



USER GUIDE

PowerGrid

CRM 2013/2015



Service



Support



Education



Add-ons

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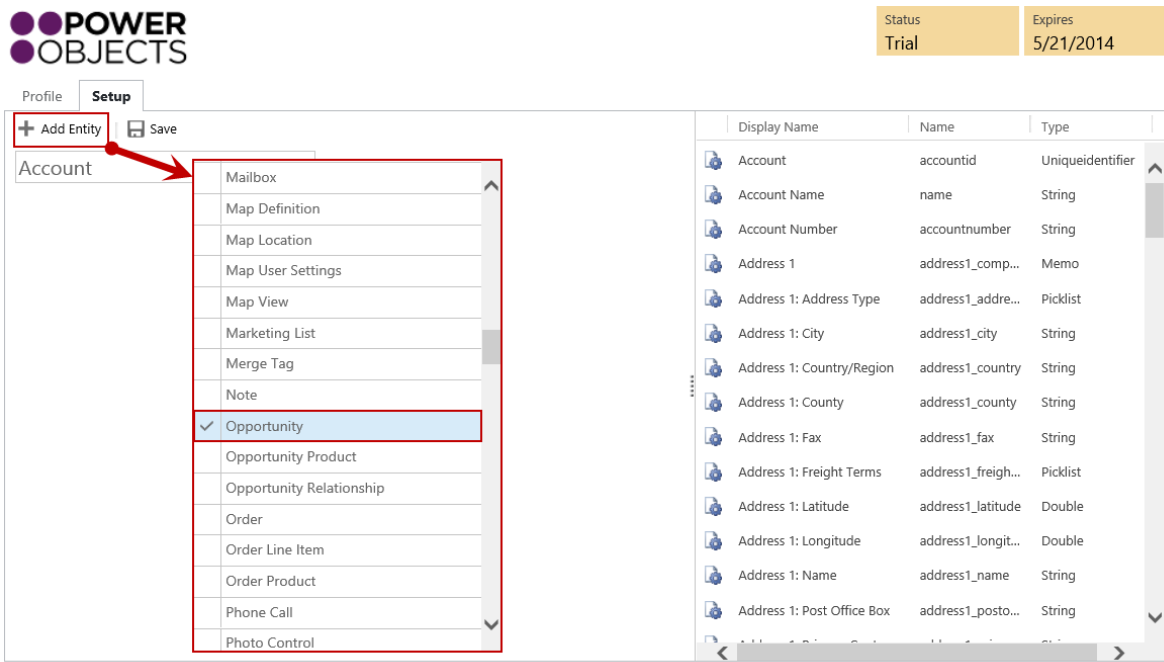
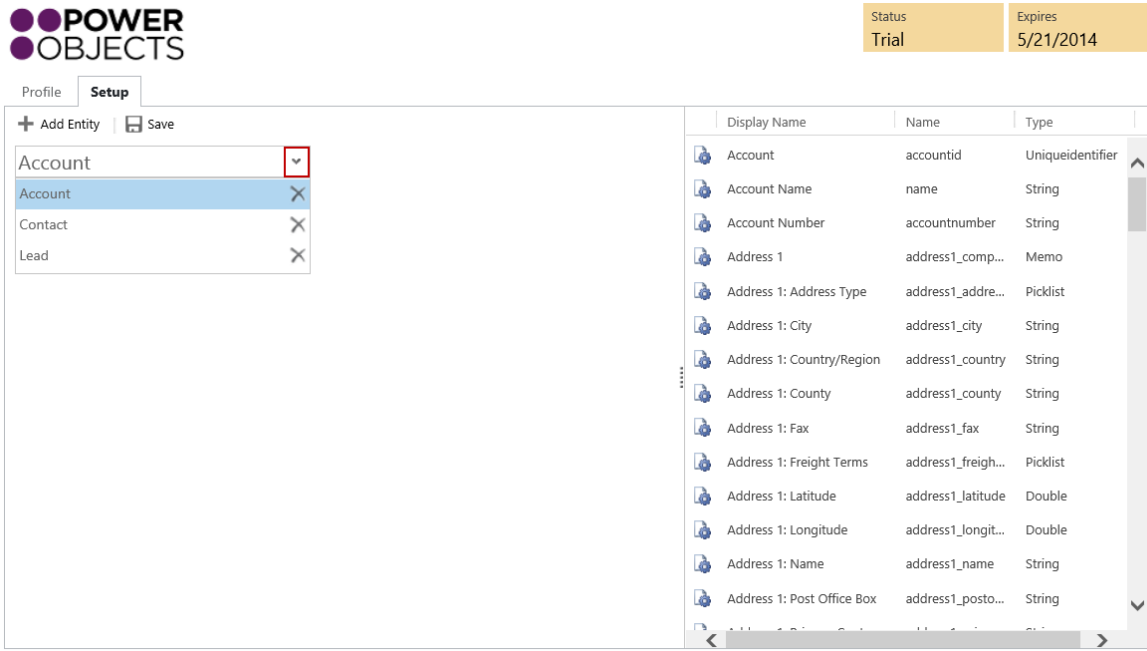
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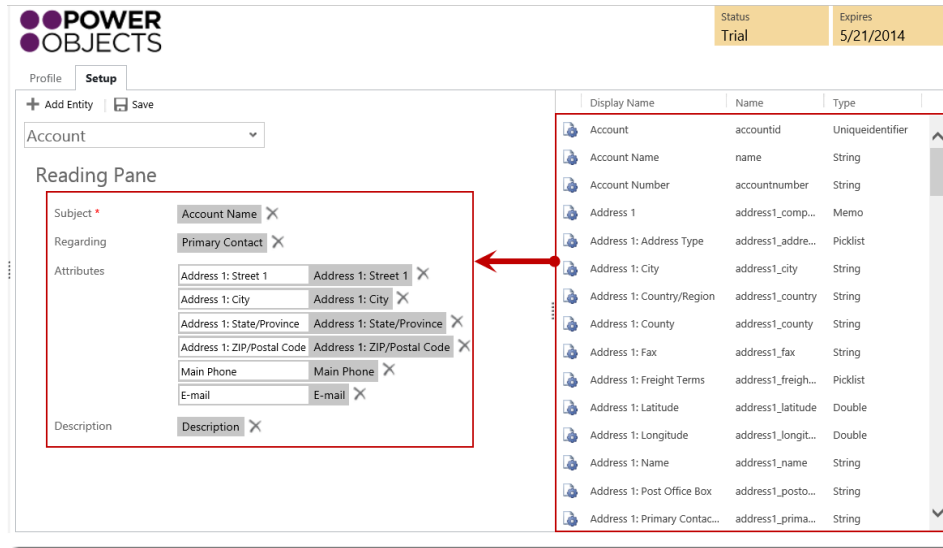


Configuring PowerGrid

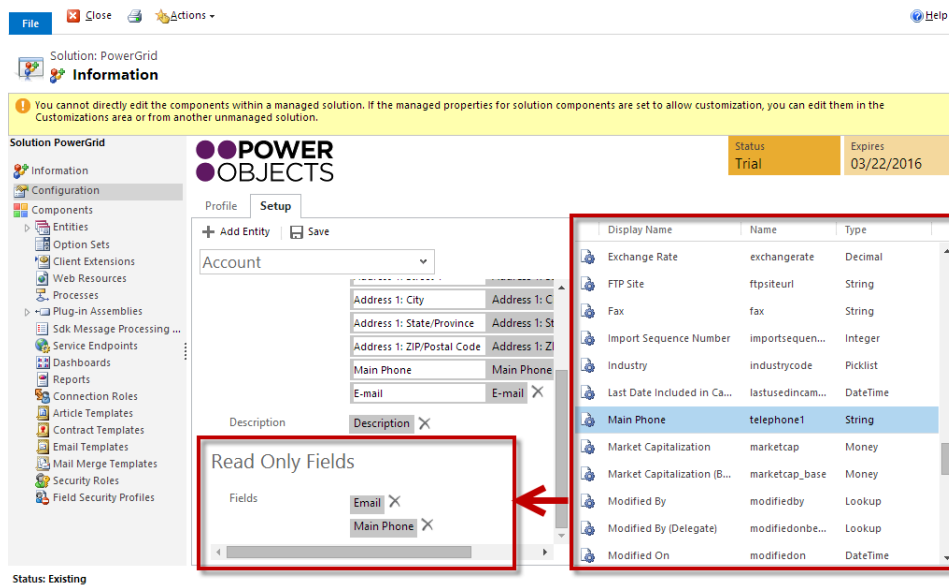
Once you have imported and registered the PowerGrid solution for your Microsoft Dynamics CRM system it will need to be configured. In Microsoft Dynamics CRM Navigate to Settings > Solutions and double click on PowerGrid. The setup tab is where you configure which entities you would like PowerGrid users to be able to search within. Please note that the system and personal views that each user is allowed to see in CRM for each entity you setup will be available to them in PowerGrid. Out of the box PowerGrid pre-configures the three most common entities; Account, Contact and Lead. If you would like to add additional entities select the "+ Add Entity" and select a new entity.



For each entity you will need to configure your reading pane – again we have given you a head start with pre-configured fields for the Account, Contact and Lead entities; but feel free to change these to meet your needs. To edit what is shown in the reading pane, simply drag and drop fields from the list of options on the right to the reading pane section on the left. To delete a field from the reading pane, simply select the 'x' listed after the field name. If you need the fields to be in a certain order you must delete all of the fields in the reading pane and drag the fields over in the desired order.



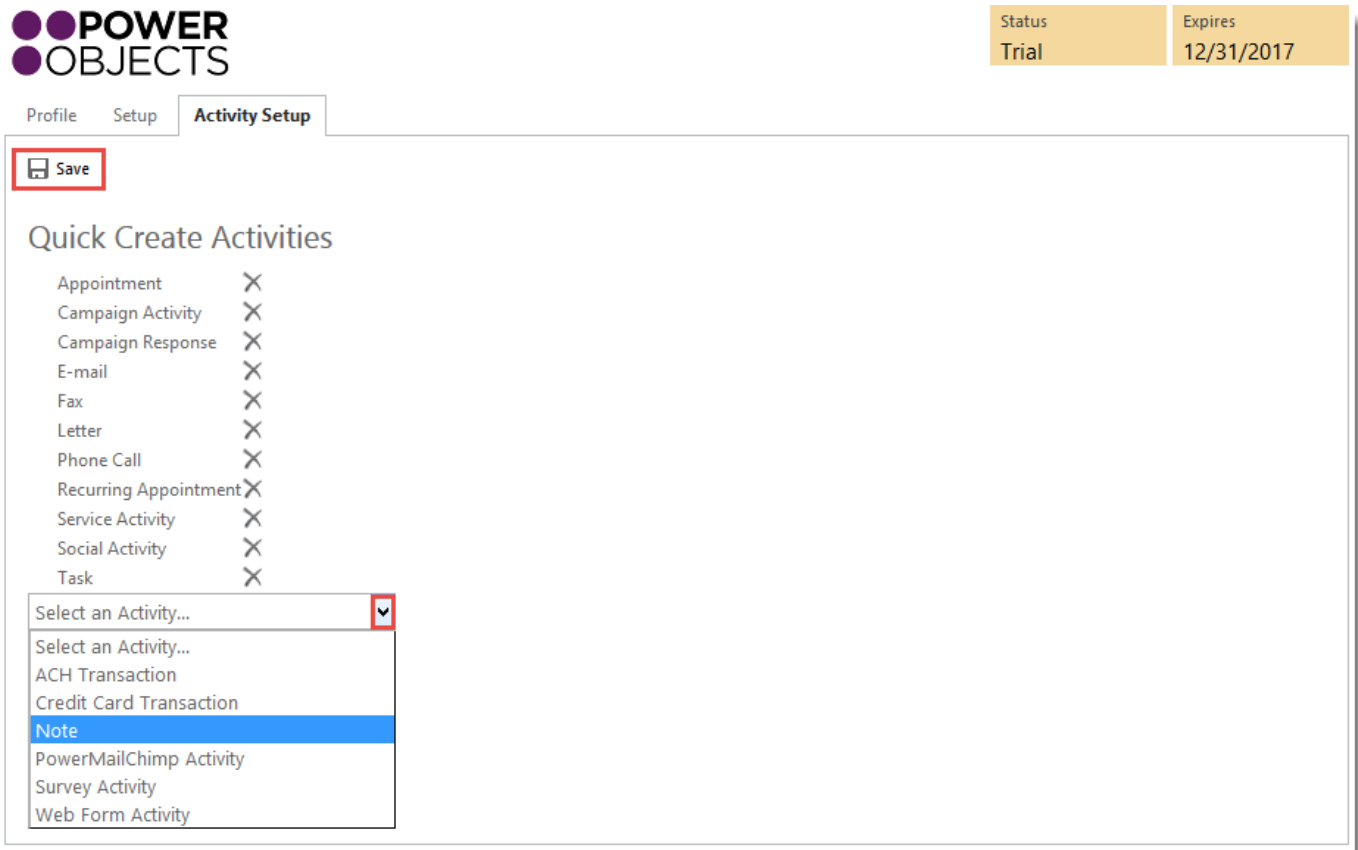
For each entity, you can also choose to set up “Read Only Fields” for the grid. This means that users will NOT be able to edit the fields added here inline, in PowerGrid. This may be useful for fields who have JavaScript or other functions that run when that field is modified, as these functions would not run when editing a field inline in PowerGrid.



Once you have completed the configuration of your entities and reading pane select save.

Activity Setup

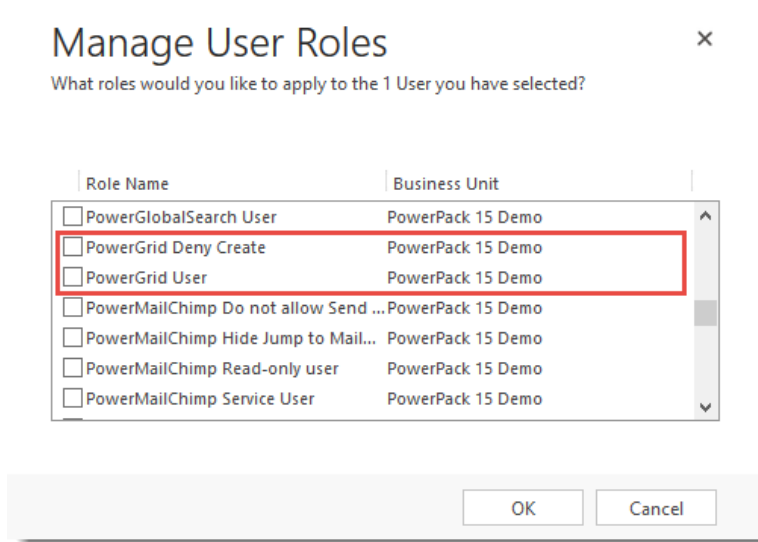
The next tab is the Activity Setup tab where you will be able to choose which CRM activities you would like to be available to PowerGrid Users, out of the box activities will automatically be setup for you, but if you would like a custom activity type added you will have to choose the activity from the dropdown and select 'Save'



Security Roles

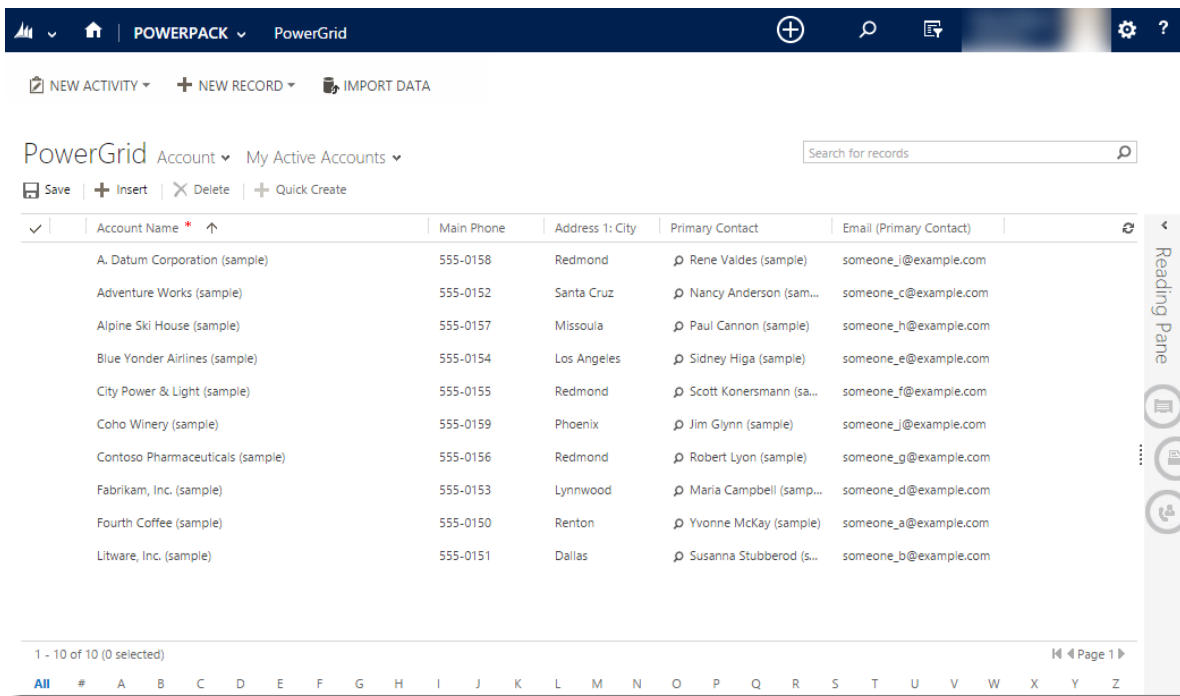
Every user who would like to use the PowerGrid add-on will need the PowerGrid user security role assigned to them. System Administrators will automatically see PowerGrid in the PowerPack section of CRM and be able to use the PowerGrid, without having the security role assigned. If you would like to restrict the ability to create new records from the PowerGrid web resource you can apply the PowerGrid Deny Create role which will hide the '+ insert' button from the users options when using PowerGrid.

Please Note: the user role does respect the existing read, write and create privileges of your users.



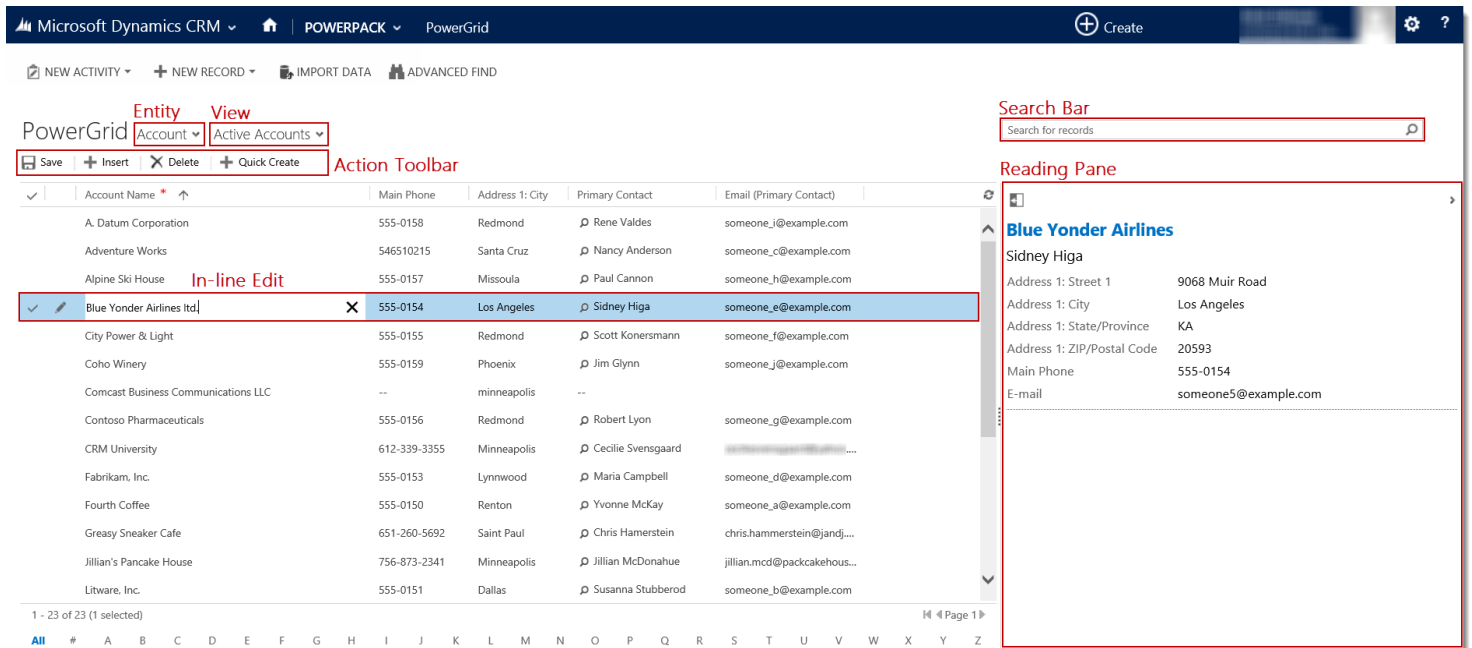
Navigating to PowerGrid

To begin a search, navigate to the Microsoft Dynamics CRM dropdown and select the PowerPack section, then select the PowerPack tab and click on PowerGrid.



Grid

Once you are in PowerGrid you have many different options for searching, filtering, editing and reading your results.



Entity

First you will want to select the entity you want to search within, you can do this by selecting the entity dropdown and choosing an entity.

View

After selecting your entity, you will need to select the view that you want to search or edit. This can be a system view or a personal view.

Search Bar

To search within PowerGrid, select the search bar, and type a search word. PowerGrid will then search the selected Entity View and display the results in the grid.

Reading Pane

The reading pane allows you to see details of the selected record without having to open it. Fields will only be displayed in the reading pane if they contain a value. If you would like to add or edit fields that are in the reading pane, you can update those preferences in the configuration screen. If you do not have access to view the configuration screen, please contact your System Administrator.

In-line Edit

With PowerGrid, users are able to edit record information on the fly with the In-line Edit functionality. Simply click on the section that you want to edit and the field will change to an editable area. Once you have made your changes you will notice a small pencil icon next to the record. This indicates that there are unsaved changes to that record. Once you select Save from the Action Toolbar the icon will disappear.

Action Toolbar

PowerGrid's action toolbar allows users to insert records into views, use the quick create functionality to create activities for records displayed in the grid, delete records in the grid, and save changes made with the in-line editing functionality.

Opening a Record

If you'd like to open a record you've found with PowerGrid, simply double click on the record in the view, or click on the name of the record in the reading pane. This will pop open the record in the window.

Using PowerGrid as a Sub-grid

If you would like to use PowerGrid as a sub-grid on Entity forms, you will need to manually add the PowerGrid web resource to each entity form you would like to utilize the sub-grid functionality. Edit the form and insert the PowerGrid web resource (popg_/Grid.html) in to a section or tab.

You will need to select the "Pass record object-type code and unique identifier as parameters" box in the Web Resources Properties in order for the sub-grid to filter only the related records.


The screenshot shows the 'Add Web Resource' dialog box with the following details:


- Title:** Add Web Resource
- Subtitle:** Add an existing web resource to the Form.
- General Tab:**
 - Web resource:** popg_/Grid.html
 - Field Name and Properties:**
 - Name: WebResource_PowerGrid
 - Label: PowerGrid
 - Display label on the Form
 - Visibility:**
 - Visible by default
 - Web Resource Properties:**
 - Restrict cross-frame scripting, where supported.
 - Pass record object-type code and unique identifier as parameters.
- Buttons:** OK, Cancel


Then select the Formatting tab and change the Number of Rows field to the recommended 18 rows, for best use the minimum value should be 12 rows, and uncheck the Display Border option.


Web Resource Properties ? x

Modify this Web resource's properties.

One column 

Two columns 

Three columns 

Four columns 

Row Layout

Select the number of rows the control occupies.

Number of Rows

Automatically expand to use available space.

Scrolling

Select the scrolling type for the IFRAME.

Scrolling

Border

Specify whether a border is displayed.

Display border

OK Cancel

Adding Conditional Formatting to a Grid

PowerGrid users can add conditional formatting to their grids by creating expressions which will allow you to highlight matching records. To begin, navigate to PowerGrid and display the Entity and View for which you want to add conditional formatting. Select the Expressions button and select the view column you wish to use for the expression criteria. Then you'll select the Operator for which you want to condition by, enter a Value if needed, and finally select the background (B/G) and Font Colors. You can choose to list multiple expressions for formatting, just be aware the solution applies the conditioning in the displayed order and once formatting has been added to a row, no other formatting will be applied.

The dialog box shows the configuration for conditional formatting. It includes a toolbar with 'Save', 'Insert', 'Delete', and 'Edit Default' buttons. Below the toolbar is a table with columns: Column, Operator, Value, B/G Color, and Font Color. Two expressions are listed:

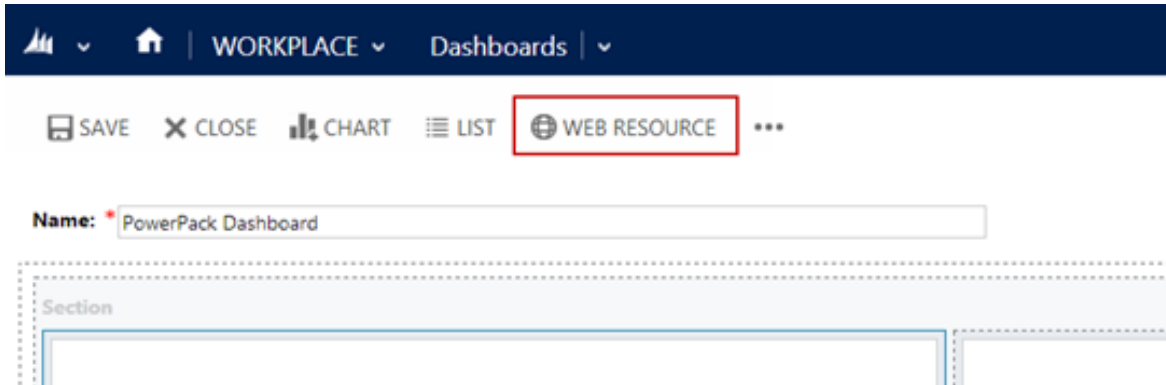
Column	Operator	Value	B/G Color	Font Color
Main Phone	Does Not Contain Data		FF0E36	FFFFFF
Account ID	Less Than or Equal	000000132	16FF15	000000

The screenshot shows the PowerGrid interface in Microsoft Dynamics CRM. The grid displays a list of accounts with columns: Account ID, Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). The rows are highlighted in alternating green and red colors, indicating conditional formatting. The status bar at the bottom shows '1 - 34 of 34 (0 selected)' and 'Page 1'.

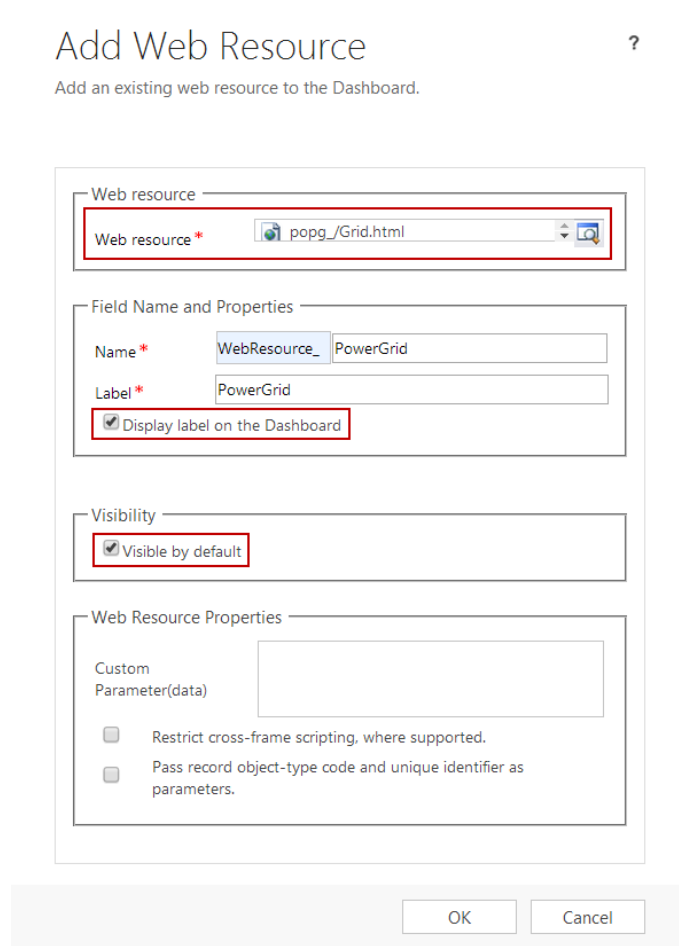
Account ID	Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
000000102	A. Datum Corporation	555-555-0000	St. paul	Rene Valdes	someone_j@example.com
000000103	Adventure Works	--	Sanita Cruz	Nancy Anderson	someone_c@example.com
000000105	Alpine Ski House	555-555-0002	Missoula	Paul Cannon	someone_h@example.com
000000107	Blue Yonder Airlines	555-555-0003	Los Angeles	Sidney Higa	someone_e@example.com
000000108	City Power & Light	--	Washington	Jill CRM	
000000109	Coho Winery	555-555-0005	Phoenix	Jim Glynn	someone_i@example.com
000000112	Contoso Pharmaceuticals	555-555-0006	Redmond	Robert	someone_g@example.com
000000149	CRM University	555-555-0007	Minneapolis		
000000114	Company	555-555-0008	Duluth	--	
000000115	Fabrikam, Inc.	--	Lynnwood	Sally Monroe	
000000141	Floral Power	555-555-0010	Minneapolis		
000000116	Fourth Coffee	--	Renton	Yvonne McKay	someone_a@example.com
000000117	Greasy Sneaker Cafe	555-555-0012	Saint Paul		
000000118	Jillian's Pancake House	--	Minneapolis	Jillian McDonahue	jillian.mcd@packcakehous
000000119	Litware, Inc.	555-555-0014	Dallas	Susanna Stubberod	someone_b@example.com
000000120	McMill's Steak House	--	Saint Paul		
000000121	Corporate HQ	--	Redmond	--	

Adding PowerGrid to Other Sections in CRM

To add PowerGrid to other sections in CRM such as a dashboard, simply navigate to the dashboard section of your CRM system – here you can choose whether you would like to edit an existing dashboard or create a new one. Then select the Web Resource button.



This will prompt a lookup where you can search for the PowerGrid html file, give the Web Resource a logical name such as PowerGrid and select the checkboxes for Display label on the Dashboard and Visible by Default. Then select ok.



PowerGrid will then be populated on your dashboard, from the ellipsis you can choose to adjust the width and height of the web resource to fit your needs. Make sure that you save your changes before closing the window.

Uninstall PowerGrid

Uninstall PowerGrid by deleting the solution from the solutions list in CRM. Deleting the solution will remove all pieces of PowerGrid from your CRM system.

Thanks for your interest in PowerGrid. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of installation. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged \$1/CRM user/month.

Interested in more CRM tips and tricks? Check out our [blog](#) or subscribe to our [newsletter](#).

