



IMPORT GUIDE

PowerGrid



Service



Support



Education



Add-ons

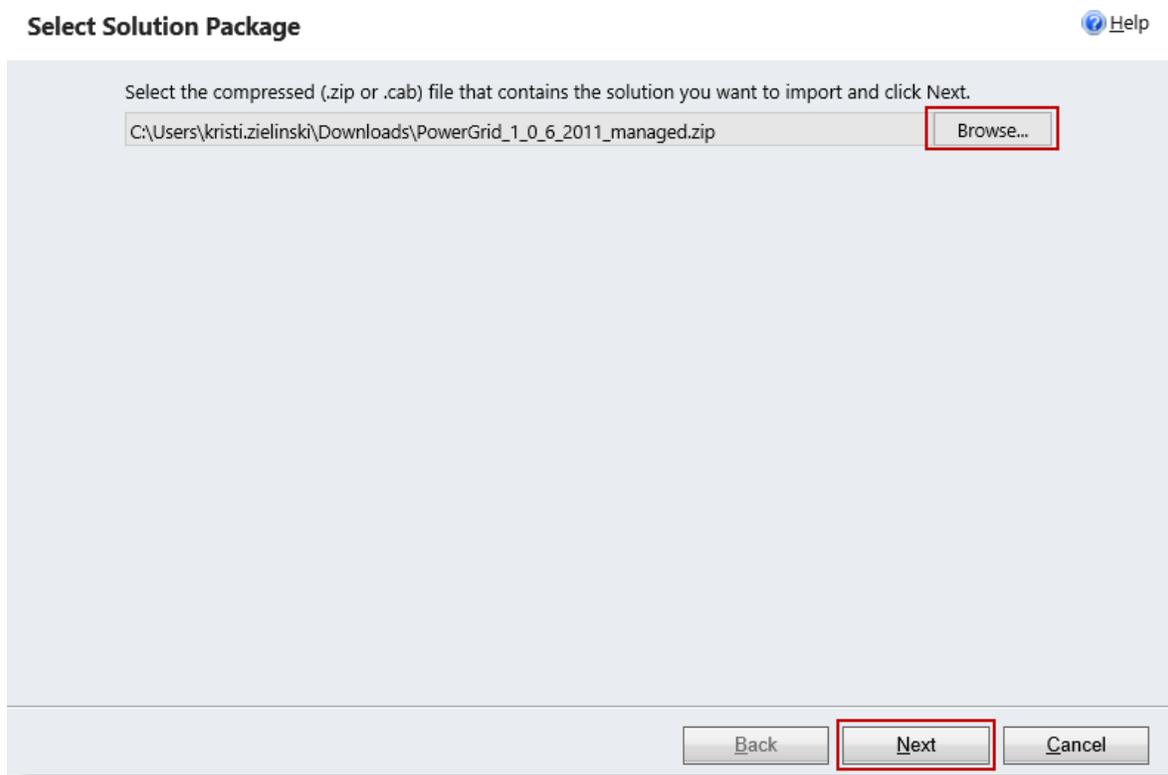
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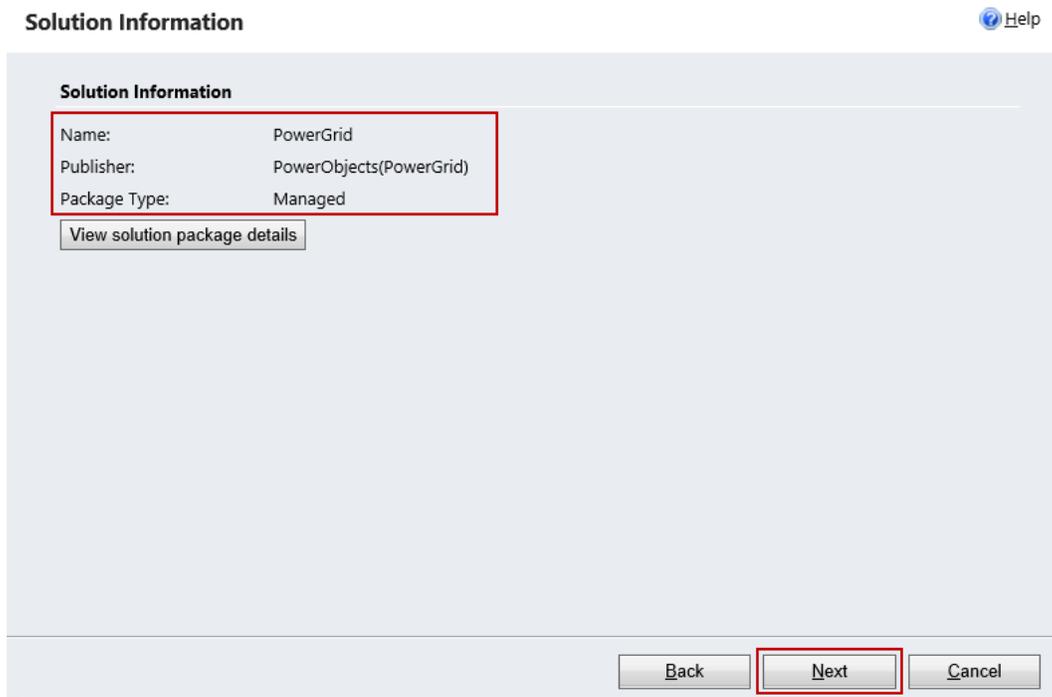
Import

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.

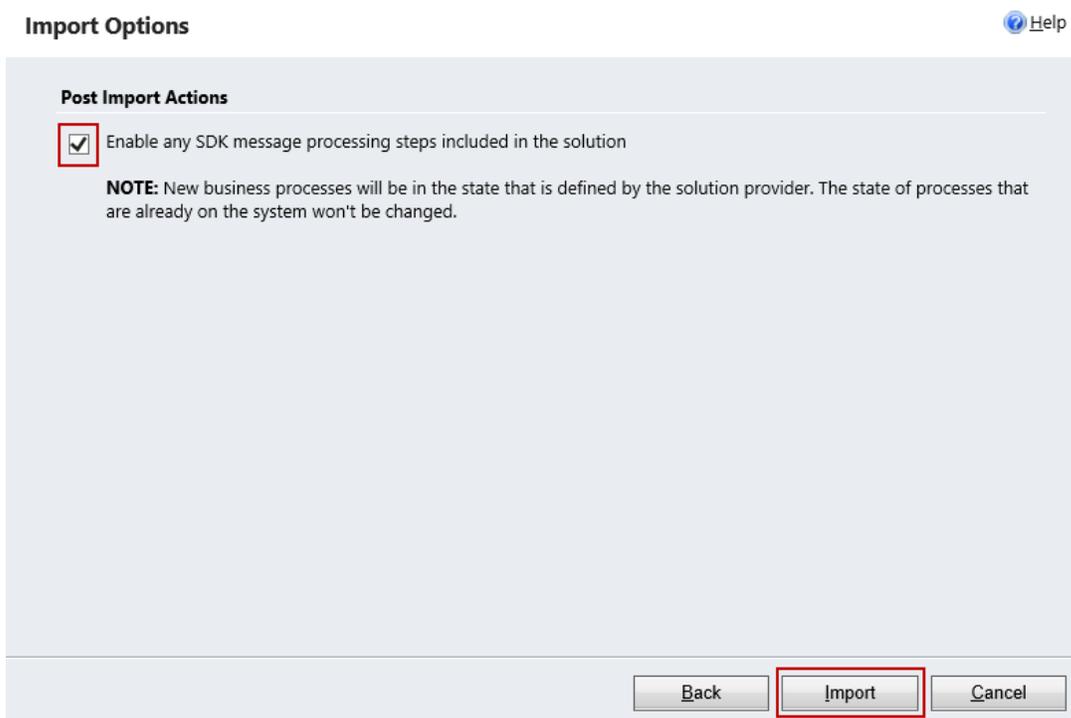


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerGrid from PowerObjects.

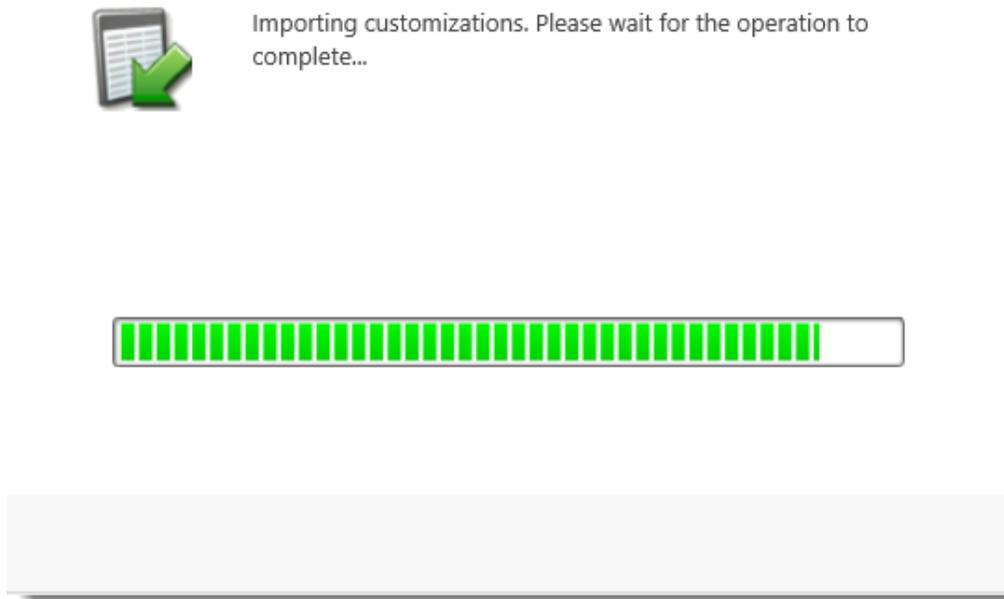


Click Next, and make sure to check the "Activate all processes..." checkbox, and click Next

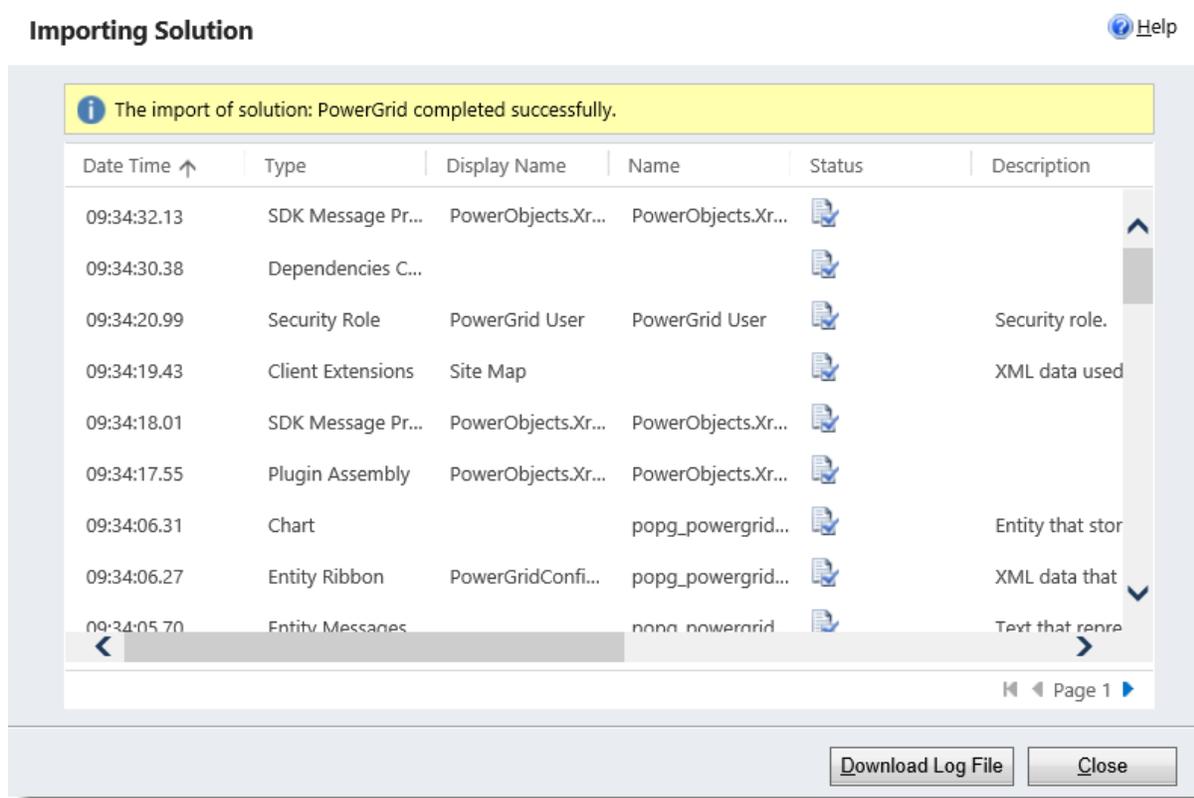
IMPORTANT: *If you do not check this box, the add-on WILL NOT FUNCTION CORRECTLY!*



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.

Solution: PowerGrid

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution PowerGrid

Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing S...
Service Endpoints
Dashboards
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles

POWER OBJECTS

Status: Trial Expires: 5/21/2014

Profile Setup

Try Subscribe

General

First Name *	PowerPack	Last Name *	Pro
Company *	PowerObjects	Main Phone *	612-339-3355
Email *	powerpackpro@powerobjects.com	State/Province *	MN
Address *	718 Washington Ave. N	Postal Code *	55401
City *	Minneapolis	Country *	USA

Status: Existing

Setup

The next tab in the configuration screen is the Setup tab. This 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 to this list simply select the "+ Add Entity" and select a new entity.



Profile **Setup**

+ Add Entity | Save

Account

Account

Contact

Lead

Display Name	Name	Type
Account	accountid	Uniqueidentifier
Account Name	name	String
Account Number	accountnumber	String
Address 1	address1_comp...	Memo
Address 1: Address Type	address1_addre...	Picklist
Address 1: City	address1_city	String
Address 1: Country/Region	address1_country	String
Address 1: County	address1_county	String
Address 1: Fax	address1_fax	String
Address 1: Freight Terms	address1_freigh...	Picklist
Address 1: Latitude	address1_latitude	Double
Address 1: Longitude	address1_longit...	Double
Address 1: Name	address1_name	String
Address 1: Post Office Box	address1_posto...	String

Profile **Setup**

+ Add Entity | Save

Account

- Mailbox
- Map Definition
- Map Location
- Map User Settings
- Map View
- Marketing List
- Merge Tag
- Note
- Opportunity
- Opportunity Product
- Opportunity Relationship
- Order
- Order Line Item
- Order Product
- Phone Call
- Photo Control

Display Name	Name	Type
Account	accountid	Uniqueidentifier
Account Name	name	String
Account Number	accountnumber	String
Address 1	address1_comp...	Memo
Address 1: Address Type	address1_addre...	Picklist
Address 1: City	address1_city	String
Address 1: Country/Region	address1_country	String
Address 1: County	address1_county	String
Address 1: Fax	address1_fax	String
Address 1: Freight Terms	address1_freigh...	Picklist
Address 1: Latitude	address1_latitude	Double
Address 1: Longitude	address1_longit...	Double
Address 1: Name	address1_name	String
Address 1: Post Office Box	address1_posto...	String

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.

POWER OBJECTS Status: Trial Expires: 5/21/2014

Profile Setup

+ Add Entity | Save

Account

Reading Pane

Subject * Account Name X

Regarding Primary Contact X

Attributes

Address 1: Street 1 Address 1: Street 1 X

Address 1: City Address 1: City X

Address 1: State/Province Address 1: State/Province X

Address 1: ZIP/Postal Code Address 1: ZIP/Postal Code X

Main Phone Main Phone X

E-mail E-mail X

Description Description X

Display Name	Name	Type
Account	accountid	Uniqueidentifier
Account Name	name	String
Account Number	accountnumber	String
Address 1	address1_comp...	Memo
Address 1: Address Type	address1_addre...	Picklist
Address 1: City	address1_city	String
Address 1: Country/Region	address1_country	String
Address 1: County	address1_county	String
Address 1: Fax	address1_fax	String
Address 1: Freight Terms	address1_freigh...	Picklist
Address 1: Latitude	address1_latitude	Double
Address 1: Longitude	address1_longit...	Double
Address 1: Name	address1_name	String
Address 1: Post Office Box	address1_posto...	String
Address 1: Primary Contac...	address1_prima...	String

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.

File Close Actions Help

Solution: PowerGrid

Information

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Solution PowerGrid

Information Configuration Components

Entities

Option Sets

Client Extensions

Web Resources

Processes

Plug-in Assemblies

Sdk Message Processing ...

Service Endpoints

Dashboards

Reports

Connection Roles

Article Templates

Contract Templates

Email Templates

Mail Merge Templates

Security Roles

Field Security Profiles

POWER OBJECTS Status: Trial Expires: 03/22/2016

Profile Setup

+ Add Entity | Save

Account

Address 1: City Address 1: C

Address 1: State/Province Address 1: St

Address 1: ZIP/Postal Code Address 1: Z

Main Phone Main Phone

E-mail E-mail X

Description Description X

Read Only Fields

Fields

Email X

Main Phone X

Display Name	Name	Type
Exchange Rate	exchangerate	Decimal
FTP Site	ftpsiteurl	String
Fax	fax	String
Import Sequence Number	importsequen...	Integer
Industry	industrycode	Picklist
Last Date Included in Ca...	lastusedincam...	DateTime
Main Phone	telephone1	String
Market Capitalization	marketcap	Money
Market Capitalization (B...	marketcap_base	Money
Modified By	modifiedby	Lookup
Modified By (Delegate)	modifiedonbe...	Lookup
Modified On	modifiedon	DateTime

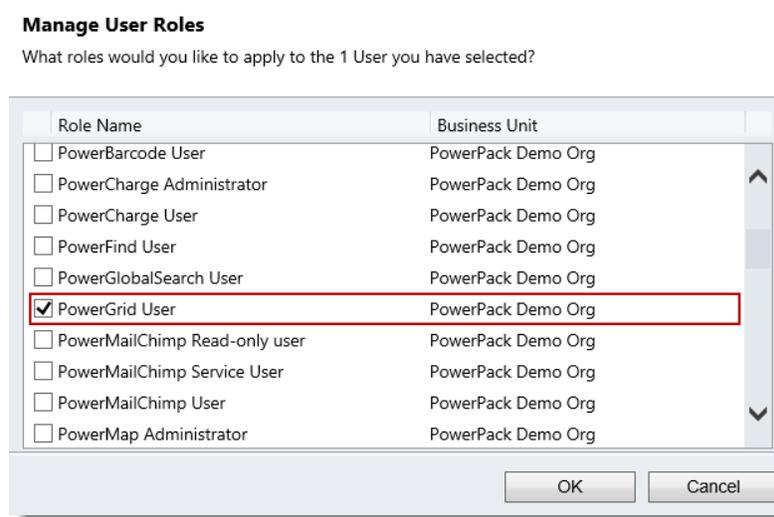


Once you have completed the configuration of your entities and reading pane select save.

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](#).

