



USER GUIDE

PowerGrid



Service



Support



Education



Add-ons

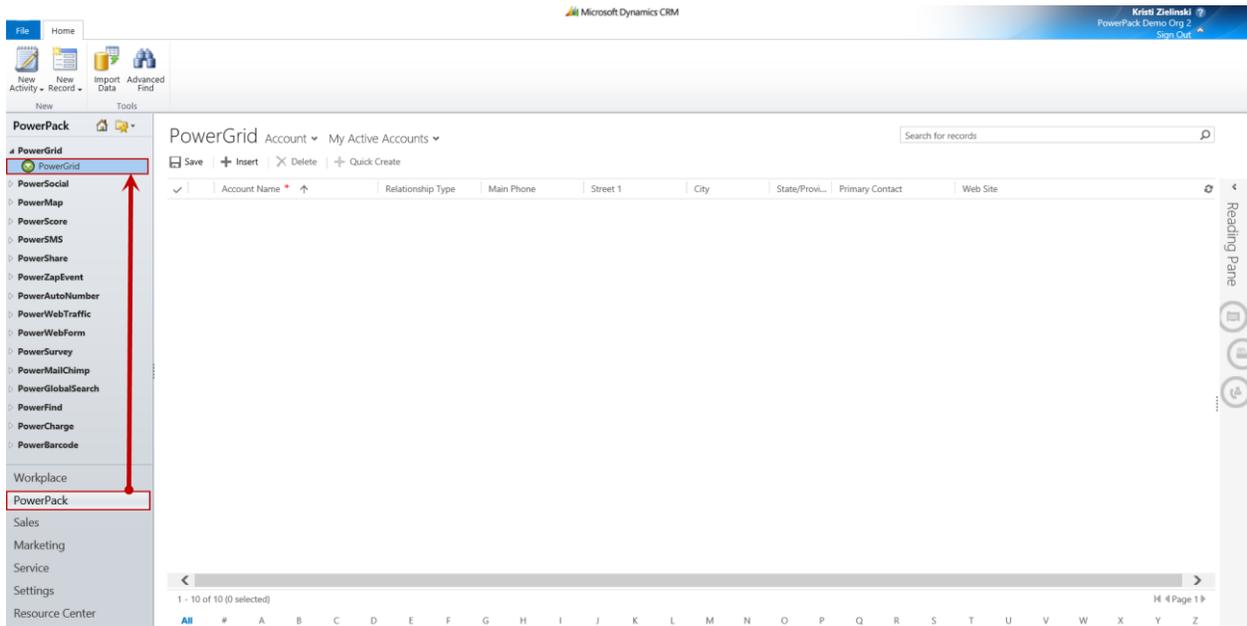
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Navigating to PowerGrid

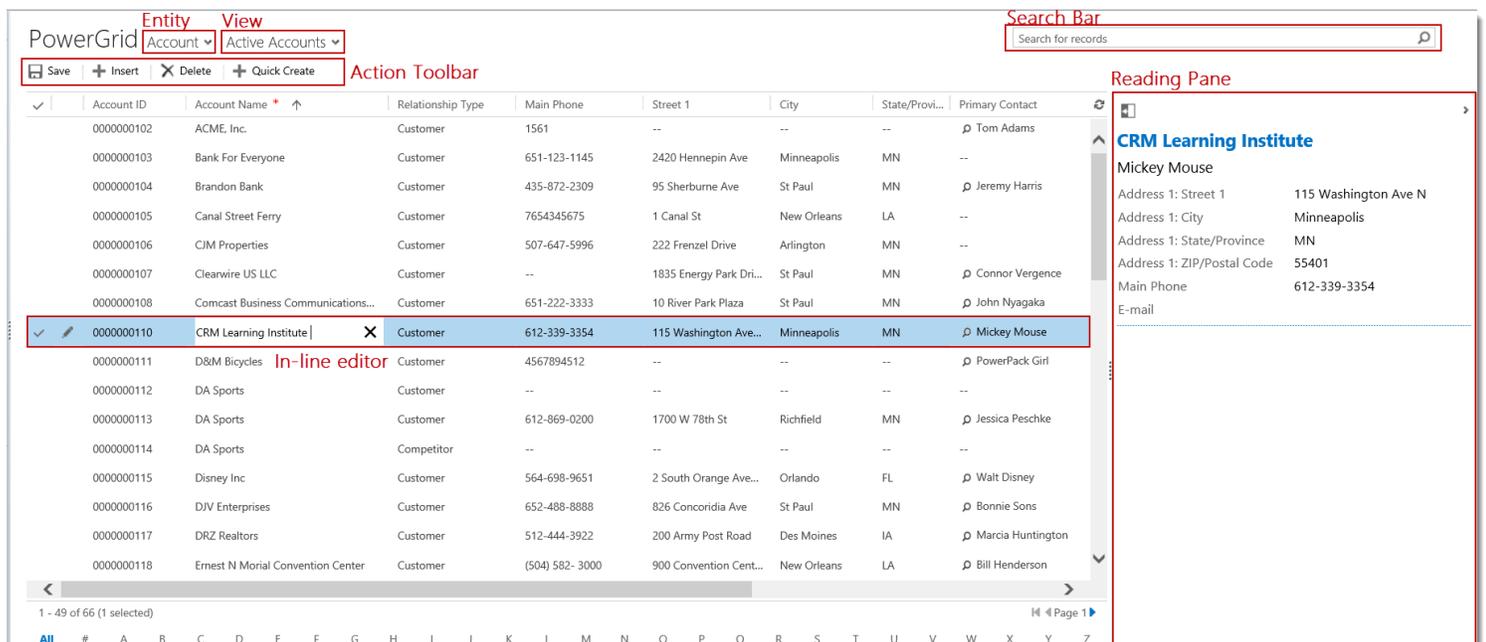
To use PowerGrid, navigate to the left navigation and select PowerPack. In the PowerPack section, select PowerGrid.



The PowerGrid solution will then show up in the main section of the screen.

Grid

Once you are in the PowerGrid solution 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 selecting 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 Editor

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.

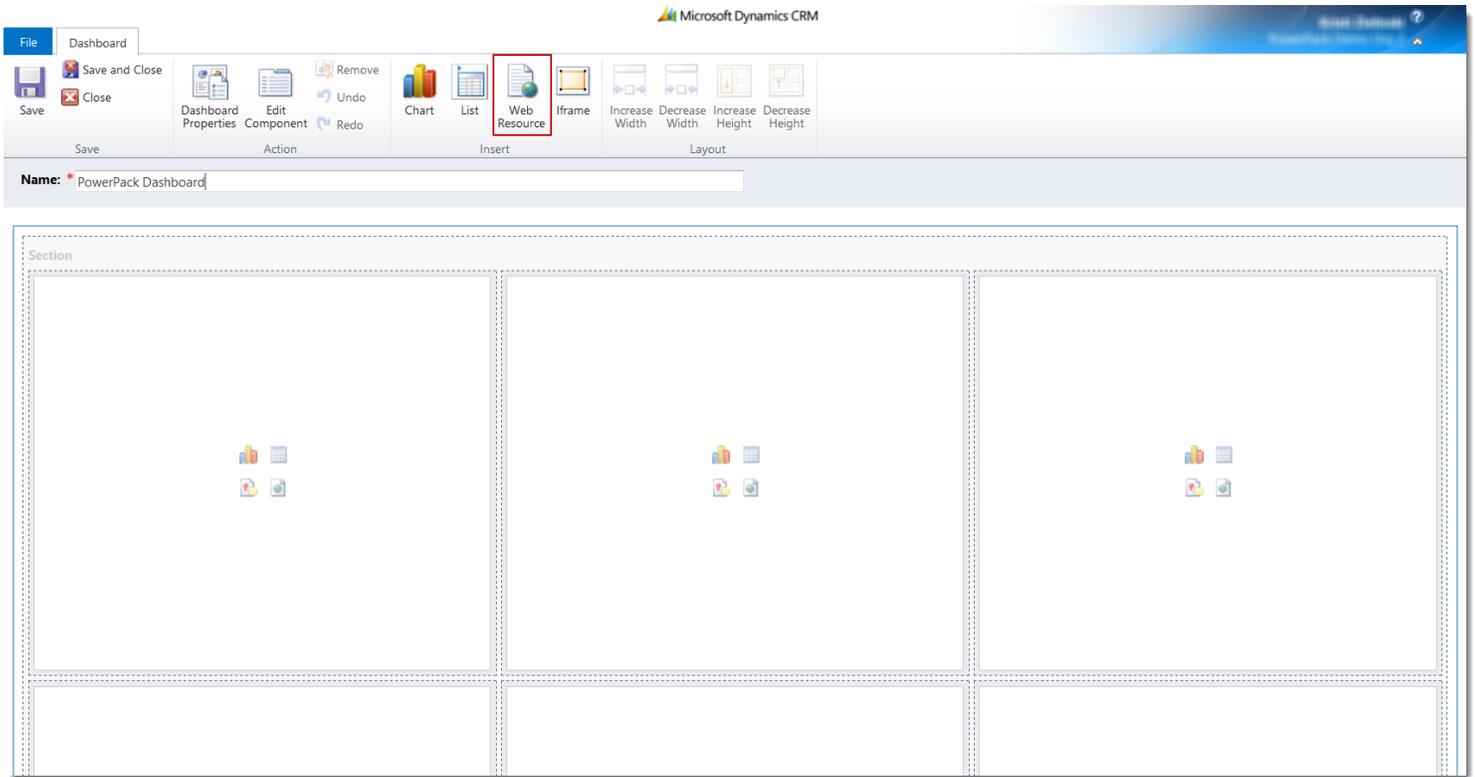
Opening a Record

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.



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 dashboard. Once you are on the editable dashboard select the WebResource button:



This will prompt a lookup where you can search for the PowerGrid .html file, give the WebResource a logical name such as PowerGrid and select the checkboxes from Display Label and Visible by Default.

Add Web Resource
Add an existing web resource to the Dashboard.

Web resource

Web resource *

Field Name and Properties

Name *

Label *

Display label on the Dashboard

Visibility

Visible by default

Show this Web Resource in Read Optimized Form

Web Resource Properties

Custom Parameter(data)

Restrict cross-frame scripting, where supported.

Pass record object-type code and unique identifier as parameters.

Help OK Cancel

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

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](#).