POWER OBJECTS

IMPORT GUIDE

PowerGrid

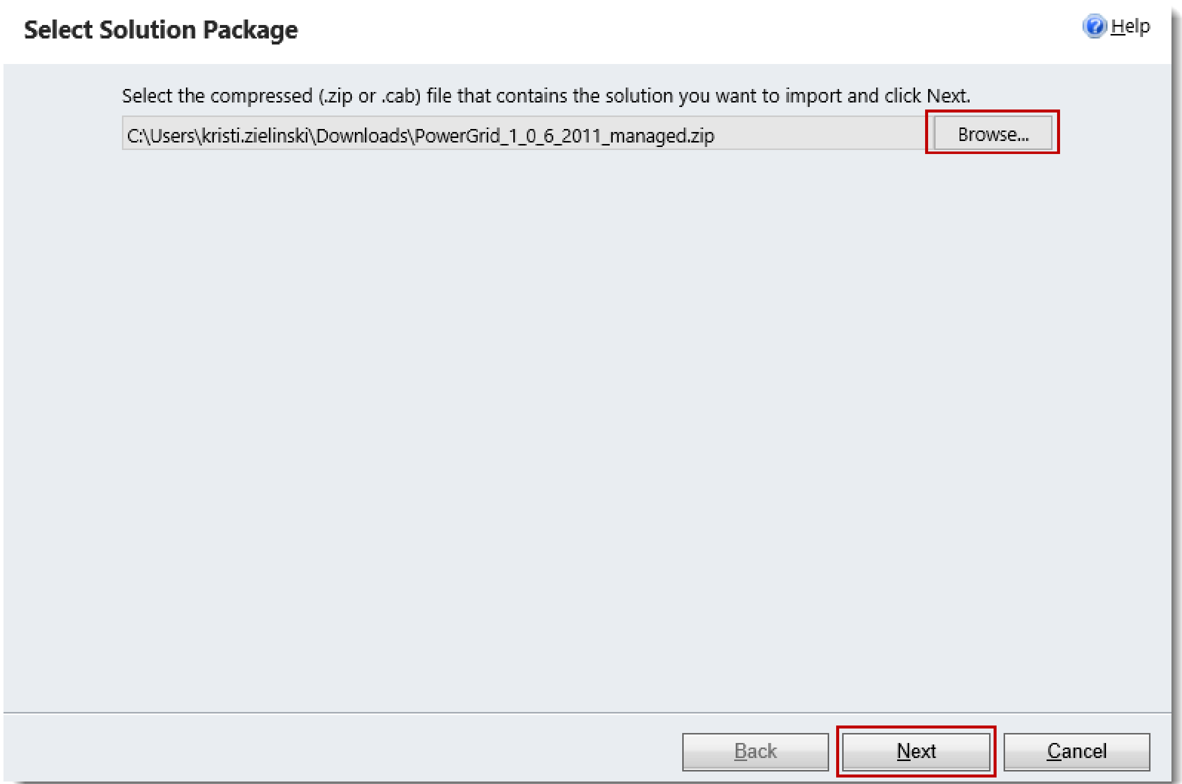
Service Support Education Add-ons

Contents

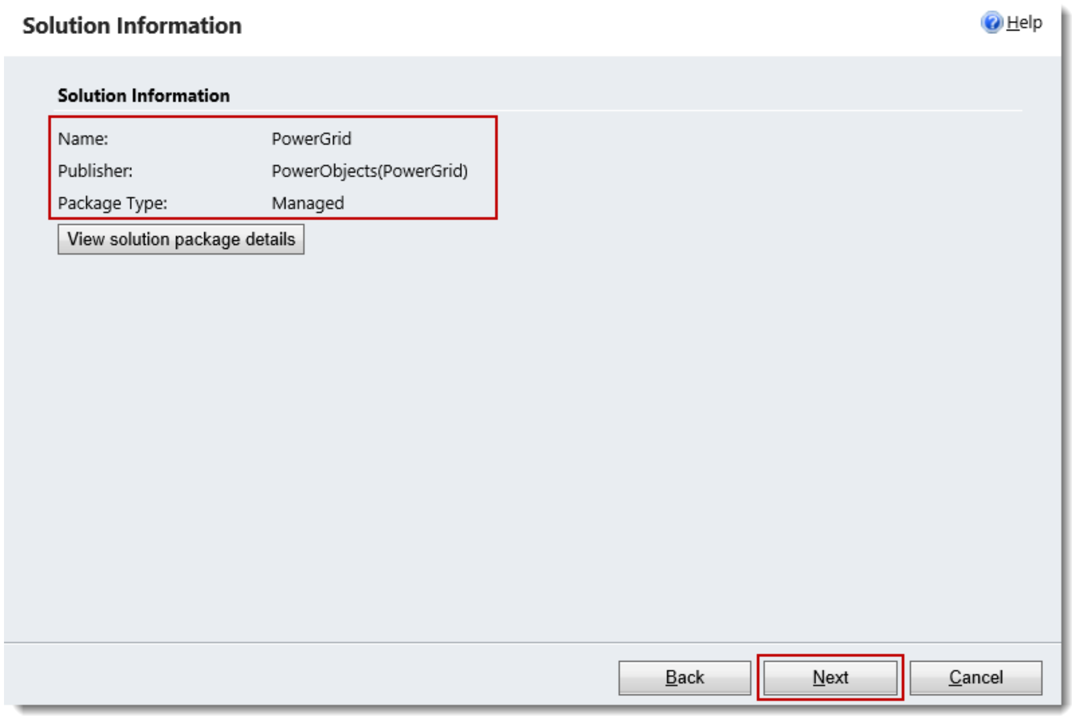
Import

The first step to installing any managed solution in Microsoft Dynamics CRM is to locate the file you want to install, download it and place it on your computer. In this instance, you would go to the PowerGrid webpage, click on Download Solution and save the file in a convenient place on your computer.

After you're done with that, log into your Microsoft Dynamics CRM as a System Administrator or System Customizer – you must have administrative privileges. Navigate to Settings > Solutions and click on Import. The next window that opens will let you browse for the solution you are importing – navigate to the file, select it and click Next.

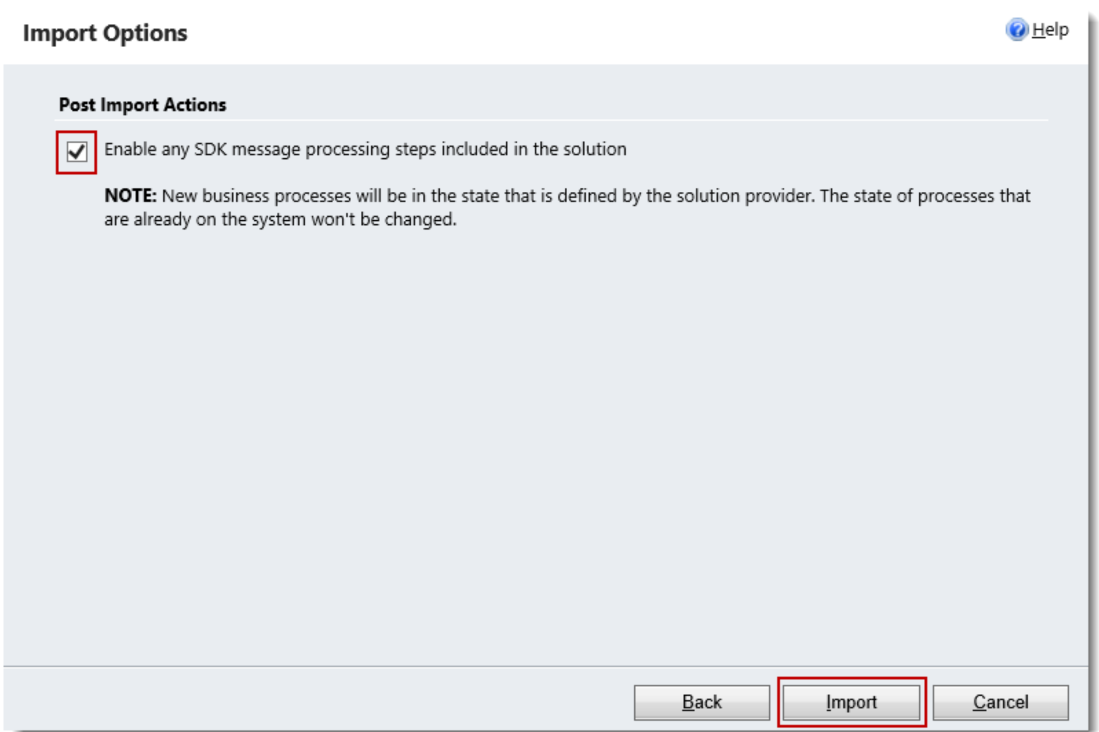


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerGrid from PowerObjects.

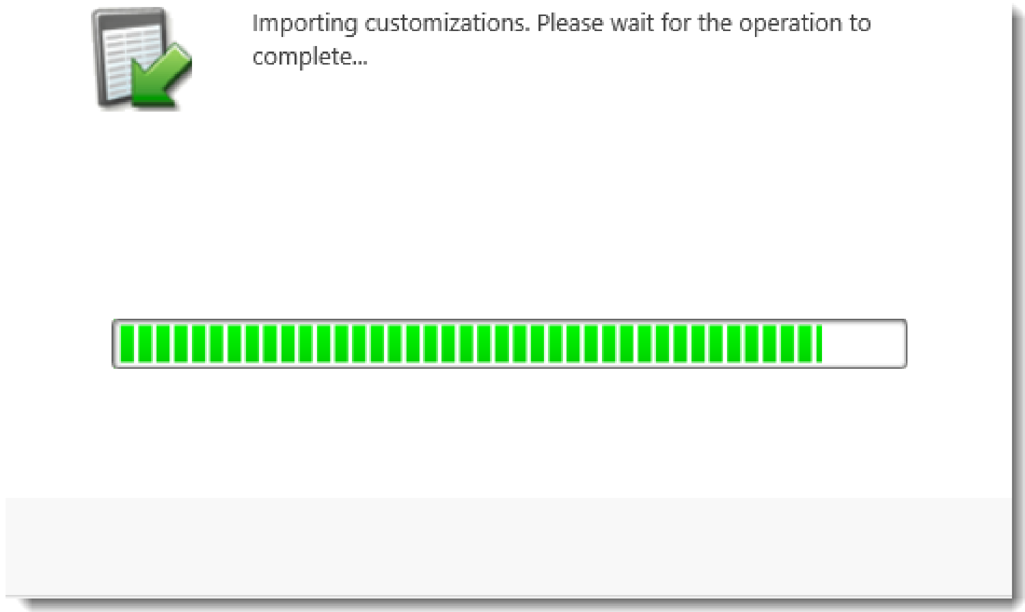


Click Next, and make sure to check the "Activate all processes…" checkbox, and click Next

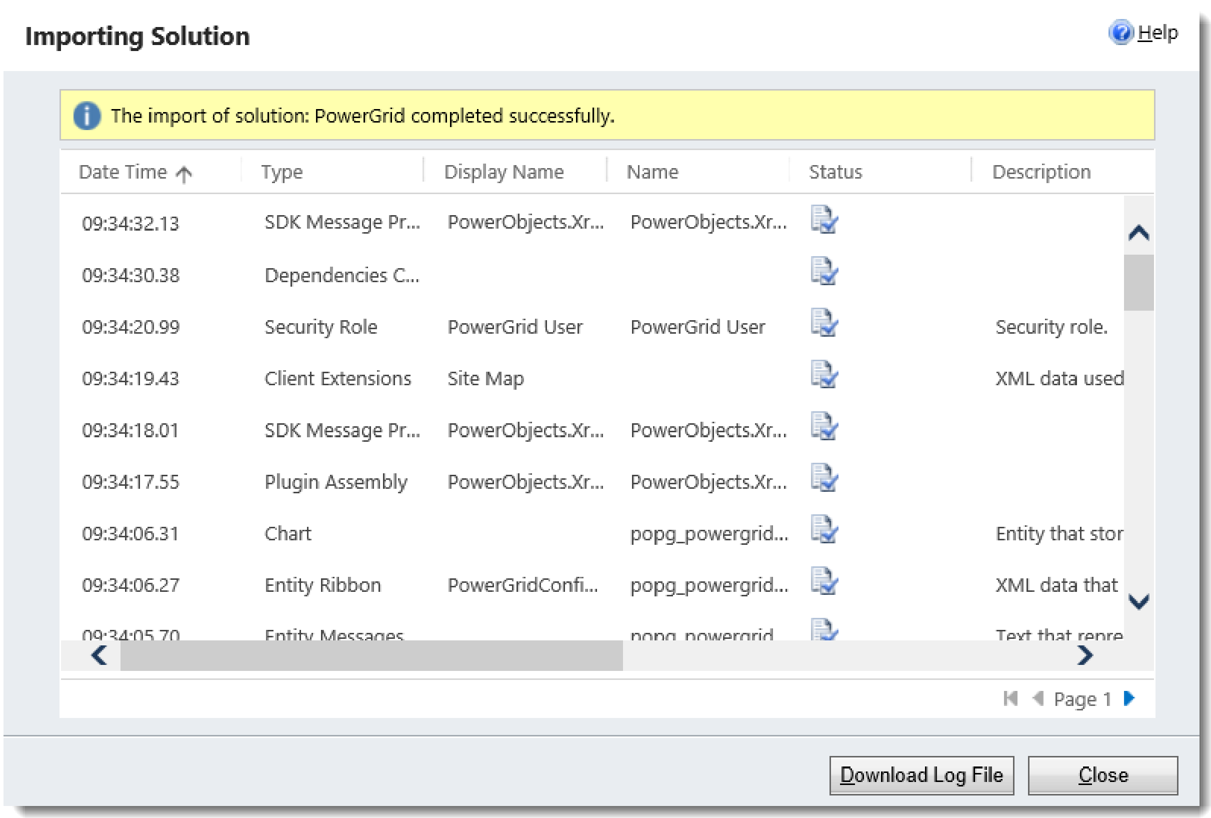
<u>IMPORTANT:</u> *If you do not check this box, the add-on* **WILL NOT FUNCTION CORRECTLY!**



A green progress indicator will display while the solution imports.

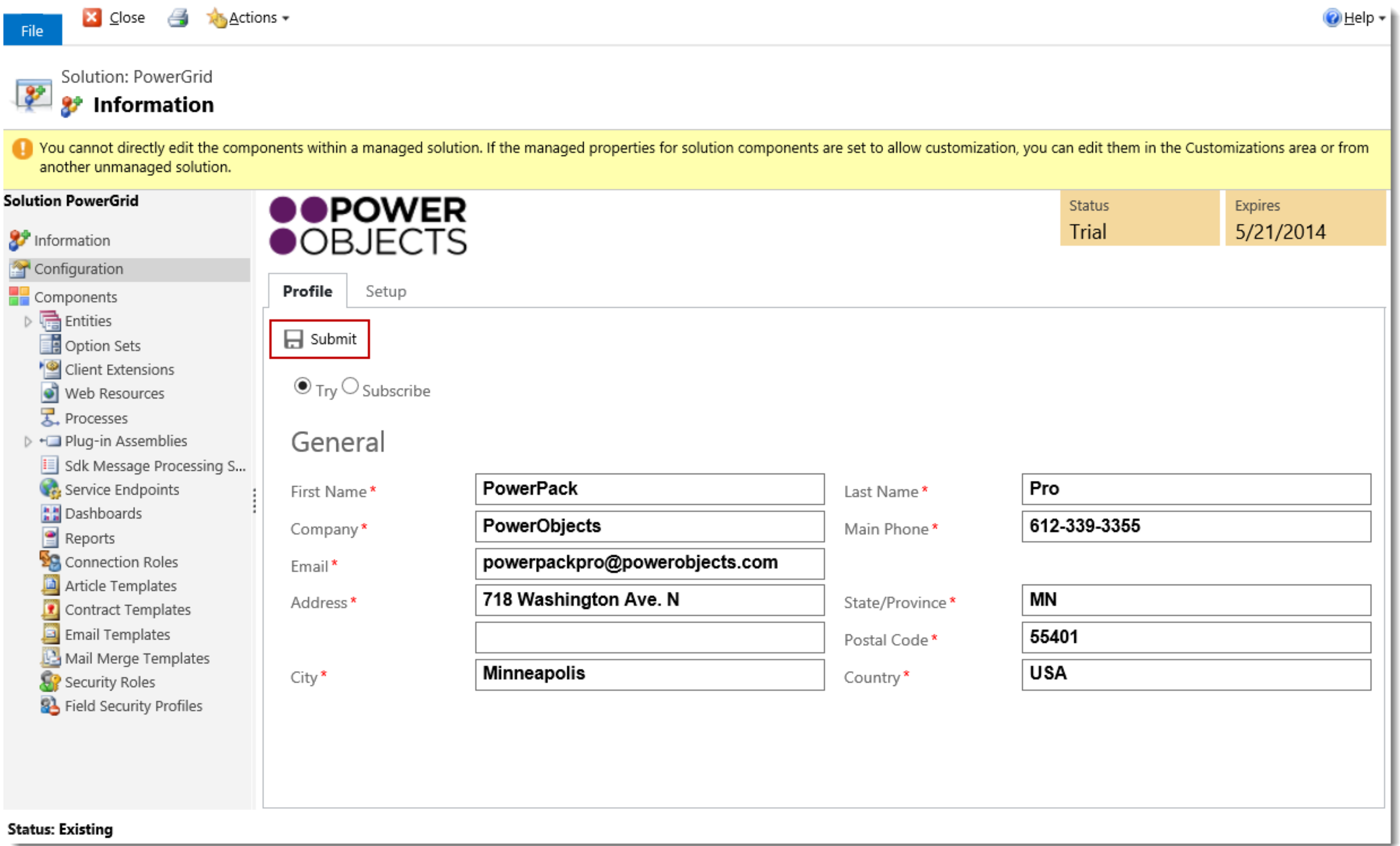


Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



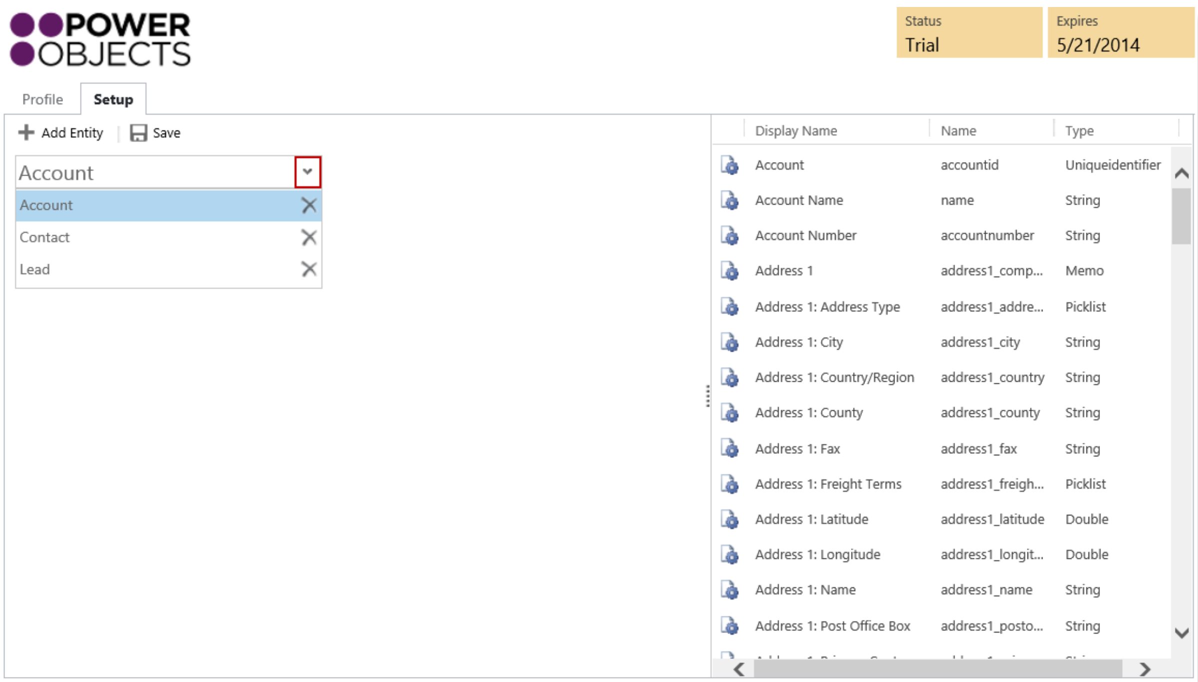
Register

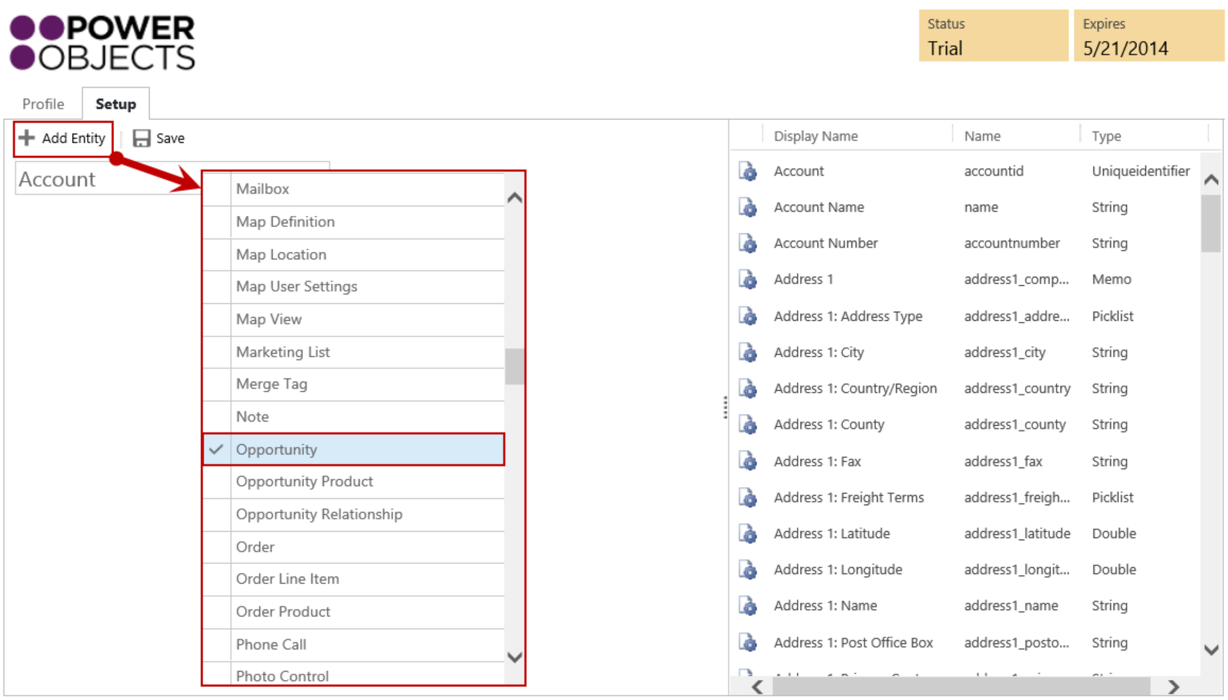
In the Solutions list, double click on PowerGrid. Fill in your information and click Submit. Be patient while the information is submitted.



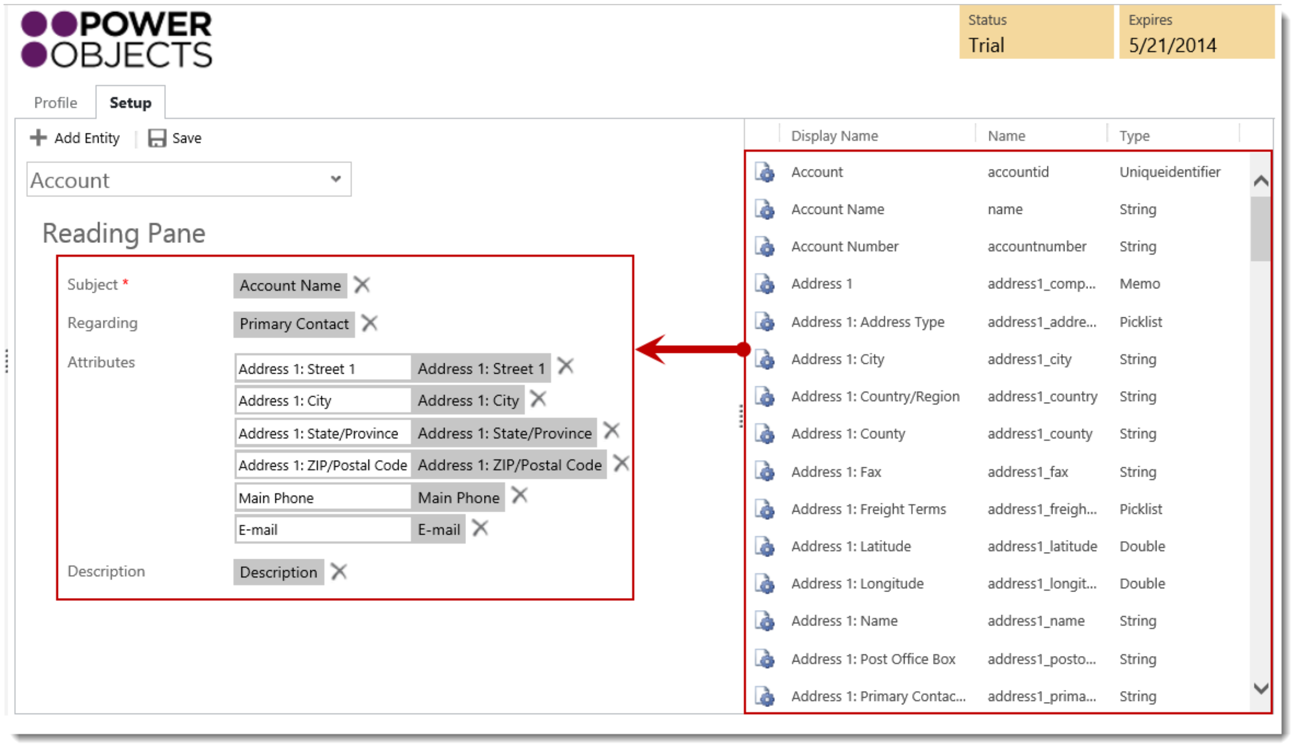
Setup

The next tab in the configuration screen is the Setup tab. This is where you configure which entities you would like PowerGird 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 to this list simply select the "+ Add Entity" and select a new entity.

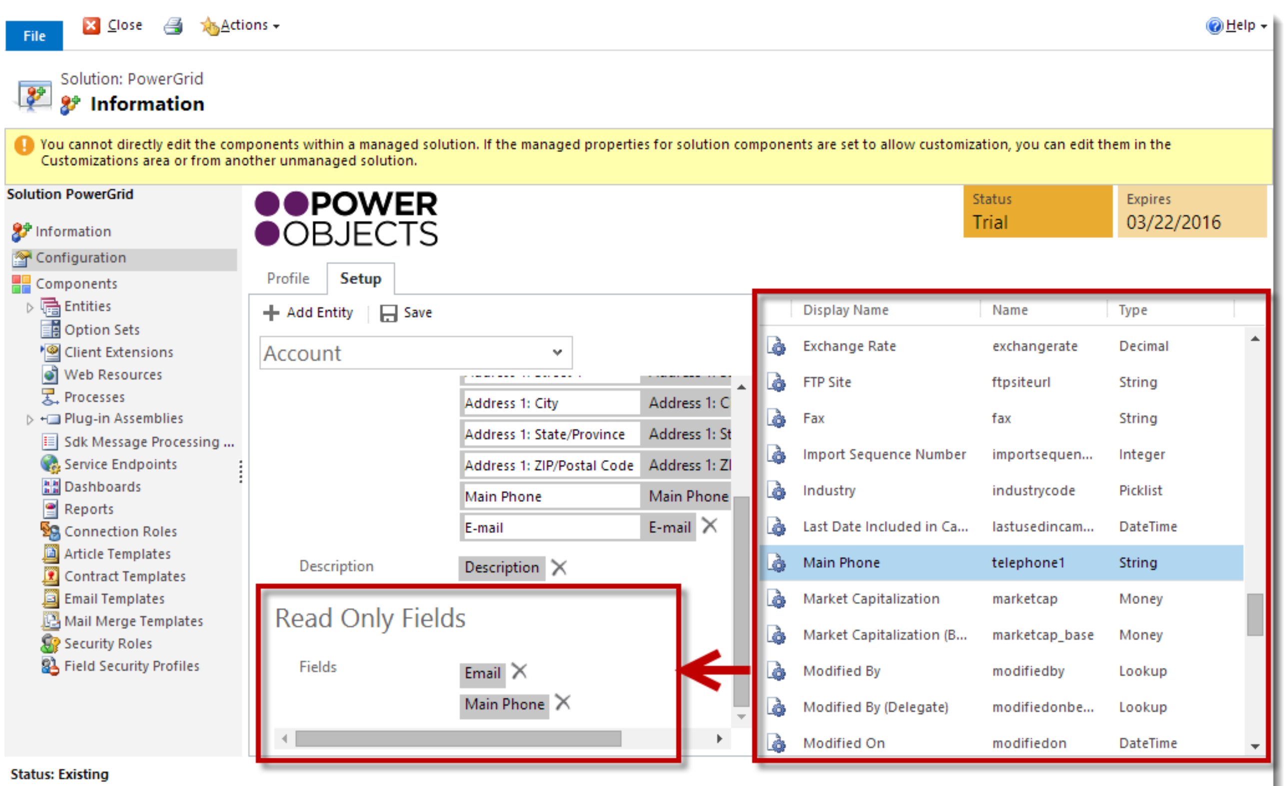




For each entity you will need to configure your reading pane – again we have given you a head start with pre-configured fields for the Account, Contact and Lead entities; but feel free to change these to meet your needs. To edit what is shown in the reading pane, simply drag and drop fields from the 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.



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 funcitons would not run when editing a field inline in PowerGrid.

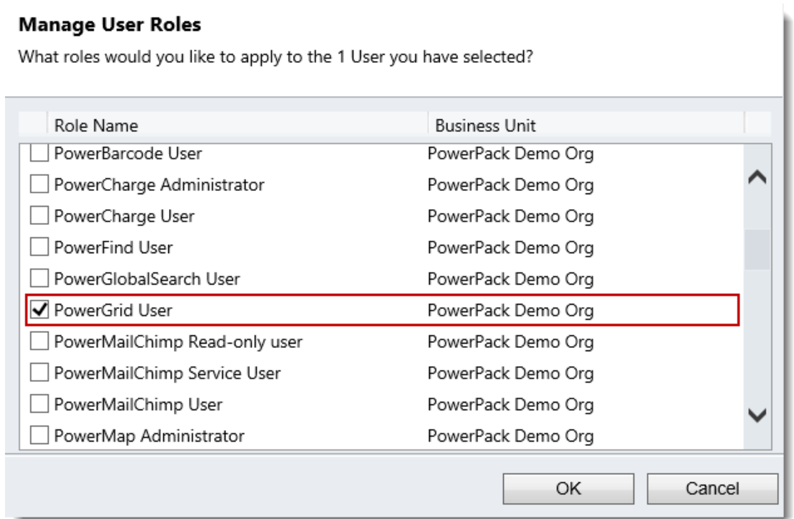


Once you have completed the configuration of your entities and reading pane select save.

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.

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



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 to the configuration screen and change the radio button from "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.