insert every single search parameter anymore. Our powerful add-on allows its users to preconfigure the search fields to save valuable time.

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1. How to install PowerSearch for Microsoft Dynamics 365

PowerSearch is very easy to install and integrate into Microsoft Dynamics 365. There are different ways how to install PowerSearch in your environment.

1.1. How to install PowerSearch via AppSource

By leveraging Microsoft AppSource, businesses can find, and implement our applications like PowerSearch that align with their requirements and help them streamline processes.

After accessing the app on AppSource, check the compatibility and requirements of your Microsoft software, sign into your Microsoft account, and install the app by clicking Free Trial. Make sure you select the environment you want to install PowerSearch in case you have different environments.

Follow any on-screen instructions or prompts to complete the installation process. You may be asked to grant certain permissions or provide additional information during the installation.

Once the app is successfully installed, you should receive a confirmation message or notification. The app should now be accessible within the chosen Microsoft environment.

Follow this article for post AppSource installation.

1.2. How to install PowerSearch via .exe file

PowerSearch can be installed and integrated into Microsoft Dynamics 365 Via an .exe file.

You can find the required data for the installation on our homepage www.mscrm-addons.com in the Download section.

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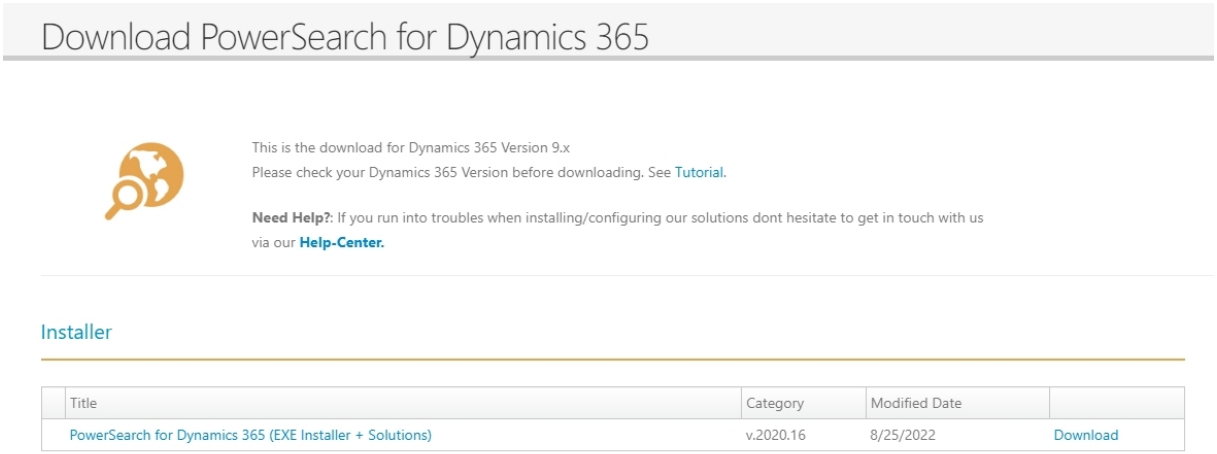

Figure 1: Download section for PowerSearch on www.mscrm-addons.com

With a click on the **Download** button, you will receive a .zip file.

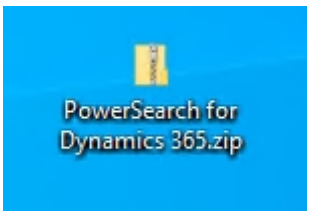

Figure 2: .zip file for PS installation in Dynamics 365

Regardless of the method you select, the .zip file serves as the initial step for your installation. Ensure that you unpack the downloaded .zip file. Once unzipped, the solution package will appear as depicted below.

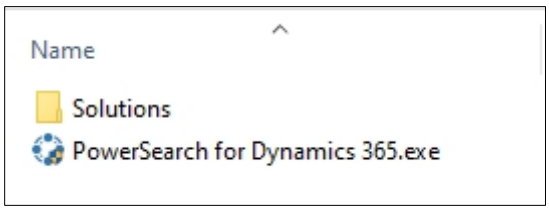

Figure 3: Unzip the PS .exe file

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In the folder where you have unzipped the PowerSearch installation file, make double-click on the .exe file and the InstallShield Wizard opens.

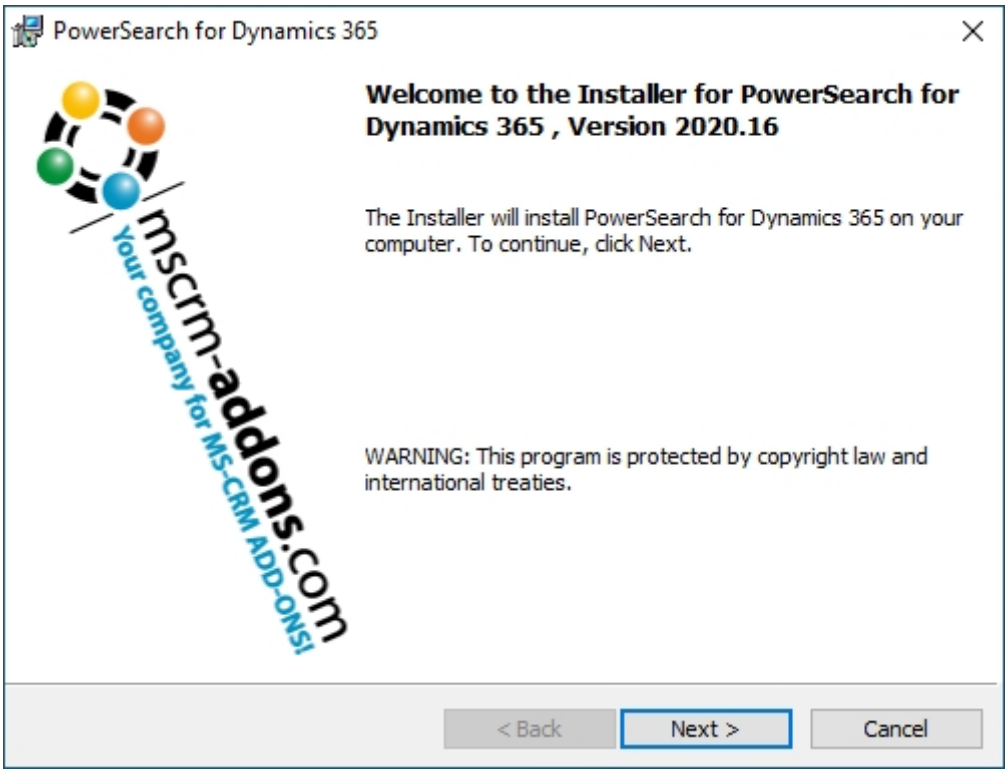

Figure 4: InstallShield Wizard

Click the **Next** button. Now check to accept the terms in the license agreement.

Figure 5: Accept terms of license agreement

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Click **Next** to install to this folder or click **Change** to install to a different folder.

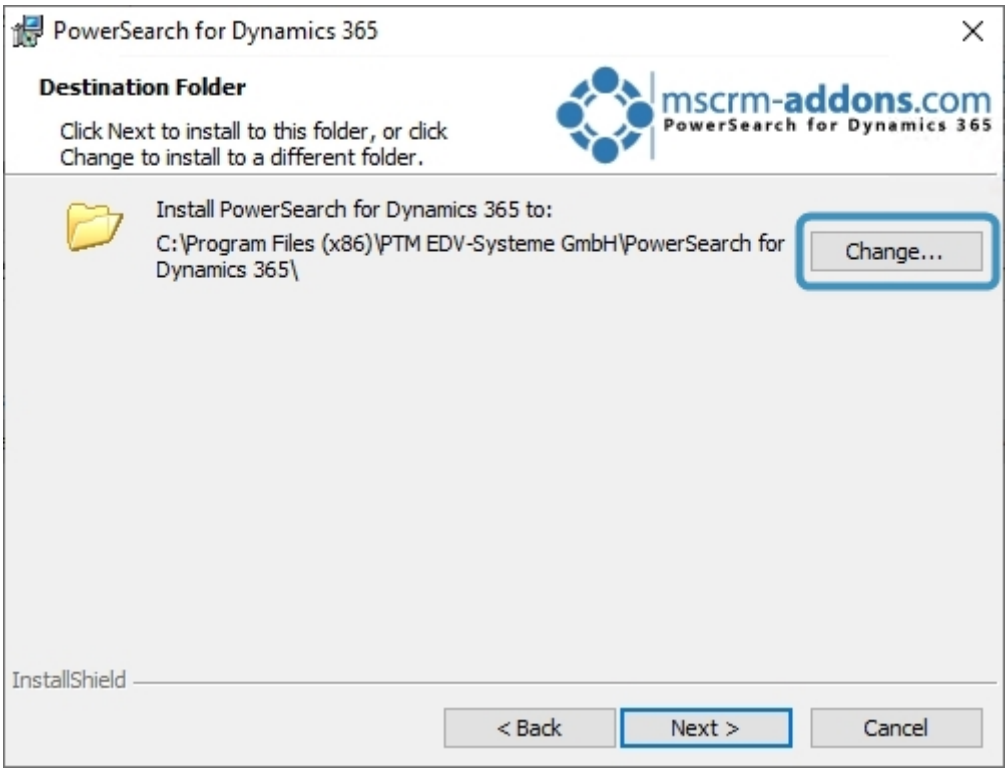

Figure 6: Select the destination folder

Click **Next** and subsequently click **Install** to begin the installation.

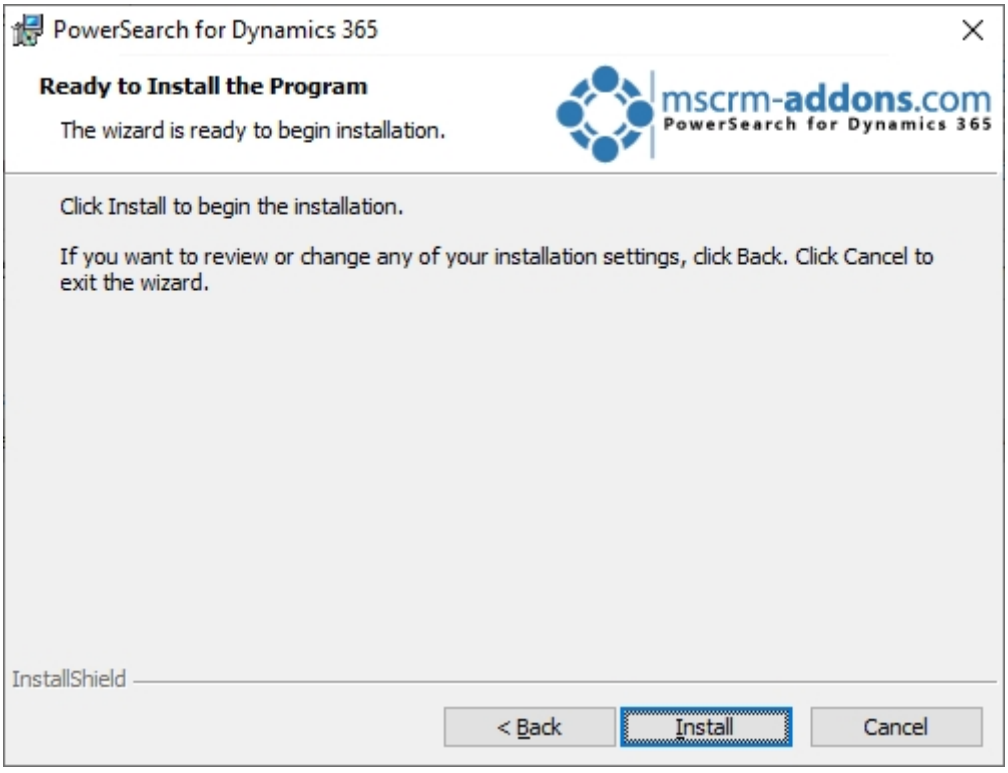

Figure 7: Install the program

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The installation of PowerSearch for Dynamics 365 may take several minutes. You can see it on the status.

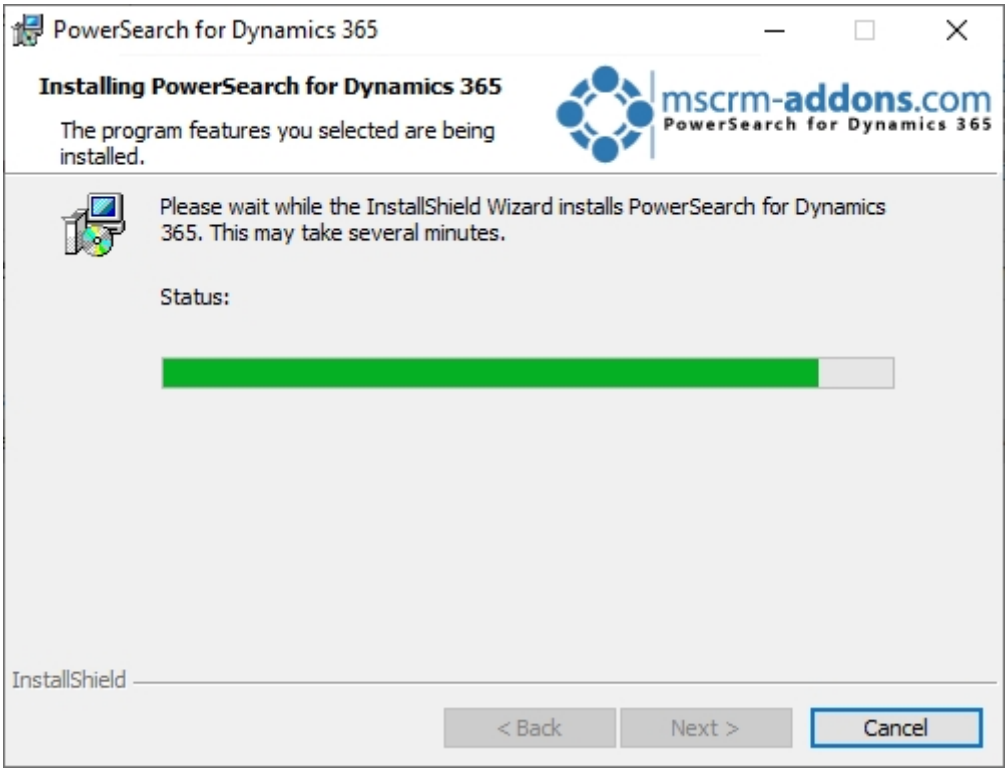

Figure 8: Installing PowerSearch

1.2.1. Connection Setup

This window opens during installation. Please make the connection setup as described.

Select your ❶ **Existing Profile** or create a new profile and select your ❷ **Dynamics 365 type**. Choose the ❸ **Dynamics 365 Server-URL**. Click on the ❹ **Retrieve all** button and as soon as the organizations are retrieved, choose the respective one and press the ❺ **OK** button.

Please note: A login with your Dynamics 365 credentials is required.

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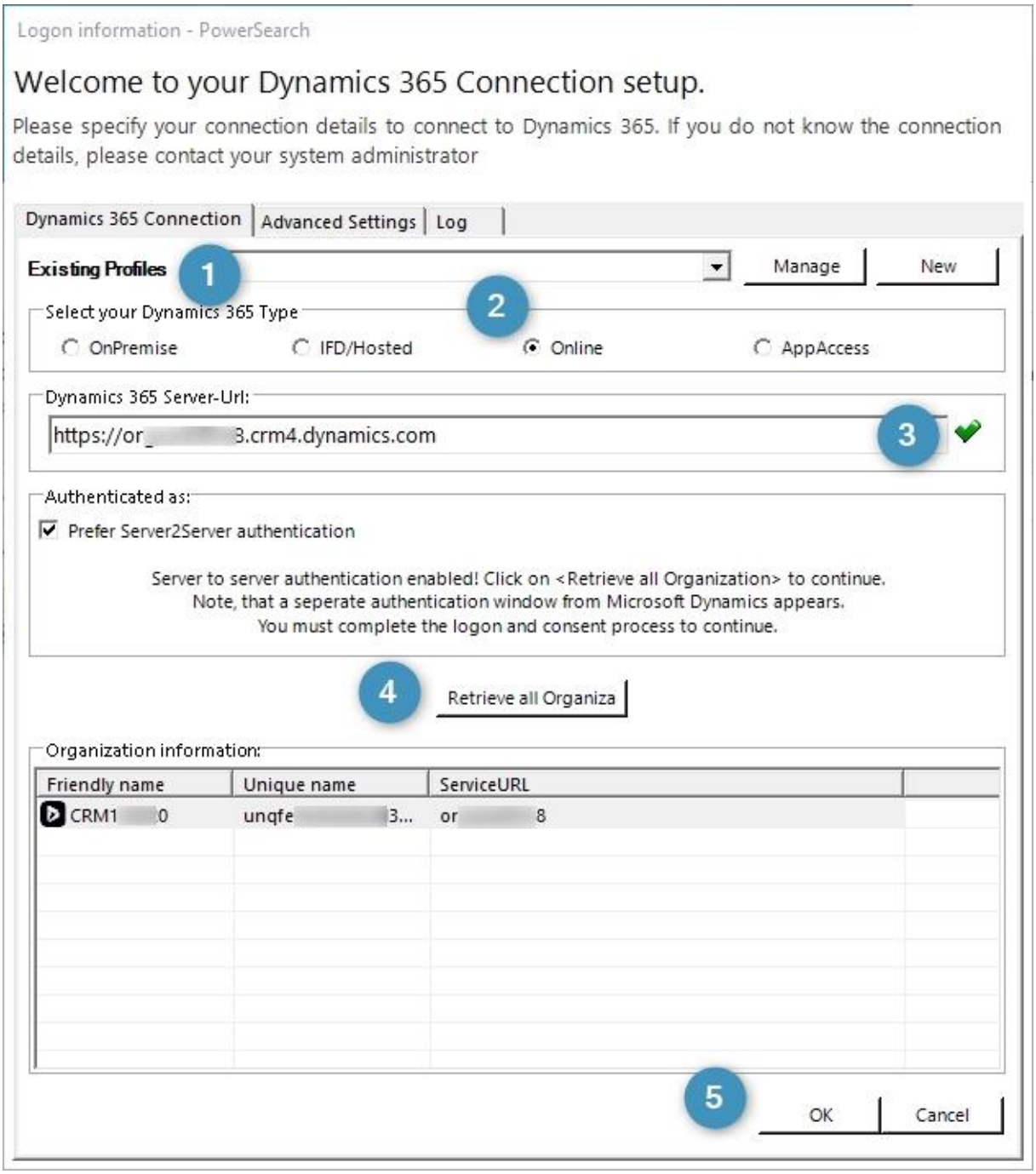

Figure 9: Connection setup

After the Connection setup, please click the **Save** button when this window opens.

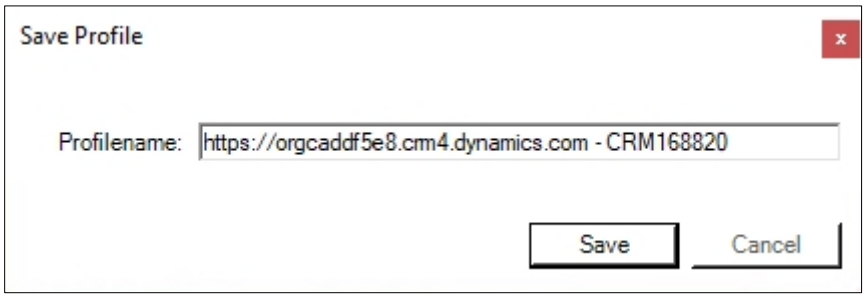

Figure 10: Save the profile from the setup

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The InstallShield Wizard has completed the installation of PowerSearch to Dynamics 365. Please click **Finish**.

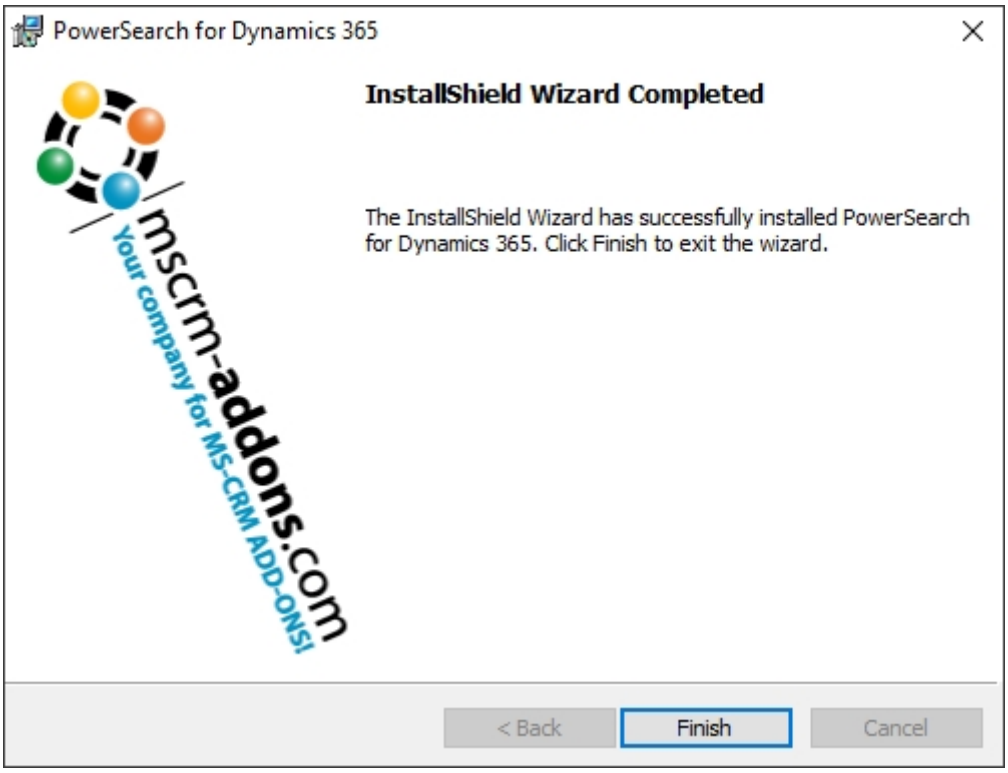

Figure 11: Finish installation

The PowerSearch configuration page opens. To begin configuring PowerSearch, you have two options. You can either utilize the Configuration page or start working with our provided sample data. Throughout the upcoming chapters, you will acquire the necessary knowledge to perform these tasks effectively.

Please note: PowerSearch includes optional sample data for your convenience. In the absence of any existing configuration, PowerSearch offers this sample data, which you can choose to utilize or not.

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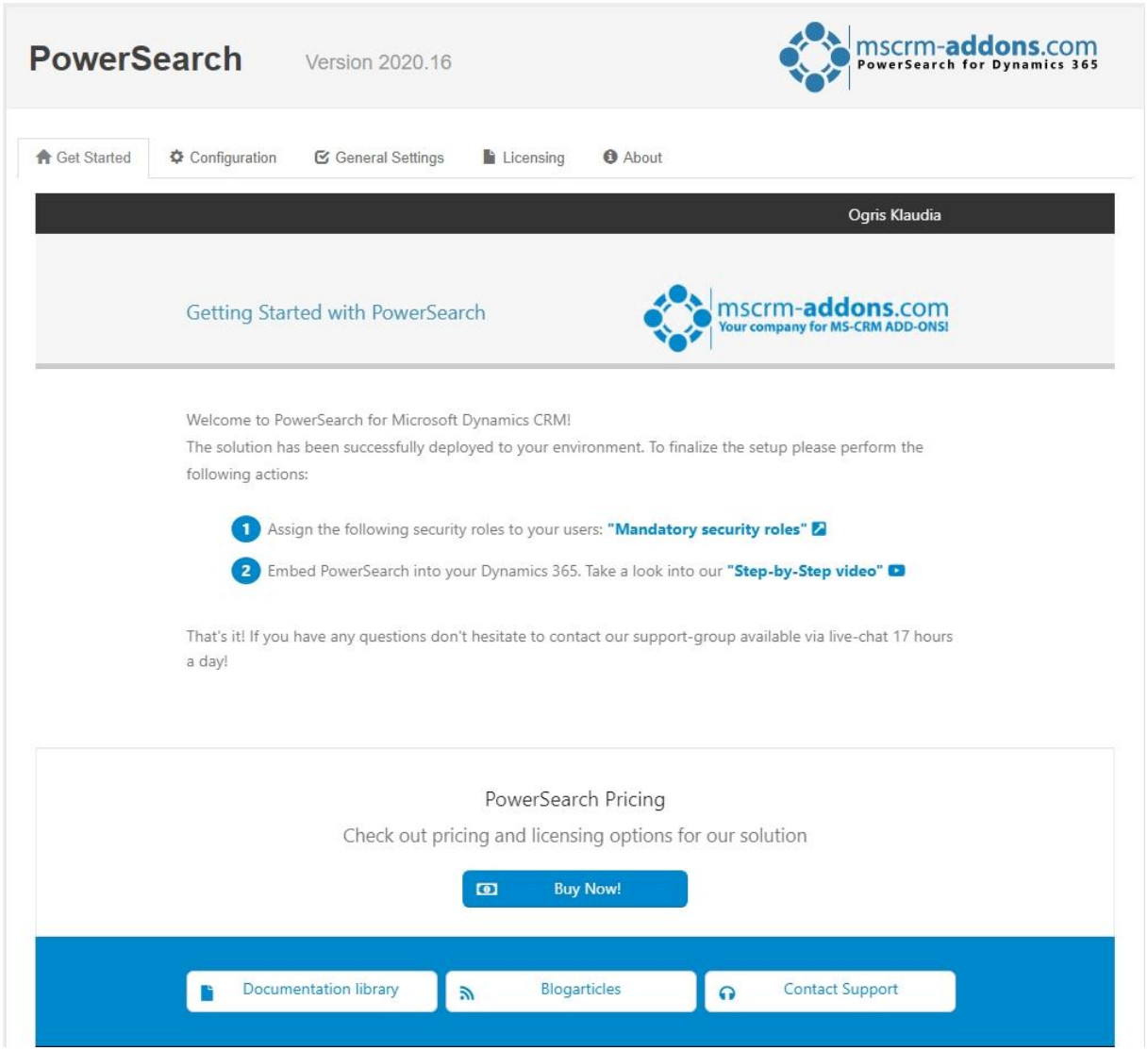

Figure 12: PowerSearch Configuration page

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1.3. How to install PowerSearch via solution import (manually)

In some cases, it is necessary to install our mscrm-addons.com solutions manually. Here is shown how this can be done in Dynamics 365.

Navigate in Dynamics 365 to **Settings** and to **Solutions**.

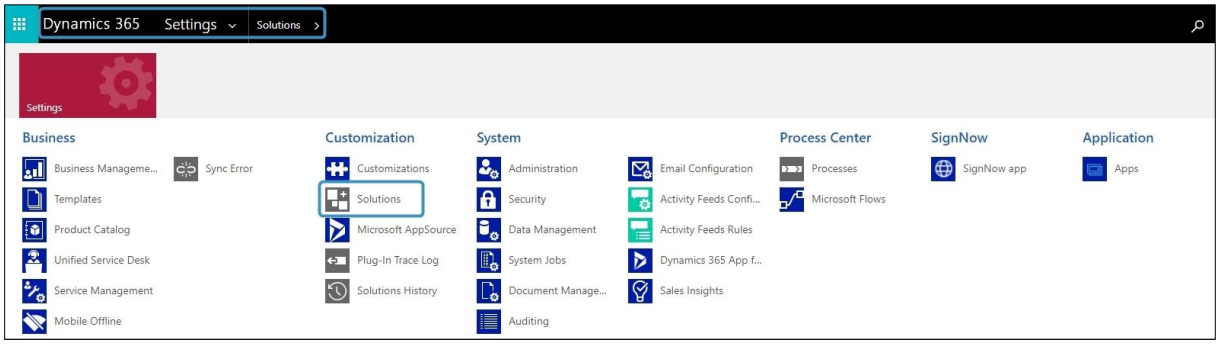

Figure 13: Dynamics 365 > Settings > Solutions

In the **All Solutions** overview select **Import**.

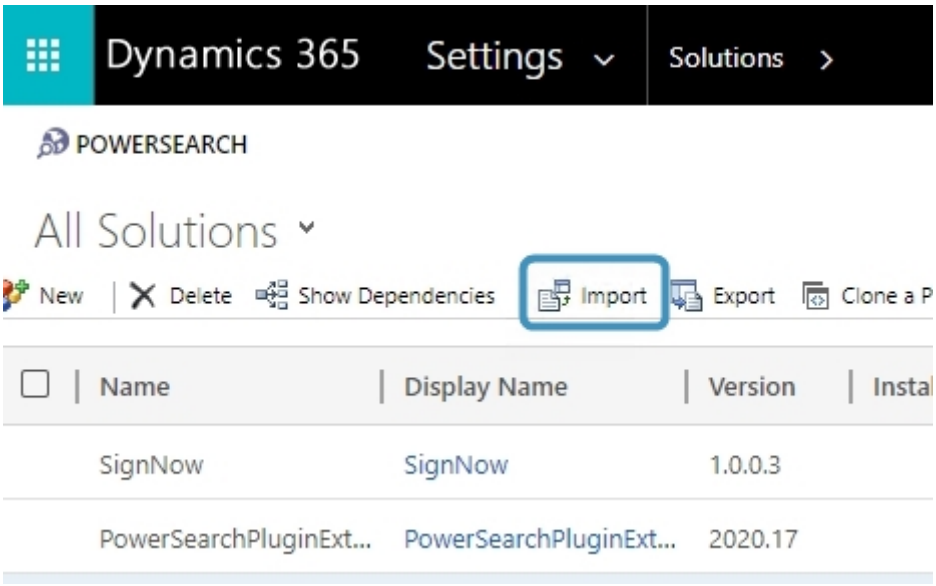

Figure 14: All Solutions overview

Select the Solution Package like in the Figure below and continue with **Next**.

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Please note: It is of upmost importance to upload the two mandatory files in the following order!

1. **MSCRMADDONScomGeneral**
2. **PowerSearchPluginCore**
3. **PowerSearchPluginConfig** (optional: embeds links in SiteMap and adds a dashboard)
4. **PowerSearchPluginGlobalButton** (optional: adds the global button to PowerSearch)
5. **PowerSearchPluginExtension**

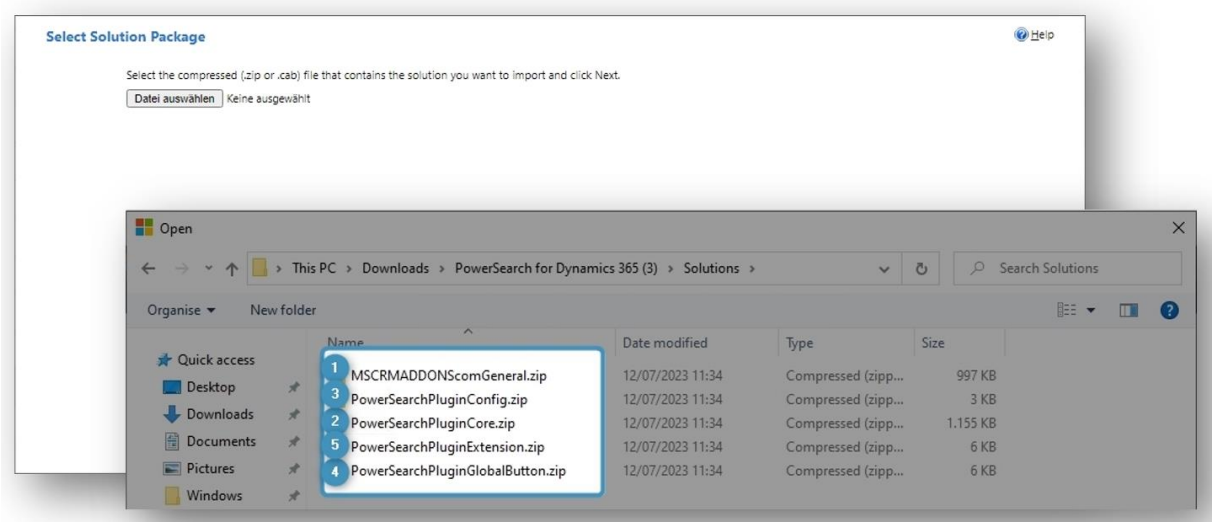

Figure 15: Select Solution Package

After a double-click on **MSCRM-ADDONScomGeneral.zip** this window is shown. Continue with **Next**.

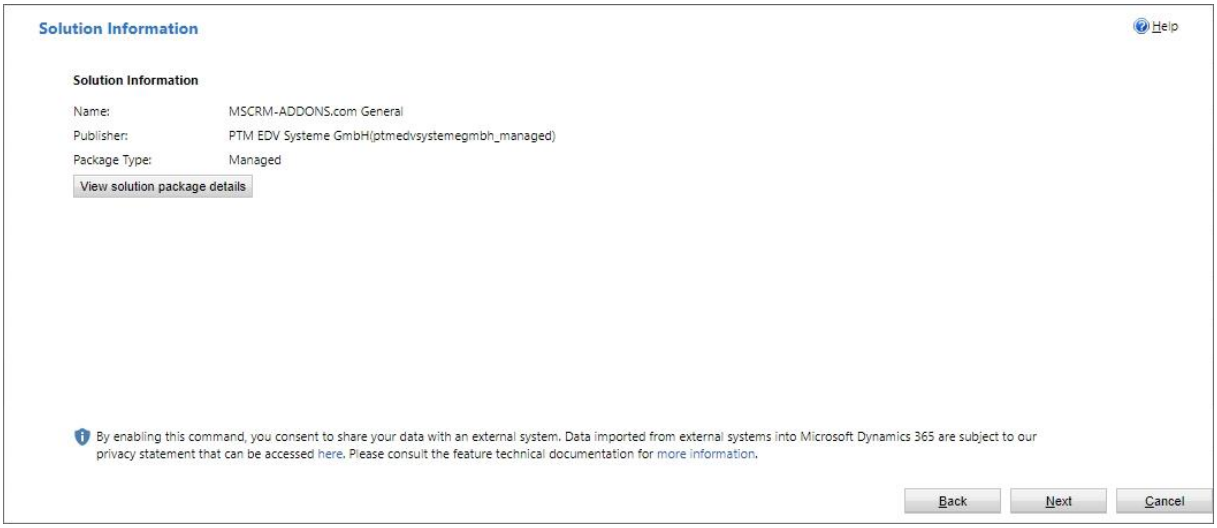

Figure 16: Solution information

Enable any SDK message processing steps included in the solution. Click on **Import**.

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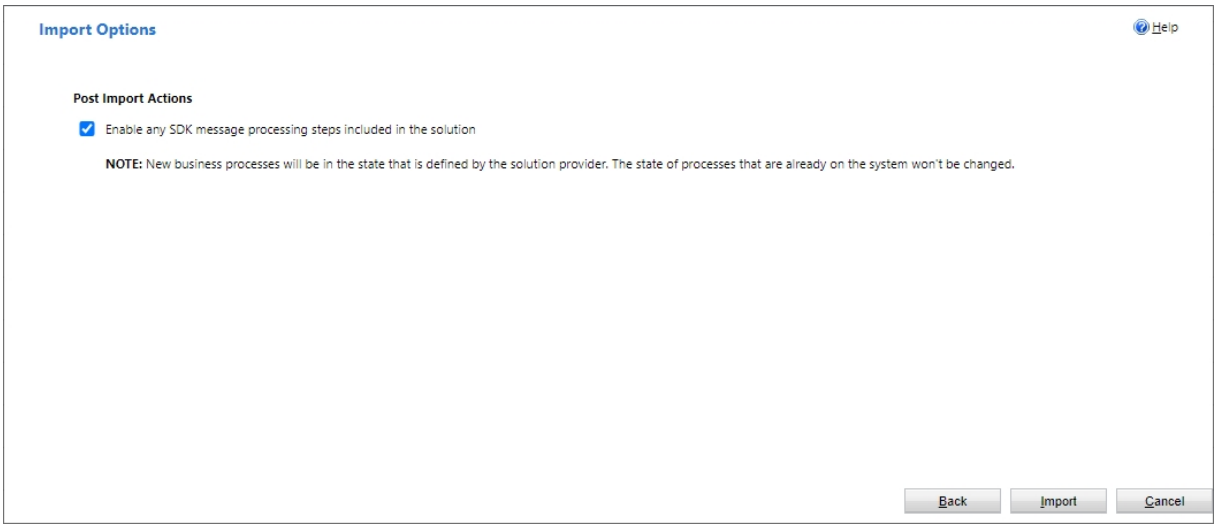

Figure 17: Import options

The solution gets imported. Please wait for the operation to complete.

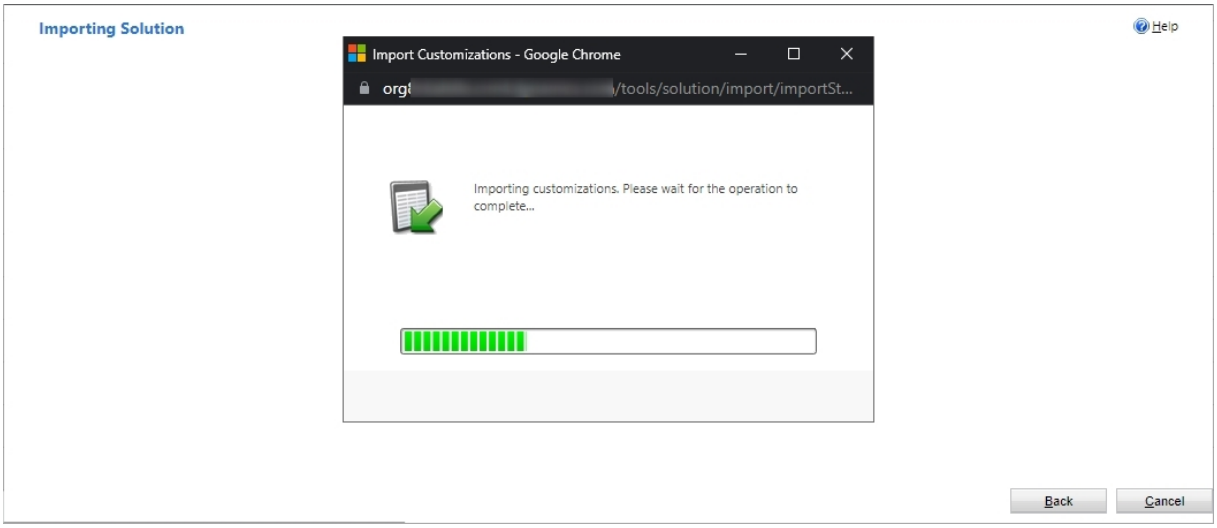

Figure 18: Importing Solutions

The import of the solution **MSCRM-ADDONS.com General** is completed successfully. The ribbon client metadata is being refreshed in the background.

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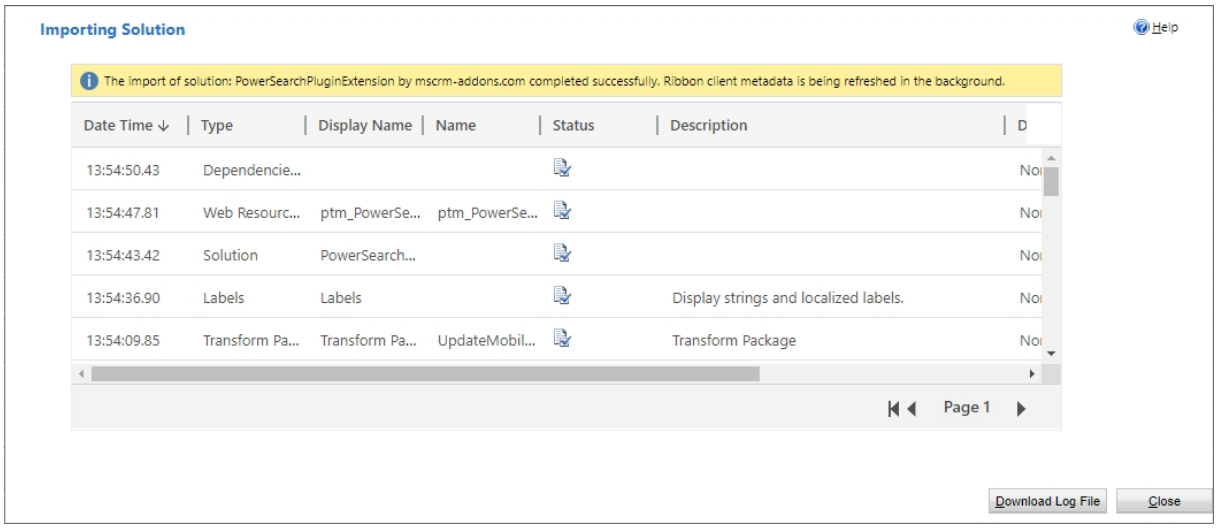

Figure 19: Imported solution

Now repeat the procedure for

- **MSCRMADDONScomGeneral**
- **PowerSearchPluginCore**
- **PowerSearchPluginConfig** (optional: embeds links in SiteMap and adds a dashboard)
- **PowerSearchPluginGlobalButton** (optional: adds the global button to PowerSearch)
- **PowerSearchPluginExtension**

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2. Configuration page

The configuration of PowerSearch is very simple. To open the configuration, navigate to **Dynamics 365** > **Settings** > **mscrm-addons** > **PowerSearch**. The window that opens now is the PowerSearch Configuration. Its functionalities will be explained during the following chapters.

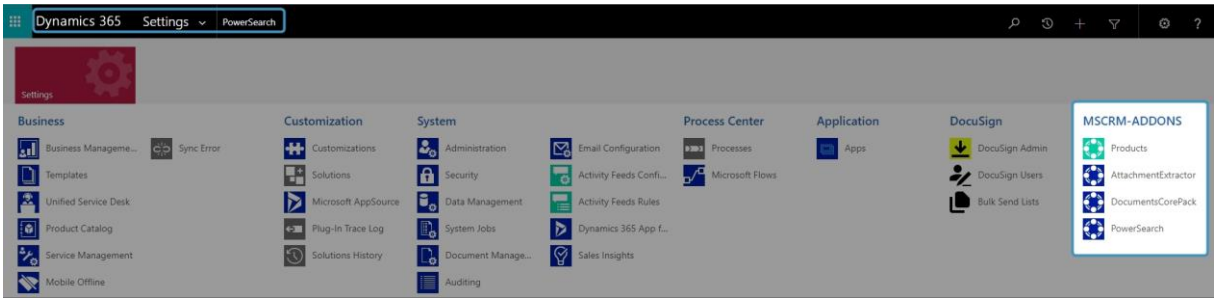

Figure 20: Dynamics 365 > Settings > PowerSearch

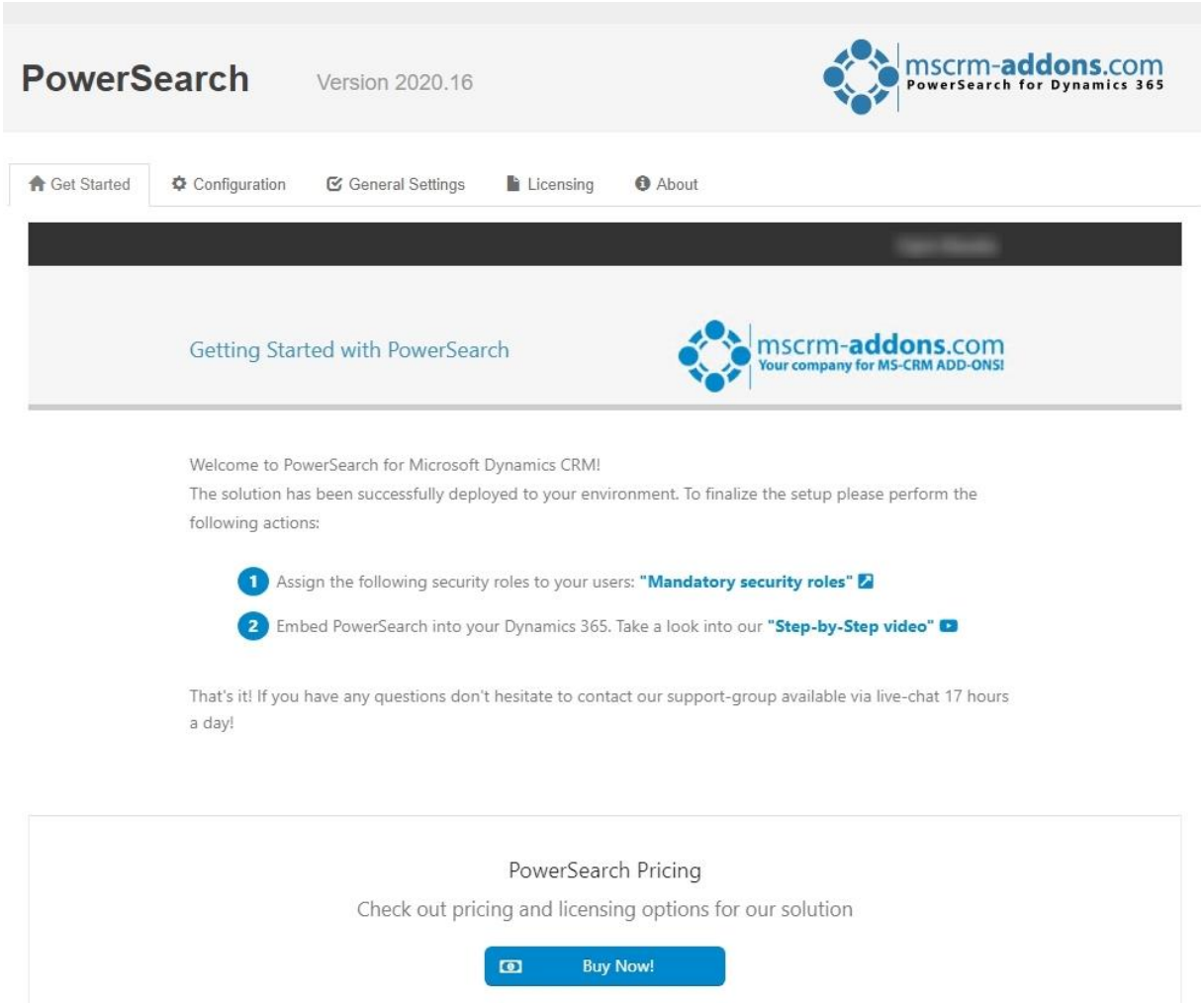

Figure 21: PowerSearch Configuration page

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2.1. The Get Started tab

This tab provides you with an overview, general information on PowerSearch and links to our website. All useful information about PowerSearch can be found here. If you scroll down the page, you might even find the different pricings for PowerSearch, a link to the documentation library, a link to some awesome blog articles and a contact button that links you directly with our support.

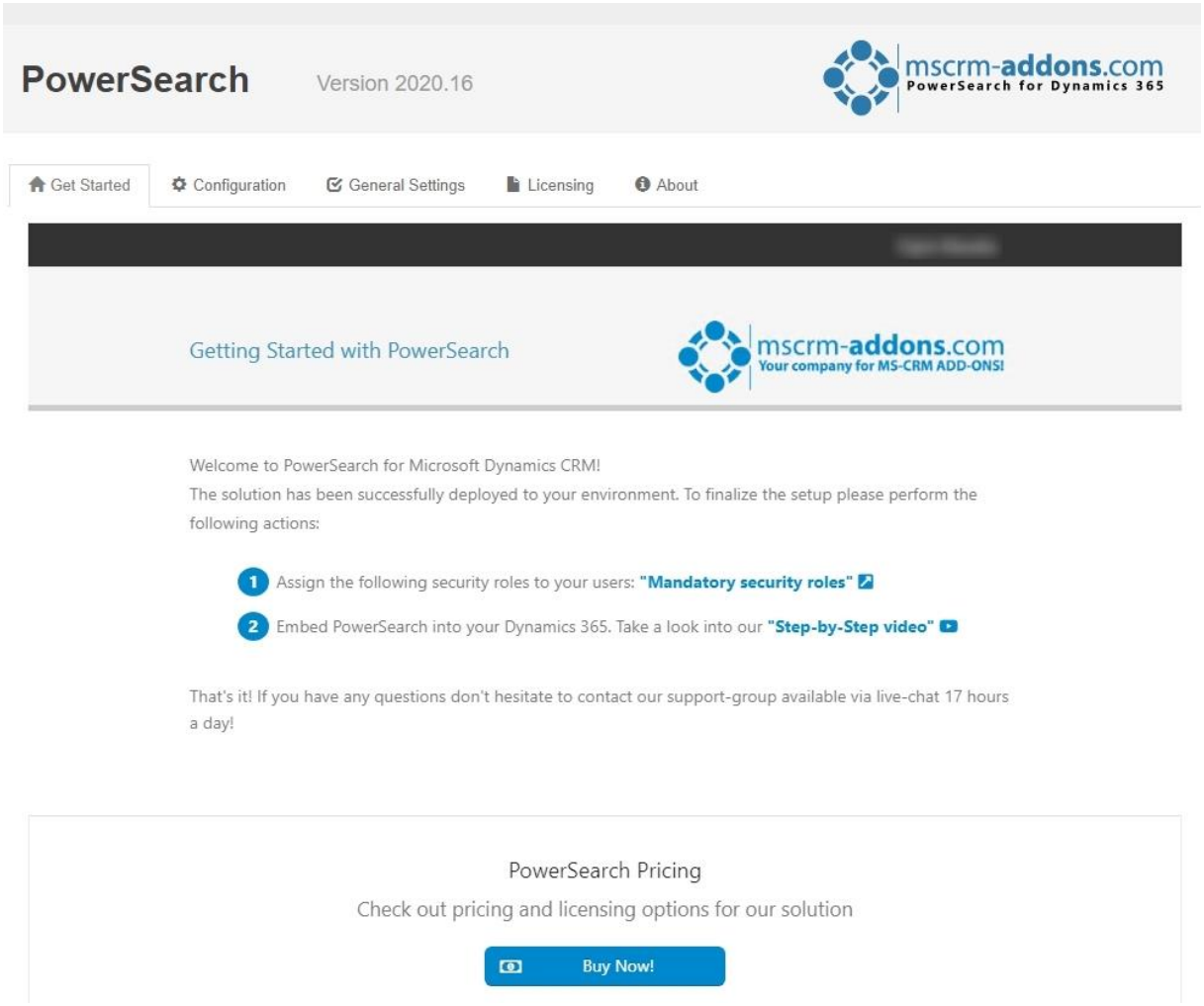

Figure 22: the Get Started tab

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2.2. The Configuration tab

Opening this tab provides you with a direct link to the PowerSearch Configuration Entity. Whenever you need to enter your Config, this is your tab.

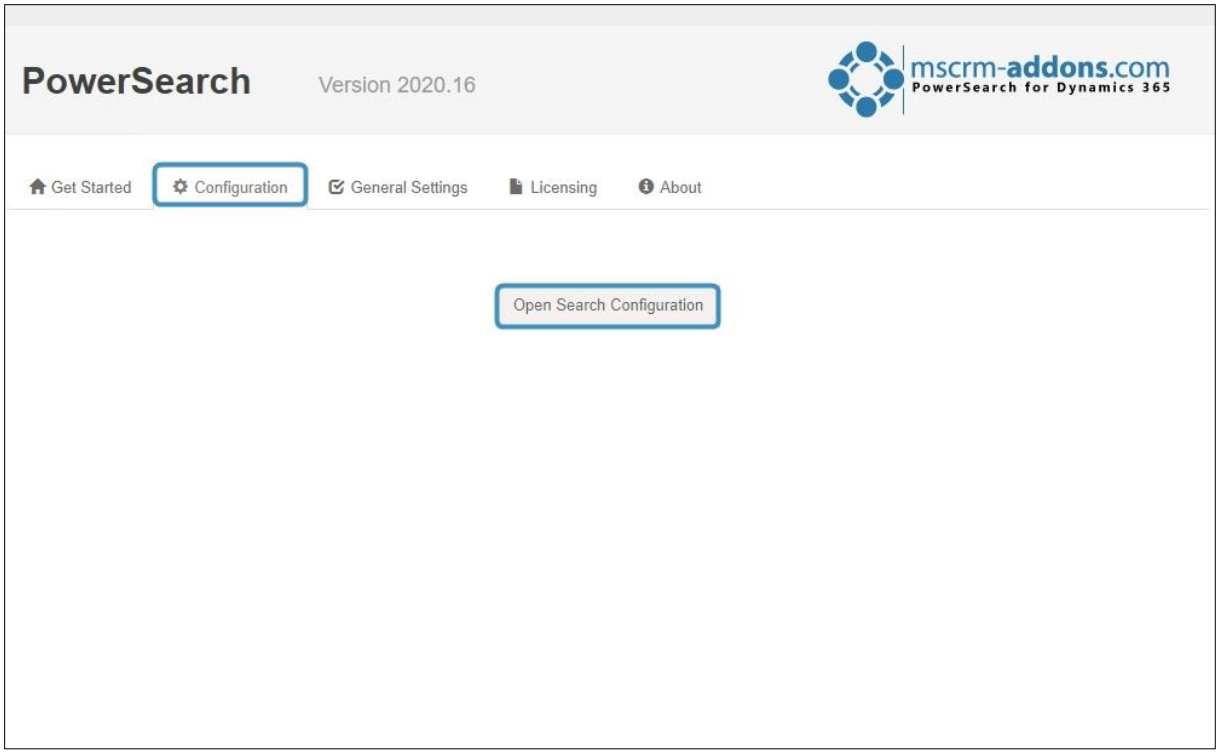

Figure 23: The Configuration tab

Please note: PowerSearch includes optional sample data for your convenience. In the absence of any existing configuration, PowerSearch offers this sample data, which you can choose to utilize or not.

If the sample data fits your requirements, you can start searching with PowerSearch immediately.

With the **New** button you can create a new record. Within this process you can select an entity and a view.

You can add some search and result fields by using the corresponding sub-grids.

During this documentation, you will learn in detail how to search with PowerSearch.

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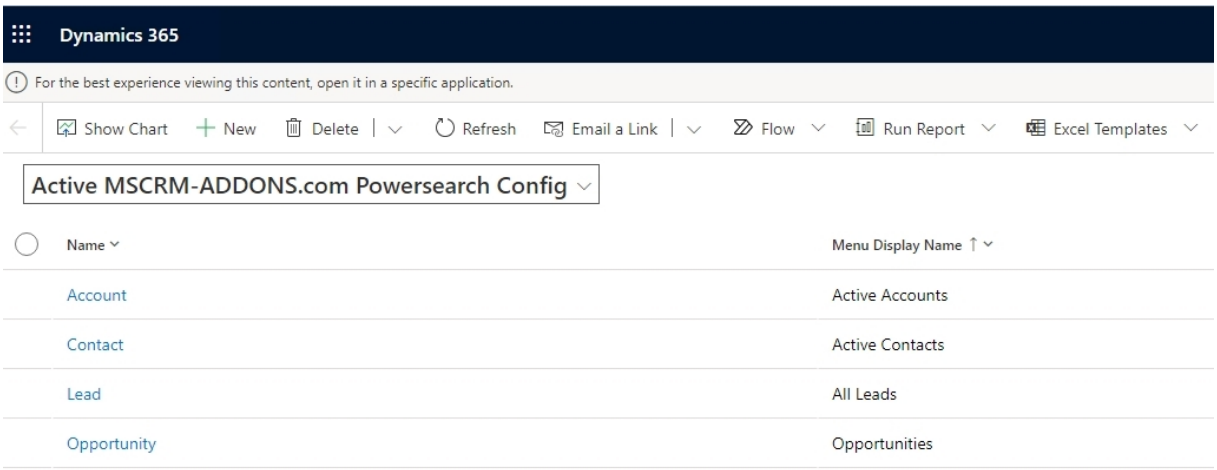

Figure 24: PowerSearch Configuration

2.3. The General Settings tab

This tab allows you to change your general settings. Once changed, please do not forget to save the settings!

❶ **Debugging**: Set this option on **Enabled** if you want to activate debugging. Once activated, you can use the buttons at the right side to modify the debugging process.

- **Show** button: Displays all logs that were generated during the last xx hours (in this example 24 hours)
- **Download** button: Allows you to download the log-file (.xml). The
- **Delete** button enables you to delete the log-files.

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2 **Page Size**: Define how many records should be displayed in the Grid.

3 **Grid min height (px)**: Define the minimum height of the grid (valid for e.g., entity preview) here.

4 **Disable tab sorting**: If this setting is set to true, no user can change the tab order.

5 **Add tabkey navigation to operator**: If this setting is set to true, operator picklist can be selected with tab key.

6 **Open PowerSearch with current Entity**: If this setting is set to true, the PowerSearch Global button will open PowerSearch with the current entity as active tab.

7 **Show total record count**: By default, the **total record count** shows a maximum number of 5000. If this setting is activated, it shows the record number up to 50.000.

8 **Disable scrolling on sub-grid area**: Per default, every main grid shows 2 sub-grids. If you want to see more sub-grids (provided there are more than 2), you have to scroll down. Once this feature is enabled, all sub-grids are displayed permanently (for example, 4 sub-grids at once).

Please note: If you activate this setting, it is recommended to set the grid min. height in pixels to at least 600.

9 **Minimum Search Criteria**: Enable this setting to force every user on every search to enter a minimum one value for one search field.

10 **Trim Search Fields**: Enable this setting to remove empty spaces at a search text's beginning and end.

11 **Custom Width for Search Fields (px)**: Define here a custom width for each part of the search field.

12 **Entity preview for**: Define the entity for which you want to define the EntityPreview.

13 **Show CRM views for**: Here you can define for which entities CRM views would be created. You can also automatically share these views with one or more teams. Therefore, click on the textbox on the right and choose your teams.

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14 **Search Fields Inline Filter**: Enable this setting to activate the inline filter for each text field. This is only available for text fields.

15 **Hide default buttons**: Here you can type a comma separated list of button names which should not be shown (e.g., btCreate, btclearFields, btSave). Available button names: **btStartSearch, btCreate, btclearFields, btEntityPreview, btOpenCRMGrid, btOpenConfig, cbGridSelectAll;**

16 **Show 'checkbox' to ignore 'Search Fields'**: If activated, a checkbox in front of each 'Search Field' is shown. It can be used to ignore that field for searching.

17 **Show 'Tolerance' control for number fields**: Show the 'Tolerance' control. 'Search Fields' of type 'number' and 'money' can be marked as Tolerance Field. This must be done on the 'Search Fields' records directly.

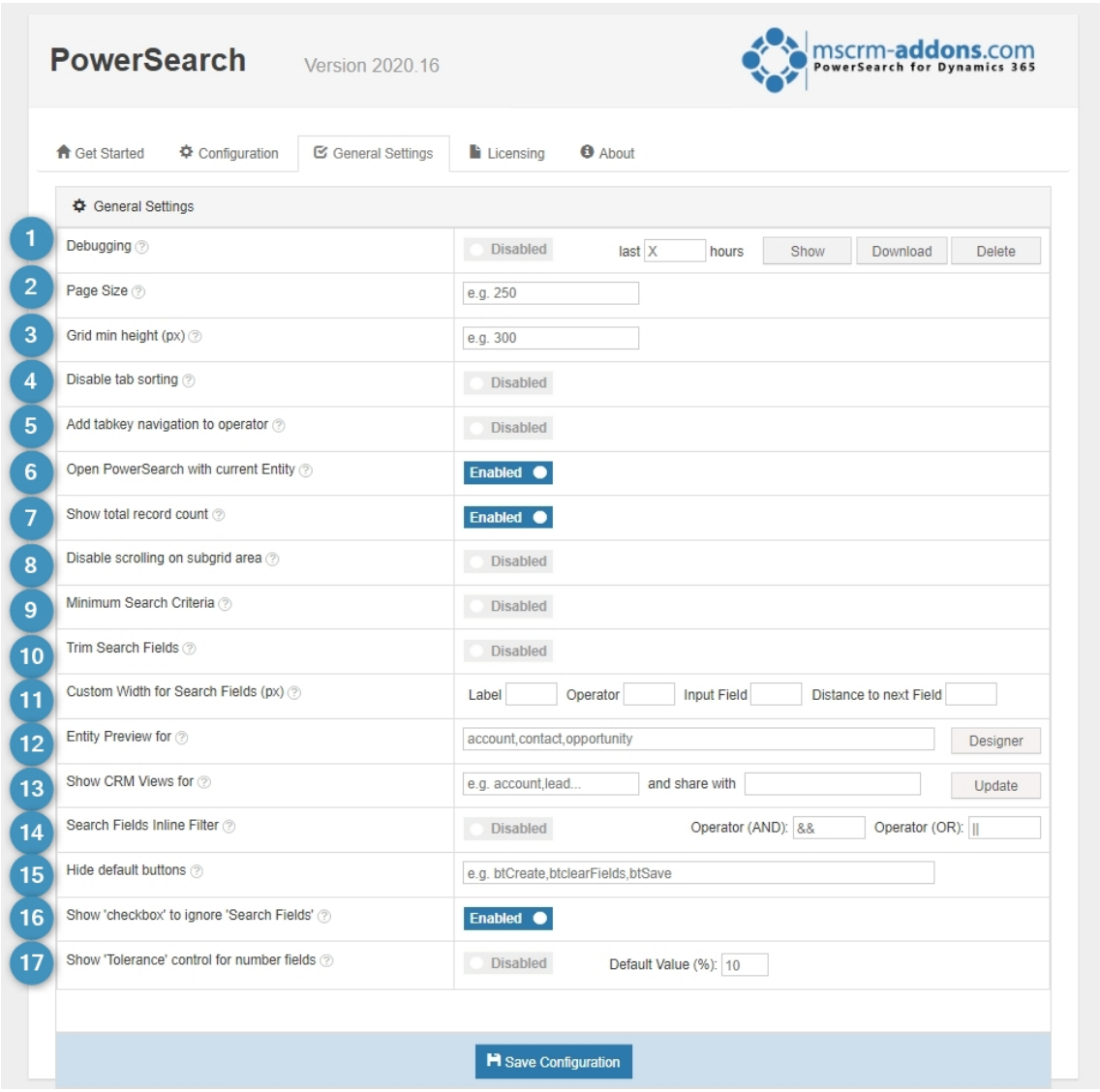

Figure 25: The General Setting tab

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2.4. The Licensing tab

This tab provides you with information regarding to the status of your license. Green checkmarks mean that your license is valid. Red crosses mean that your license is invalid.

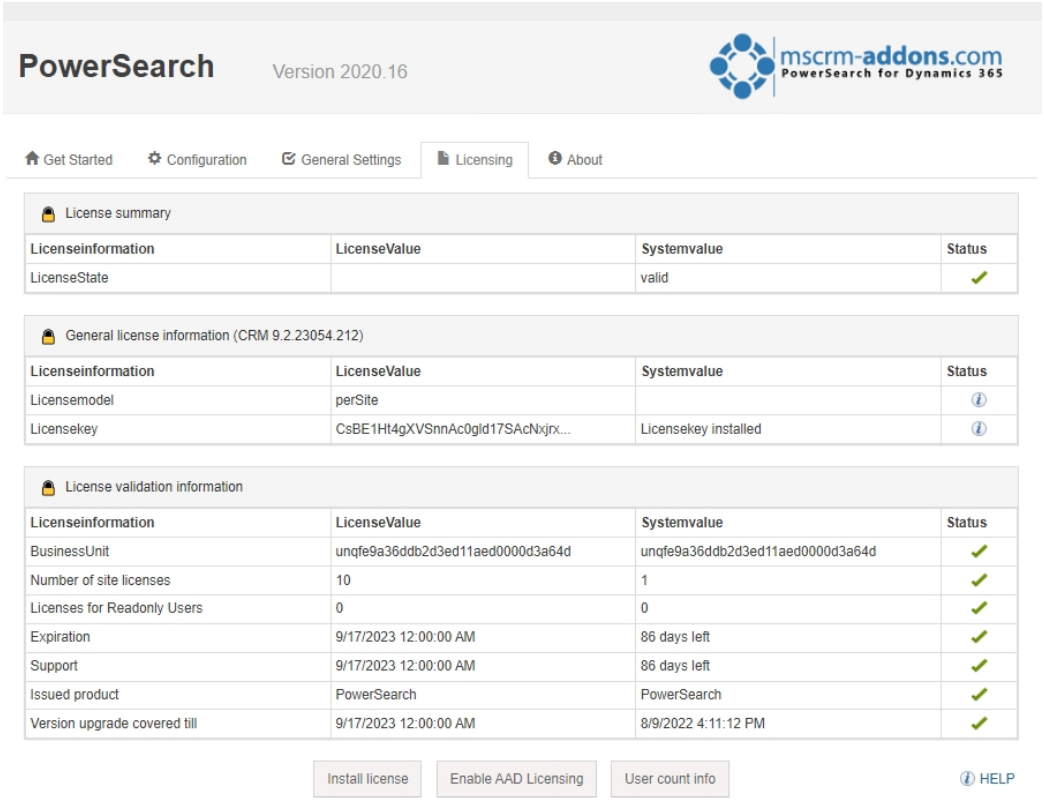

Figure 26: the Licensing tab

Click on the **Install License** button and the **Install License** dialog opens. Enter your license key or the subscription number that you received from our support team.

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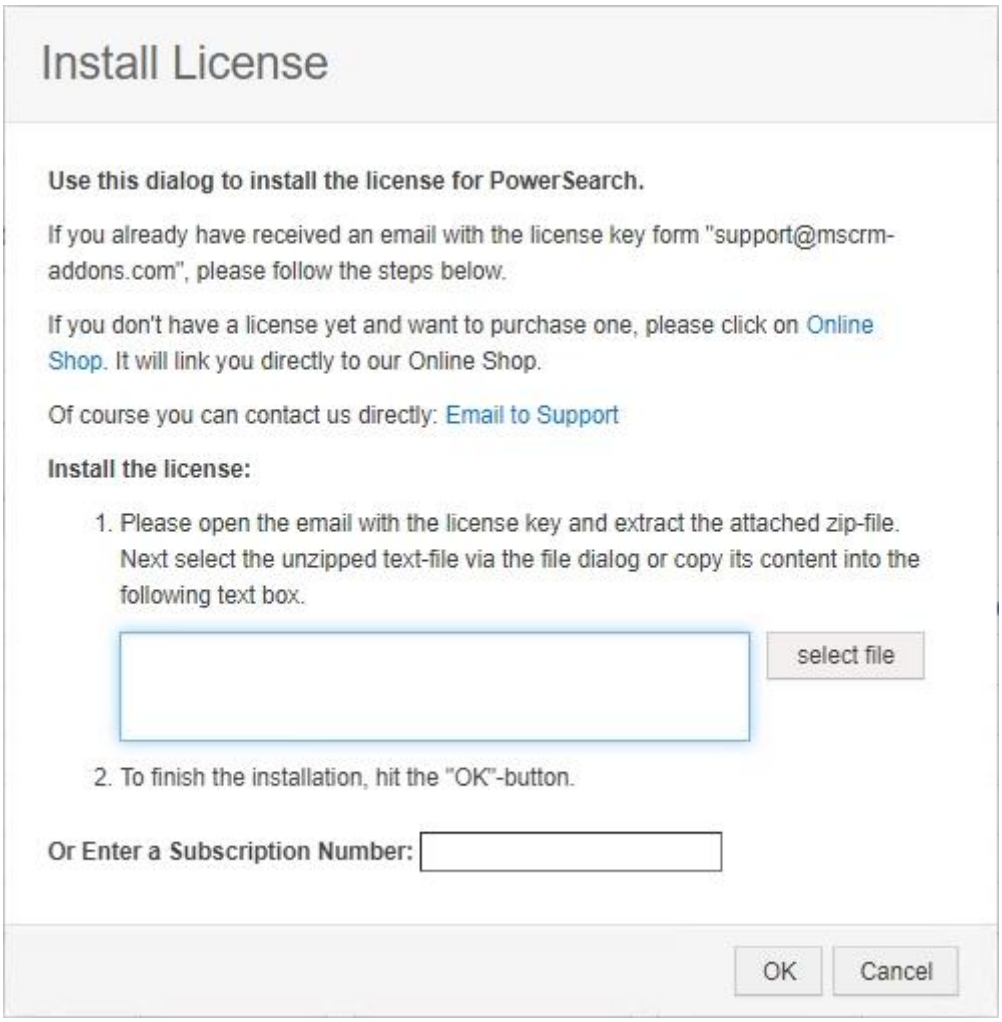

Figure 27: Install license kex or subscription number dialog

2.5. The About tab

The **About** tab provides you with general information regarding to your license and the Copyright.

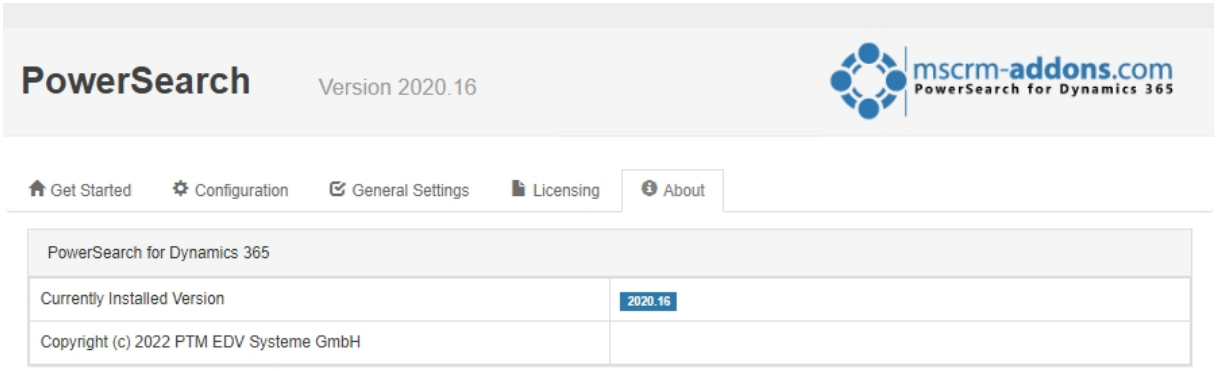

Figure 28: The About tab

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2.6. Connection Setup

This window opens during installation. Please make the connection setup as described.

Select your ❶ **Existing Profile** or create a new profile and select your ❷ **Dynamics 365 type**. Choose the ❸ **Dynamics 365 Server-URL**. Click on the ❹ **Retrieve all** button and as soon as the organizations are retrieved, choose the respective one and press the ❺ **OK** button.

Please note: A login with your Dynamics 365 credentials is required.

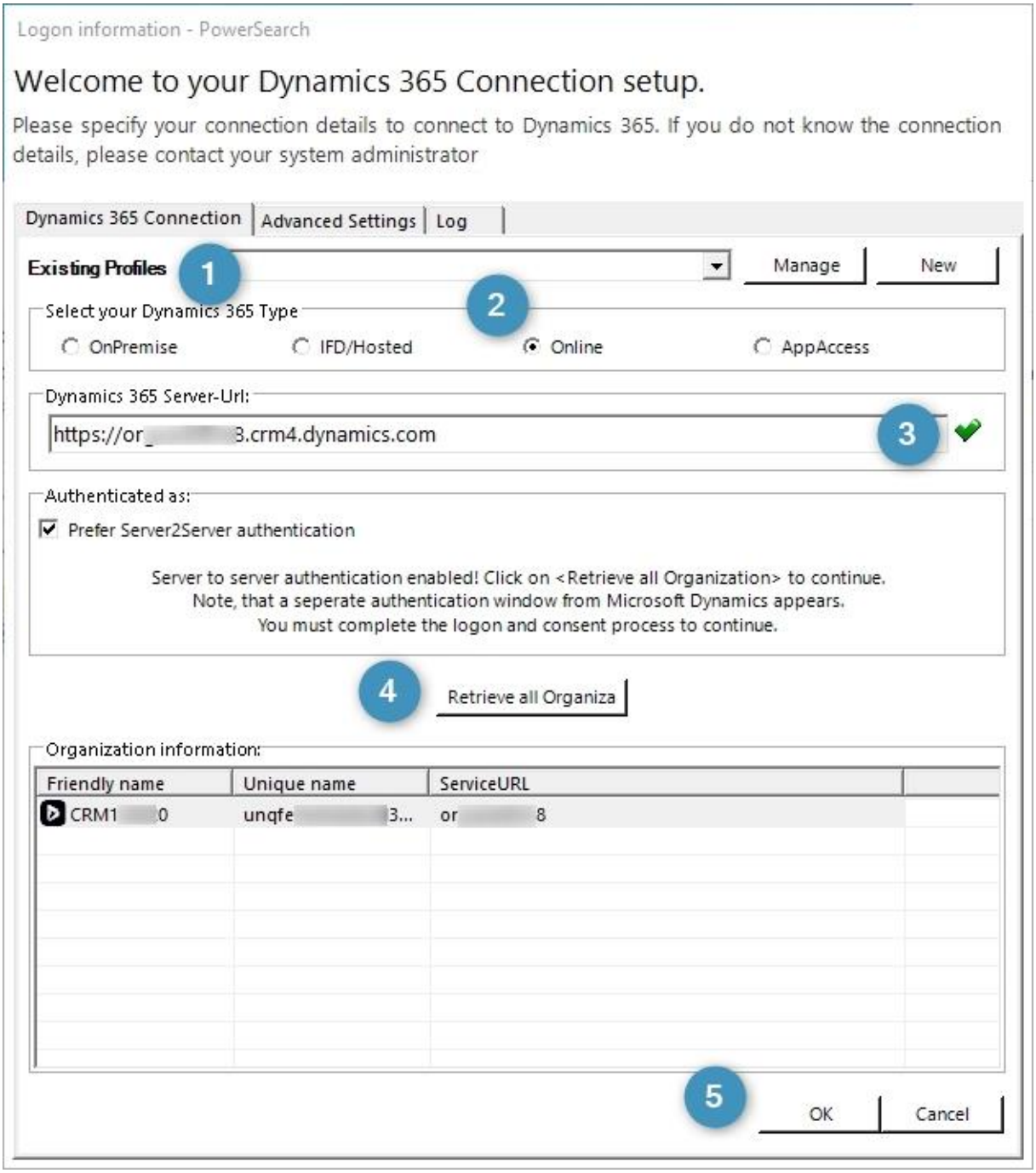

Figure 29: Connection setup

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After the Connection setup, please click the **Save** button when this window opens.

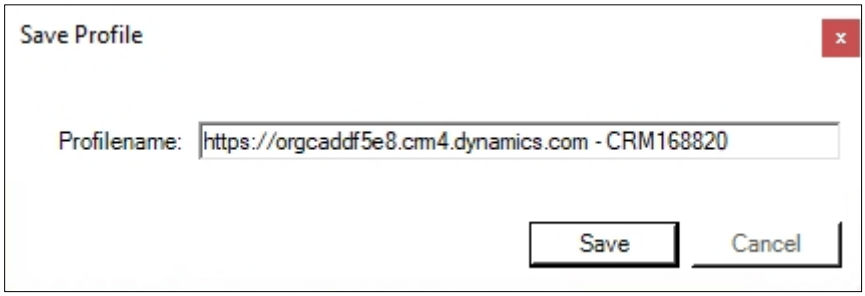

Figure 30: Save the profile from the setup

The InstallShield Wizard has completed the installation of PowerSearch to Dynamics 365. Please click **Finish**.

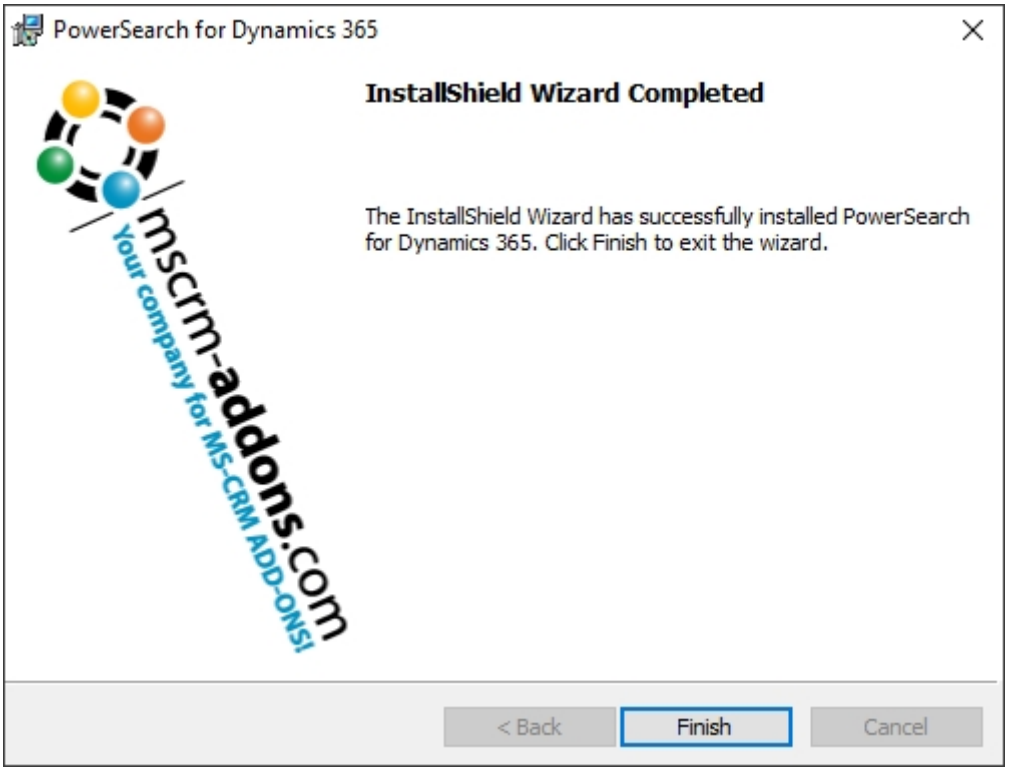

Figure 31: Finish installation

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3. How to embed PowerSearch in Microsoft Dynamics 365

Please follow the post App Source installation steps.

Assign the PowerSearch Security Role. Please add the **MSCRM-ADDONS.com PowerSearch** security role to your users.

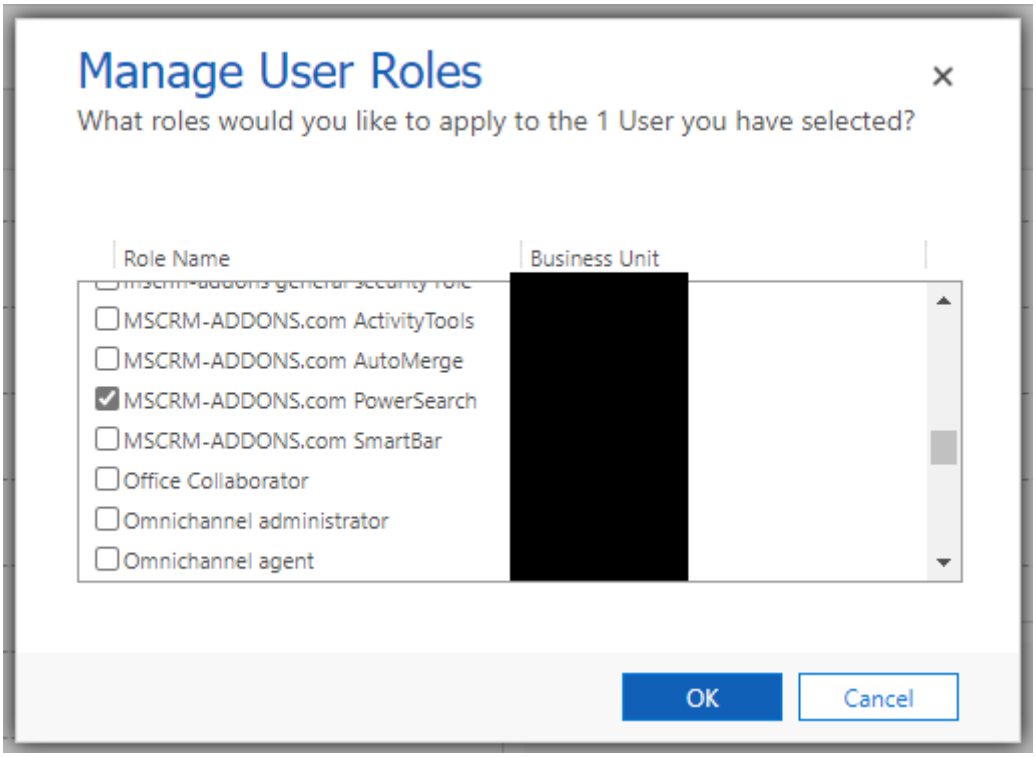

Figure 32: Assigning Role

To embed PowerSearch into your Microsoft Dynamics 365 environment, sign in and open the PowerApps Studio.

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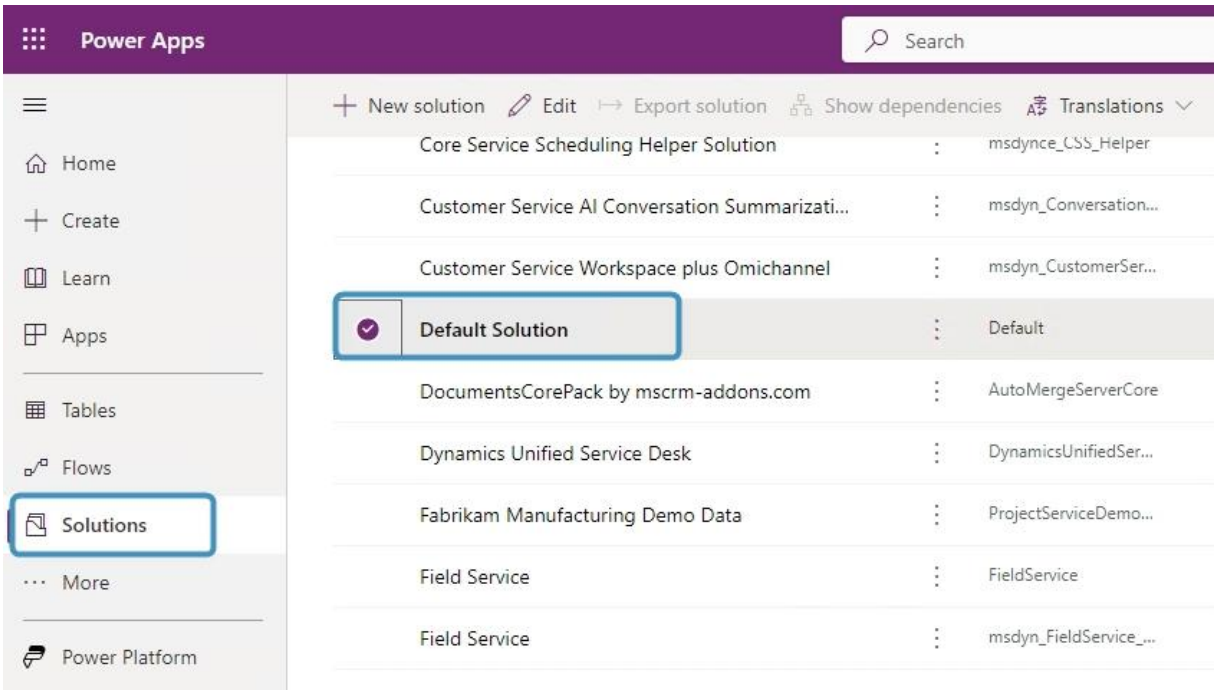

Figure 33: Select in Power Apps Default Solution

On the following screen, select **Dashboards** under **Objects.** Then, locate and click on the dashboard you would like to customize.

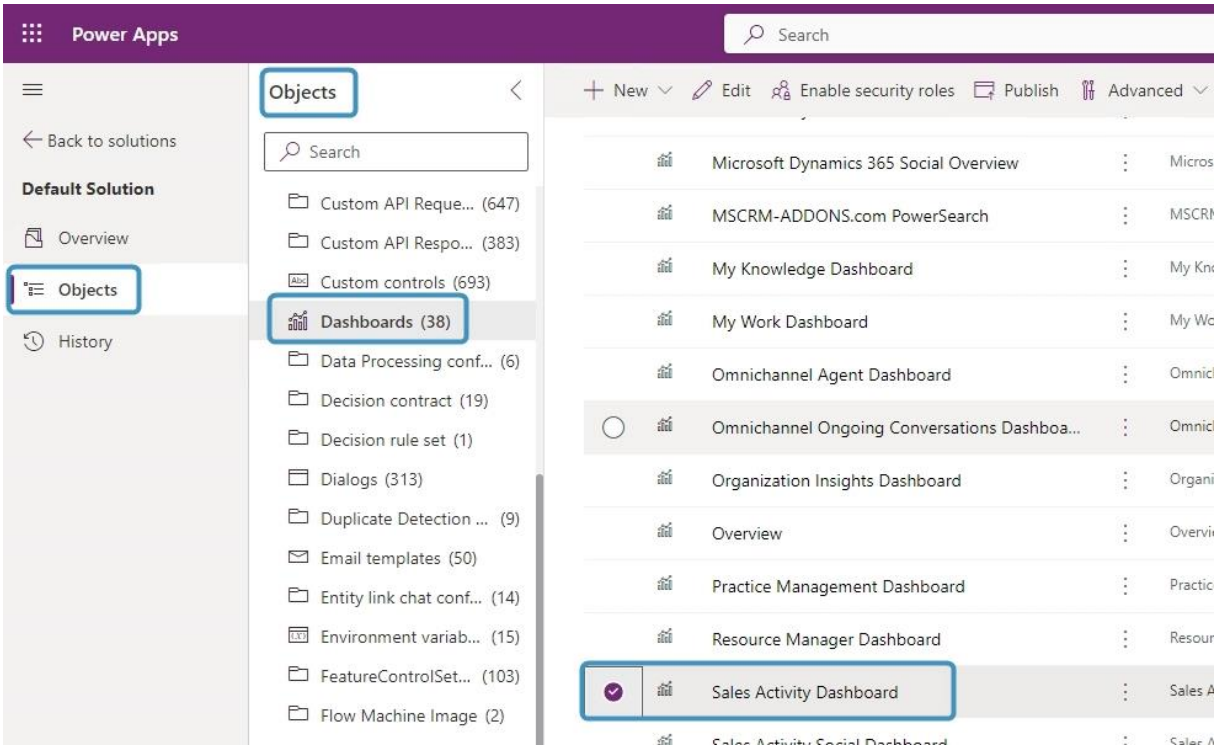

Figure 34: Select the dashboard you want to customize

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Within the select dashboard, click on the **Web Resource** button. In the window that appears, add **ptm_PowerSearch/MainPage.html** as a web resource and fill in the **Name** and **Label** under the **Field and Name Properties**. Click **OK** once you are finished, then **Save** and **Close**.

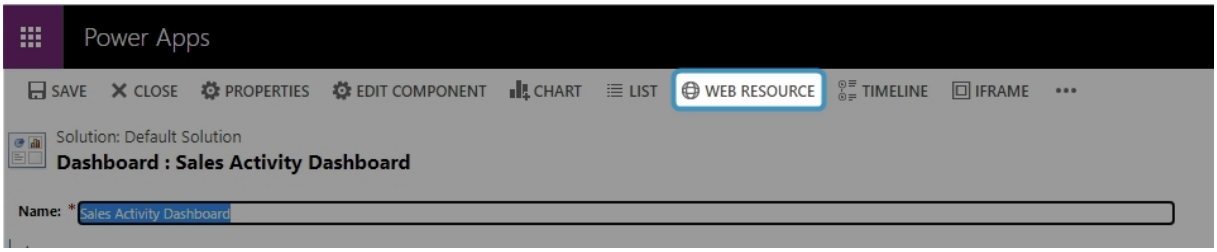

Figure 35: Click web resource button

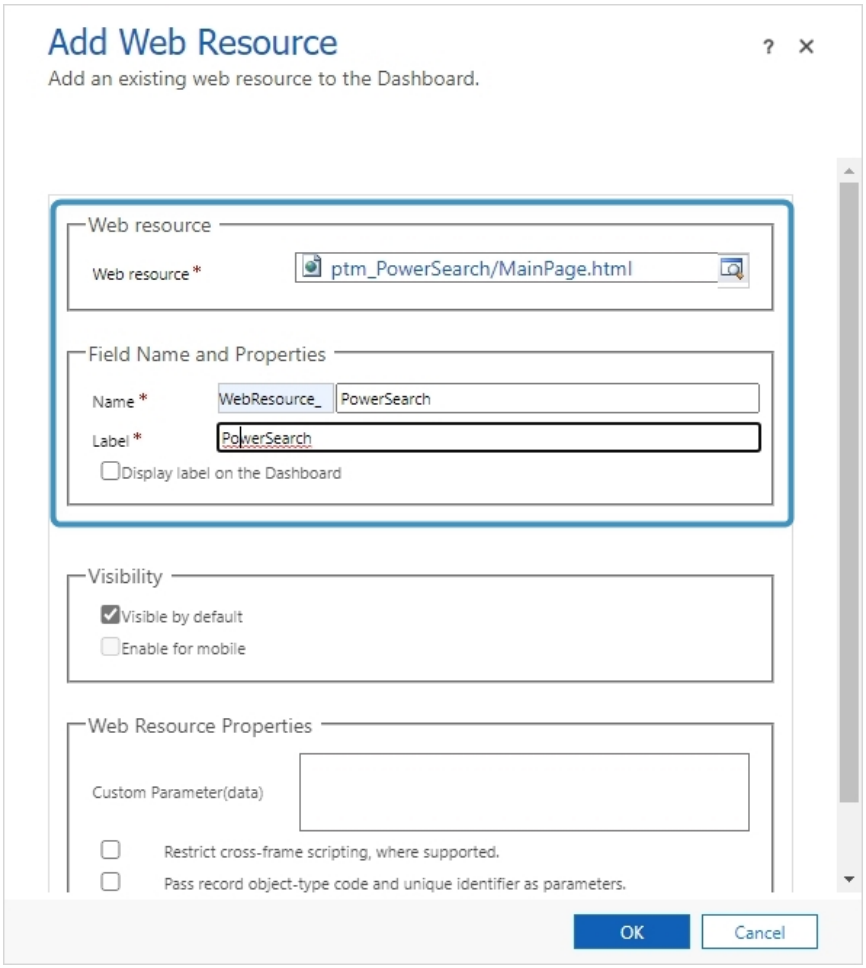

Figure 36: Add Web Resource

Click the **Publish** button in your solution to publish your customizations.

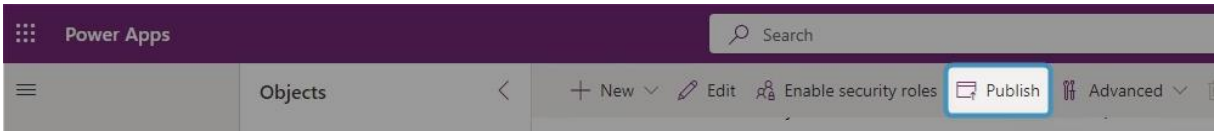

Figure 37: Publish Customizations

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Finally, to configure PowerSearch, click on the gear icon in your PowerSearch tile as shown below.

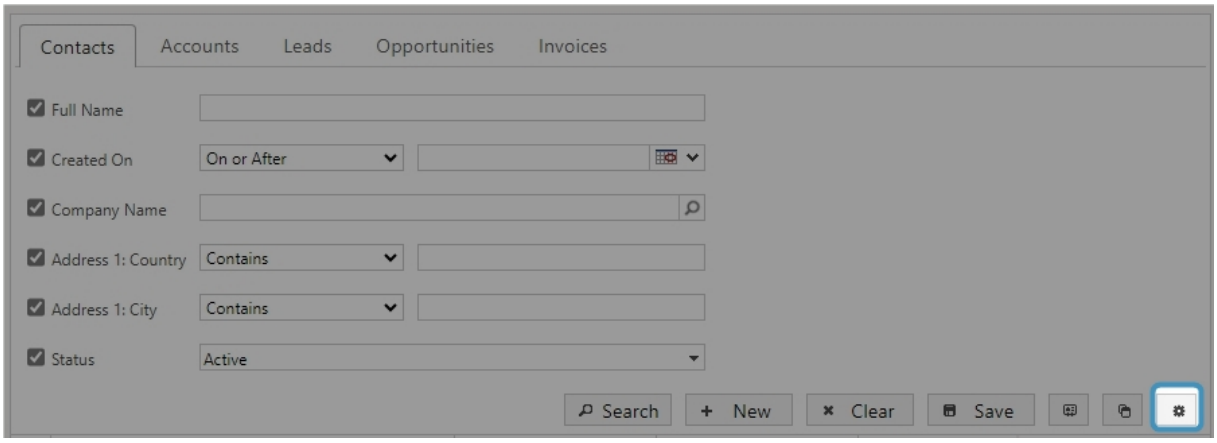

Figure 38: Open Gear symbol to configure PowerSearch

Alternatively, you can configure PowerSearch by accessing our app through Dynamics 365 > **Settings** > **MSCRM-ADDONS** > **PowerSearch** and selecting the **Configuration** tab.

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4. How to access PowerSearch from within Microsoft Dynamics 365

There are two ways to access PowerSearch once you have finished the installation and configuration process.

4.1. How to access PowerSearch via the GlobalButton

To access **PowerSearch** through the **GlobalButton**, click on the 1 button located in the command bar to expand it. The PowerSearch GlobalButton can be found there. In case there are additional tabs in the command bar, the button may be concealed within the extension of the command bar. In such cases, you can click on the [...] button to reveal it.

Please note: The access via GlobalButton is only possible if you have imported the solution previously.

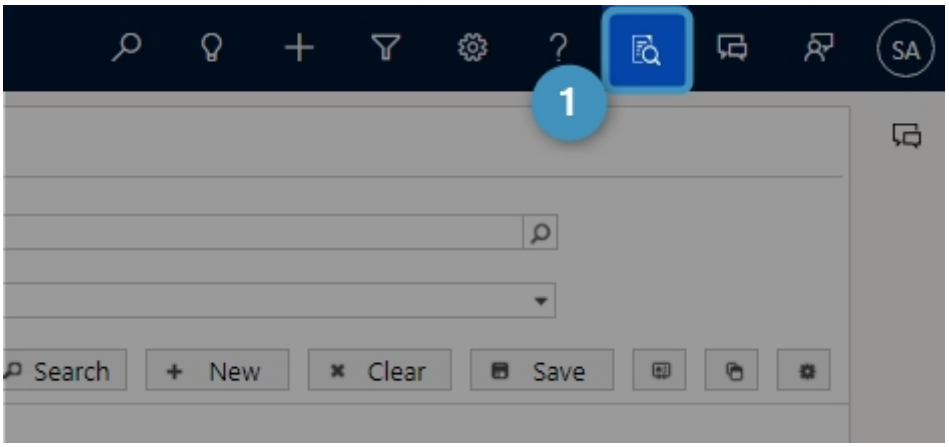

Figure 39: Access PowerSearch via GlobalButton

4.2. Via Sitemap link

Unlike the automated **GlobalButton**, an alternative option is available using a sitemap link. Nevertheless, this alternative requires manual installation. You can find instructions on how to implement it here.

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5. The PowerSearch entity configuration overview

To configure PowerSearch, we provide a custom entity called MSCRM-ADDONS.com PowerSearch config. You can access the entity via the PowerSearch Configuration Page.

If you have created the sample data, the grid provides a sample configuration consisting of the entities Account, Contact, and Lead. Each record represents an entity that can be searched through with PowerSearch.

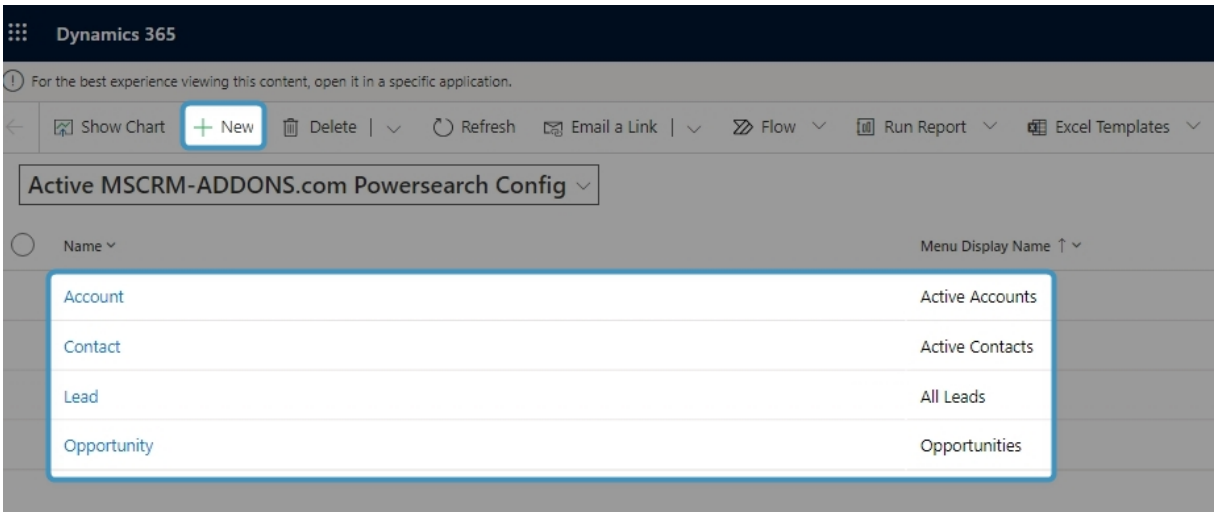

Figure 40: Entity configuration overview

Whenever a new entity is added to PowerSearch, it will be visible here. Thus, the grid provides you with an overview of all your created records, as well as the default records. Both can be deleted anytime if they do not fit your requirements. If you want to make an entity available for PowerSearch, simply click on the New button in the left upper corner.

5.1. The configuration of PowerSearch entities

Entities for PowerSearch can be configured in the PowerSearch Configuration. Besides the configuration of the Search and Result fields, you can also get additional information.

The Configuration provides you with the possibility to minimize the sections. Clicking on the arrows next to the teams extends them to their full size. Please find an overview below. Figures of the extended areas and a brief description of their functionalities can be found during the following pages.

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Entities for PowerSearch can be configured in the PowerSearch Config. You can also get additional information besides the configuration of the Search and Result fields.

5.1.1. The General section

The fields of the general section support you in setting the general conditions of your future Search and Result fields.

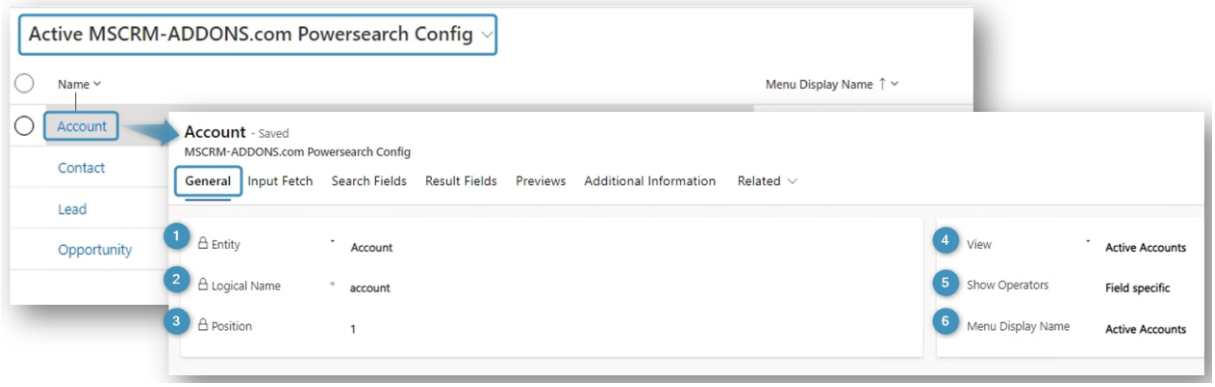

Figure 41: General tab in the PowerSearch configuration

❶ **Entity**: Select the entity which should be configured for PowerSearch. All the entities that can be selected
correspond to the existing entities in Microsoft Dynamics CRM/Dynamics 365.
❷ **Logical Name**: The logical name is automatically set as soon as an entity is selected.
❸ **Position**: The position is also set automatically, but you can rearrange the positions of the different entities.
❹ **View**: Additionally, to an entity, you can select a related system view in this field. Once you have selected a certain view, the predefined result fields of the view are automatically applied to the Result Fields section. Of course, you can also leave this field blank – in that case, you have to define your own result fields. But you can also select a view as a kind of "base" and then add or delete some of the predefined fields.

The 3 main advantages of using views:

- If you select a view, the view itself applies its general condition to the search. This means, that the different views include conditions that are combined with the criteria of the later search.
- The Result fields are automatically applied to the search, which saves valuable time.
- If the search criteria itself is not defined, the general conditions of the view apply to your search.

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One remarkable functionality of PowerSearch is the **Update View Info** button. Use this button if you have selected a view previously. Should the Dynamics 365 view have been changed in your absence, you can update the view with a simple click on this button.

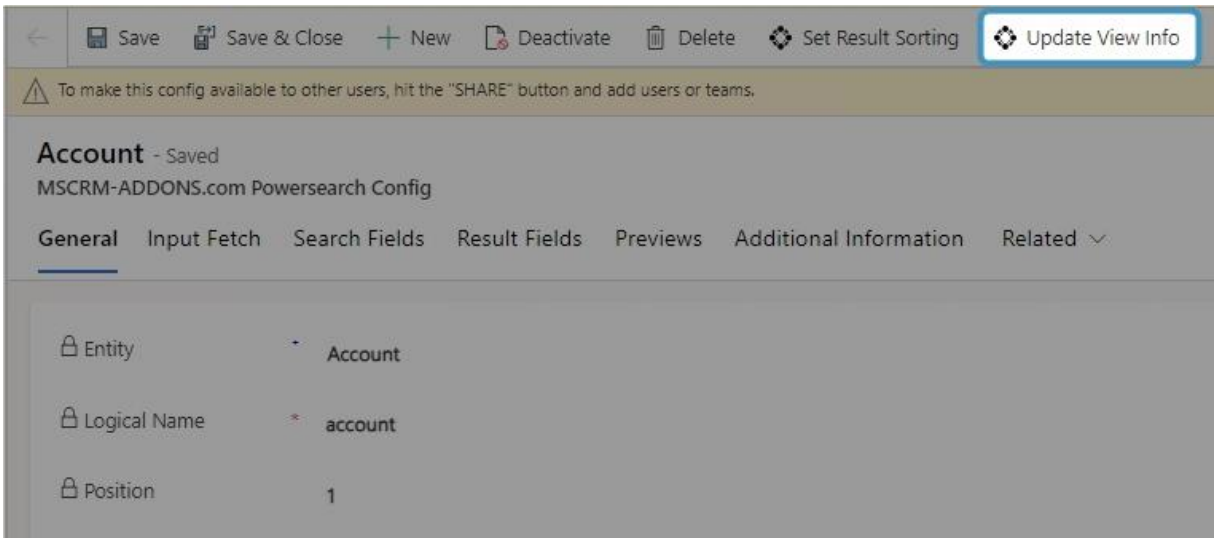

Figure 42: The Update View Info button

5 **Show Operators**: Use this field to define if condition operators should be displayed on the PowerSearch interface.

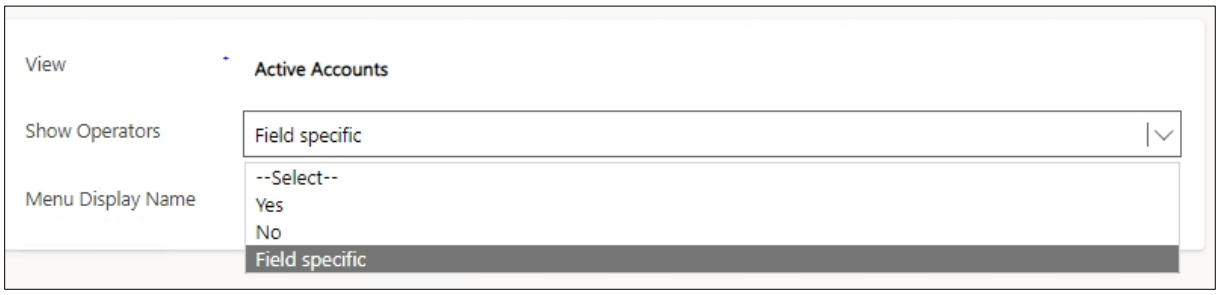

Figure 43: Show Operator - settings and outputs

6 **Menu Display Name**: PowerSearch provides the possibility to save different searches within one entity. For example, you could have two searches running on the entity account:

- One that includes only all active accounts and
- One that includes all inactive accounts.

To be able to distinguish the searches that you apply to the same entity from each other, you can give them a pretty name here. Per default, the entity name is inserted into this field. If you also select a view, the view name is used. But you can customize the **Menu Display Name** any time.

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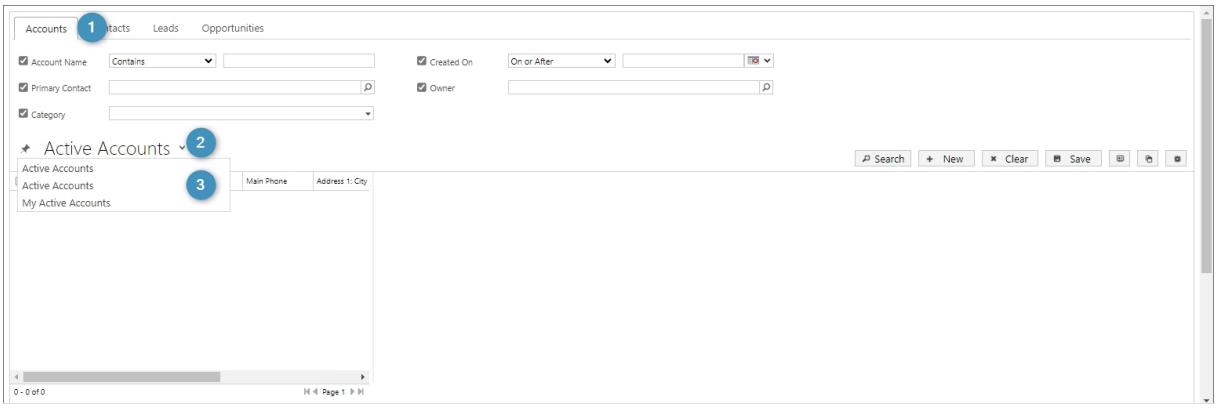

Figure 44: PowerSearch –Menu display name of more than one view in the entity account

1 **PowerSearch**: Regular Search Fields in the entity/table Account
2 **Drop Down Menu**: With a click on the drop-down-arrow you open a menu that shows you all the searches that run within the
entity account.
3 **Different Searches Running on Account**: Here, you have the possibility to display all your searches and to distinguish them, if you have previously set a pretty name in the Menu display name field. With a click on a certain view, you can switch to that view.

5.1.2 The Input Fetch Section

The FetchXML feature provides you with the possibility to customize your search query similar to an Advanced Find.

Figure 45: PowerSearch Config - Input Fetch

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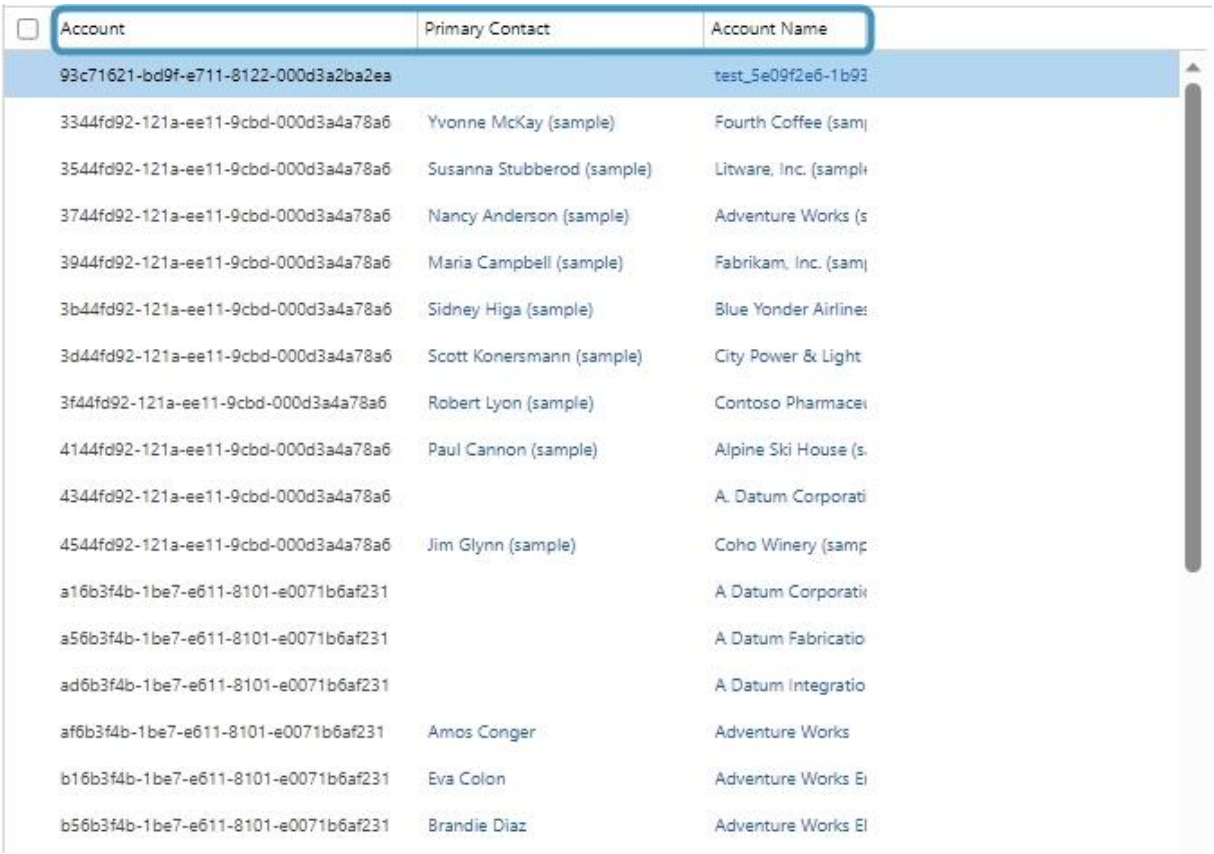
Please note: To use this feature you should at least be familiar to FetchXML.

The usage is very simple: Simply select the main entity in the General-section and insert a Fetch XML into the Input Fetch-field and save your changes!

If you save the record, the fetch creates search and result fields in the background. For every attribute, a result field is generated, while for every condition, a search field is generated.

A fetch can be created by using Advanced Find or manually by a FetchXML creator. After creating a fetch, it usually contains values in the condition-tags. If you include them into the FetchXML, they will be used as default search values. If you don't want to work with default values, please empty the value-property.

Once saved, the results of your changes are displayed in the PowerSearch surface.



Account	Primary Contact	Account Name
93c71621-bd9f-e711-8122-000d3a2ba2ea		test_5e09f2e6-1b93
3344fd92-121a-ee11-9cbd-000d3a4a78a6	Yvonne McKay (sample)	Fourth Coffee (sam
3544fd92-121a-ee11-9cbd-000d3a4a78a6	Susanna Stubberod (sample)	Litware, Inc. (sampl
3744fd92-121a-ee11-9cbd-000d3a4a78a6	Nancy Anderson (sample)	Adventure Works (s
3944fd92-121a-ee11-9cbd-000d3a4a78a6	Maria Campbell (sample)	Fabrikam, Inc. (sam
3b44fd92-121a-ee11-9cbd-000d3a4a78a6	Sidney Higa (sample)	Blue Yonder Airline
3d44fd92-121a-ee11-9cbd-000d3a4a78a6	Scott Konersmann (sample)	City Power & Light
3f44fd92-121a-ee11-9cbd-000d3a4a78a6	Robert Lyon (sample)	Contoso Pharmace
4144fd92-121a-ee11-9cbd-000d3a4a78a6	Paul Cannon (sample)	Alpine Ski House (s
4344fd92-121a-ee11-9cbd-000d3a4a78a6		A. Datum Corporati
4544fd92-121a-ee11-9cbd-000d3a4a78a6	Jim Glynn (sample)	Coho Winery (samp
a16b3f4b-1be7-e611-8101-e0071b6af231		A Datum Corporati
a56b3f4b-1be7-e611-8101-e0071b6af231		A Datum Fabricatio
ad6b3f4b-1be7-e611-8101-e0071b6af231		A Datum Integratio
af6b3f4b-1be7-e611-8101-e0071b6af231	Amos Conger	Adventure Works
b16b3f4b-1be7-e611-8101-e0071b6af231	Eva Colon	Adventure Works E
b56b3f4b-1be7-e611-8101-e0071b6af231	Brandie Diaz	Adventure Works El

Figure 46: FetchXML results in PowerSearch surface

But there's even more! You are provided with more than simple results. Click on the main account and be rewarded with one sub grid for each 1:N and N:N relationship (e.g., Accounts > Contacts/Cases > Activities).

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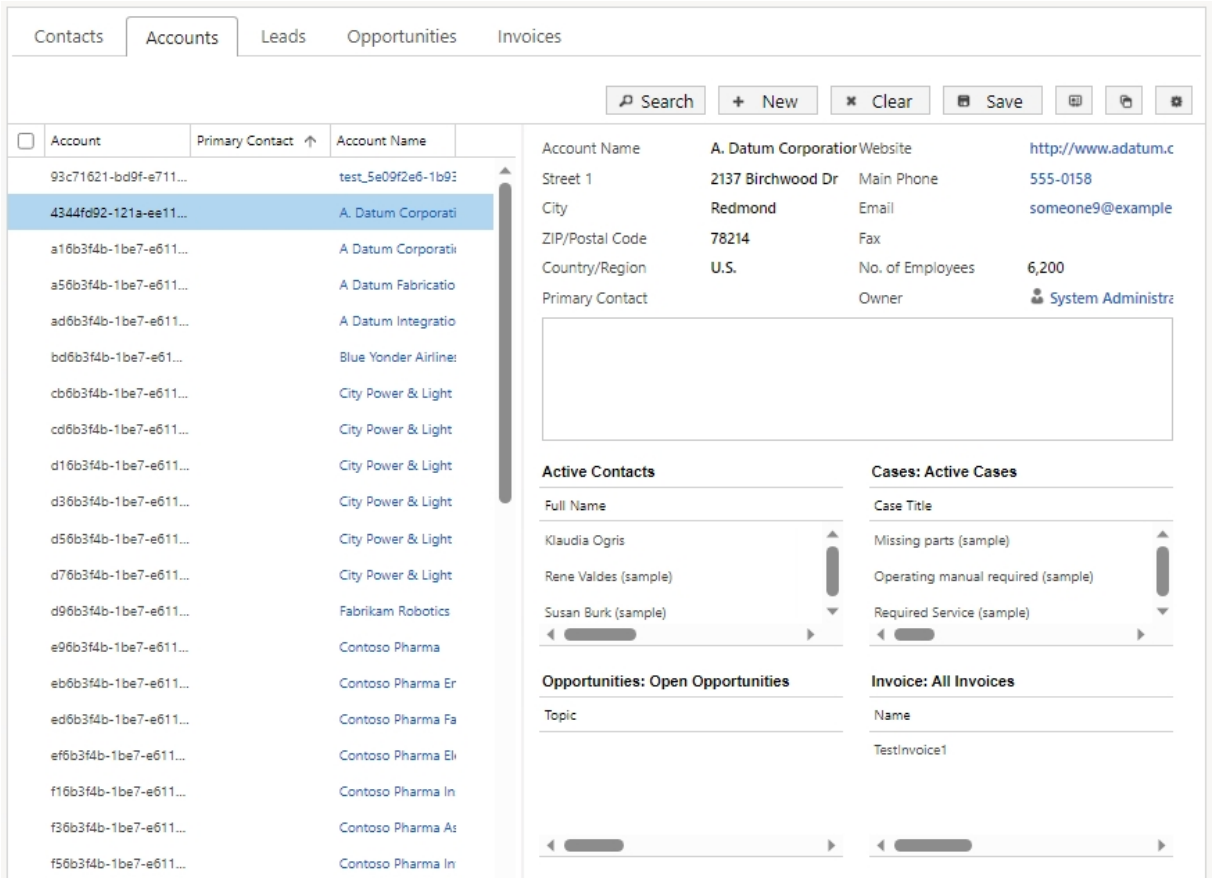

Figure 47: Opened entity from within the results

All entities can be opened with a double click from within the results overview.

5.1.3 The Search Fields

Search fields are the fields into which your future users will enter the search terms.

Please note: To add a search field, you first have to select and save your general settings.

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5.1.4 The Result Fields

Result fields are the fields in which your future users will find the results of their search.

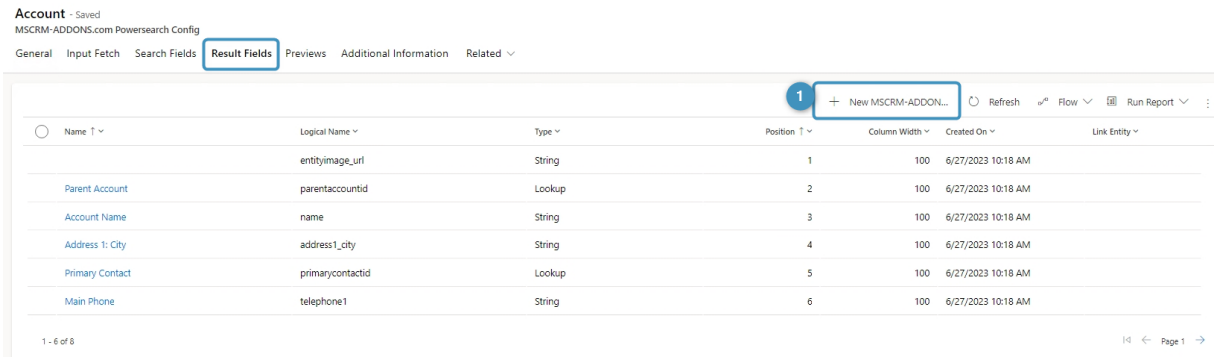

Figure 48: Result Field

Result fields are added and deleted in the same way as Search fields are. You can filter them as well by name and/or position and thus, change the order of the fields.

With the 1 **+MSCRM-ADDONS.com PowerSearch field** you can add a new PowerSearch Field or add a related PowerSearch Field to the record.

But of course, there are also some functionalities that are different to those of the Search fields. The PowerSearch Result field customization window enables you, for example, to set a 2 column width.

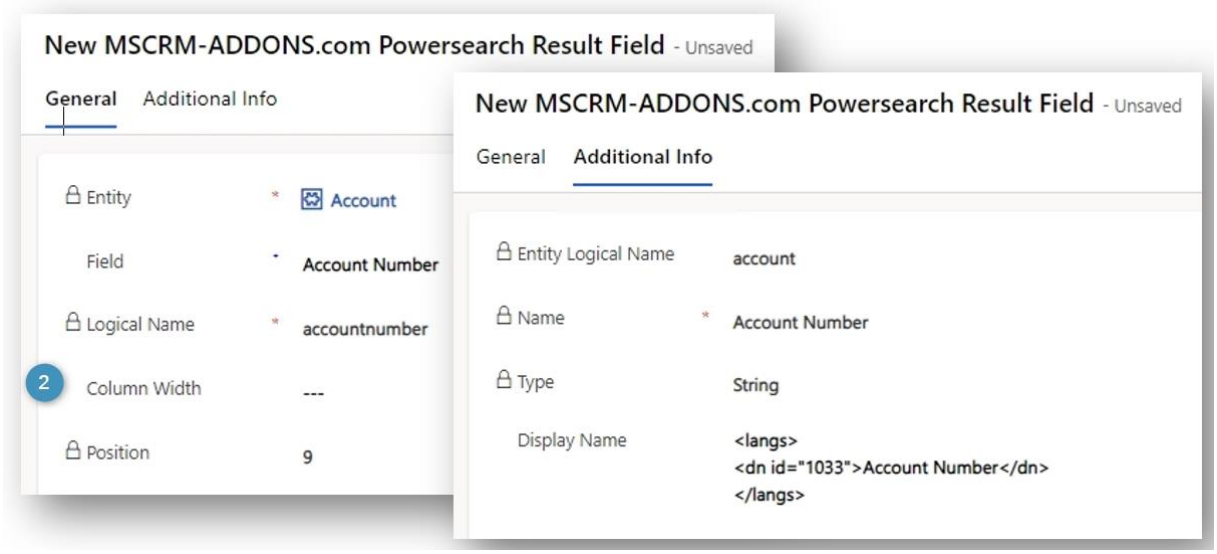

Figure 49: PowerSearch - Result Field with Additional Info

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5.2 How to share PowerSearch Configuration records

Once you have created some nice PowerSearch Configuration records, you may want to share them with other users.

Please note: It is crucial to share your Config records if you want others to work with them. Before you haven't shared them, the Config records will not be visible for others. (The only exception are administrators – they can view and change Configuration records anyway)

5.2.1 Open a random PowerSearch Configuration

Click in the Command bar on the **Share** button and select **Manage access**.

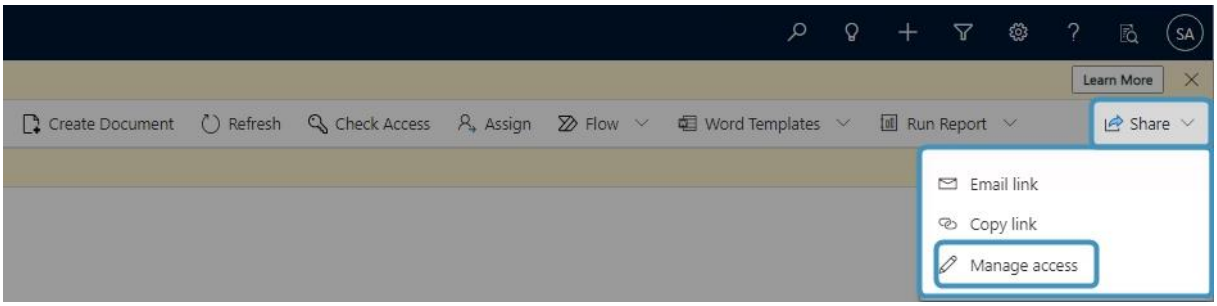

Figure 50: Search button in PowerSearch Config

5.2.2 The Share records in mscrm-addons.com PowerSearch Configuration opens

This window enables you to select the users or teams you want to share the **mscrm-addons.com PowerSearch Configuration** with and to assign specific permissions to these users or teams. To select a certain user or team, click on the **Add User/Team** button on the left side.

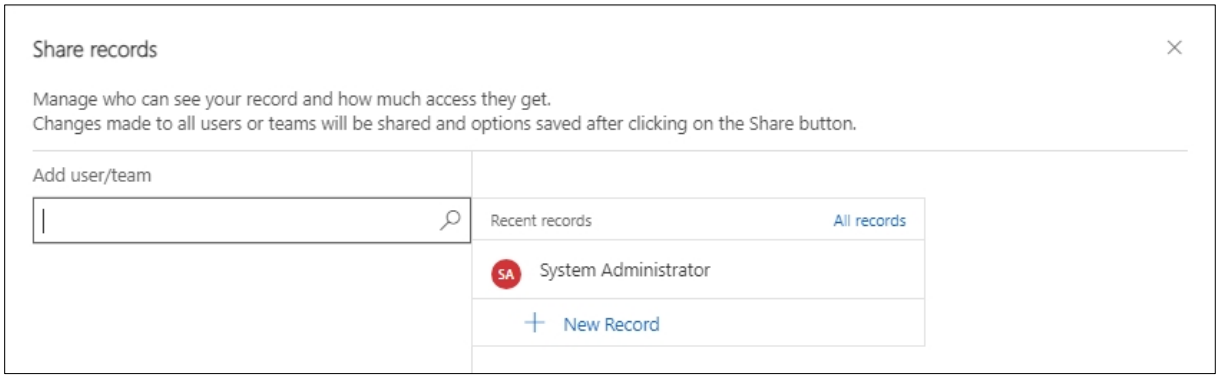

Figure 51: Share records in mscrm-addons.com PowerSearch Configuration

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5.2.3 Look for a user or team

In the so opened Look Up Records-dialog, look for a user or a team you want to share your PowerSearch Configuration with. Once you have found a good match, mark it. Then click on the **Select** button and it will show up in the selected records list. Click on the **Add** button to proceed.

Alternativ: Click the magnifying glass to open the Look Up Records dialog to look for a user or a team to share the PowerSearch configuration with. Open the Advanced lookup. Select between the tables Teams and Users with whom you want to share the PowerSearch Configuration.

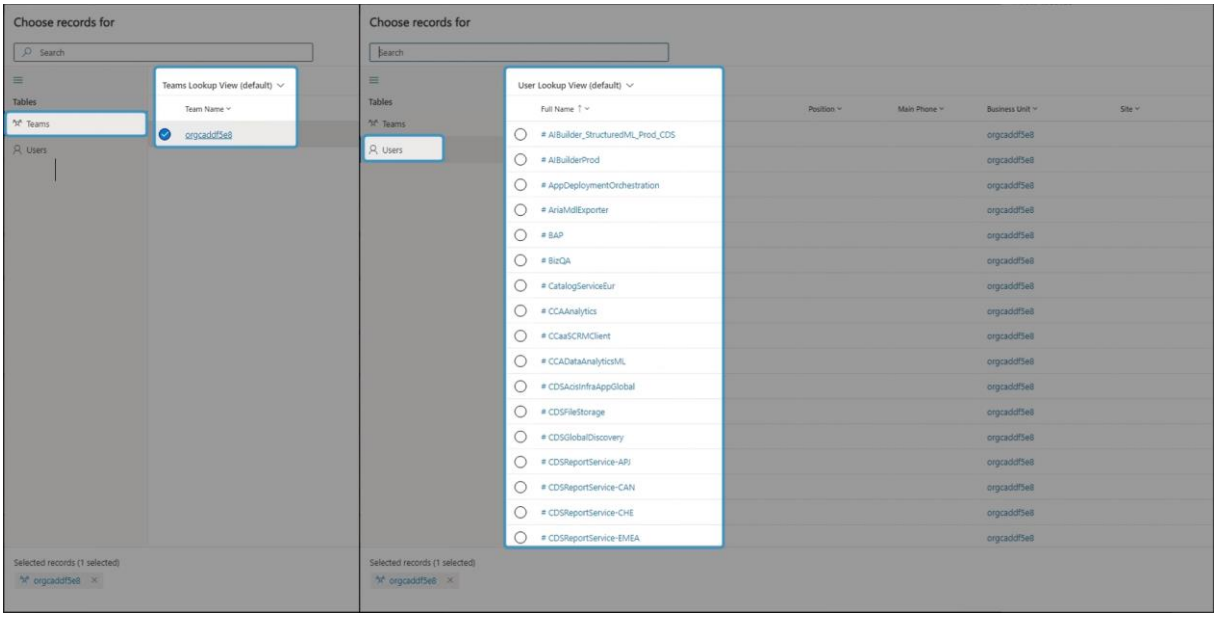

Figure 52: Look up records window - select team or user

5.2.4 Assign permissions to selected users

After you have decided with whom you want to share the PowerSearch Configuration, now also assign the rights that everyone should have. Like

- Read
- Write
- Delete
- Append
- Append to
- Assign
- Share

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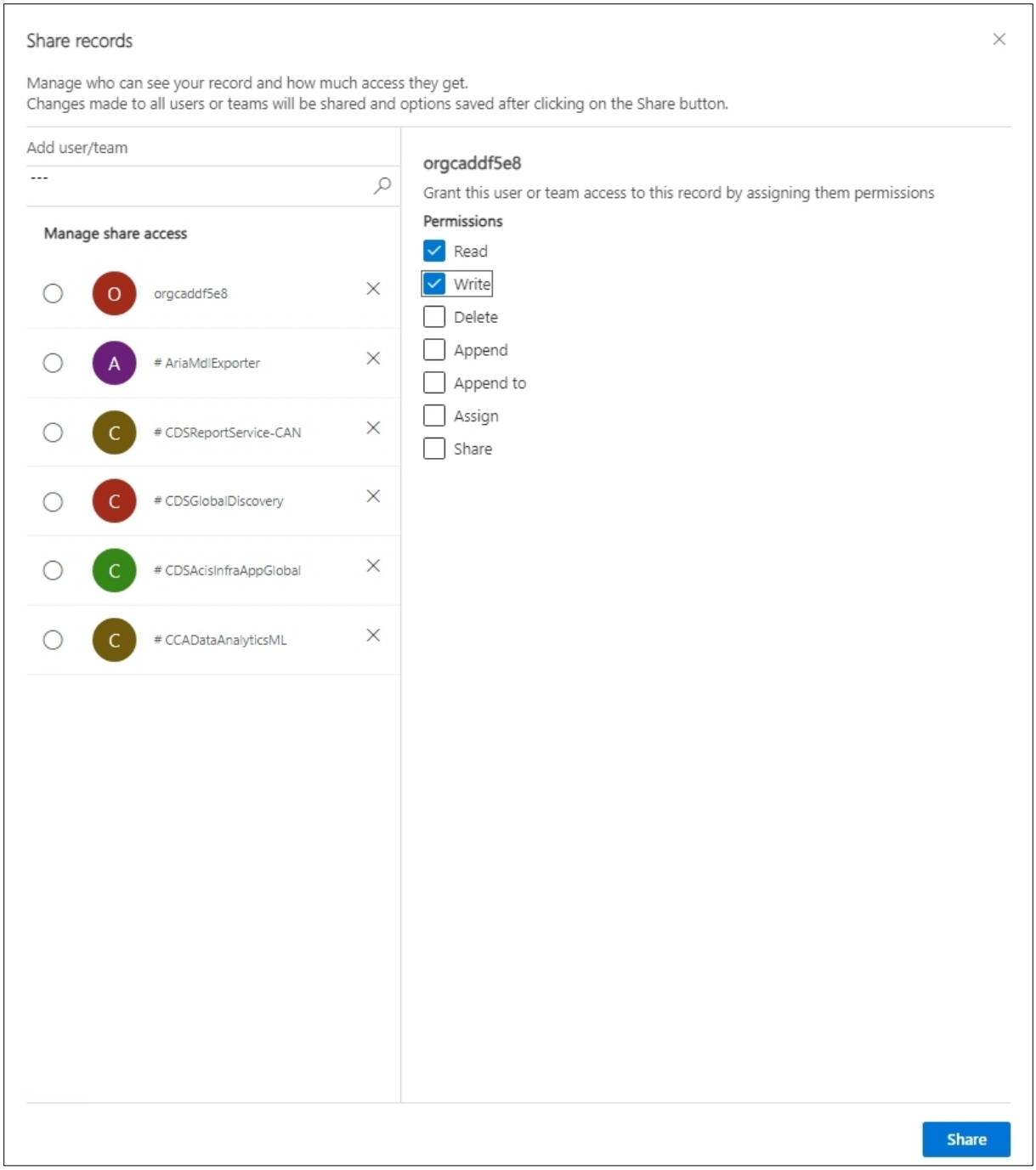

Figure 53: Select permissions for users with who you share the PS configuration

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6 The PowerSearch Layout Designer

The PowerSearch Layout Designer is providing functionality for designing and manipulating the visual layout of the PowerSearch entity, giving you the ability to customize its appearance and behavior.

6.1 How to start the PowerSearch Layout Designer

In Dynamics 365 navigate to PowerSearch and open it. Select the **General Settings** tab and look for Entity Preview for. Enter your preferred entity. To open the **Layout Designer,** click the 1 **Designer** button.

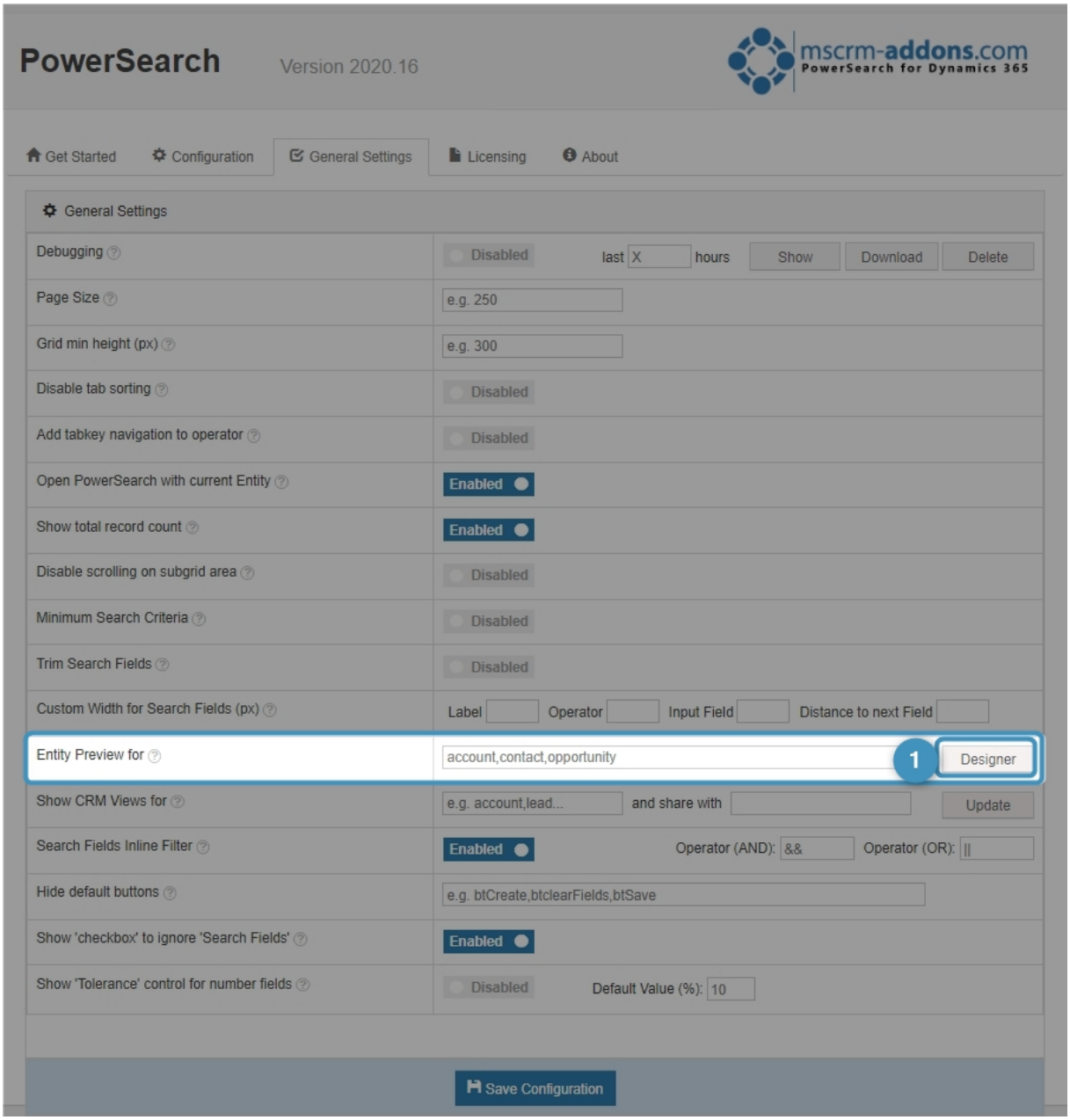

Figure 54: Open the Layout Designer

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After clicking the button, the Entity Layouts dialog will open, providing you with options to **create**, **import**, **export**, or **edit** a layout in PowerSearch.

To proceed, check the default label and choose the desired action from the options available at the bottom of the window. The default entity displayed depends on the entity you have previously enabled in the General Settings. By clicking the **Edit** button (as shown in Figure 37), you will be redirected to the PowerSearch Layout Designer surface.

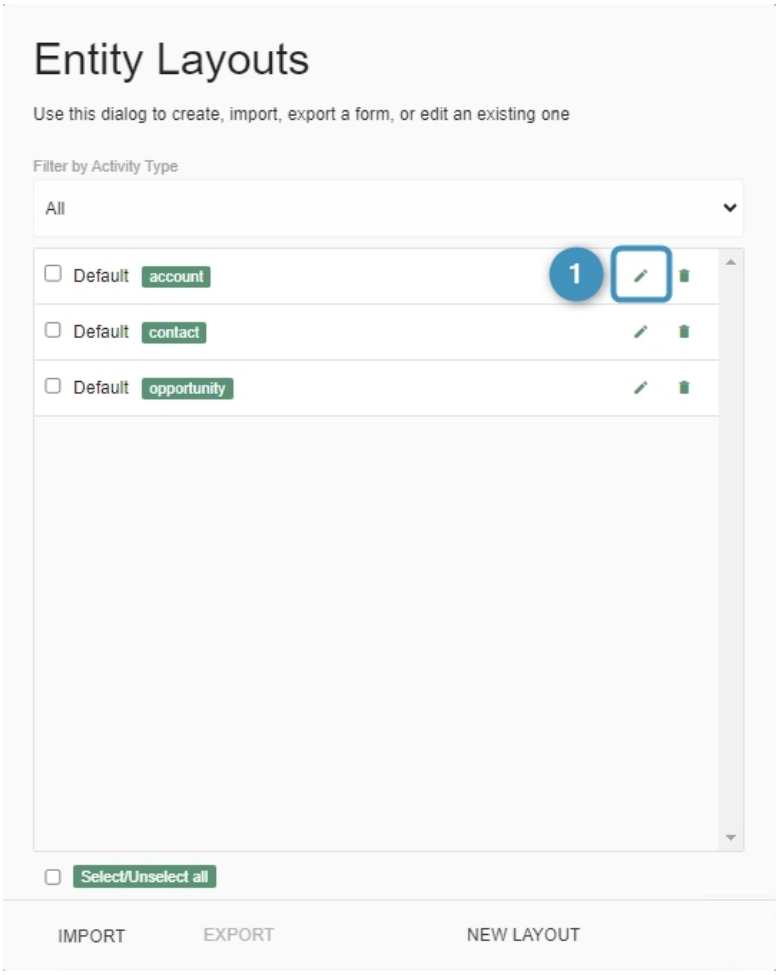

Figure 55: PowerSearch Layout Designer

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6.2 The PowerSearch Layout Designer surface

In this chapter, you will find a short introduction to the PowerSearch Layout Designer surface and its capabilities. The Layout Designer offers numerous options for designing the layout of PowerSearch, which will be further elaborated on in subsequent chapters, providing a more detailed explanation.

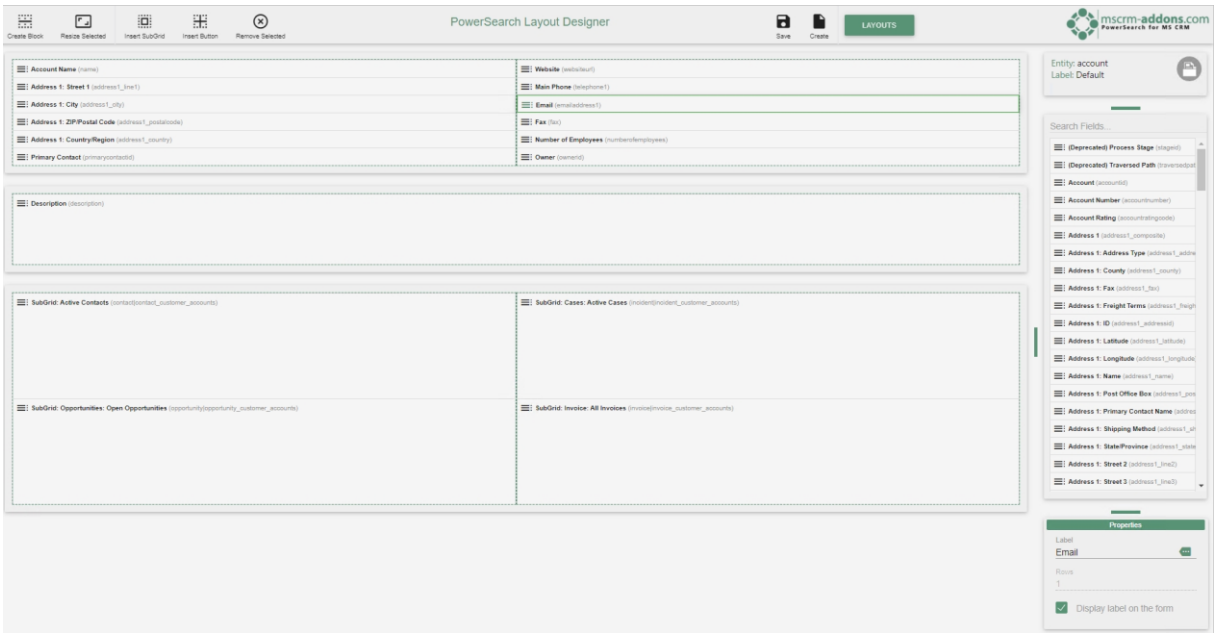

Figure 56: Layout Designer surface

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6.2.1 How to customize Layouts

A layout usually consists of various blocks, which can be split into up to three columns. By customizing these blocks and columns you can create your personal design, which could look like the further example:

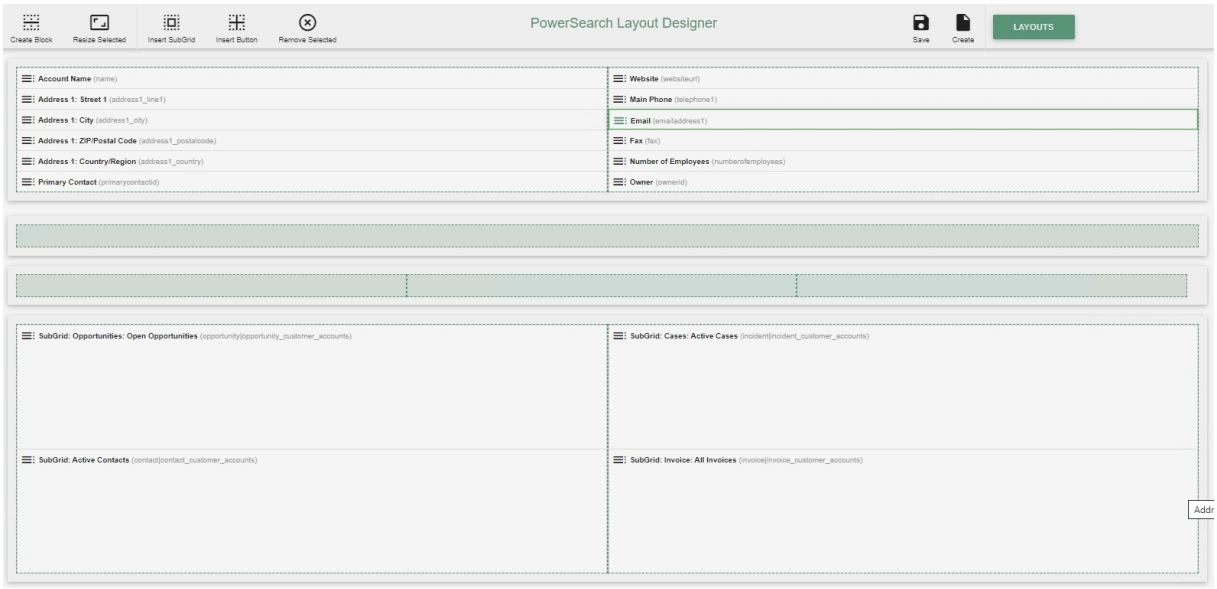

Figure 57: Design your PowerSearch Layout with the Layout Designer

With this icons you can customize blocks, columns and fields.

Figure 58: customize with these buttons blocks, columns and fields

1 **Create Block button**: click on the button and a new window opens. You can create your block here by customizing its columns. With the slider you can determine the width for the column. Add or remove fields with + or −. To save your settings, click **CREATE**.

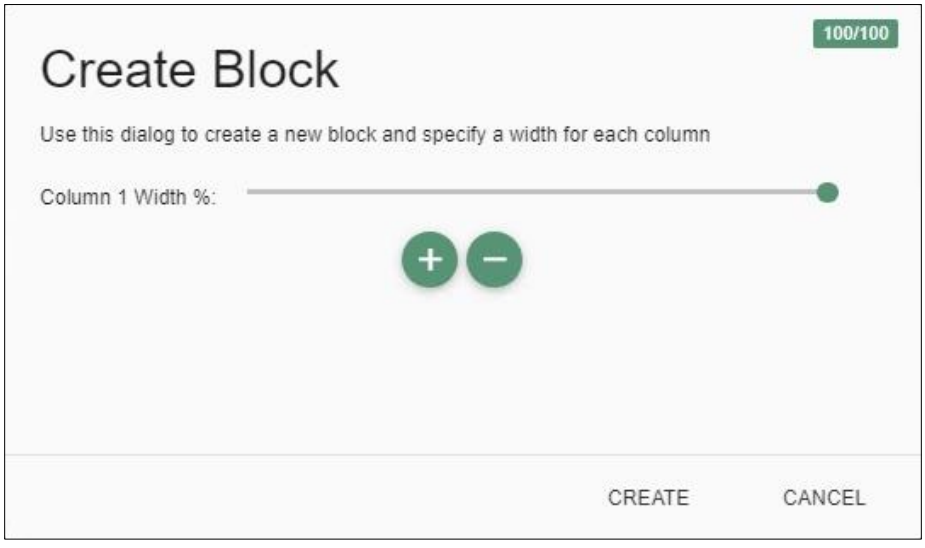

Figure 59: Create Block window

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2 **Resize Selected button**: With a click on this button, you can resize a row in the **Edit Row** dialog. Simply select the row you would like to resize and edit the width of each column by moving the slider to the left or to the right. Once you have finished, do not forget to **SAVE** your settings.

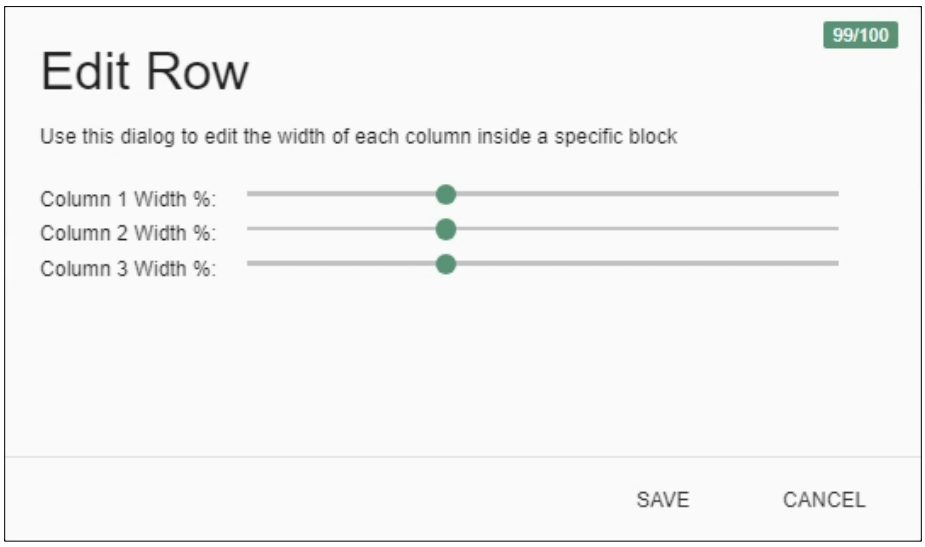

Figure 60: Edit Row dialog:

Please Note: The overall percentage maximum for a block is 100 percent!
3 **Insert SubGrid button**: Once you have clicked this button, you will be provided with a dialog that enables you to create a new sub-grid.

Please note: The sub-grid must be inserted into a new empty block with only one field.

Figure 61: Insert SubGrid Dialog

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a) **Relationship**: Open this fields' drop-down menu and select a relationship for your sub-grid. You can choose between 1:N and N:N (which are equal to M:M – many:many) relationships.
b) **View**: Once you have selected a relationship for your sub-grid, you will be provided with the views that are related to your selected relationship and that are already saved in the system.
c) **Rows**: Here, you can select how many rows should be displayed in your sub-grid. The number of rows must be bigger than 1, it must not be < = 0!
d) **Label**: This field provides you with the possibility to rename your sub-grid label.
e) **Display label**: Here, you can decide if you want the label to be displayed or not.
f) **Create and Cancel button**: Save or Cancel your actions with these buttons.

4 **Insert button**: Enables you to insert a JavaScript button. Fill in the open dialog the corresponding information and confirm with **CREATE**.

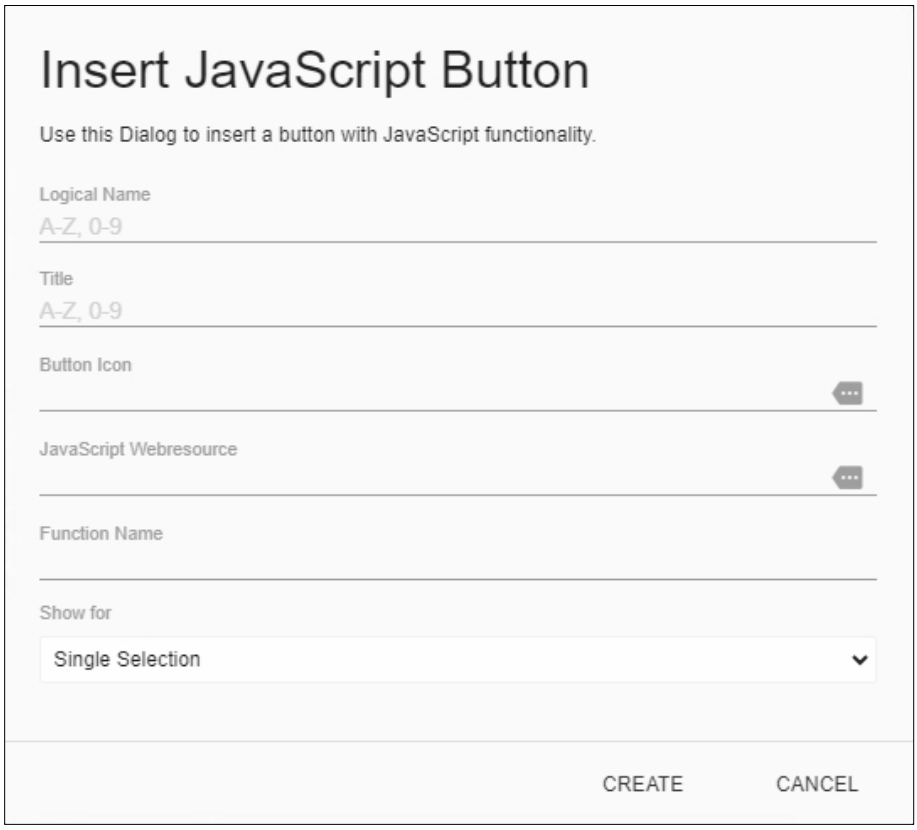

Figure 62: Insert JavaScript

5 **Remove Selected**: Please click on this button in order to remove a certain field, row or sub-grid.

Please note: You must select the area you would like to delete before you click on the **Remove selected** button.

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6 **Save and Create button**: To Save and Create the PowerSearch Layout.

7 **Layouts button**: To open the Entity Layouts dialog. In contrary the **Entity and Label** overview at the top right shows you with which entity/label/table you are working on now.

Figure 63: Entity and Label overview

1. The Search Field

In the Search Fields-section you have the possibility to select which fields you want to add to which column. Simply drag and drop your preferred field from the Search Fields-section to the column you would like to place it.

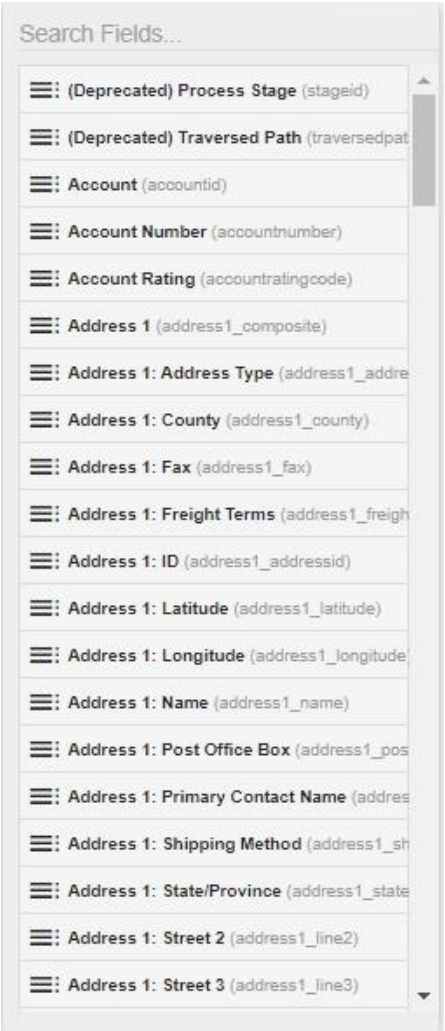

Figure 64: The Search Field section

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2. The PowerSearch Layout Designer Properties

In the Properties of the PowerSearch Layout Designer, you can edit your field labels in any activated Microsoft Dynamics 365 language.

Figure 65: Layout Designer properties

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7 PowerSearch Surface: Special field functions and buttons

PowerSearch offers the Search and Result fields functionalities that most users already know from MS Dynamics 365. However, there are some buttons and fields that have special functions or a special behavior.

7.1 Look up field

A click on a Lookup-field (e.g., Primary contact) will open the Standard Dynamics 365 Lookup dialog.

Please note: Should you use another operator than **equals**, (like e.g., **contains**) the Look up field will be transformed into a regular text field.

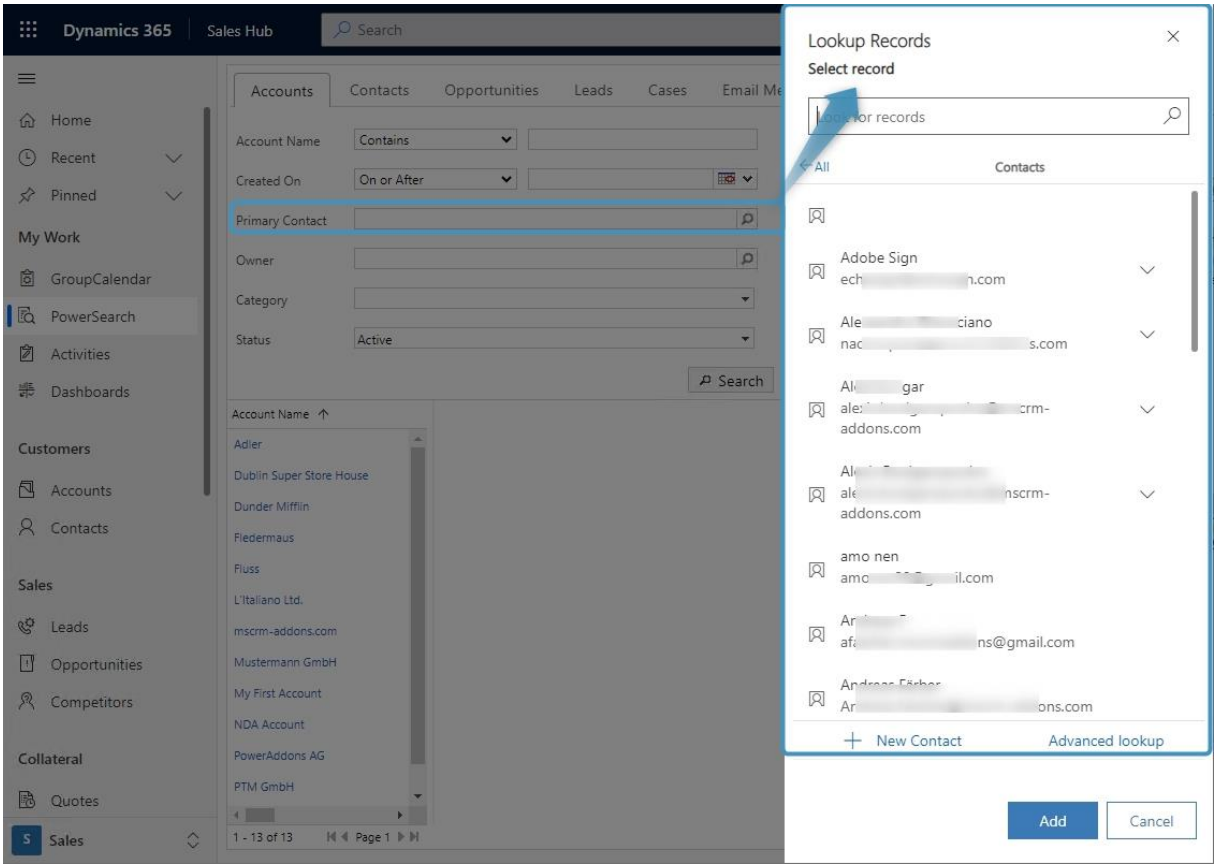

Figure 66: Open Lookup records

7.2 Date related fields

Date related fields (e.g., created on) usually work with a data picker.

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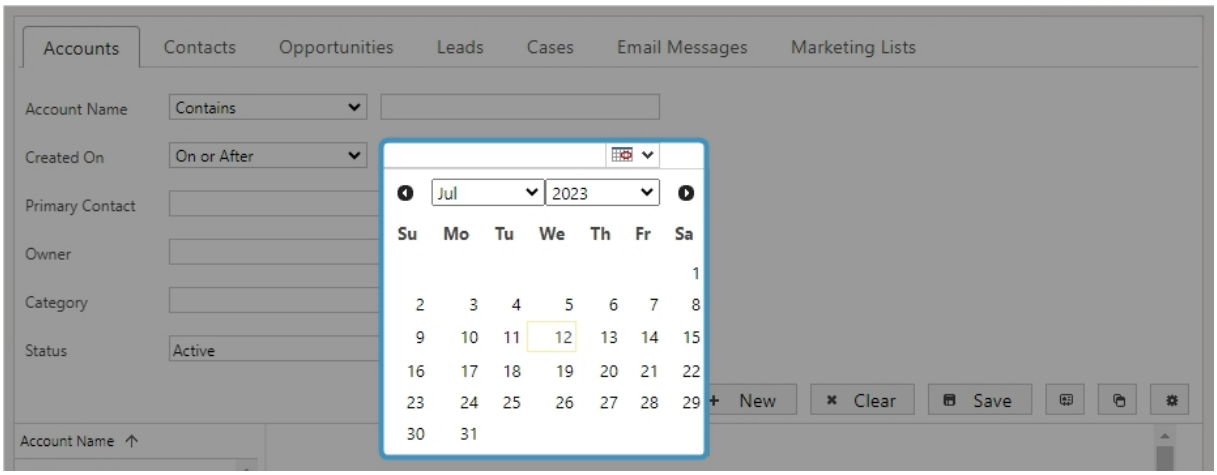

Figure 67: Date related field

7.3 The Open Configuration button

The **Open Config** button is a kind of shortcut to the Configuration tab for users and can be found at the PowerSearch user surface, in line with the **Search** button.

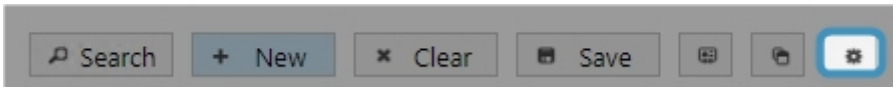

Figure 68: Open config button

7.4 The Clear button

The Clear button enables you to clear the PowerSearch results and entries with a simple click on the button.

Figure 69: Clear button

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8 Ways to proceed with your Search results

Once created, users of PowerSearch can proceed in various ways with the results.

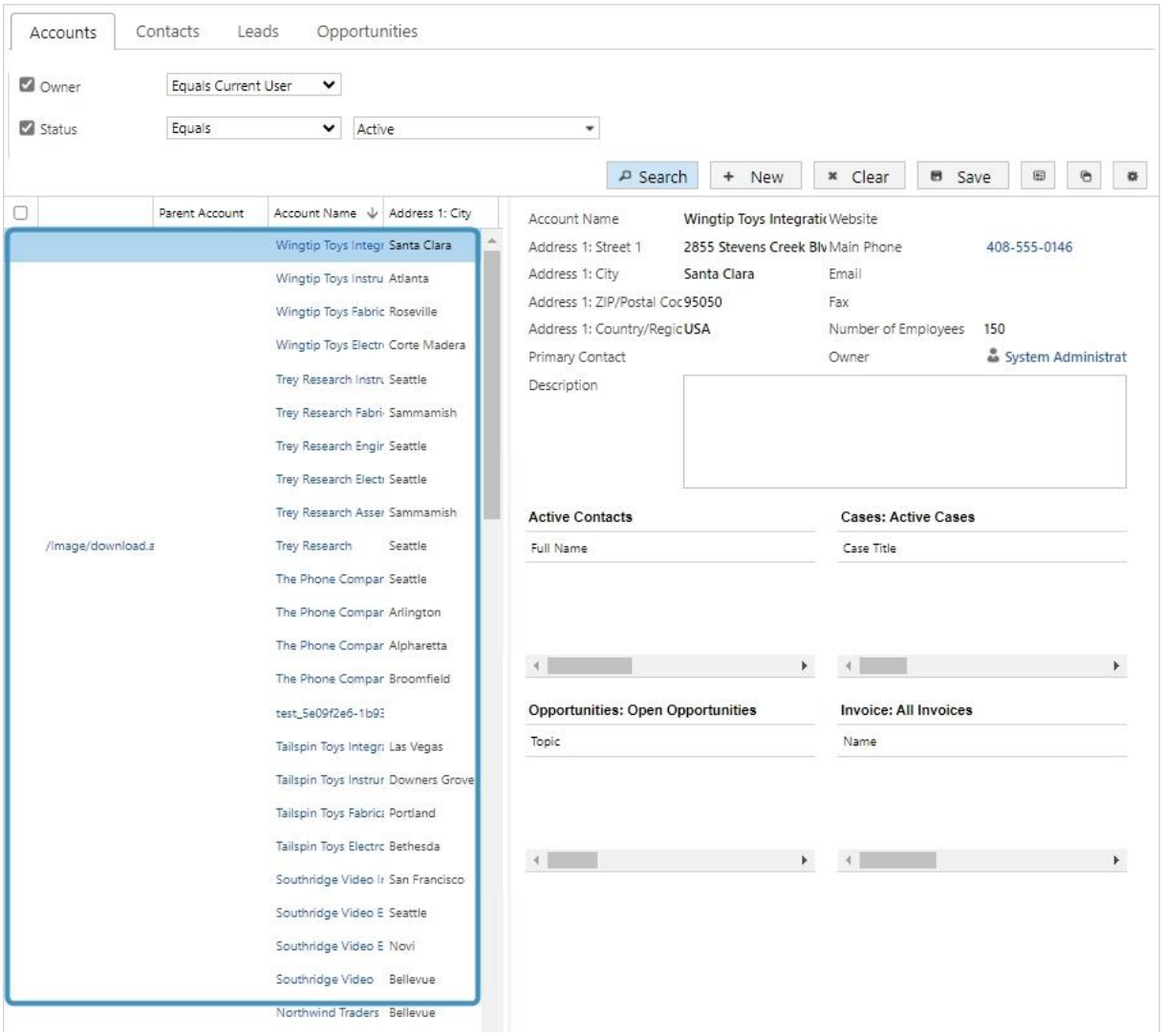

Figure 70: PowerSearch with results

8.1 Open the record with a double click on them

Simply double click the record if you want to open it.

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8.2 Open your results with Microsoft Dynamics 365

Once you have created some pretty results, you can also open them directly within Microsoft Dynamics 365 using the **Open result in CRM** Grid button.

The button can be found right next to the **Clear** button at the right side of on top of your results.

Please note: To use this functionality of PowerSearch you have to select a view in the Config entity.

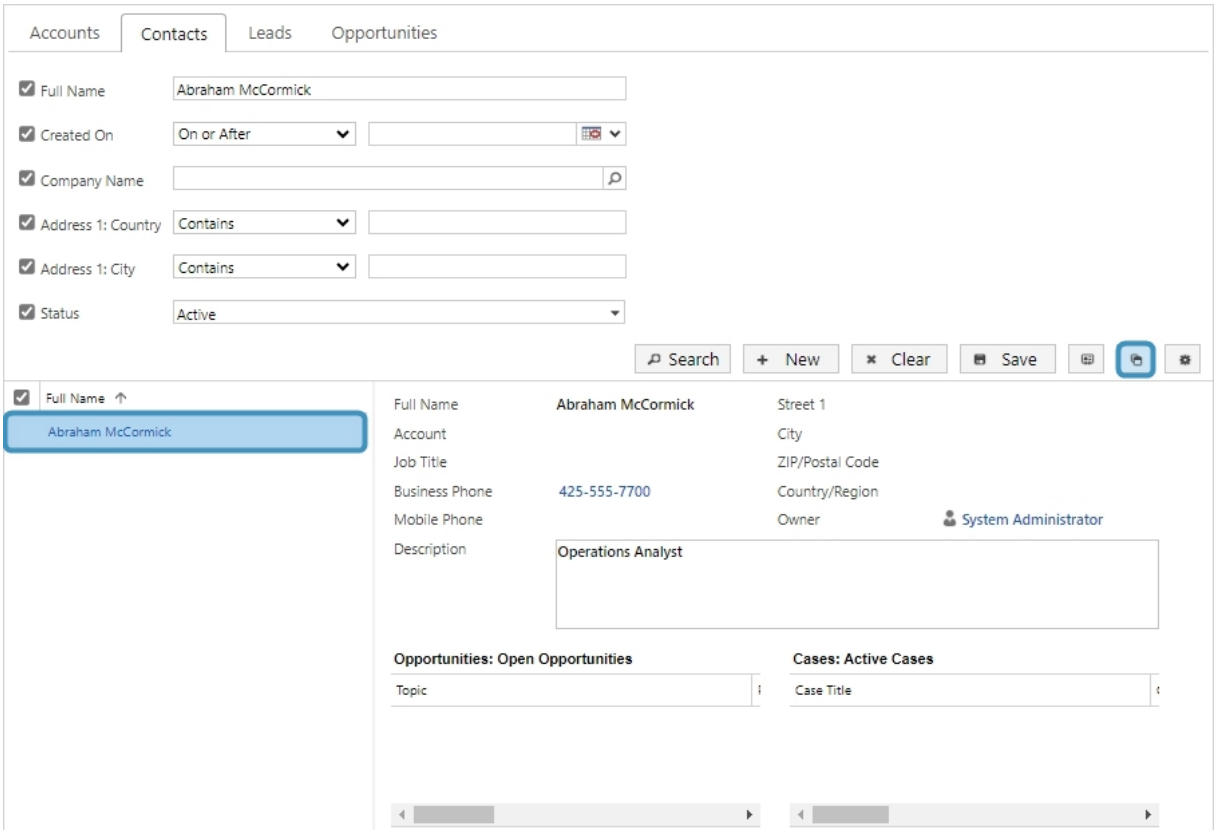

Figure 71: Open the result in the CRM Grid

This action will open your results in a Microsoft Dynamics 365 Grid in which you can apply all Microsoft Dynamics 365 functionalities to the results, using the command bar.

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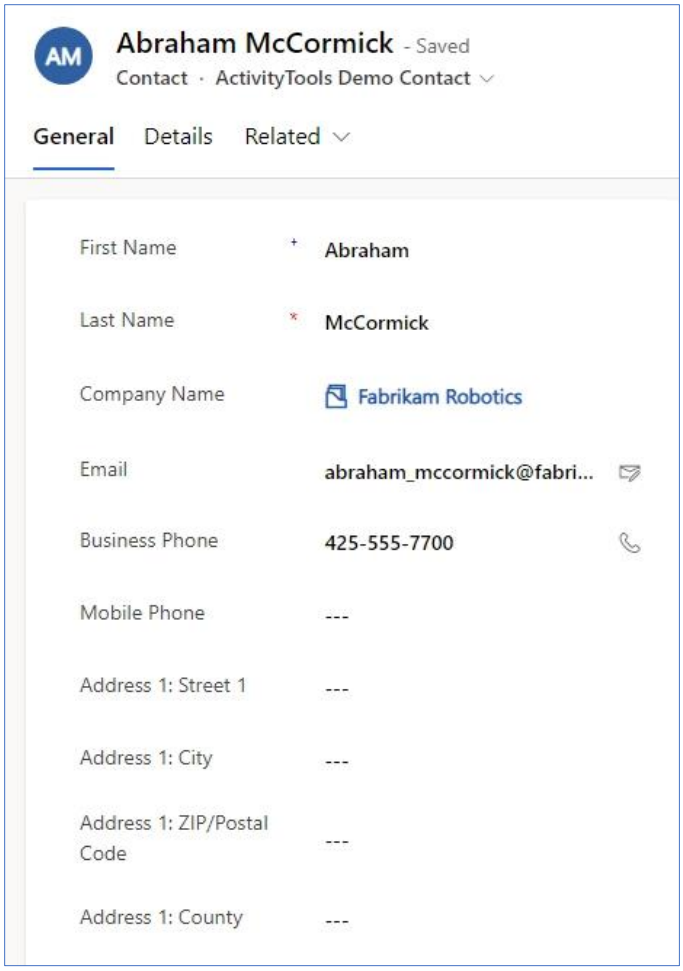

Figure 72: Open result from PowerSearch in Dynamics 365

8.3 Jump from page to page

As per default, the standard page size delivers 250 results. If you receive more results, you can easily navigate through pages by clicking on the corresponding arrows in the lower right corner. Additionally, you have the option to change the page size.

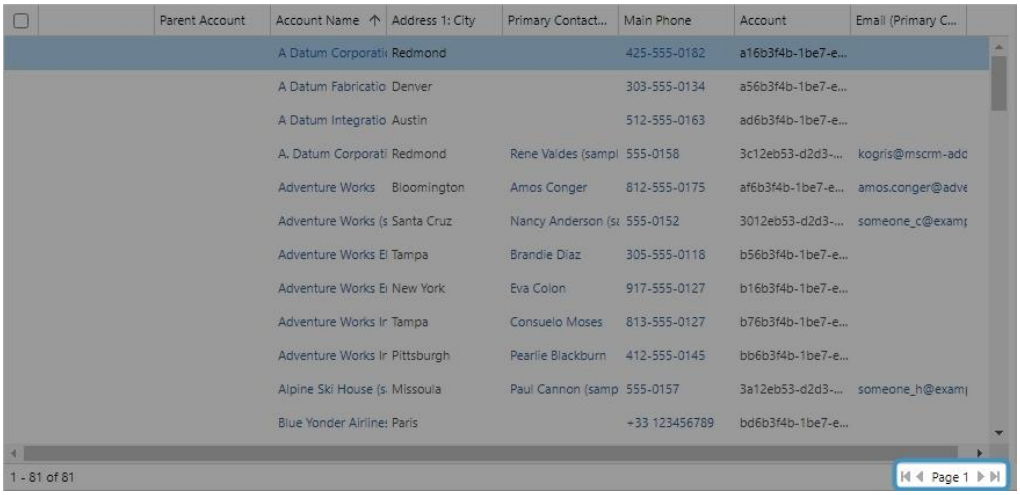

Figure 73: Page jumping

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8.4 Change the result or using the column header

PowerSearch enables easy single-column sorting by simply clicking on the term you want the results to be sorted by. In our example, we sort the account names in descending alphabetical order by clicking on **Account Name**. The arrow next to **Account Name** indicates that the results have been sorted in descending order.

Figure 74: Change result order

PowerSearch also provides the ability to perform multi-column sorting. To illustrate this, we have added the field **Address 1: City** to our result fields. To achieve multi-column sorting, click on **Address 1: City** and then press and hold the **Shift** button on your keyboard while clicking on **Account Name**. This will apply the same result order (in our example, ascending) to both columns.

In Figure 71 you can see that both columns are sorted.

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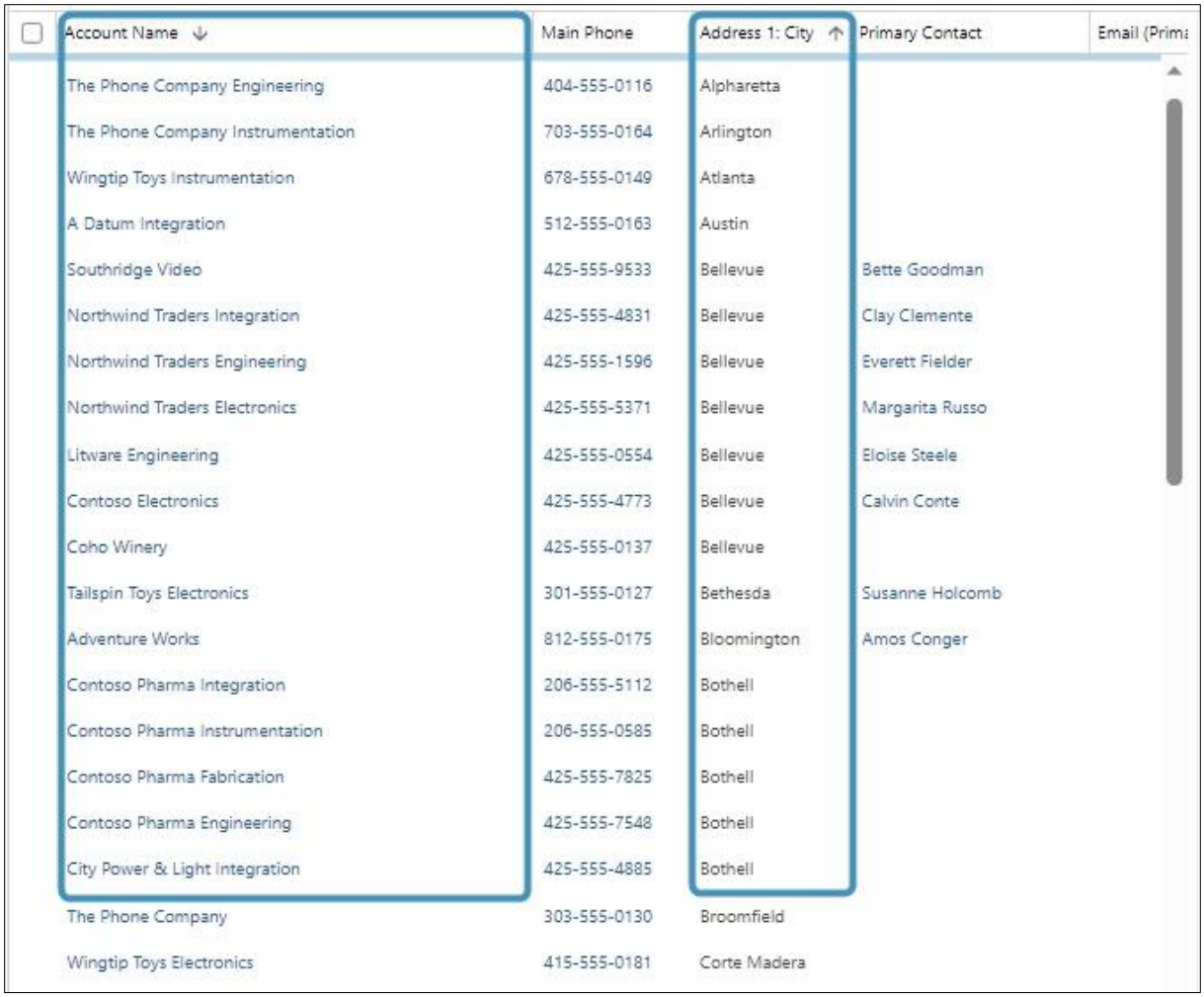

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Prima
The Phone Company Engineering	404-555-0116	Alpharetta		
The Phone Company Instrumentation	703-555-0164	Arlington		
Wingtip Toys Instrumentation	678-555-0149	Atlanta		
A Datum Integration	512-555-0163	Austin		
Southridge Video	425-555-9533	Bellevue	Bette Goodman	
Northwind Traders Integration	425-555-4831	Bellevue	Clay Clemente	
Northwind Traders Engineering	425-555-1596	Bellevue	Everett Fielder	
Northwind Traders Electronics	425-555-5371	Bellevue	Margarita Russo	
Litware Engineering	425-555-0554	Bellevue	Eloise Steele	
Contoso Electronics	425-555-4773	Bellevue	Calvin Conte	
Coho Winery	425-555-0137	Bellevue		
Tailspin Toys Electronics	301-555-0127	Bethesda	Susanne Holcomb	
Adventure Works	812-555-0175	Bloomington	Amos Conger	
Contoso Pharma Integration	206-555-5112	Bothell		
Contoso Pharma Instrumentation	206-555-0585	Bothell		
Contoso Pharma Fabrication	425-555-7825	Bothell		
Contoso Pharma Engineering	425-555-7548	Bothell		
City Power & Light Integration	425-555-4885	Bothell		
The Phone Company	303-555-0130	Broomfield		
Wingtip Toys Electronics	415-555-0181	Corte Madera		

Figure 75: Multi-column sorting

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9. Tutorials (How to´s)

This chapter provides you with helpful tutorials that show you how to work with PowerSearch efficiently.

9.1. How to search with PowerSearch

Once PowerSearch is configured, you can start with your search queries. Please follow our Tutorial on how to search with PowerSearch.

Step 1: Open PowerSearch in Dynamics 365. This action automatically opens PowerSearch. If there does not exist any configuration, PowerSearch offers sample data, which you can, but do not have to make use of.

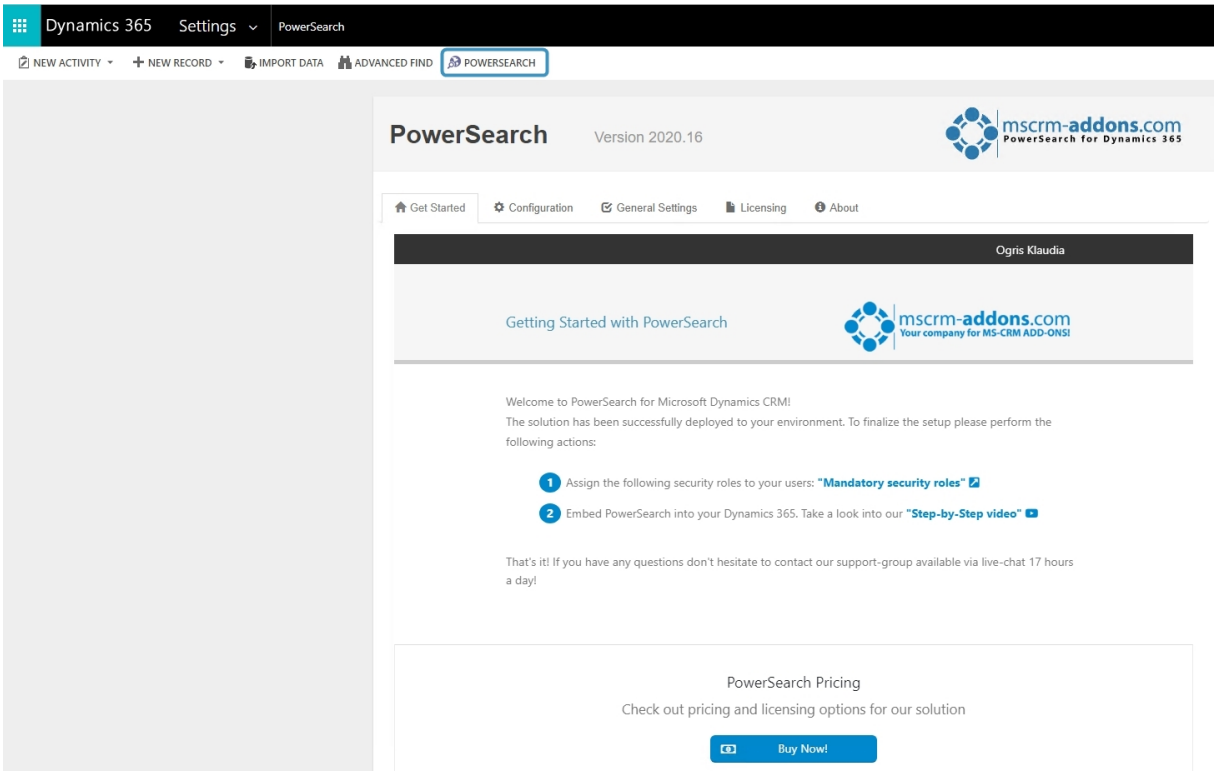

Figure 76: Open PowerSearch in Dynamics 365

Step 2: You could run your search query in any of the entities – to switch between them, simply click on the entity you would like to start your query. As soon as you have selected one, please proceed as shown in the next steps. For illustration purposes, we will proceed with the entity **Contact**.

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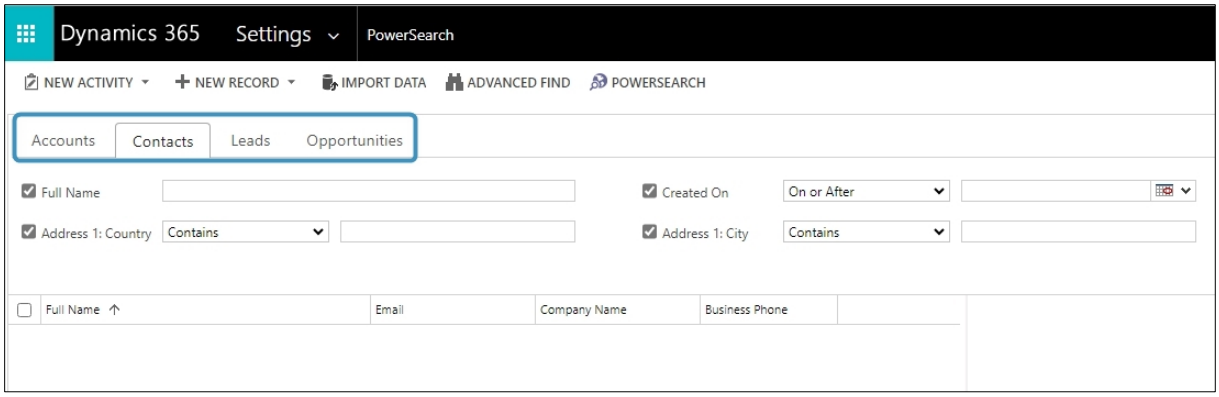

Figure 77: Select entity for applying search

Step 3: After entering your 1 **Search Term** in the relevant fields for your query, you can click on the 2 **Search** button or simply press Enter. While it's not necessary, you have the option to enter a term in every provided field. Using more fields for your query will yield more precise 3 **Results**.

In our case, we have chosen to enter only one term. The displayed results are based on your result field configuration, and they will appear in the designated result field.

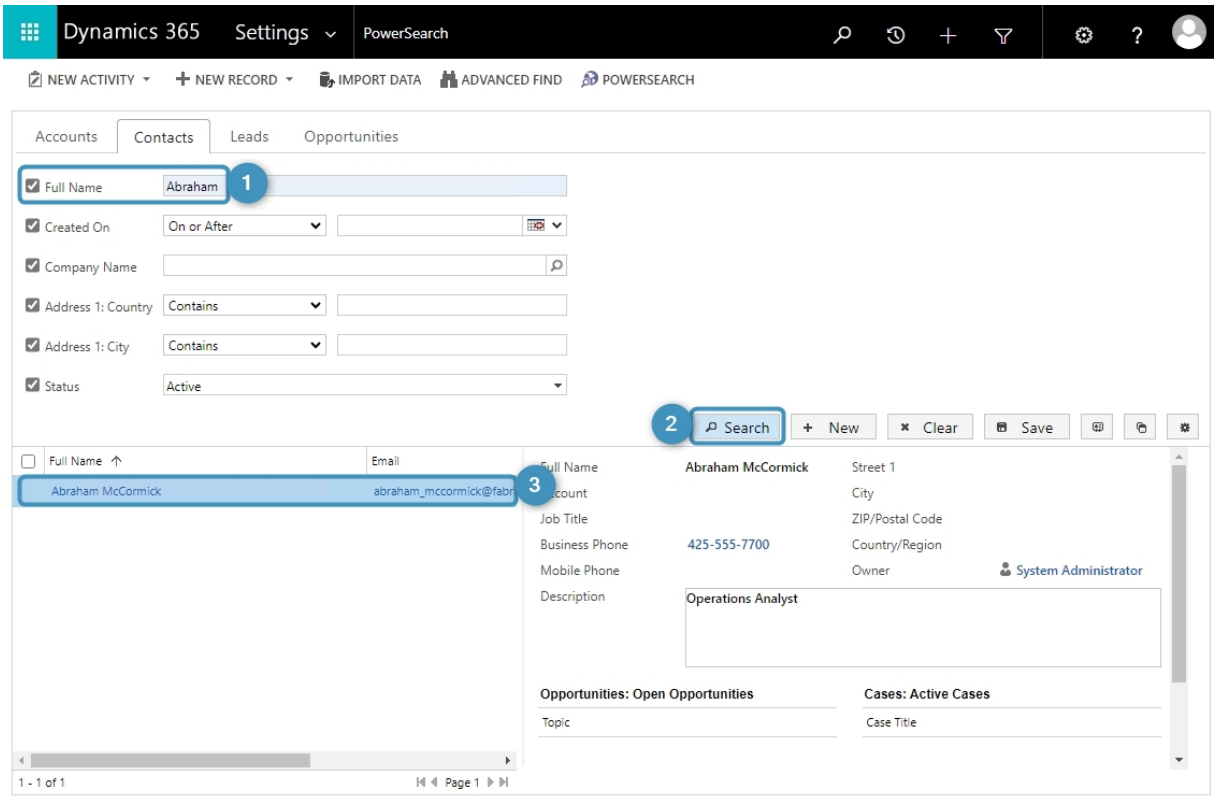

Figure 78: How to enter a search term

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9.2. How to configure an entity/table

PowerSearch allows you to add as many entities to your search as you wish. This tutorial shows you how to configure the entity **Invoice** with one view **All Invoices** and two search fields (**Account**, **Created on**).

Our result fields are automatically applied due to the view that we have selected before (**All Invoices**). However, you could as well add or delete some result fields. This works exactly like adding or deleting search fields.

Step 1: Open PowerSearch configuration and click the **New** button.

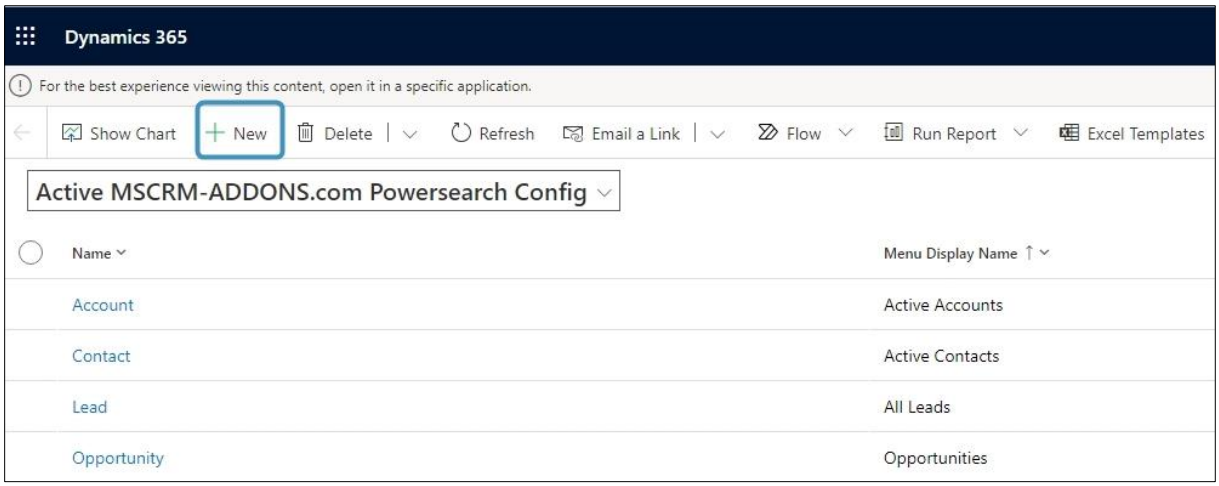

Figure 79: New PowerSearch Configuration

Step 2: Now select the entity you would like to add to PowerSearch.

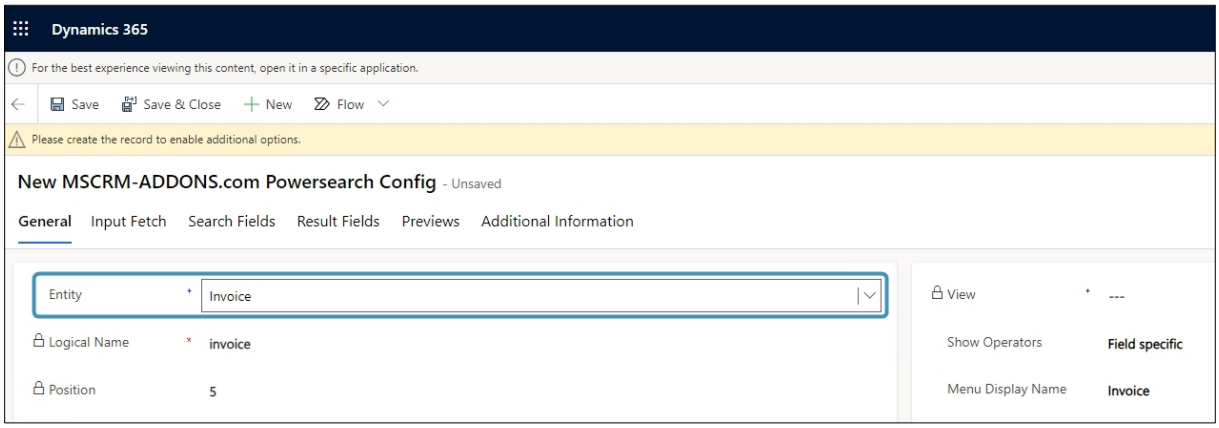

Figure 80: Select table

Step 3: Select a view that will be applied to your future result fields. We decided to add Active Accounts.

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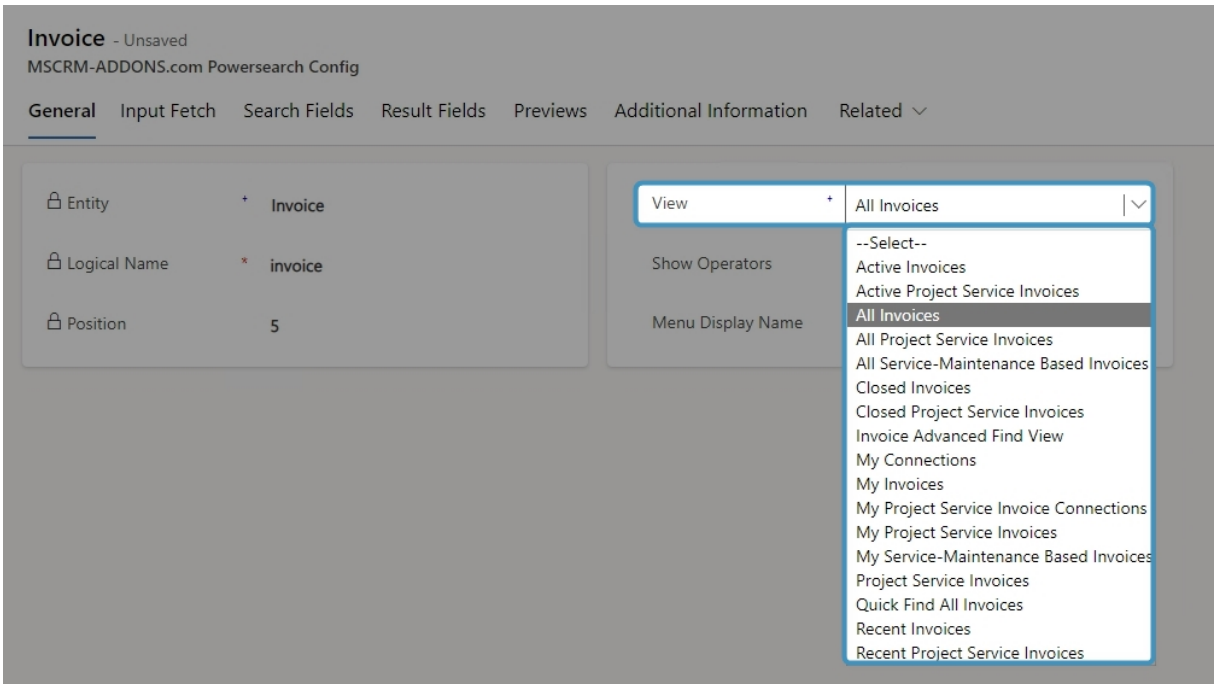

Figure 81: Select View

9.3. How to add Fields

Please note: The Search Fields settings ALWAYS overrule the view settings. In case you should have added a field that overrules a certain view, you will be notified.

Navigate to the ❶ **Search Fields** tab and ❷ **Add** another Search Field to this table/entity. Don´t forget to **Save**.

Please note: You can add more than one Search Field.

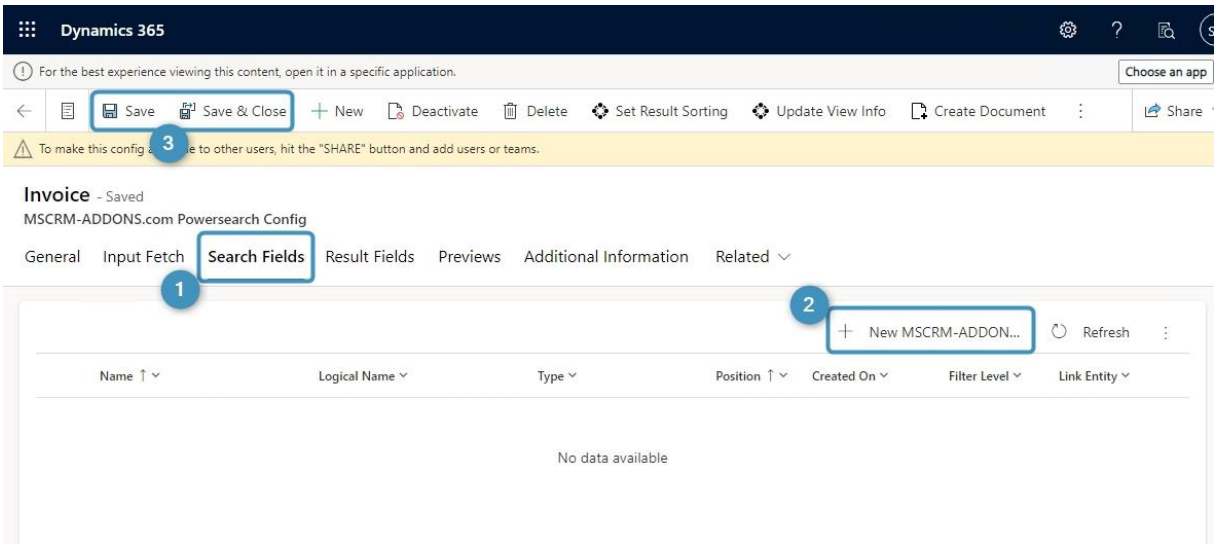

Figure 82: Add Search field

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9.4. The results

Once you have configured your Search and Result fields, do not forget to save them. To see the results, navigate to PowerSearch and refresh the page, if necessary.

Figure 83: New Table added to PowerSearch

9.5. How to delete Search and Result Fields

If you have added a wrong Search or Result field, you can delete it. Navigate to the Search- or Result Field Configuration (corresponding to which field you would like to delete).

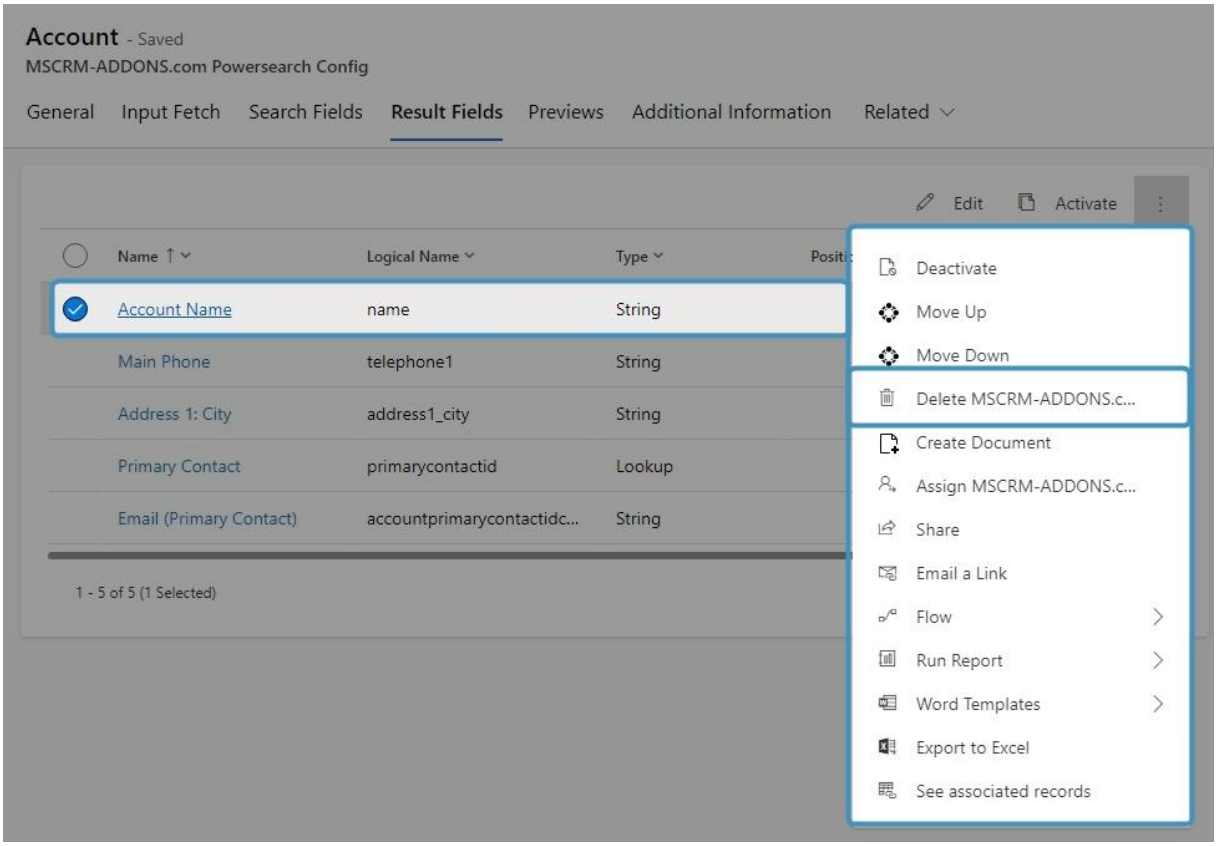

Figure 84: Delete a Field

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9.6. How to set an operator

When you open the drop-down menu of the Default operator-field you get the opportunity to select between various options that depend on the entity/field you have chosen before. The operators are depending on the field type (e.g., Money fields, DateTime fields or like in Figure 80 a Text field offer different operator).

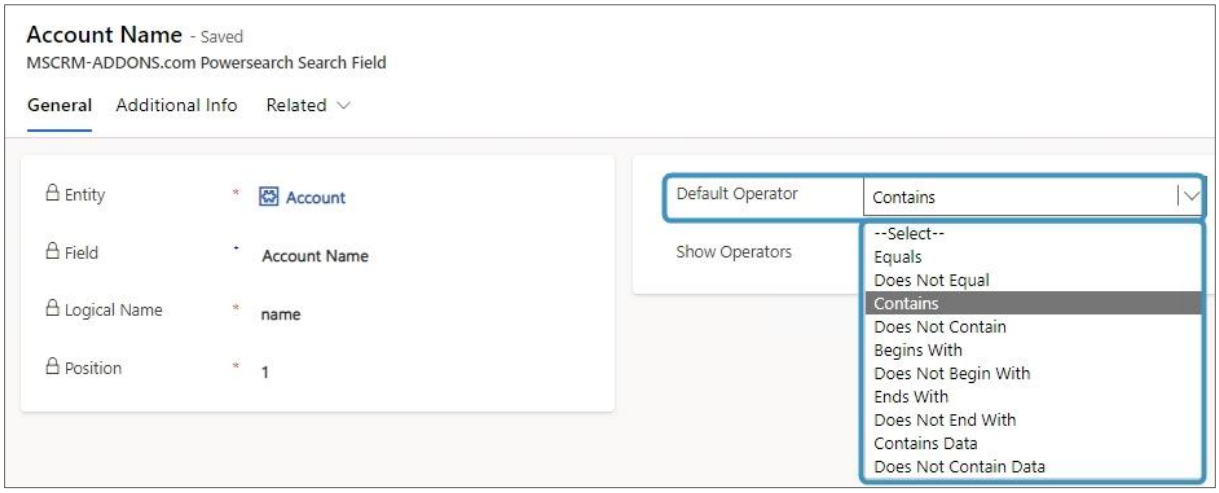
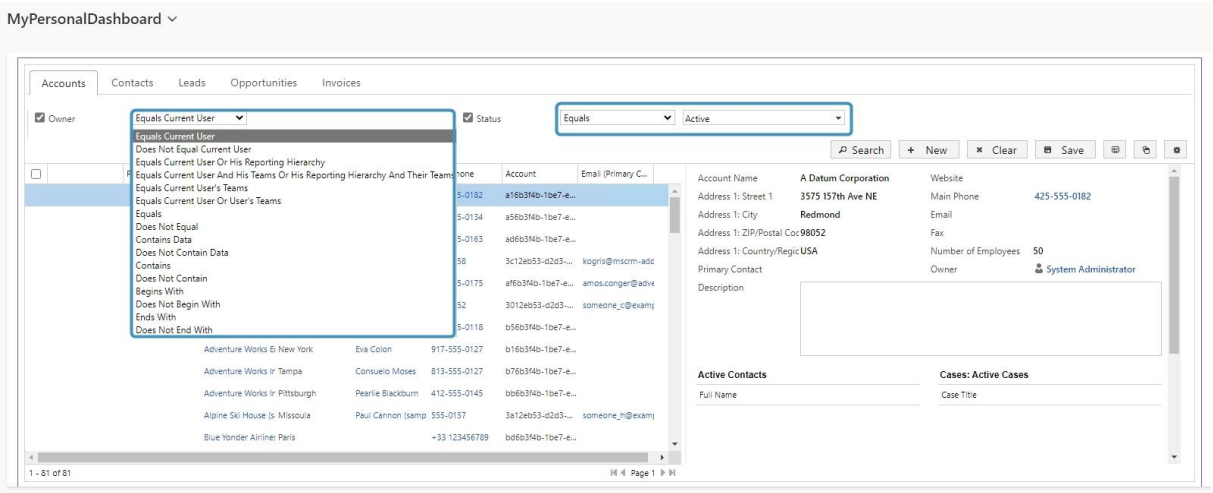


Figure 85: Set an operator

Please note: The **default** operators vary depending on the entity/fields you select. For the Account name-field you can, for example, select between Equals, Does Not Equal, Contains, Does Not Contain, Begins With, Does Not Begin With, Ends With, Does Not End With, Contains Data, Does Not Contain Data.

If you do not set a Default Operator, the first operator of the list is selected automatically (only if the operator is visible). Per default, users cannot change the operators, but you can give them the opportunity to do so.



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9.7. How to enable users to choose between operators

In the configuration settings for an entity's search functionality, you can determine how the search operator is presented: universally for all search fields (**Yes**/**No**), or **Field Specific**. If you choose the field-specific approach, you can directly define this within the configuration of the entity's individual search fields.

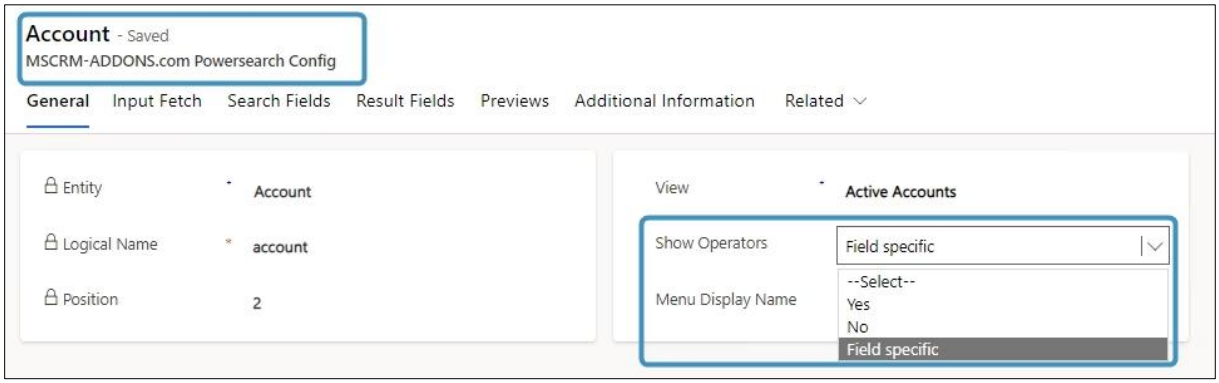

Figure 86: Show Operators

You can enable your users to choose between operators each time they run a search. To do so, simply set the Show operators-field on **YES**. If you do not want your users to use this option, select **No**.

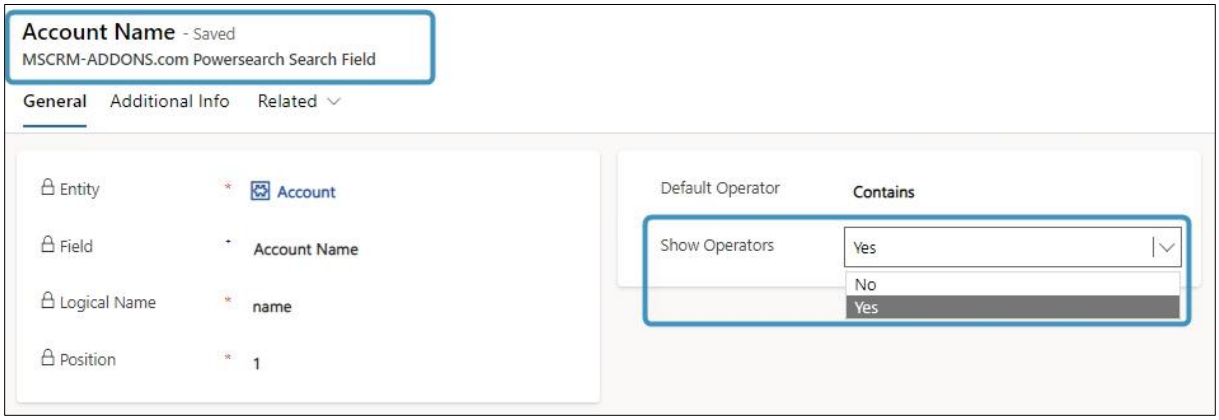

Figure 87: Show Operators in PS Search Field

9.8. How to change the page size

PowerSearch also allows to change the size of pages. Enter the PowerSearch General Settings navigate to Page Size and enter how many records should be displayed in the grid. Don´t forget to **Save** the **Configuration**!

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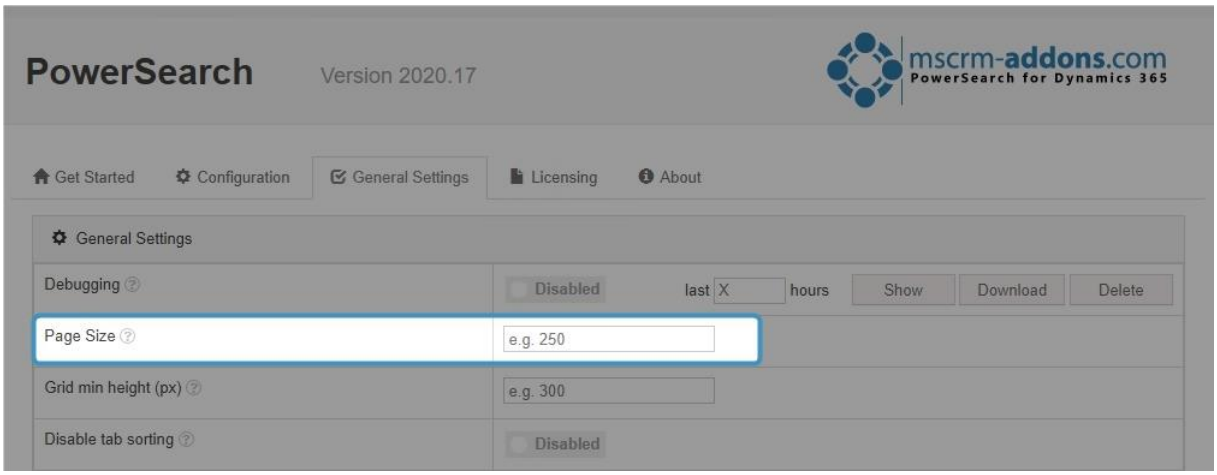

Figure 88: Change the page size

9.9. How to rearrange the order of fields

Search and result fields can be rearranged easily. This tutorial can be applied to search fields, as well as to result fields.

Simply navigate to the ❶ **Search Field** tab click on the ❷ **entity** you want to rearrange and press the ❸ **Move Up** or **Move Down** button.

Please note: When you click on the ❹ three little dots, the option **Move Down** is shown.

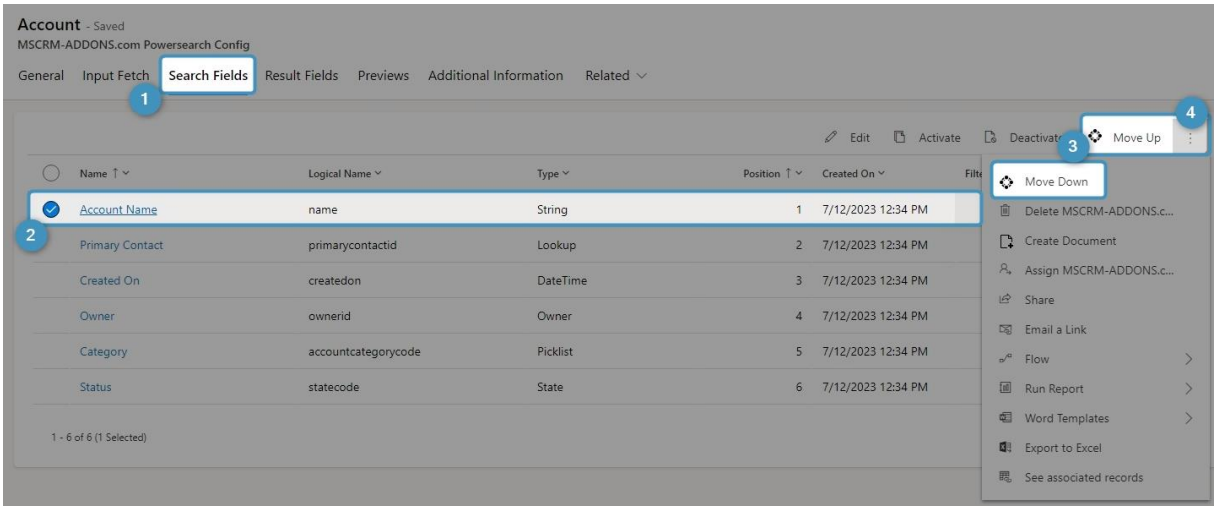

Figure 89: Rearrange Fields

9.10. How to rearrange the Configuration entities (for administrators)

Next to the order of fields, you can also change the order of the different Configuration entites. In our example, Account is in the first place. But we want it to be placed in the second place.

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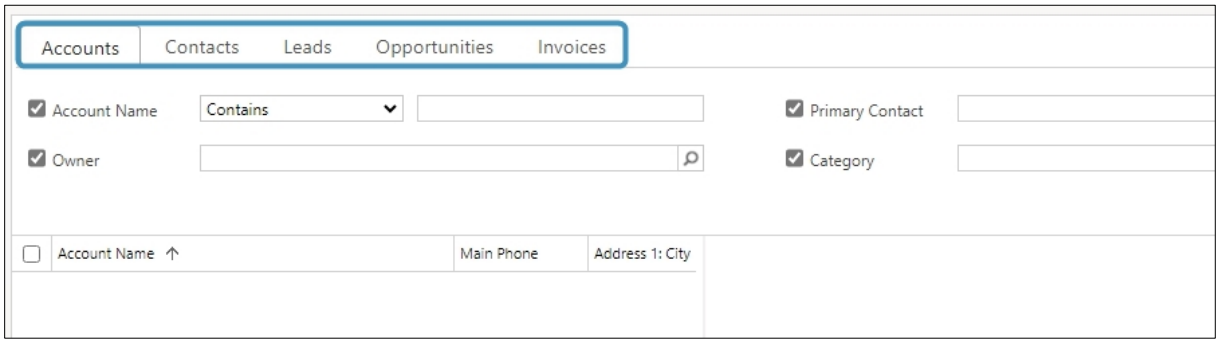

Figure 90: Change order of fields

To do so, simply enter the Main Configuration, select the entity you would like to rearrange and then click on the **MOVE UP** button or the **MOVE DOWN** button in the command bar and save the changes.

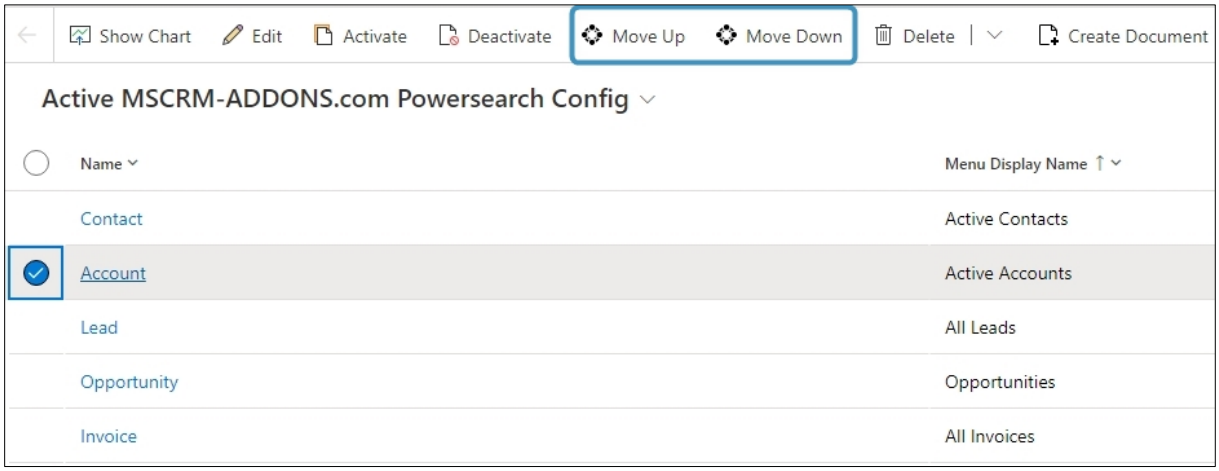

Figure 91: Change order of fields

We have successfully switched the entity Account to another. Have a look at the result:

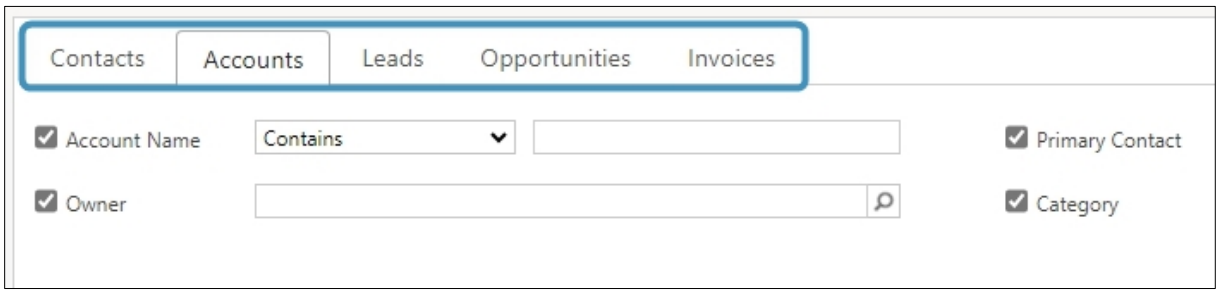

Figure 92: Changed order of fields

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9.11. How to rearrange Configuration entities (for users)

Because we want to provide our customers with the most comfortable user experience possible, we decided to create a simple way to rearrange Config entities for PowerSearch users.

9.11.1. How to drag and drop Configuration entities

To use this functionality, simply click on the Configuration entity you would like to rearrange and drop it at the position that fits your requirements more.

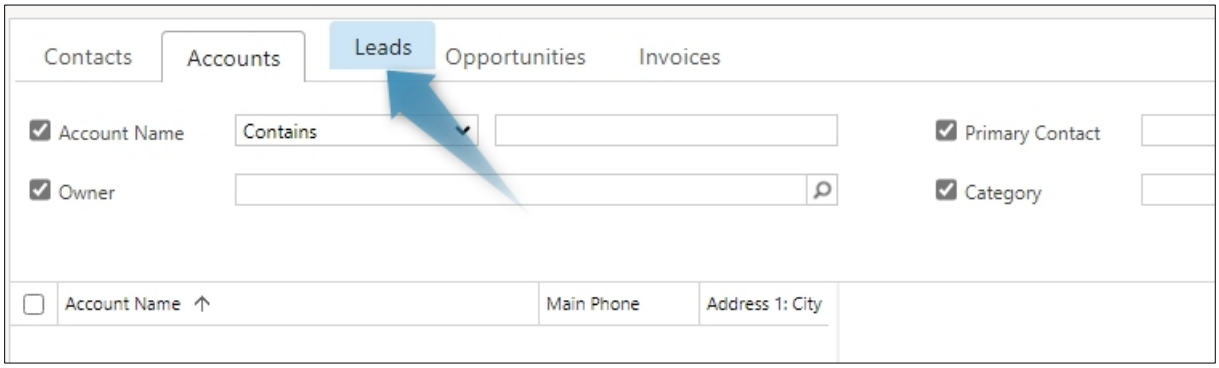

Figure 93: Drag and drop

Don´t forget to save your changes!

9.11.2. How to set result sorting

PowerSearch enables you to set a default result order. If you are not pleased with the default order, you can change it. To do so, open an entity and click on the **Set Result Sorting** button in the CommandBar.

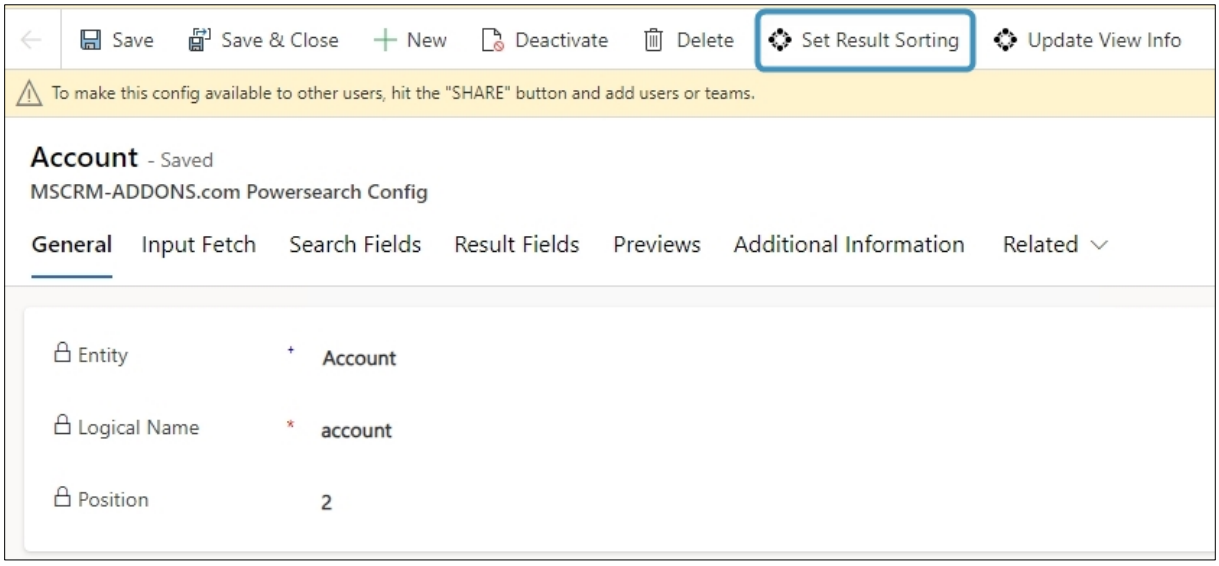

Figure 94: Set result sorting

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The Configure Sort Order dialog opens, which enables you to customize the default order.

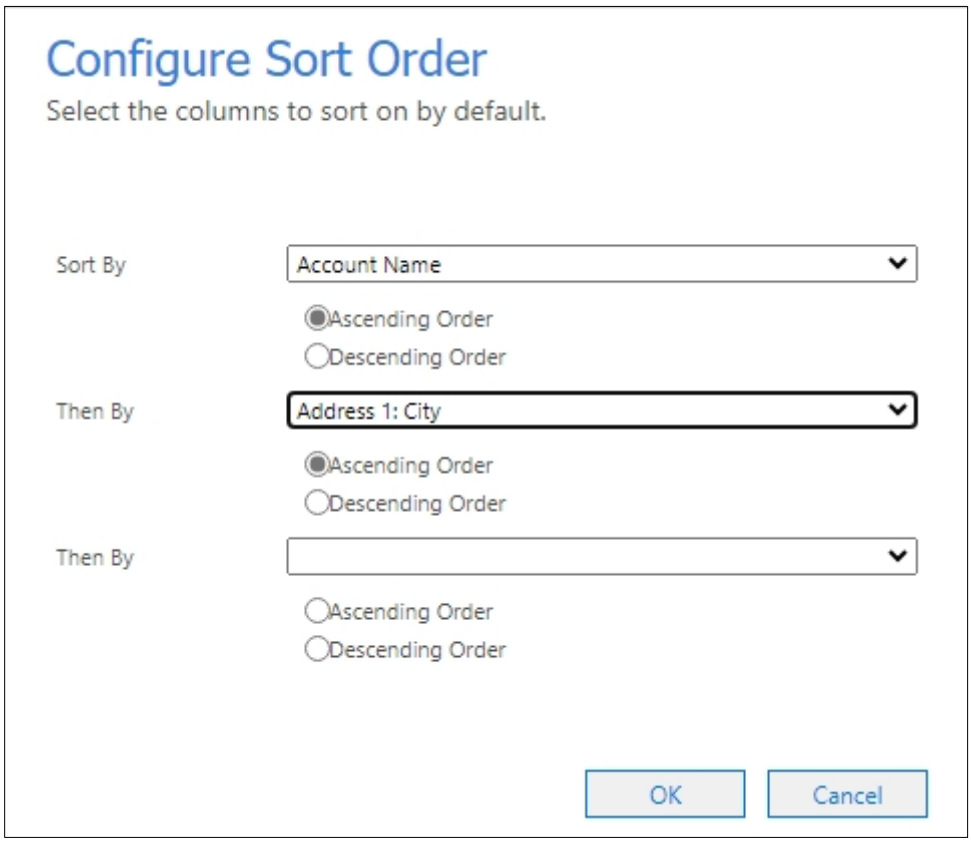

Figure 95: Configure Sort Order dialog

In our example, we sort our results first by

- Account Name and then by
- Adress 1: City.

You can as well define, if you want the order to be ascending or descending. Hit the **OK** button in order to proceed.

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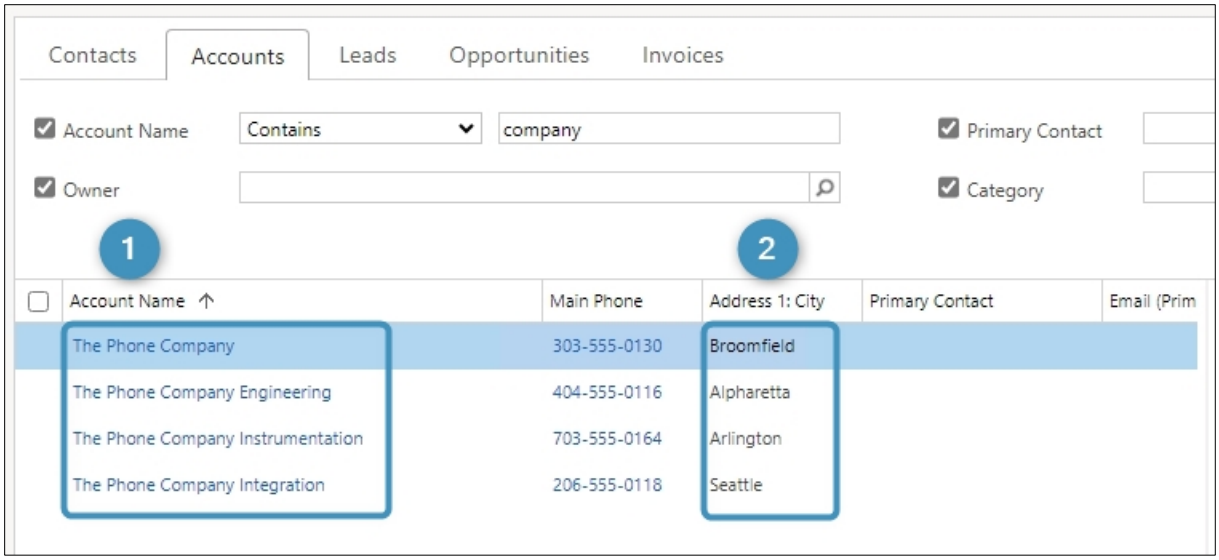

Figure 96: Sort order result

The result fields are now sorted by 1 **Account name** and 2 **Address 1: City**. As you can see, all the companies are sorted by Address 1: City.

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10. List of Figures

Figure 1: Download section for PowerSearch on www.mscrm-addons.com 5
Figure 2: .zip file for PS installation in Dynamics 365 5
Figure 3: Unzip the PS .exe file 5
Figure 4: InstallShield Wizard 6
Figure 5: Accept terms of license agreement 6
Figure 6: Select the destination folder 7
Figure 7: Install the program 7
Figure 8: Installing PowerSearch 8
Figure 9: Connection setup 9
Figure 10: Save the profile from the setup 9
Figure 11: Finish installation 10
Figure 12: PowerSearch Configuration page 11
Figure 13: Dynamics 365 > Settings > Solutions 12
Figure 14: All Solutions overview 12
Figure 15: Select Solution Package 13
Figure 16: Solution information 13
Figure 17: Import options 14
Figure 18: Importing Solutions 14
Figure 19: Imported solution 15
Figure 20: Dynamics 365 > Settings > PowerSearch 16
Figure 21: PowerSearch Configuration page 16
Figure 22: the Get Started tab 17
Figure 23: The Configuration tab 18
Figure 24: PowerSearch Configuration 19
Figure 25: The General Setting tab 21
Figure 26: the Licensing tab 22
Figure 27: Install license kex or subscription number dialog 23
Figure 28: The About tab 23
Figure 29: Connection setup 24
Figure 30: Save the profile from the setup 25
Figure 31: Finish installation 25
Figure 32: Assigning Role 26
Figure 33: Select in Power Apps Default Solution 27
Figure 34: Select the dashboard you want to customize 27
Figure 35: Click web resource button 28
Figure 36: Add Web Resource 28
Figure 37: Publish Customizations 28
Figure 38: Open Gear symbol to configure PowerSearch 29
Figure 39: Access PowerSearch via GlobalButton 30
Figure 40: Entity configuration overview 31
Figure 41: General tab in the PowerSearch configuration 32
Figure 42: The Update View Info button 33

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Figure 43: Show Operator - settings and outputs 33
Figure 44: PowerSearch –Menu display name of more than one view in the entity account 34
Figure 45: PowerSearch Config - Input Fetch 34
Figure 46: FetchXML results in PowerSearch surface 35
Figure 47: Opened entity from within the results 36
Figure 48: Result Field 37
Figure 49: PowerSearch - Result Field with Additional Info 37
Figure 50: Search button in PowerSearch Config 38
Figure 51: Share records in mscrm-addons.com PowerSearch Configuration 38
Figure 52: Look up records window - select team or user 39
Figure 53: Select permissions for users with who you share the PS configuration 40
Figure 54: Open the Layout Designer 41
Figure 55: PowerSearch Layout Designer 42
Figure 56: Layout Designer surface 43
Figure 57: Design your PowerSearch Layout with the Layout Designer 44
Figure 58: customize with these buttons blocks, columns and fields 44
Figure 59: Create Block window 44
Figure 60: Edit Row dialog: 45
Figure 61: Insert SubGrid Dialog 45
Figure 62: Insert JavaScript 46
Figure 63: Entity and Label overview 47
Figure 64: The Search Field section 47
Figure 65: Layout Designer properties 48
Figure 66: Open Lookup records 49
Figure 67: Date related field 50
Figure 68: Open config button 50
Figure 69: Clear button 50
Figure 70: PowerSearch with results 51
Figure 71: Open the result in the CRM Grid 52
Figure 72: Open result from PowerSearch in Dynamics 365 53
Figure 73: Page jumping 53
Figure 74: Change result order 54
Figure 75: Multi-column sorting 55
Figure 76: Open PowerSearch in Dynamics 365 56
Figure 77: Select entity for applying search 57
Figure 78: How to enter a search term 57
Figure 79: New PowerSearch Configuration 58
Figure 80: Select table 58
Figure 81: Select View 59
Figure 82: Add Search field 59
Figure 83: New Table added to PowerSearch 60
Figure 84: Delete a Field 60
Figure 85: Set an operator 61

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Figure 86: Show Operators 62
Figure 87: Show Operators in PS Search Field 62
Figure 88: Change the page size 63
Figure 89: Rearrange Fields 63
Figure 90: Change order of fields 64
Figure 91: Change order of fields 64
Figure 92: Changed order of fields 64
Figure 93: Drag and drop 65
Figure 94: Set result sorting 65
Figure 95: Configure Sort Order dialog 66
Figure 96: Sort order result 67

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11 Contact

For further technical questions, please visit our blog or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.

Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:
7AM - 7PM GMT+1 (Monday-Friday)

Sales:
+43 316 680 880 14
sales@mscrm-addons.com

www.ptm-edv.at
www.mscrm-addons.com

Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404 720 6066

Support:
9AM - 6PM EST (Monday-Friday)

Sales:
+1 404 720 6046
ussales@mscrm-addons.com

www.mscrm-addons.com

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