



c360 SearchPac User Guide

SearchPac Version 1.2.3 – Microsoft CRM 1.2 Compatible

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c360 SearchPac

Overview

c360 Solutions SearchPac consists of several tools that greatly enhance the search, query and data management capabilities of Microsoft CRM. SearchPac allows users to perform quick searches as well as quickly build complex queries and save them for future use. SearchPac also provides Marketing segmentation and data management capabilities not available in the core Microsoft CRM product. The tools in SearchPac allow users to:

- Segment data by creating complex queries involving multiple record types
- Edit and save unique column set and sort order for each saved query
- Save frequently accessed queries for future use
- De-duplicate data by merging duplicate Lead, Contact and Account records
- Bulk update or modify fields on records retrieved in a search or query
- Customize the field list in query results sets for ad hoc data analysis and export to Microsoft Excel
- Perform quick searches for Lead, Contact, Account, Case, Product, Quote, Contract, Order and Invoice records

The tools included in SearchPac are:

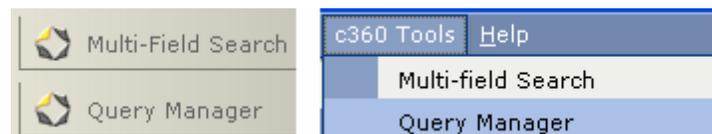
Query Manager: A query building and data-mining tool that allows users to design and execute complex queries and save those queries for future use.

Multi-Field Search: A quick search screen that lets users perform quick searches on the most commonly searched fields.

Update Field Action: A custom action that allows users to bulk update or modify fields on all searchable record types.

Record Merge Action: A custom action that allows users to de-duplicate data by merging duplicate records into a single record.

Multi-Field Search and Query Manager may be launched from the Microsoft CRM navigation bar and run inside Microsoft CRM or may be launched from the c360 Tools menu and run independently from Microsoft CRM, even if the Microsoft CRM is closed.



SearchPac's custom Merge and Update Field actions are launched from the Query Manager and Multi-Field Search Actions menus.

Query Manager

Overview

c360 Solutions Query Manager is a web-based add-on to Microsoft CRM that allows Microsoft CRM users to retrieve groups of records by building complex queries.

Screen Resolution Settings

It is recommended to use a screen resolution of 1024 x 768 pixels or greater when using the SearchPac tools. Users with 600 x 800 settings will need to launch Query Manager and Multi-Field search from the menus to use all features.

Accessing Query Manager

Query Manager can be accessed from two places within the Microsoft CRM application; the left navigation bar and the c360 SearchPac menu. This is illustrated in figure 1.

When Query Manager is accessed from the left navigation bar, it is displayed in the same window with Microsoft CRM. Using Query Manager this way, if you are building a query and move to another page, your query will not remain in Query Manager. If you access Query Manager through the c360 SearchPac menu, Query Manager will be displayed in a separate window allowing you to navigate separately in the application without losing your query. You can even operate a Query Manager window and close the main Microsoft CRM window.

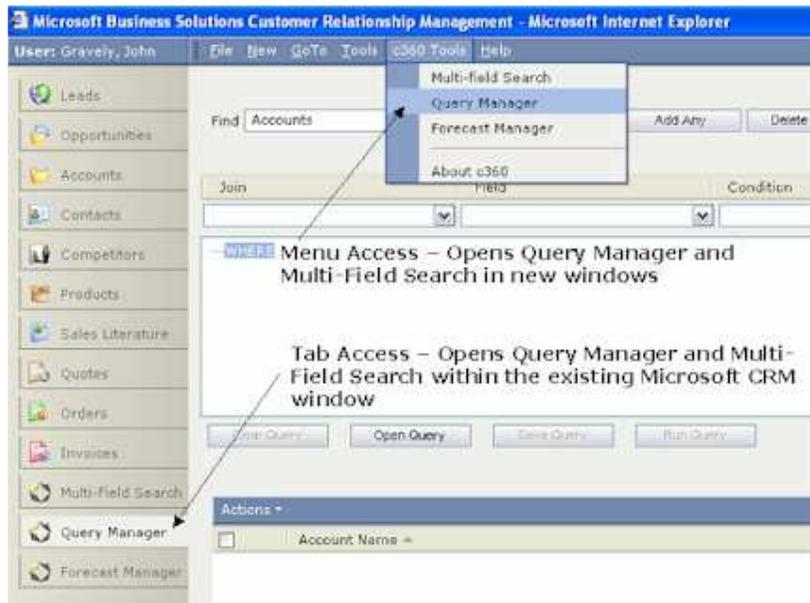


Figure 1: Accessing Query Manager through the navigation bar or c360 menu

Building a Query

Once you've accessed Query Manager, you can begin building queries. Each query consists of one or more conditions. The steps to build a query are:

- Start by selecting the type of records you want to retrieve by making a selection in the 'Find' Box.
- Begin building a condition by choosing a:
 - o Join Record
 - o Join Field
 - o Join Operator
 - o Join Value
- Insert the condition in the query by clicking the 'Add Condition' button
 - o The first condition will always appear directly under the Root Node
- If you wish to add an Any/All Node, select either a Join Record Node or another Any/All Node and click the 'Add All' or 'Add Any' button depending on whether you want your results to match ALL conditions under the All node (i.e. AND clause) or ANY one of the conditions (i.e. OR clause) under the Any Node.
 - o **Note:** If you select a Join Record node and click the 'Add All' or 'Add Any' button, the existing Any/All Node will toggle between 'Meets All' or 'Meets Any'
- Figure 2 displays a sample complex query

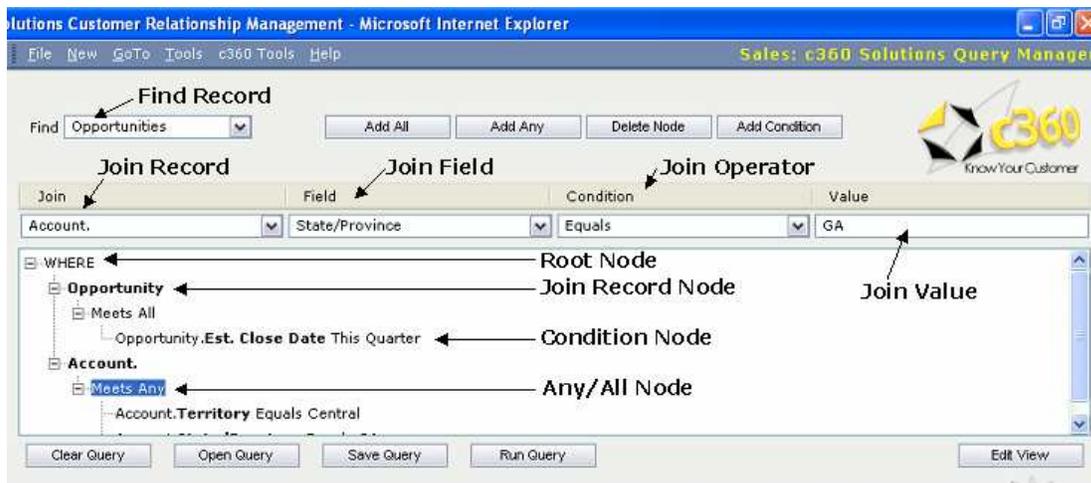


Figure 2: a complex query in Query Manager

Understanding a Sample Query

Find: **Opportunities**

Where

- **Opportunity**
 - o Meets All
 - Opportunity.**Est. Close Date** This Quarter
- **Account.**
 - o Meets Any
 - Account.**Territory** Equals **Central**
 - Account.State/Province Equals **GA**

The sample query will return all Opportunity records that are projected to close (i.e. be won) this quarter and whose Account is either in the Central region or the State of Georgia. If you like, you may think of 'Meets All' as a traditional AND clause and 'Meets Any' as a traditional OR clause.

Join Records

If you look at the list of Join Records for any given 'Find' record, you will see that there is an entry in bold with entries above and below it. The bold entry represents the fields on the record you are searching. Entries above the bold entry end with a period to show that they are parent records to the record you are querying. Entries below the bold record begin with a period to show that they are child records to the record you are querying. Some entries have multiple records and periods to show that you are querying to several levels below the Find record.

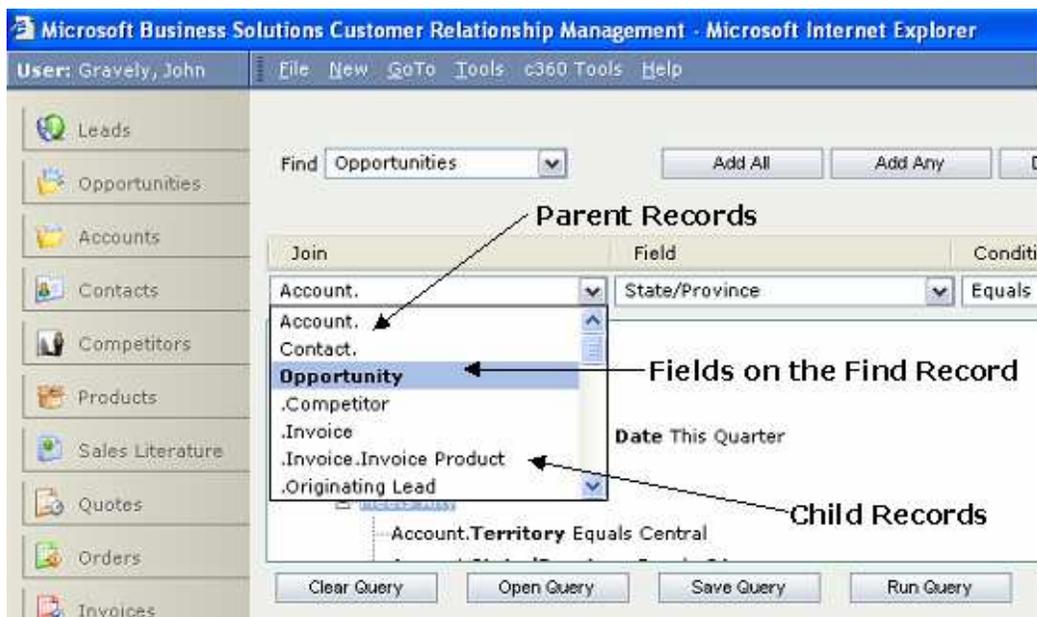


Figure 3: Parent and Child records of the Find record

Changing the Column Set – the Edit View button

You can change the column set in Query Manager by clicking the 'Edit View' button. This button will only be available to users with create and read privileges for record customization. For information on the security privileges necessary to edit queries please refer to the SearchPac Installation and Configuration Guide.

Saving, Opening and Updating Queries

Query Manager allows you to save your queries for future use and open them when you need to use them again. You can save a Query by clicking the 'Save Query' button then clicking the 'Create New' button and providing a name for the query. For information on the security privileges necessary to save queries please refer to the SearchPac Installation and Configuration Guide.

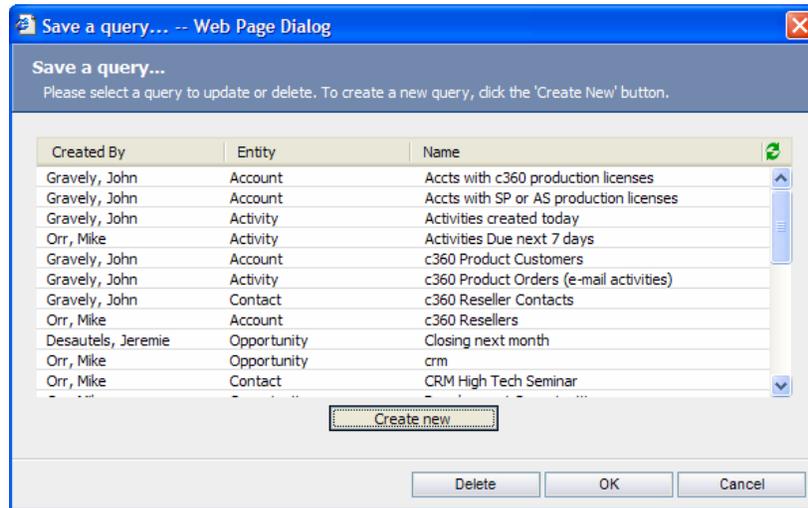


Figure 4: Selecting a query to update it with the currently active query

You can update a query by clicking the 'Save Query' button, selecting the query you want to update and clicking OK. You will be prompted to make sure that you want to overwrite the query you have selected.

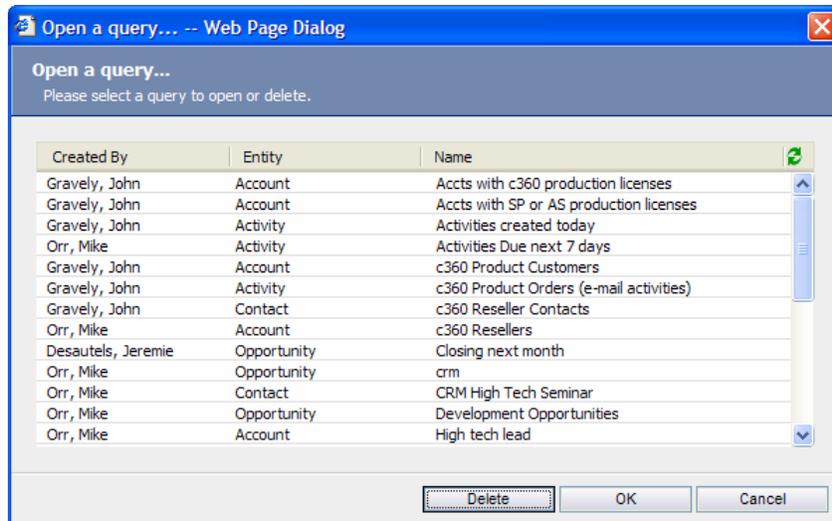


Figure 5: Opening a saved query

To open a saved query, click the 'Open Query' button and choose the query you wish to open from the list of queries and click OK.

Clearing a Query

In Query Manager, you can clear a query from the screen by either clicking the 'Clear Query' button or by choosing a new Find record.

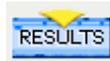


Retrieving All Records

All CRM records have a 'created on' date field by default. To retrieve a list of **all** (non-deleted) records, create a condition that looks for a 'created on' date of 'anytime.'

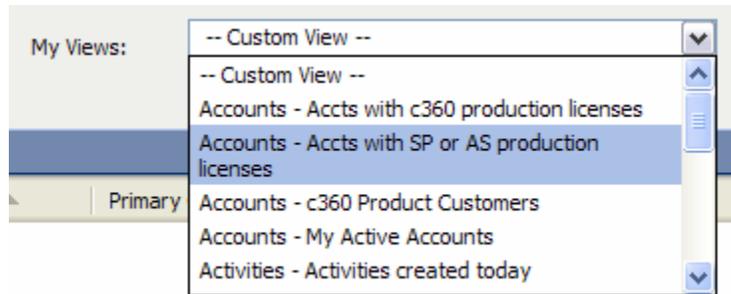
Hiding the criteria window to enlarge the results grid

The 'results' icon may be clicked to hide the criteria window thus displaying more of the query results set on the screen.



Using the 'My Views' drop-down

The 'My Views' drop-down displays all queries the active user has created as well as queries of objects assigned to the active user (e.g. 'My Active Accounts'). When a query is selected it is run automatically.





Multi-Field Search

Overview

Multi-Field search presents the user with a single screen with the most commonly searched fields for Leads, Contacts, Accounts and Cases. In addition, Multi-Field Search allows the user to quickly search for Cases, Products, Quotes, Orders and Invoices by ID.

Searching for Records

Multi-Fields Search has two distinct search functions. When searching for Leads, Contacts and Accounts you can enter multiple criteria in the fields on the left side of the screen. The search will only bring back records that match all of your criteria. The 'Relationship Type' and Account Number fields only pertain to Account records. If you have selected/entered a value in these fields, you will not be able to search Contacts and Accounts until you remove the value. You may search ID's on the right side of the screen by entering the ID and selecting the appropriate button.



Figure 6: The Multi-Field Search screen



Using Wildcards

As with the Advanced Find tool, users can enter the '*' symbol to represent a wildcard character. A wildcard is assumed at the end of every string entered (i.e. a user who enters a name of 'Fran' will receive 'Frank' and 'Francis').

Custom Field Labels

If fields have been customized to display different field labels, the custom label will appear on the Multi-Field Search screen.

SearchPac Custom Actions

Overview

Actions in Microsoft CRM may be executed from the standard actions menu on any results grid (i.e. view). SearchPac introduces custom actions that users can take in addition to the standard actions supplied by Microsoft.

Merge Records Action

SearchPac includes a custom action to merge duplicate Lead, Contact and Account Records. When records are found that are determined to be duplicates, they can be merged together two at a time by selecting both records as shown in figure 7 and selecting the Merge Records option as shown in figure 8. Upon selecting this option a prompt will appear so the user can indicate which of the two records he/she would like to 'preserve.' This is shown in figure 9. The merge action will delete the record that the user does not want to preserve but all linked records (i.e. Activities, Notes, Cases, Opportunities) will be re-linked to the record the user does want to preserve.



Figure 7: Selecting records to merge

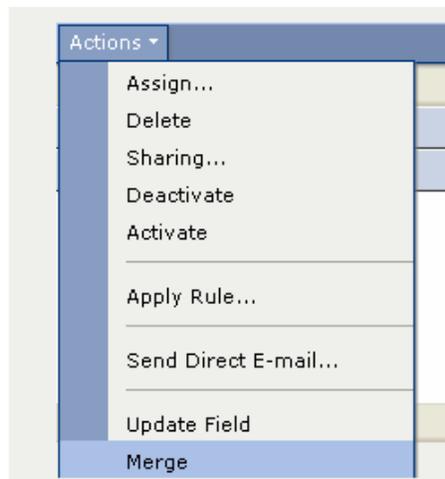


Figure 8: Selecting the merge option

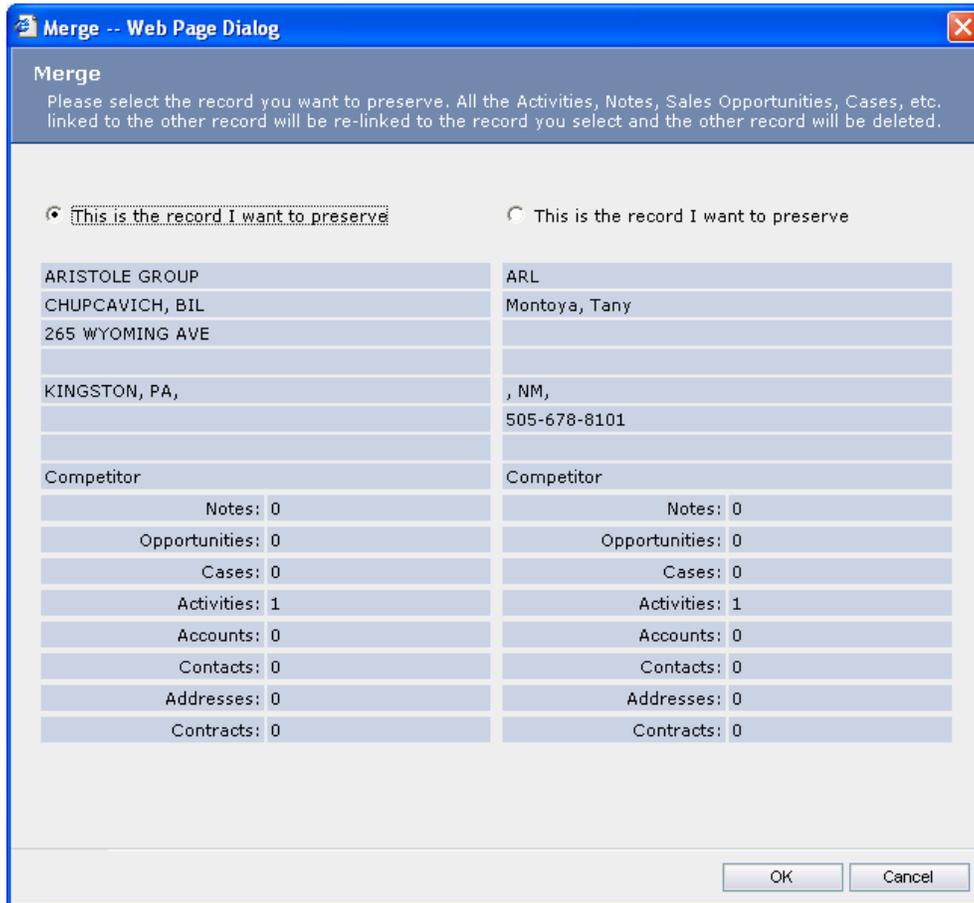


Figure 9: Selecting which record to preserve

It is important to note that Account or Contact records with linked Contract records cannot be merged. Additionally, if a user has security access to view a record but not edit or delete it, he/she will be unable to merge that record.

Update Field Action

SearchPac includes a custom action to bulk update any field on the record you have selected. To execute this action, choose 'Update Field' from the results set Actions menu. You can then choose a field to update and specify the new field value.

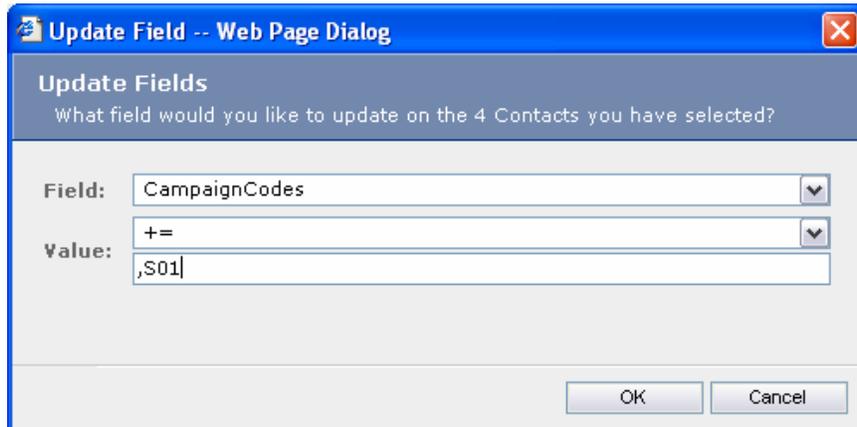


Figure 8: Bulk updating a field on a results set

The 'Update Action' action provides special operators for manipulating data in the updated fields. Table 1 below lists the operators that are available for the various filed types.

Table 1: CRM Object Update Relationships.

Field Type	Options
String	= +=
Integer	= += -= * =
Float	= += -= * =
Currency	= += -= * =
Date/time	<i>Not available for update</i>
Boolean	=



Picklist	=
Memo	= +=

Table 2 defines the various field operators and their functions.

Table 2: Object Update Operators

Operator	Definition
=	Equals. Original value is replaced with the update value
+=	Add. In the cases of Integer, Float, and Currency fields, the update value is added to the original value (3 += 5 = 8). In the cases of String and Memo fields the update value is appended to the original value (cat += dog = catdog)
-=	Subtract. This operator is only used with numeric fields. It subtracts the update value from the original value (7 -= 5 = 2)
*=	Multiply. This operator is also only used with numeric values. It multiplies the update value times the original value (5 *= 6 = 30)

Action Execution

Microsoft CRM actions are designed to execute only on the current page of results. If your query returns multiple pages and you want to execute an action against all results, you will have to execute the action by page. This is because when a user makes a request to the Microsoft CRM query engine, the engine retrieves the results on the CRM server and inspects them to ensure that the user has the appropriate permissions to view them. When the all the records have been inspected or a full page has been reached, the results are sent to the client's screen.

SearchPac's design follows the Microsoft standard in executing actions. Whether you choose a standard action or a custom action, the action is taken one page at a time. Note that the print and Excel export functions behave differently from actions in that they give the user the option of printing/exporting the current page or all records.

Viewing Record Counts

Because of the way Microsoft CRM pages records, total record counts for searches and queries are never displayed. One workaround to obtain a total record count is to export to Excel and view the count in the Excel file.