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Feature Outline:

CompleteView & Advanced Querying
in
PowerSearch for Microsoft Dynamics 365

Look & Feel

CompleteView for Dynamics 365

PowerSearch 2.0 ▾

Accounts Opportunities Contacts Licences Leads

★ My Opportunities (Adv.Find) ▾

Topic	Potential Customer	Est. Reven
Very likely will order 73 Product SKU JJ105 this year (sample)	A. Datum Corporation (sample)	€ 16.000,0
Very interested in our products - need to follow up (sample)	City Power & Light (sample)	€ 40.000,0
10 orders of Product SKU JJ202 (sample)	Fourth Coffee (sample)	€ 22.000,0
Some interest in our JJ line of products (sample)	Adventure Works (sample)	€ 95.000,0
6 orders of Product SKU JJ202 (sample)	Fabrikam, Inc. (sample)	€ 10.000,0
Needs to restock their supply of Product SKU AX305; will p...	Blue Yonder Airlines (sample)	€ 25.000,0
Very likely will order 73 Product SKU JJ105 this year (sample)	Contoso Pharmaceuticals (sample)	€ 30.000,0
They sell many of the same items that we do - need to follo...	Contoso Pharmaceuticals (san	€ 26.000,0
Will be ordering about 110 items of all types (sample)	Coho Winery (sample)	€ 25.000,0
10 orders of TX40 Mountain Bike	Litware, Inc. (sample)	€ 6.800,00

View or Search Results

Preview

RUN WORKFLOW ASSIGN

Buttons

Topic: 10 orders of TX40 Mountain Bike

Description: Needs SKU AX 305 delivered before July 2017. Thus, this order should be in by end of March. 10% Euro early bird discount provided

Account	Pipeline Phase	Priority	Default Value
Litware, Inc. (sample)	Budget	Customer Need	Diversify into selling related prod
Susanna Stubberod (sample)	Budget	Customer Pain Points	

Lead: Est. Revenue € 6.800,00

Time Zone Rule Version 10: Purchase Timeframe This Quarter

Status Reason: In Progress

All Quotes			Notes: All Notes		
Name	Status	Total Amou	Title	Description	Modified B
10 orders or Product SKU AX305 this summer (sample)	Closed	€ 6.500,00	Terms and Conditions	terms and conditions provided	Michael Dr
10 orders or Product SKU AX305 this summer (sample)	Closed	€ 6.300,00	Product Pictures	attached pictures have been sent	Michael Dr
10x TX 40 Mountain Bike for Litware (summer event)	Active	€ 6.300,00			

Email Messages: All Emails Phone Calls: All Phone Calls

Subgrids

CompleteView

Instant Preview of Records inside Grids/Lists within Dynamics365

Goal: Productivity, Reduce Clicks, Form Loads, Standardize Common Tasks

Available For

- System Views
- Personal Views
- PowerSearch Results

Features

- Customizable Layout
- Supported Attributes
 - Entity attributes (all types)
 - Lookups (N:1, one level)
 - Subgrids (1:N, one level)
- Quick Access
- Perform Commandbar Actions
 - Examples: run workflow, assign, activate quote, close opportunity
 - Extendable via JS-functions

Advanced Queries

Import Fetch-statements (Advanced find)

Simple configuration:

- Import Advanced Find
- Complex Fetch – Statements supported

Additional features:

- Search attributes on related records
 - Lookups
 - One-to-Many and Many-to-Many relationships
- Advanced result view
 - Subgrids of One-to-Many and Many-to-Many relationships

Opportunity ▾

Topic ↑	Potential Custom...	Est. Revenue	Status Reason	Opportunity	Owner	Main Phone	Email	Address 1: Count...	A
Computer Upgrade	Alpine Ski House	\$93,375.00	In Progress	f00d0283-5bf2-e3...	Veronica Quek	425-488-7759	Cathan@alpineski...	United States	
Computers	Tails핀 Toys	\$2,000,000.00	In Progress	d80e0283-5bf2-e...	Sven Mortensen	425-391-8595	mtanara@tails핀...	United States	
Computing Lease...	Coho Winery	\$5,305,032.00	Won	d20e0283-5bf2-e...	Spencer Low	425-485-1255	Cat@cohowinery...	United States	
Cooking Applianc...	City Power & Light	\$290,000.00	Won	620e0283-5bf2-e...	Sanjay Shah	425-485-7377	walter@cpandl.co...	United States	
Demo Opportunity	MSCRM-ADDONS		In Progress	f8633e98-81ec-e6...	Clint Higley	404-720-6066	office@mscrm-ad...	United States	
Desktop and Lapt...	Fabrikam, Inc.	\$2,132,000.00	In Progress	e20e0283-5bf2-e...	Sven Mortensen	425-685-9591	evacorets@fabrik...	United States	
Desktops	Litware	\$4,910,000.00	Canceled	8e0e0283-5bf2-e...	Molly Clark	425-683-8536	andrewr@litware...	United States	
Expressed Interest...	Northwind Traders	\$4,215,040.00	In Progress	628cf01a-aed1-e4...	Veronica Quek	(425) 861-9199	alexw@northwind...	United States	
Games	Tails핀 Toys	\$4,910,000.00	Canceled	ac0e0283-5bf2-e3...	Sven Mortensen	425-391-8595	mtanara@tails핀...	United States	
General	Adventure Works	\$5,910,000.00	Won	920e0283-5bf2-e...	Clint Higley	425-235-7948	Adrian@adventur...	United States	

Opportunity Products (Opportunity)

Existing Product	Price Per Unit	Quantity	Extended Amount
SX20, City-simple	\$415.00	1,00000	\$415.00
A. Datum E100	\$10.00	1,00000	\$10.00
	\$75.50	1,00000	\$75.50

Quotes (Opportunity)

Name	Status	Total Amount	Created On
Demo Opportunit...	Draft	\$500.50	2/6/2017 10:35 AM

Demo

PowerSearch 2.0/Dynamics 365


1. CompleteView – Look and Feel
 - Layout
 - Custom Buttons
2. Advanced Search Capabilities
 - Custom Fetch-statements
 - Result View
3. Configuration
 - Layout-Design of CompleteView
 - Importing and Advanced Find

Thank you!


Support & Contact

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

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