



c360 SearchPac Installation and Configuration Guide

SearchPac Version 1.2.8 – Microsoft CRM 1.2 Compatible

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Overview and Notes

Overview

c360 SearchPac no longer requires a manual installation. The steps to install and configure SearchPac are listed in the following sections of this document.

Microsoft CRM Compatibility

c360 SearchPac is compatible with Microsoft CRM version 1.2.

Version Changes

c360 SearchPac version changes are listed below:

Version 1.2.5 – 1.2.8 Changes

- Various defect fixes.
- Add Open Query list filter

Version 1.2.4 Changes

- SearchPac is now distributed with an automated installation setup.

Version 1.2.3 Changes

Internationalization

- This version of SearchPac has been internationalized and will be available in several languages in addition to English: French, Spanish, Italian, German and Portuguese.
- SearchPac also correctly supports international date formats.

Other minor changes or improvements:

- The ability to search on Contracts has been improved in Multi-Field Search
- The Category and Sub-category searchable fields have been added in Query Manager to the Task, Letter, Phone, Fax linked entities
- The criteria text is cleared after you add criteria in Query Manager.

Version 1.2.2 Changes

- Query Manager saved queries now also include column set and sort order. These saved queries are Microsoft CRM 'views' just like those created in the system customization area. For more information on this is provided in the following section of this document.
- An Expand/Collapse view button (labeled 'results') has been added to Query Manager to allow users to hide the query criteria window, thus providing more screen room for the results set.
- A 'My Views' drop-down has been added to Query Manager to allow users to quickly run queries they have created as well as queries of objects assigned to them (e.g. 'My Active Accounts').
- Multi-Field Search has been modified to allow users to search for Opportunities, Cases, Quotes, Orders and Invoices using any of the search fields listed on the Multi-Field Search screen. These objects could previously only be searched by ID.



- SearchPac's Query Manager no longer uses the Internet Explorer Web Controls which required a separate server installation. SearchPac now uses the tree control installed with Internet Explorer. This control is resident on all browsers capable of running Microsoft CRM and requires no separate client or server installation.

Version 1.2.1 Changes

- Adds Activities as a retrievable object
- Adds Merge action to merge duplicate Lead, Contact and Account records
- Adds several new linked entities for deeper searching
- Provides ability to add an additional search field to Multi-Field search
- Provides query sorting by user name, object type and query name
- Multi-Field Search and Query Manager now return all matching records regardless of record status
- Improves screen layout

User privileges for saving and editing queries/views

SearchPac 'queries' are Microsoft CRM 'views' similar to those created through the System Customization area of Microsoft CRM. Views are made up of four main components:

- The view's name
- The view's criteria
- The view's sort order
- The view's column set

Saving queries/views – the 'Save Query' button

When a user saves a query in Query Manager, he or she is really creating a new Microsoft CRM view which can only be accessed through Query Manager. To create a query/view, the user must have the 'create view' privilege as part of his or her security role(s). If the user does not have this privilege, he or she will not be able to see the 'Save Query' button in Query Manager. This privilege can be located on the 'Business Management' tab of the user's security role (see figure 1).

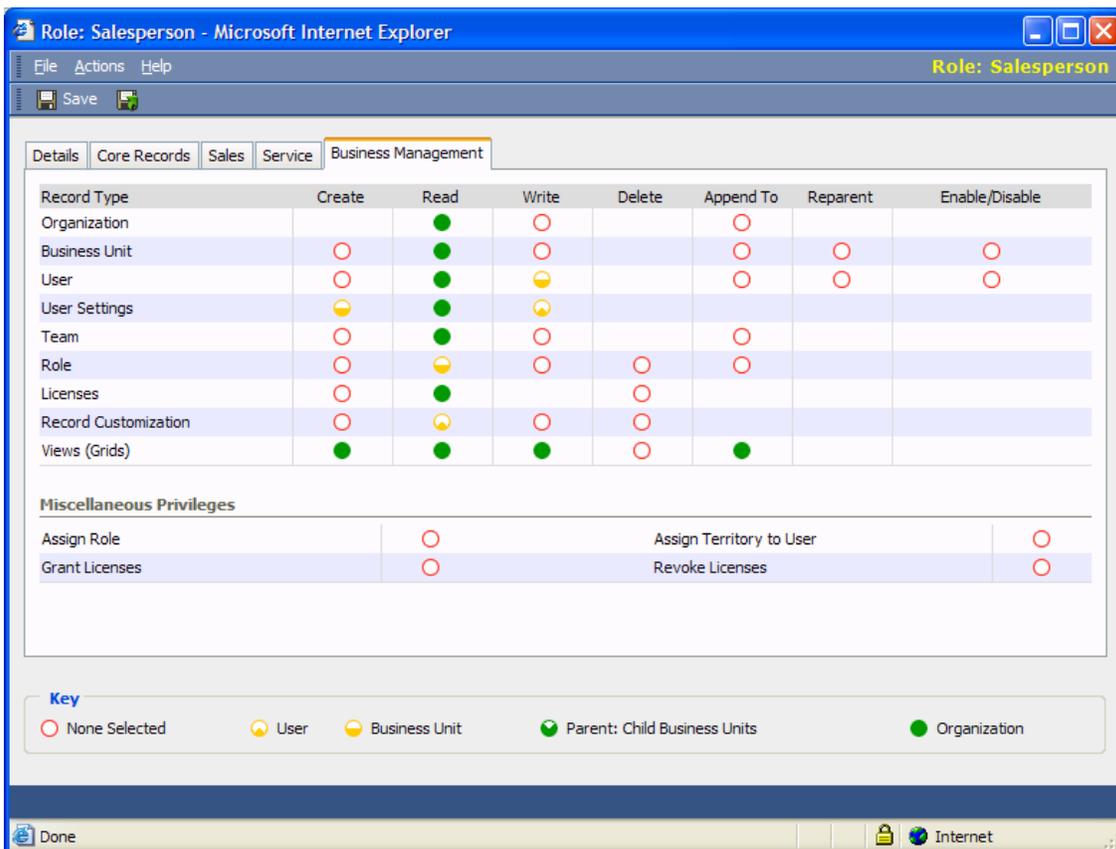
The standard Microsoft CRM security roles have all view privileges by default with the exception that some roles do not have the privilege to delete queries/views. The table below lists the standard settings for the 'Views (Grids)' privilege in Microsoft CRM.

Standard Microsoft CRM Roles	Create Views	*Read Views	Write Views	Delete Views	Append To Views
CEO-Business Manager	Yes	Yes	Yes	Yes	Yes
CSR Manager	Yes	Yes	Yes	Yes	Yes
Customer Service Representative	Yes	Yes	Yes	No	Yes
Marketing Professional	Yes	Yes	Yes	No	Yes
Sales Manager	Yes	Yes	Yes	Yes	Yes
Salesperson	Yes	Yes	Yes	No	Yes
System Administrator	Yes	Yes	Yes	Yes	Yes
Vice President of Sales	Yes	Yes	Yes	Yes	Yes

** The Global Read Views privilege cannot be removed from any role*

Changing the column set for a query/view – the 'Edit View' button

Users that have the minimum record customization privilege (user level read access) plus the 'create' and 'write' privileges for views will be able to see a button titled 'Edit View.' Clicking this button will allow the user to modify the column set and sort order of the active query/view. Figure 1 shows a role with all privileges for views (global create, read, write, delete and append to) and the minimum privilege for record customization (user level read access). It is important to note that the minimum privilege for record customization (user level read access) provides access to all record customization functions including form modification.



Record Type	Create	Read	Write	Delete	Append To	Reparent	Enable/Disable
Organization		●	○		○		
Business Unit	○	●	○		○	○	○
User	○	●	●		○	○	○
User Settings	●	●	●				
Team	○	●	○		○		
Role	○	●	○	○	○		
Licenses	○	●		○			
Record Customization	○	●	○	○			
Views (Grids)	●	●	●	○	●		

Miscellaneous Privileges	
Assign Role	○
Grant Licenses	○
Assign Territory to User	○
Revoke Licenses	○

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

Figure 1: a role that can exercise all Query Manager view/query operations. This role has been modified to include the minimum record customization privilege.

Default column set for Query Manager queries/views

The default column set for Query Manager queries/views is based on the Advanced Find view which is a standard Microsoft CRM view used only by Microsoft CRM's Advanced Find tool and Query Manager. When a user saves a new view in Query Manager, the column set from the Advanced Find view is copied to the user's new view and the user may then edit the column set and sort order.



User Privileges necessary to use record merge functionality

SearchPac's record merge functionality allows users with the appropriate privileges to merge Lead, Contact and Account records when duplicates are identified. Merging two records undertakes the following steps:

- The user's security role(s) is assessed to see if the user has all the necessary privileges to execute the merge.
Appendix A of this document lists the privileges a user must have to perform a merge on Lead, Contact or Account records.
- The CRM database is queried to find all records which are linked to both records involved in the merge. If uneditable linked records such as expired Contracts are found under one of the two records, the user will be prevented from merging over that record. If both records have uneditable linked records, the user will be prevented from merging over either record.
- The user must select one of the two records to be 'preserved'
 - o All records linked to the record to be deleted are unlinked and re-linked to the record to be preserved
The other record will be marked for deletion (deletionstatecode set to 2). The record will only physically be deleted when/if the Microsoft CRM Deletion Service is set to run
 - o If either one of the two primary addresses on the preserved record is blank, it is updated with the corresponding address on the deleted record
 - o If any of the three standard phone numbers or the fax number or the cell phone number is blank, it is updated with the corresponding phone number on the deleted record.

Upgrading from previous versions of SearchPac

If you currently have an older version of SearchPac installed, you can simply follow these instructions, overwriting existing files with the new files provided in the version 1.2.4 installation package. If you are upgrading from a previous version of SearchPac do not overwrite the file named 'c360.SearchPac Version 1.lic' in the Licenses directory.

Please note that the isv.config file does not need to be modified to upgrade to SearchPac version 1.2.4. New entries have been added to the web.config file to take advantage of additional field searching in Multi-Field search. These new entries must be added to web.config only if you wish to enable additional field searching.



Installation Instructions

Installation Instructions

You will need to have your c360 SearchPac license file on hand if you are doing a fresh install of the product, to complete the installation. A license file for Adventure Works Cycle has been included in the c360.SearchPac (MSCRMv1.2).zip file.

Follow these steps to install SearchPac:

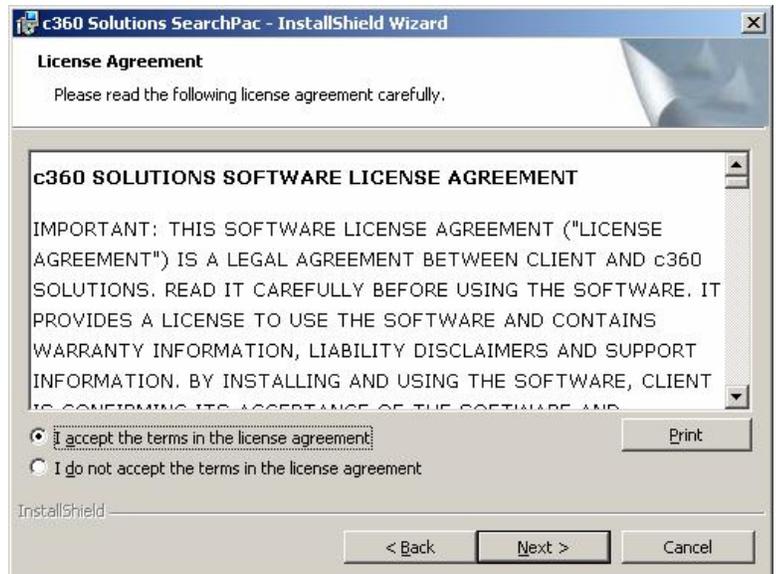
1. Extract the c360.SearchPac(MSCRMv1.2).zip file into a folder on the Microsoft CRM server computer.
2. Double click the 'c360.SearchPac.exe' file.

3. Click *Next* to begin the installation process.





4. Accept the License Agreement and click *Next*.



5. Verify the location of Microsoft CRM web application files. Select *Change...* if Microsoft CRM is installed in a different location. This folder should contain the 'web.config' file for Microsoft CRM web application.

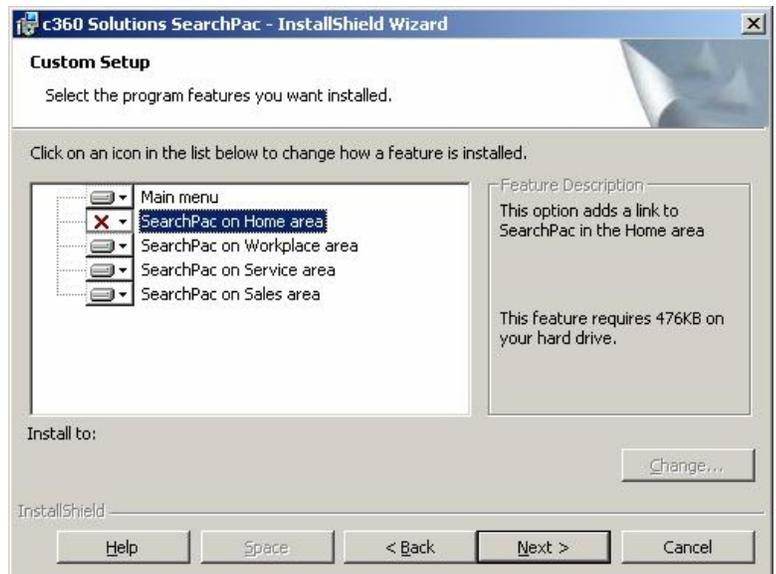




6. Select *Complete* to install all the links in CRM with SearchPac or select *Custom* to have the opportunity to selectively enable or disable some of the links. Click *Next*.

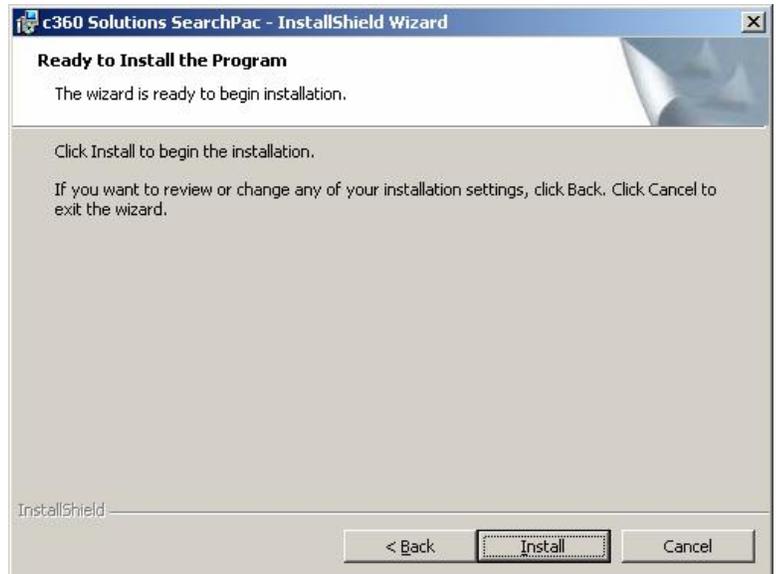


7. If you selected Custom in the previous screen, you must choose the options you want to enable and those you want to disable.

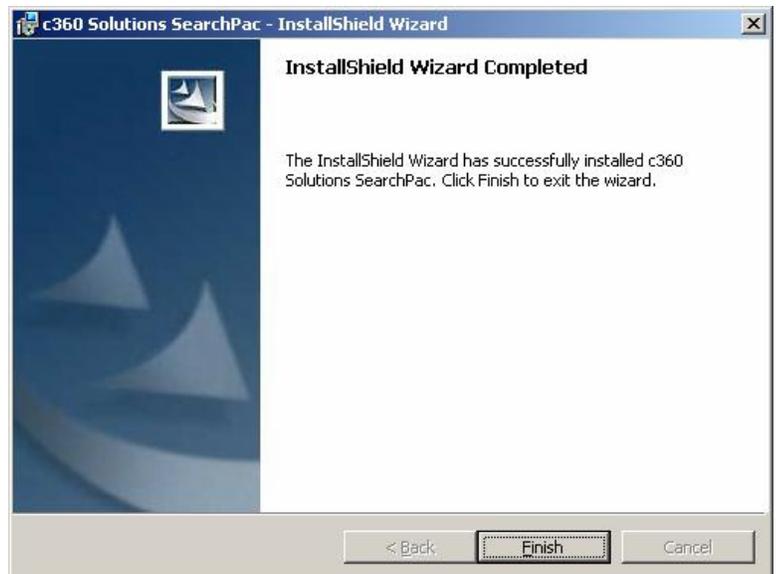




8. Click *Install* to install c360 SearchPac.



9. Click *Finish* to complete the Setup Wizard.





10. **This step outlines how to deploy SearchPac in the Microsoft CRM Sales for Outlook client.** Version 1.2 of Microsoft CRM employs a configuration file titled OutlookClient.xml. This file is the Outlook Client equivalent of the isv.config file and utilizes the exact same structure. Adding the isv.config entries listed in this guide will allow users to launch Query Manager and Multi-Field search directly from the Outlook client. It is important to note that the Outlook Client does not have a left navigation bar. The SearchPac tools must be launched from the c360 Tools menu in the Outlook client. In addition, the server name must be specified in OutlookClient.xml. For example, the following entry in isv.config:

```
<MenuItem Title="Multi-field Search"  
Url="/Custom/c360/SearchPac/MultiFieldSearch/redirect.htm" WinMode="0" />
```

must be implemented as:

```
<MenuItem Title="Multi-field Search"  
Url="http://server/Custom/c360/SearchPac/MultiFieldSearch/redirect.htm"  
WinMode="0" />
```

in OutlookClient.xml. In this example you would replace the text 'server' with the name of your CRM server.

A SearchPac configured copy of OutlookClient.xml is included in the SearchPac download file. You may open it in a text editor like notepad and use the search and replace function to quickly replace the word 'server' with your CRM server name. Once you have modified the OutlookClient.xml it should be placed in the c:\inetpub\wwwroot_Resources folder on the CRM server. Once users have gone offline for the first time a copy of the OutlookClient.xml will be copied to the c:\Program Files\Microsoft CRM\Client\res\Web_Resources folder. If you wish to provide the SearchPac functionality to Outlook client users who have not or do not intend to go offline you may manually copy the OutlookClient.xml file to their computers.

11. If you are upgrading from version 1.2.1 or older, you will need to run the 'Upgrade c360 Queries' tool to upgrade queries saved in the older version of Query Manager. (*Queries created in version 1.2.2 or later do not need to be upgraded.*) To run this tool copy the c360.UpgradeQueriesTool.zip file (found in the c360.SearchPac(MSCRMv1.2).zip file) onto the CRM server and unzip it. Double-click the c360.UpgradeQueriesTool.exe to run it. **Note: The Upgrade Queries tool must be run on the CRM server itself.**

Figure 2 shows the Upgrade Queries screen. Clicking the 'Verify' button will list the existing queries and indicate which queries will be deleted and which will be upgraded. Some queries from older versions of SearchPac are not upgradeable and must be deleted. In most scenarios, these older queries will have been rebuilt per a previous SearchPac installation instruction. Clicking the 'Upgrade' button will actually upgrade and delete the queries as indicated using the 'Verify' button.



Note: queries from versions 1.2.1 or older that are not upgraded will no longer work once version 1.2.3 of SearchPac is installed. In these cases you may manually delete and rebuild the queries through the Query Manager screen.

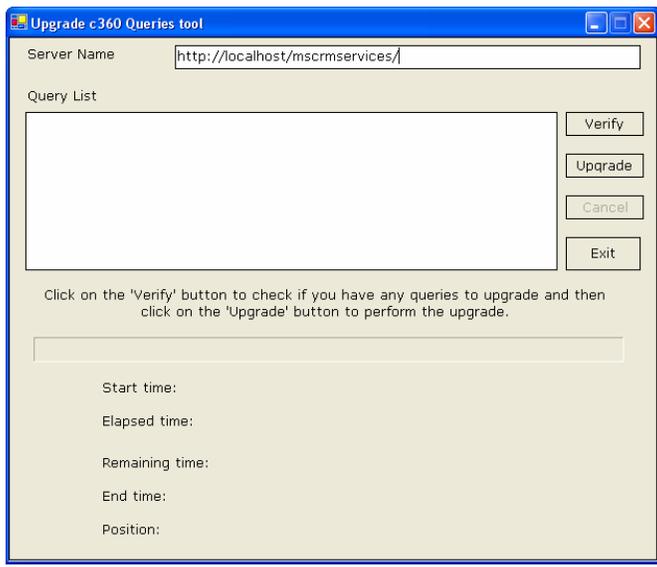


Figure 2: The c360 Upgrade Queries tool

Configuring Multi-Field Search for an additional search field

Multi-Field Search (MFS) can be configured to allow for searching by an additional custom or standard Lead, Contact or Account field. To enable this option, four keys must be added to the <appSettings> section of the web.config file.

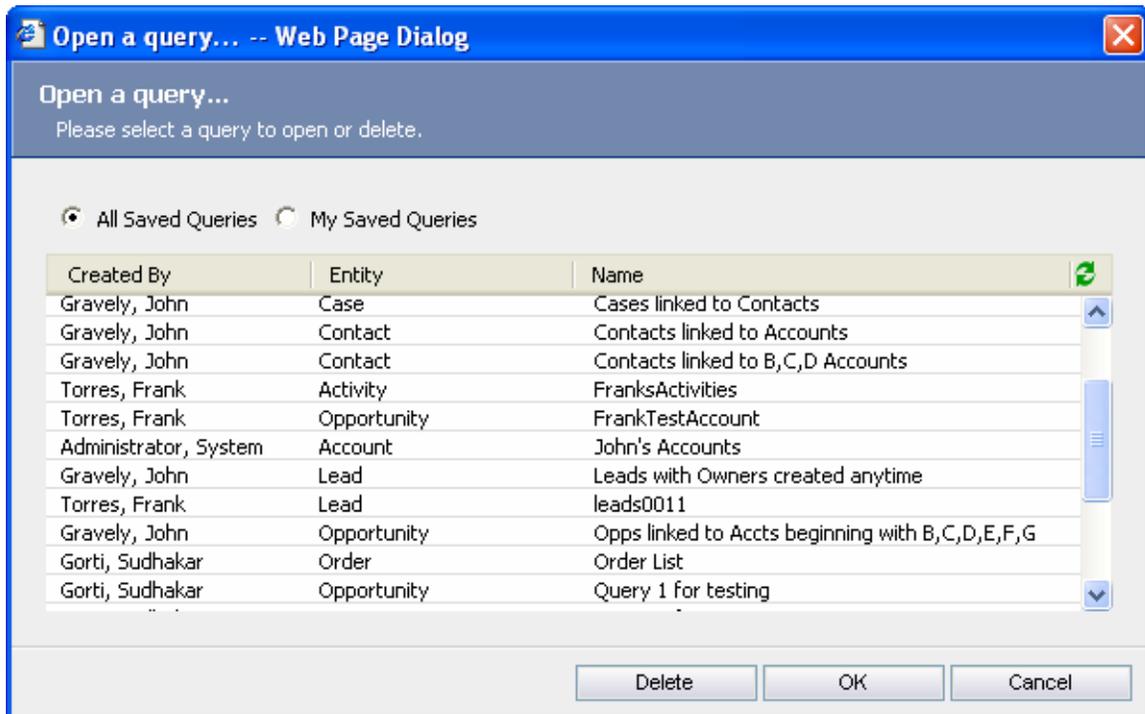
1. The first key tells MFS which field to place on the screen
`<add key="c360MultiFieldSearchCustomFieldName" value="leadsourcecode"/>`
2. The second key indicates the object type to which this field belongs. This can be set to "Lead", "Contact" or "Account"
`<add key="c360MultiFieldSearchCustomFieldEntity" value="Lead"/>`
3. The third key tells MFS the data type of the additional field. This can be set to "String", "Integer", "Float", "Currency", "Date", "Boolean", "Picklist", or "Memo"
`<add key="c360MultiFieldSearchCustomFieldType" value="Picklist"/>`
4. The fourth key allows you to override the field's default caption with a custom caption.
`<add key="c360MultiFieldSearchCustomFieldCaptionOverride" value=""/>`

Note: the example keys listed here will add the Lead Source field to the MFS screen. Any Lead, Contact or Account field may be added in place of this field.



Configuring Open Query filter default

When opening a saved query in Query Manager, the list of saved queries can be filtered to show only the saved queries created by the current user.



By default, the “All Saved Queries” option is selected and the list of saved queries is not filtered.

To have the list default to the “My Saved Queries” option, add the following key to the <appSettings> section of the web.config file.

```
<add key="c360SearchPacDefaultSavedQueryToCurrentUser" value="On"/>
```

Deploying Query Manager in the Microsoft CRM Outlook Client

Step 10 of the installation instructions outline how to provide SearchPac functionality to Microsoft CRM Sales for Outlook users.



Licensing

Copy either the Adventure Works Cycle license file or the c360 SearchPac license file received from c360 Solutions into the "C:\inetpub\wwwroot\Custom\c360\SearchPac\Licenses" folder.

To request a 15 day production evaluation license go to our web site at <http://www.c360.com/Evaluation.aspx>

When you receive your license file, you will have to save it in the "C:\inetpub\wwwroot\Custom\c360\SearchPac\Licenses" folder.



Uninstall Instructions ---

Follow these steps to uninstall SearchPac:

1. In Microsoft CRM, open Query Manager and click the 'Open Query' button. Use the 'Delete' button to delete any saved queries. Repeat until all saved queries have been removed.
2. Open 'Add or Remove Programs' from the Control Panel.
3. Select c360 SearchPac from list of the currently installed programs.
4. Click *Remove*.
5. Select *Yes* to begin the uninstall process.



Appendix A – Merge Privileges _____

Privilege List

In order to perform a merge, Microsoft CRM users must have the privileges listed below. Please note that all permissions must be Global (if they are not, there would be no way of determining all records that are linked to the records involved in the merge transaction).

Contacts and Accounts

- Contact/Account
 - o Read
 - o Write
 - o Delete
 - o Append To
- Sub-Accounts (Accounts only)
 - o Read
 - o Write
 - o Append
- Notes
 - o Read
 - o Write
 - o Append
- Activities
 - o Read
 - o Write
 - o Append
- Activity Party
 - o Read
 - o Write
 - o Append
- Address
 - o Read
 - o Write
 - o Append
- Opportunity
 - o Read
 - o Write
 - o Append
- Incident (Case)
 - o Read
 - o Write
 - o Append

- Quotes
 - o Read
 - o Write
 - o Append
- Orders
 - o Read
 - o Write
 - o Append
- Invoices
 - o Read
 - o Write
 - o Append
- Contracts
 - o Read
 - o Write
 - o Append

Lead

- Lead
 - o Read
 - o Write
 - o Delete
 - o Append To
- Notes
 - o Read
 - o Write
 - o Append
- Activities
 - o Read
 - o Write
 - o Append
- Activity Party
 - o Read
 - o Write
 - o Append