



**Dynamics 365 / CRM / XRM Platform**



# **User Guide**



**CRM Versions Supported: 2011/2013/2016/D 365**

Global Search is an add-in component developed to address specific needs for Dynamics 365 / CRM, which enables the user to search any word within the CRM for any number of selected available Entities or custom Entities.

Coding Version: 1.0.0.0  
Document Version: 1.0.0.0  
Document Date: June 22, 2016

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## Table of Contents

<b>COPYRIGHT .....</b>	<b>2</b>
<b>DISCLAIMER.....</b>	<b>2</b>
<b>LICENSE KEY .....</b>	<b>5</b>
<b>INSTALLATION PROCESS .....</b>	<b>6</b>
Installing Licensing Solution.....	7
Installing Global Search Solution .....	9
Activating License Key .....	12
<b>DYNAMICS 365 SOLUTION - TRIAL LICENSE ACTIVATION/ PRODUCT LICENSE PURCHASE/ ADDITIONAL</b>	
<b>USER LICENSE PURCHASE.....</b>	<b>14</b>
<b>GLOBAL SEARCH SETTINGS .....</b>	<b>15</b>
Configuration Settings.....	16
Global Search – Edit Filter Criteria .....	18
Adding a Column to Quick Find view .....	23
Global Search – Functionality .....	25
<b>UNINSTALLATION PROCESS .....</b>	<b>27</b>
<b>MTC OVERVIEW .....</b>	<b>28</b>
The Global CRM Community DynamicsExchange.com .....	28
End User License Agreement (EULA).....	29

## Table of Figures

Figure 1 : Developer Resources .....	5
Figure 2 : Organization Unique Name .....	5
Figure 3: To Import Solution .....	6
Figure 4 : Select Solution Package .....	7
Figure 5: Importing Options window .....	7
Figure 6: Import Option .....	8
Figure 7: Importing Solution – Licensing .....	8
Figure 8 : Select Solution .....	9
Figure 9: Solution Information .....	10
Figure 10: Solution successfully imported .....	11
Figure 11: Global Search Configuration .....	12
Figure 12: Placing of License Key .....	13
Figure 13: Global Search Configuration .....	15
Figure 14: Available/ Selected Entities, and their Views.....	16
Figure 15: Selected Entities, and their Views .....	17
Figure 16: Customization.....	18
Figure 17: Invoice Views.....	19
Figure 18: View: My Invoices .....	19
Figure 19: Edit Filter - Fields.....	20
Figure 20: Edit Filter - Fields ... Condition .....	21
Figure 21: Edit Filter - Value.....	21
Figure 22: Quick Find All Invoices .....	24
Figure 23: Global Search Screen .....	25
Figure 24: Delete a solution .....	27
Figure 25: Uninstall solution .....	27

## License Key

- To install Global Search for Dynamics 365 / CRM you will require License Key, which you can get by sending an E-mail request to **salesteam@mtccrm.com** with your Organization Unique Name.
- To access your Organization Unique Name Click on **Settings→Customizations→Developer resources** as shown below.

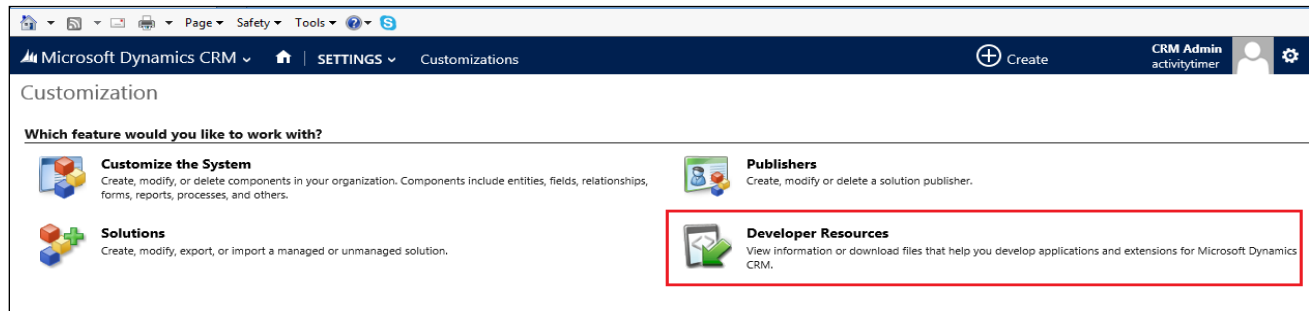


Figure 1 : Developer Resources

- A window will pop up with Organization Unique Name as shown below.

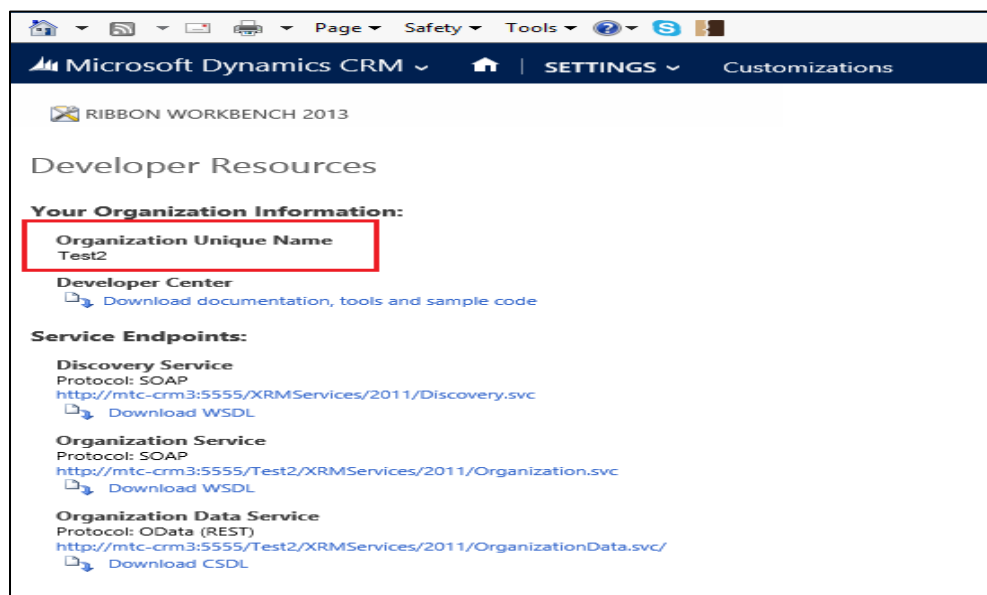


Figure 2 : Organization Unique Name

- Send this Organization Unique Name through Email and you will receive your Licensing Key within 24 hours.

**NOTE: After placing the request you will receive the LICENSE KEY within 24 hrs.**

## Installation Process

To install the Global Search solution, the following steps are to be followed.

### STEP 1:

- Go to <http://www.mtccrm.com/gs.aspx> and click on Download Global Search.

### STEP 2:

- On Downloading you will get GlobalSearch\_1\_0\_0\_0\_managed.zip (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



GlobalSearch\_1\_0\_0\_0\_managed.zip



Licensing\_1\_0\_3\_0\_managed.zip

**NOTE: To install the Global Search SOLUTION need to be imported into CRM**

### STEP 3:

- Open your CRM click on **Settings→Solution→Import** it will open import Solution window.

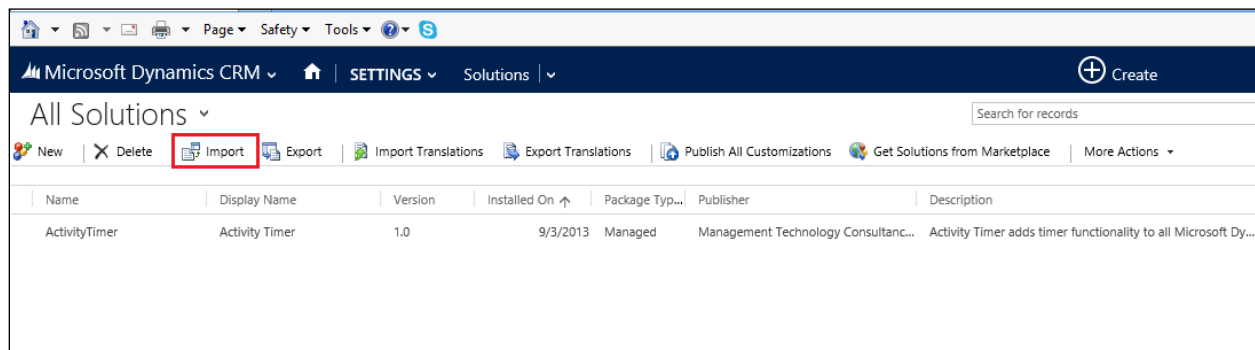


Figure 3: To Import Solution

- In Import Solution Window you can **browse** and Select Solution Package zip file and then click on **Next** for further processing.

## Installing Licensing Solution

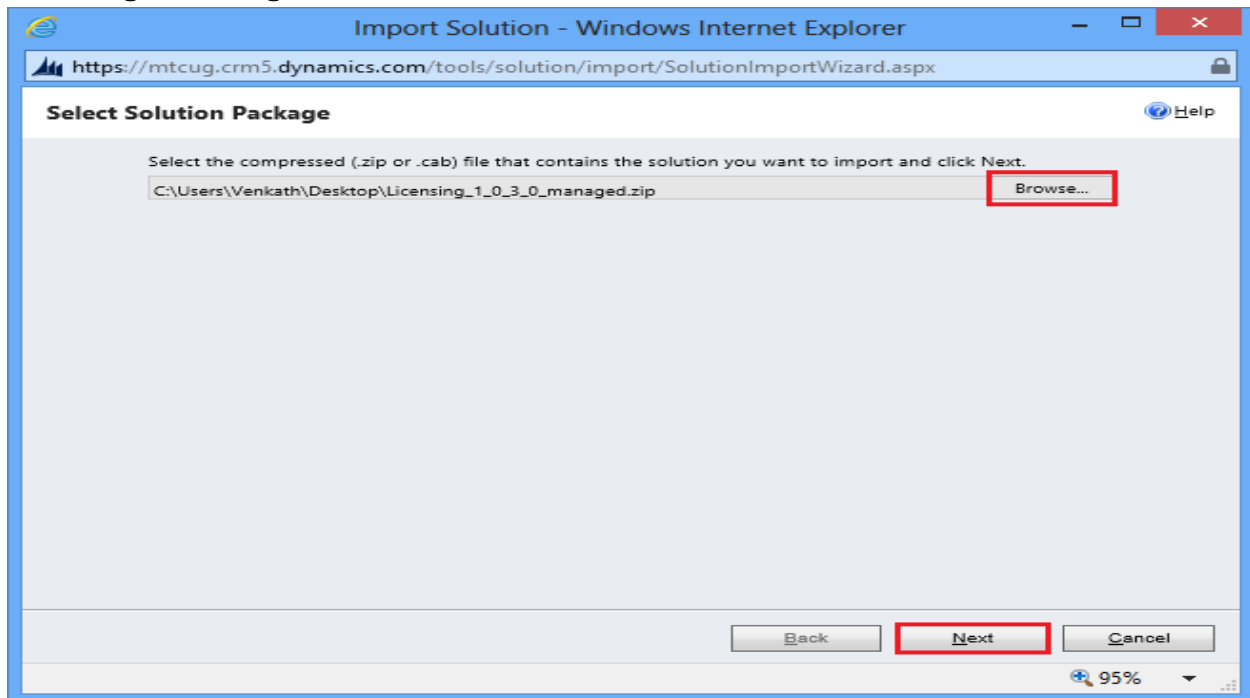


Figure 4 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

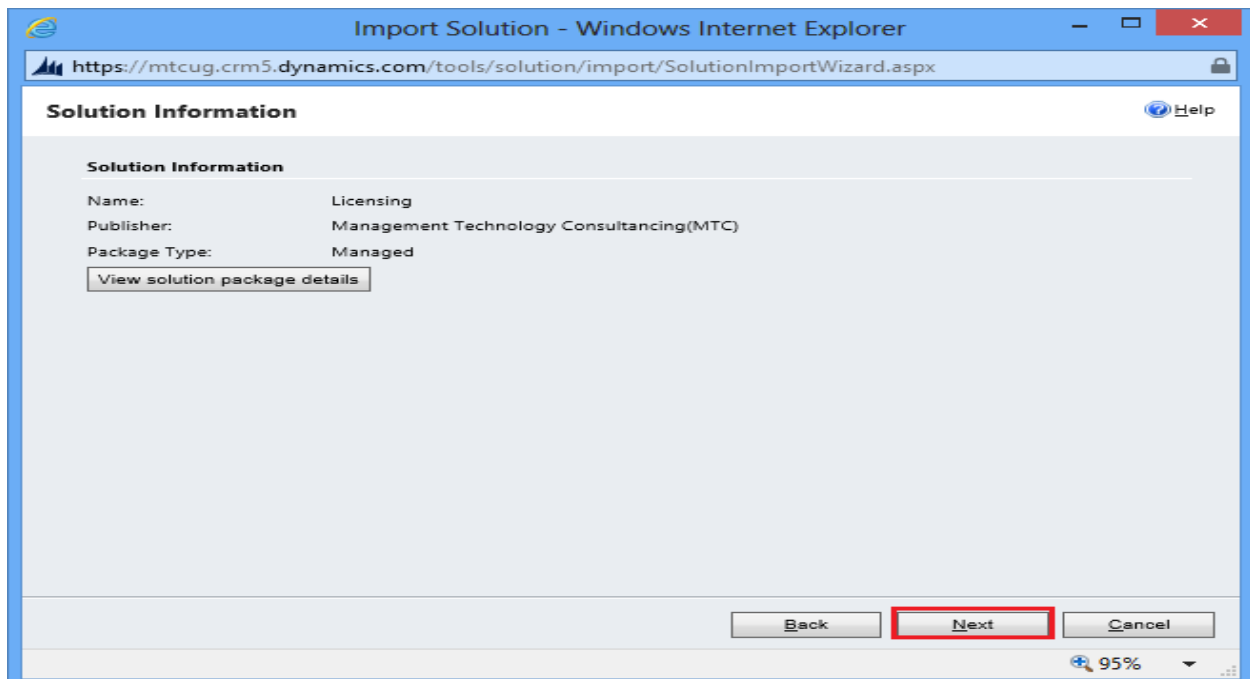


Figure 5: Importing Options window

- Click on Next to proceed.

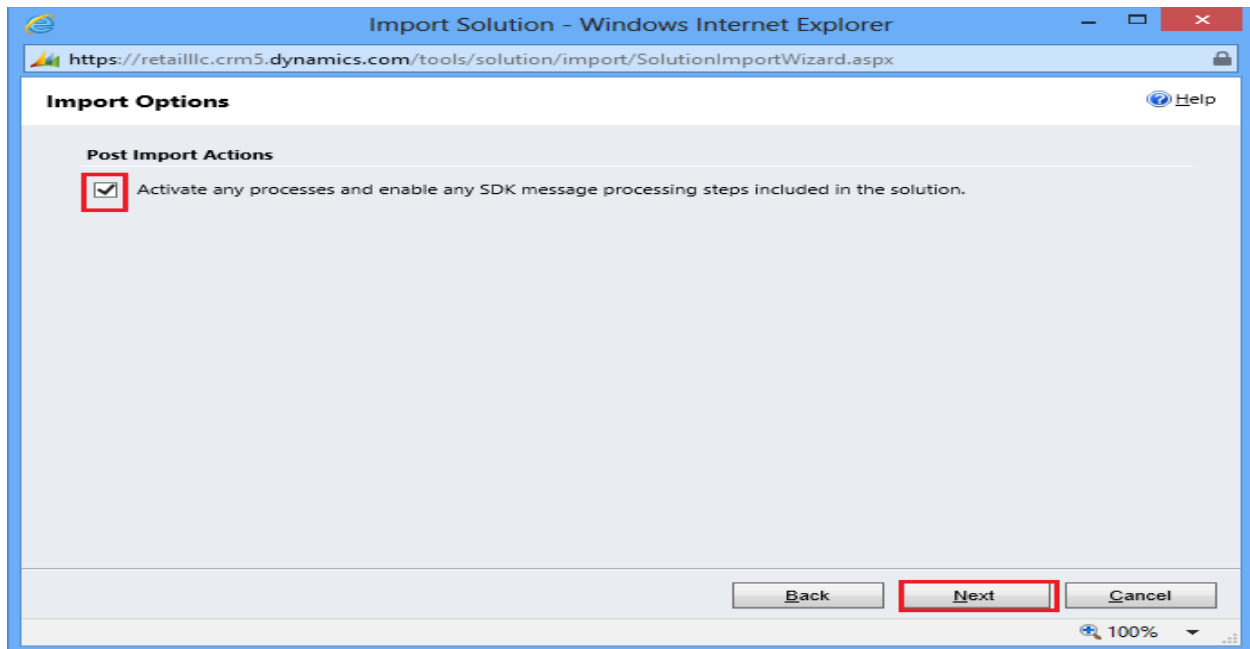


Figure 6: Import Option

- Click on Next to proceed.

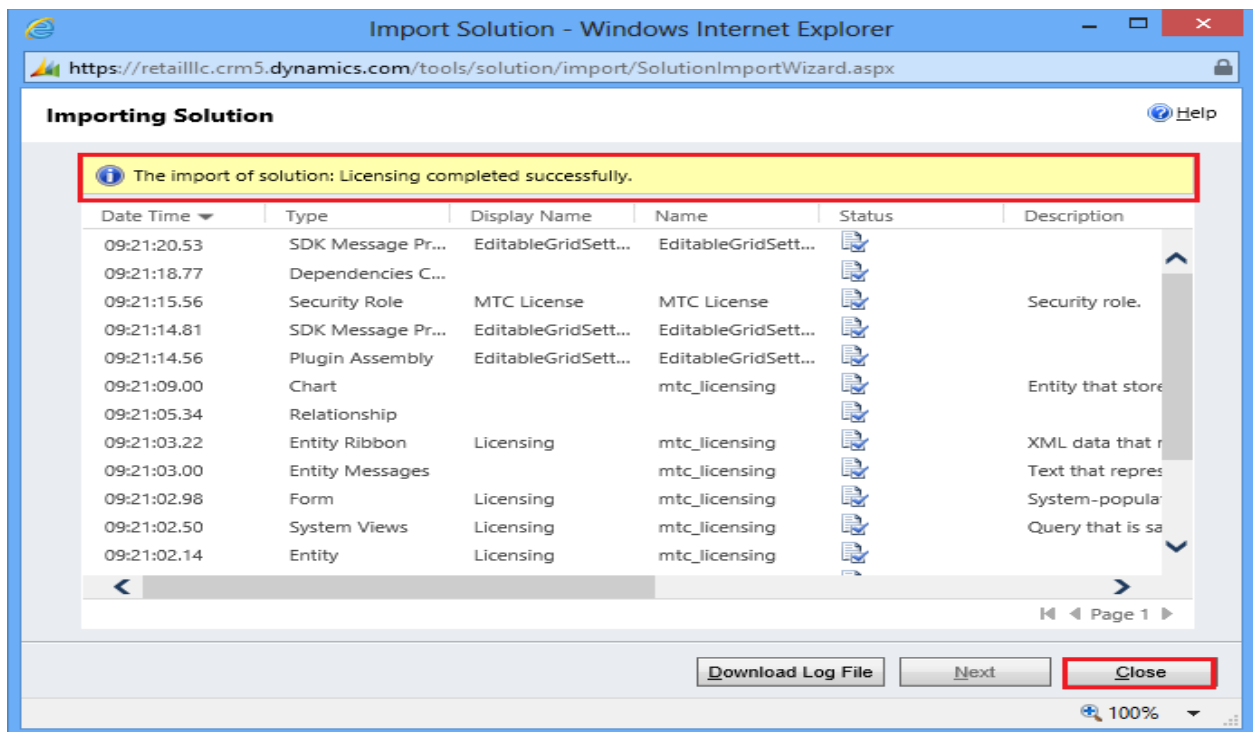


Figure 7: Importing Solution – Licensing



- Click on Close after successful completion message is displayed.

## Installing Global Search Solution

- Import Global Search Solution which you have downloaded. Click on **Next** to continue.

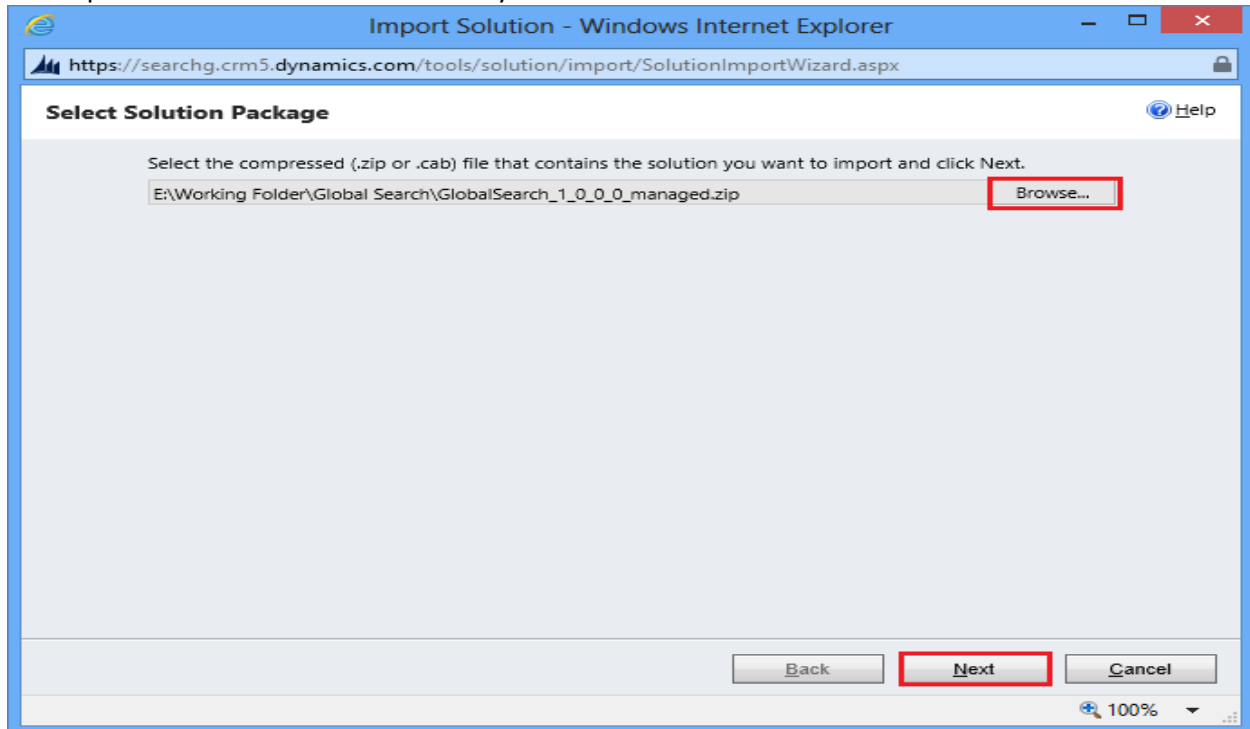


Figure 8 : Select Solution

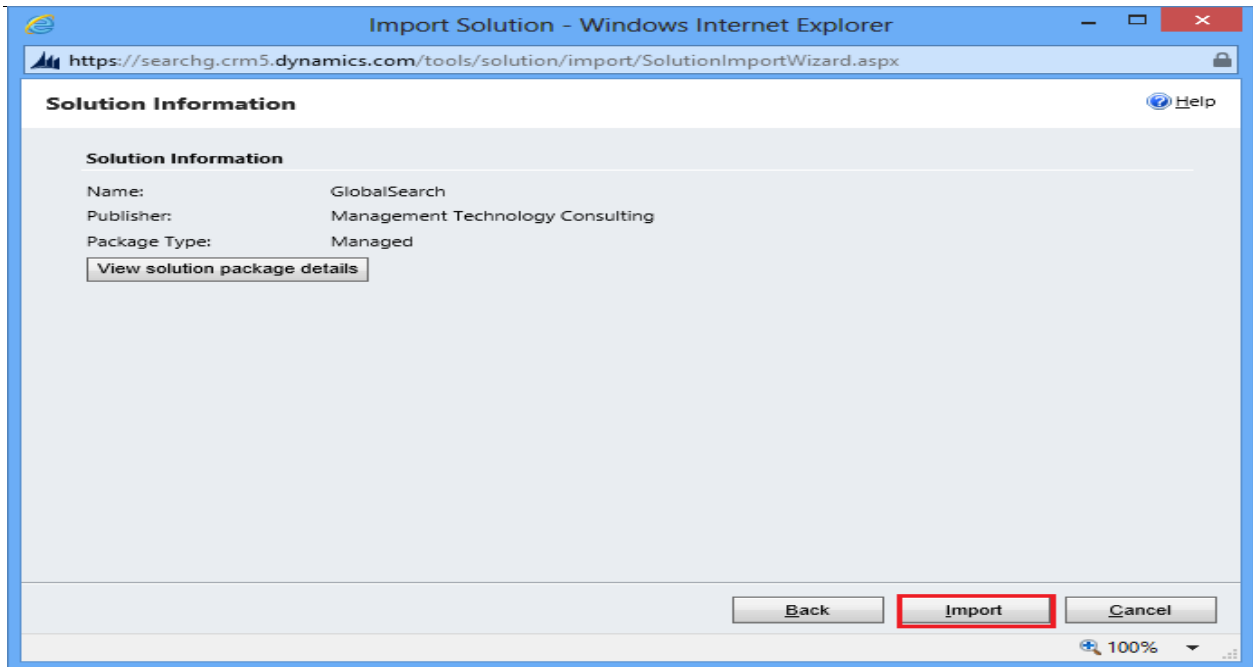


Figure 9: Solution Information

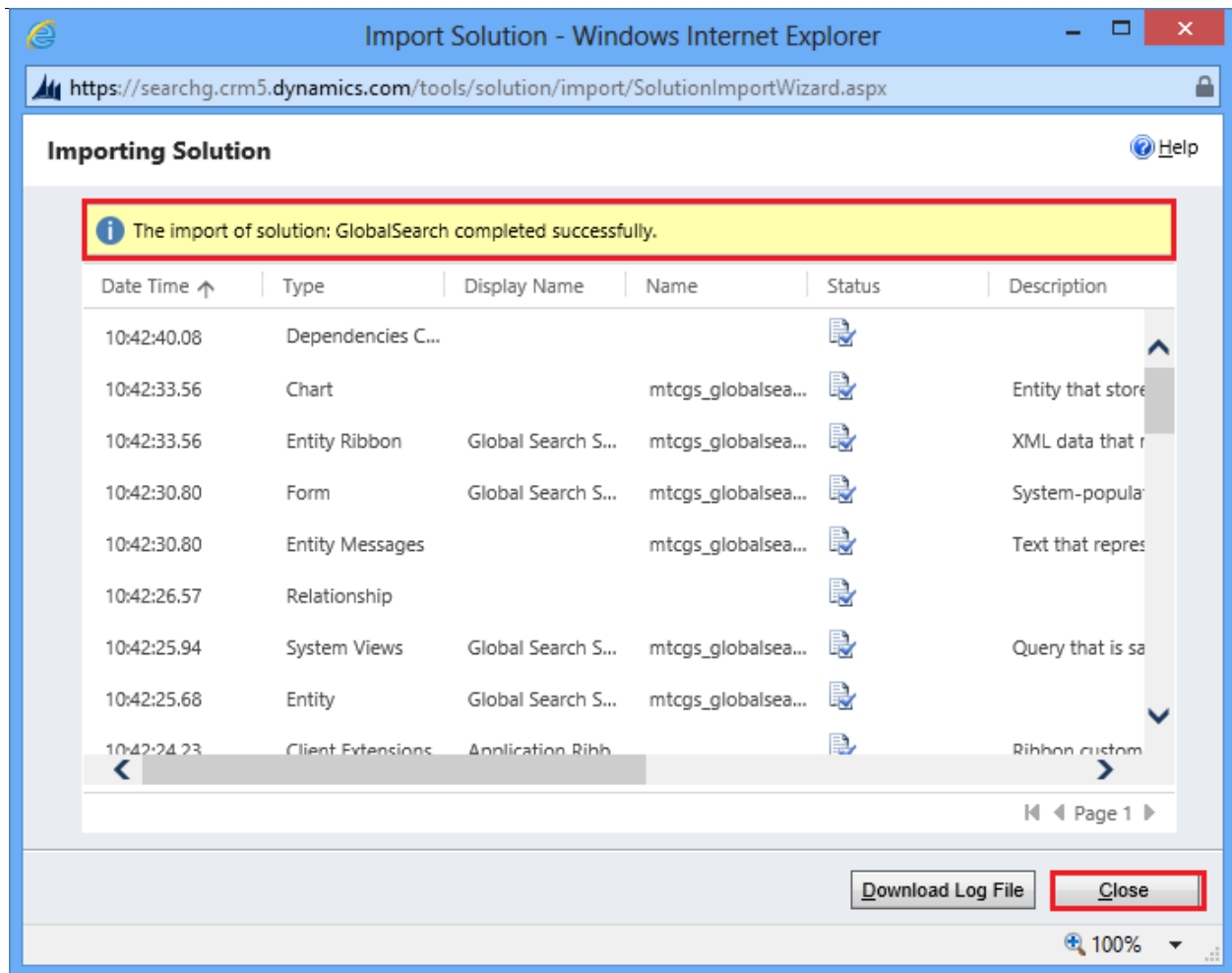
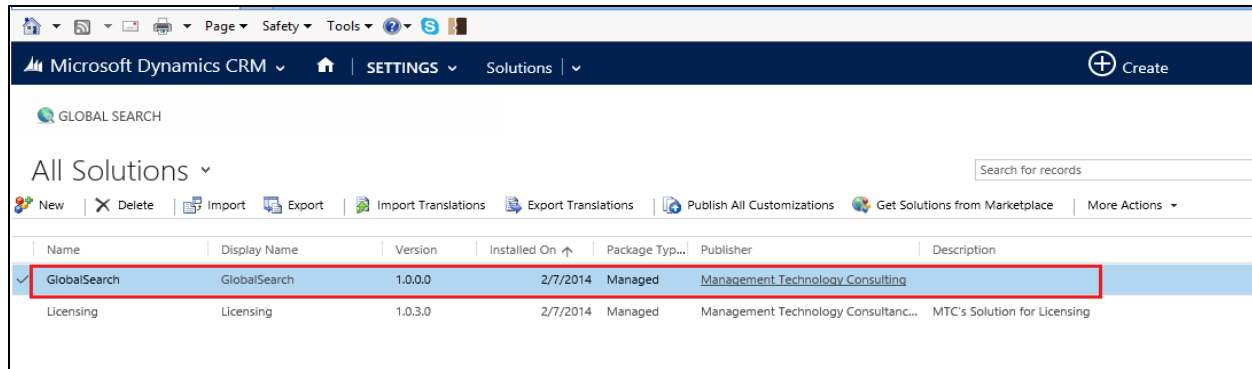


Figure 10: Solution successfully imported

- Click on Close to finish importing.

## Activating License Key

- CRM->Settings->Solutions-> double click on Global Search Solution



- Double click on GlobalSerach Solution , which opens a new screen as shown below

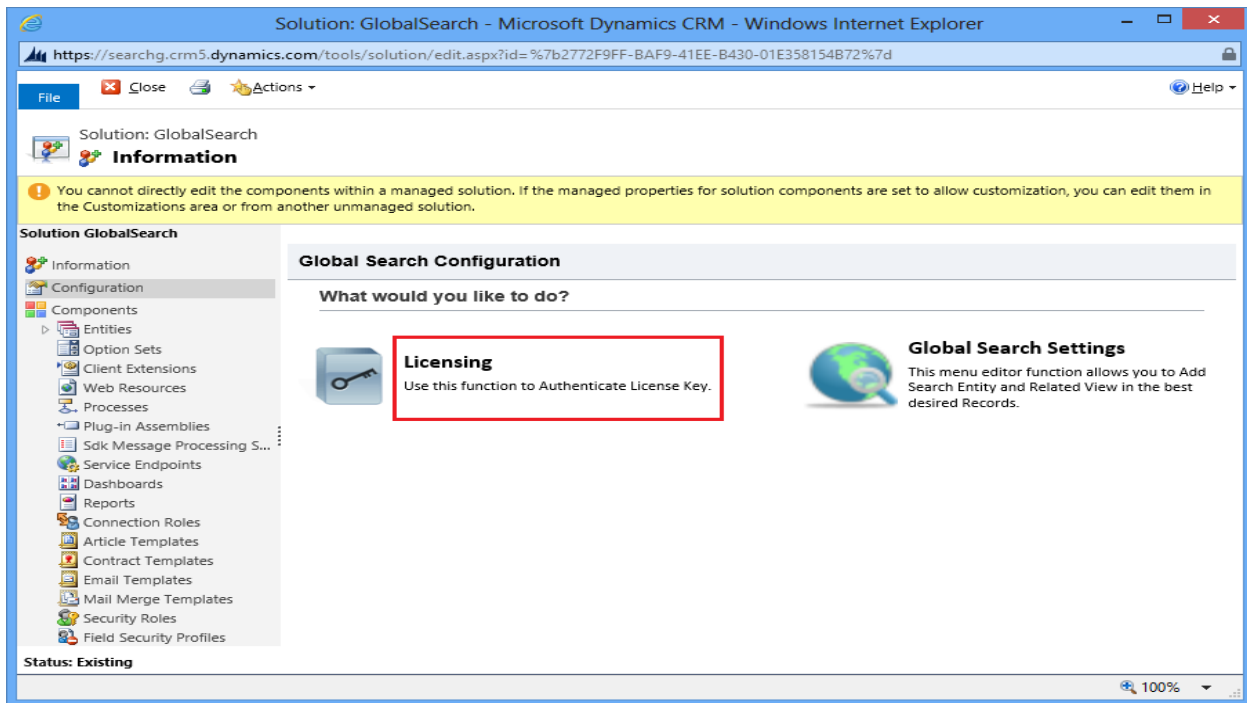


Figure 11: Global Search Configuration

- Click on Licensing.

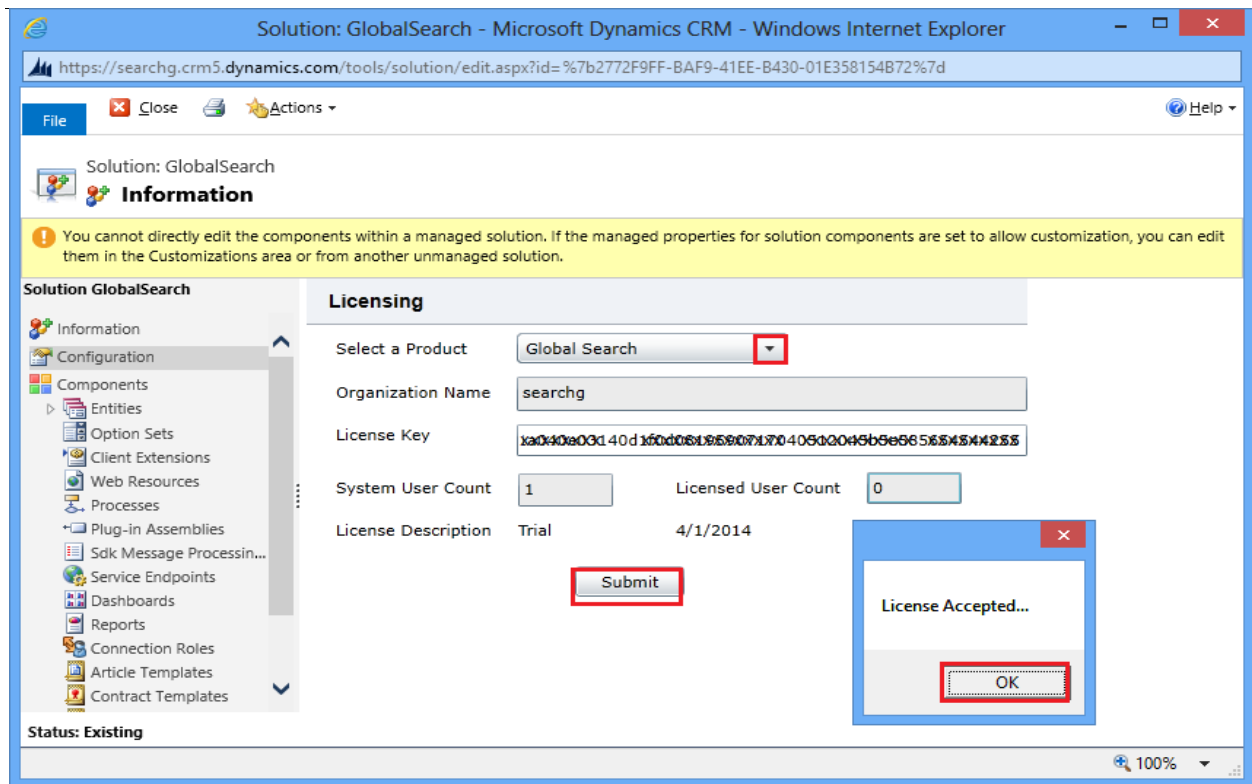


Figure 12: Placing of License Key

- Select Product as Global Search.
- Copy & Paste the License key which you have received from salesteam@mtccrm.com.
- Click on Submit.
- A pop up window appears and displays the message as License Accepted. Click on OK.

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## Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase

Please refer the below link for Trial License Activation and/or Product License Purchase and/or Additional User License Purchase for MTC's Dynamics 365 Solution.

<https://www.mtccrm.com/PLI>

*In case of queries or issues, please write down to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com) for quick help.*

## Global Search Settings

- CRM->Settings->Solutions-> double click on Global Search Solution
- Select & Click on Global Search Settings

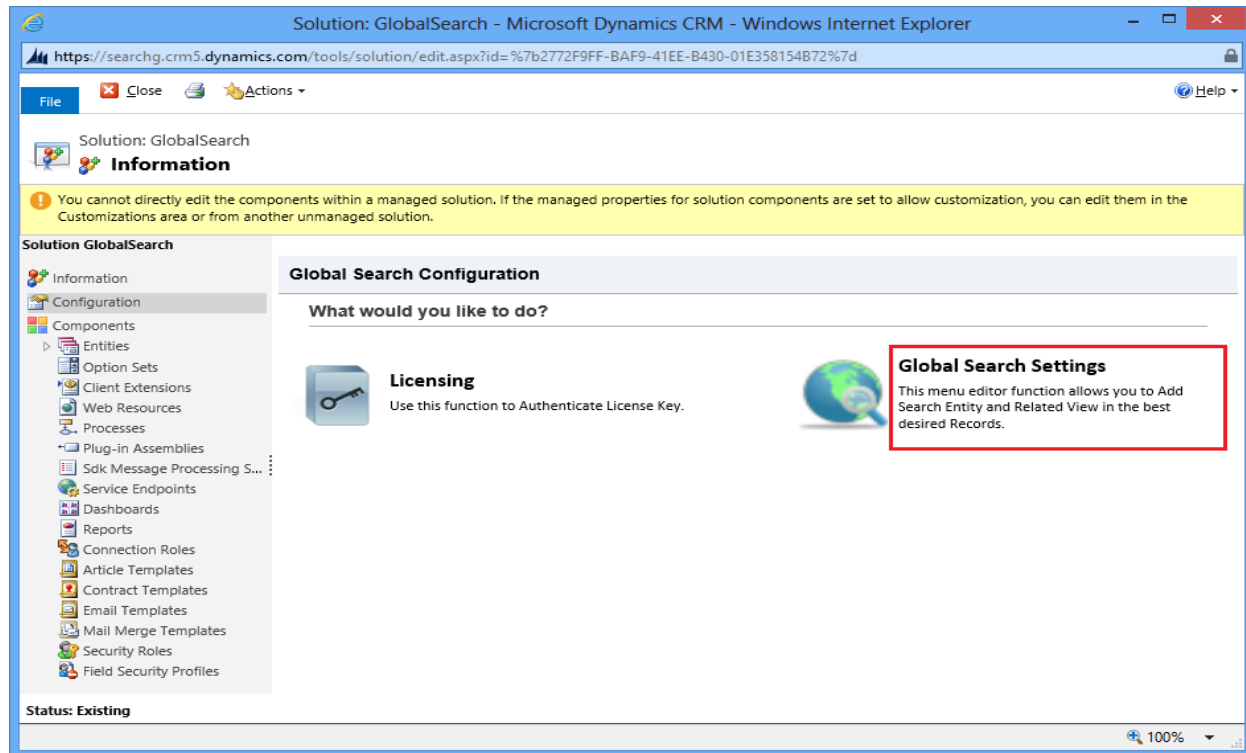


Figure 13: Global Search Configuration

## Configuration Settings

- A Global Search Configuration details are shown
- All the Available Entities are listed for your ready reference

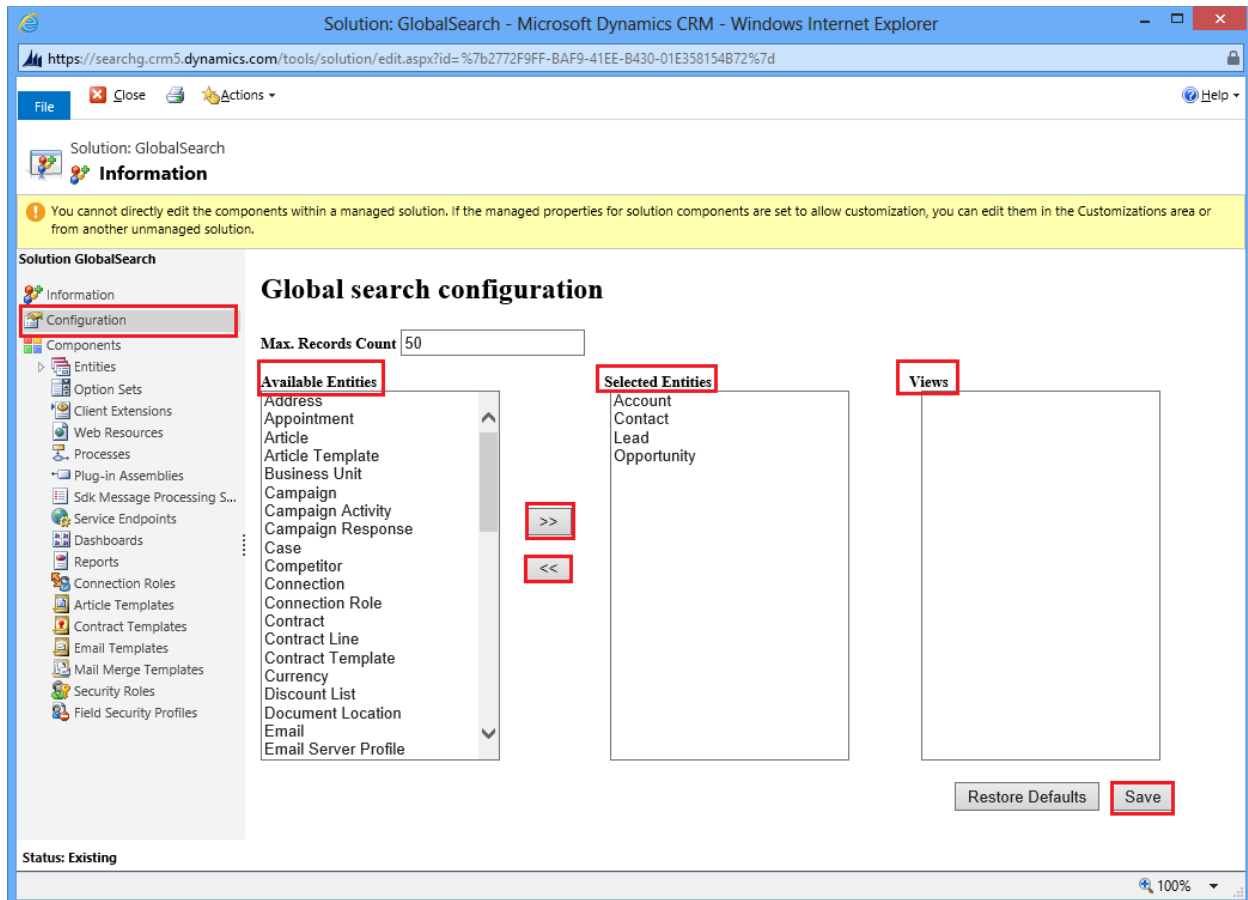




Figure 14: Available/ Selected Entities, and their Views

- Max Records count is nothing but, user can decide how many lines per page should be the output display
- Select one or more entities that you would like to search (Users Choice)
- Move these entities to “Selected Entities” by clicking on button 
- You can remove these entities from the list by selecting them and clicking on 



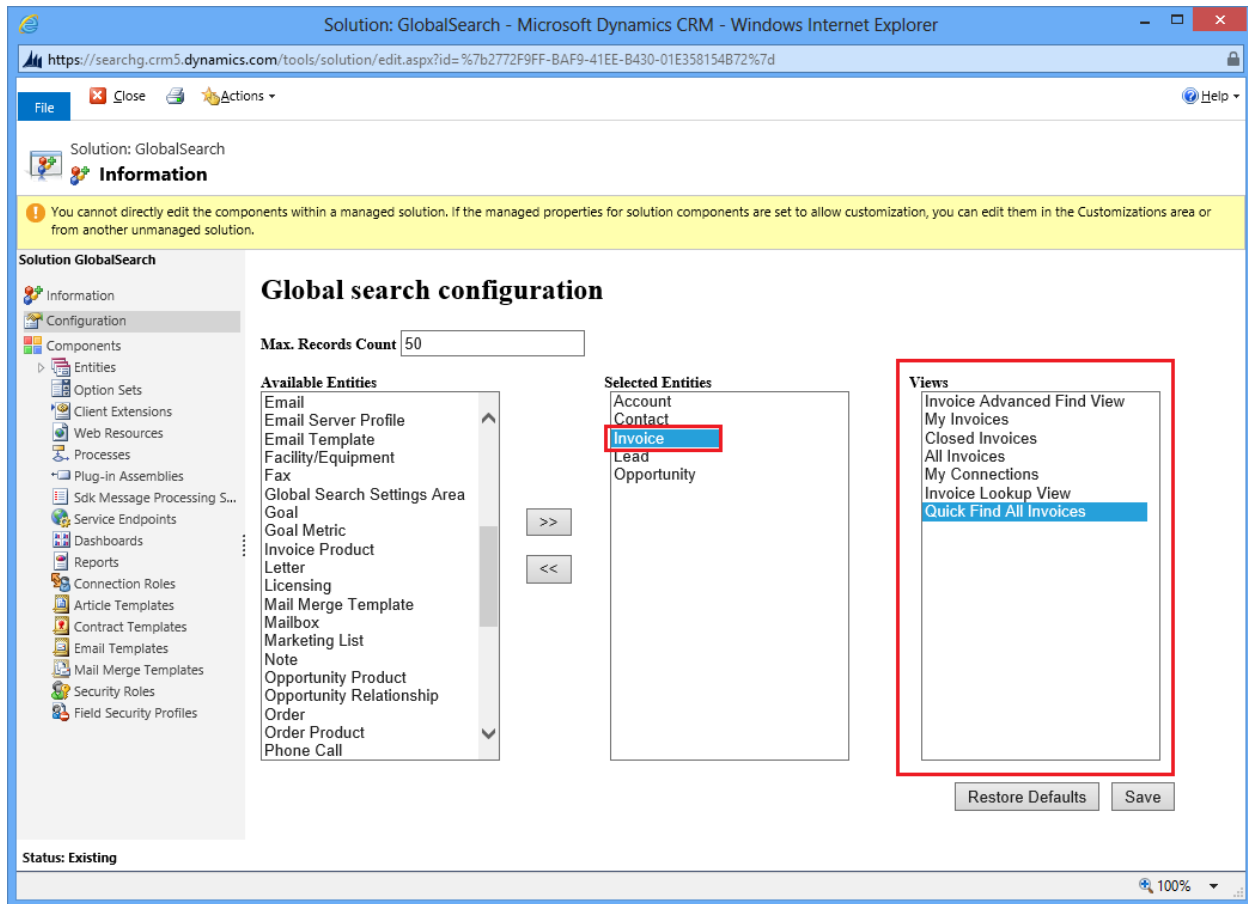


Figure 15: Selected Entities, and their Views

Now, Select the Entity, for example we have selected “Invoice” as shown above

Under “Views” all the possible views available in the CRM are listed for example here in the above

- Invoice Advance Find view
- My Invoices
- Closed Invoices
- All Invoices
- My Connections
- Invoice Look up view
- Quick find All Invoices

Here we have selected Quick Find All Invoice. Now click on save button which is placed on bottom left corner of the form. Also select the Max. Record Count that you wish to have display in CRM page

## Global Search – Edit Filter Criteria

This Edit Filter Criteria work other than Quick Find View of any Entity. (System or Custom Entities).

- To access go to **CRM->Settings->Customizations-> Customize the System**

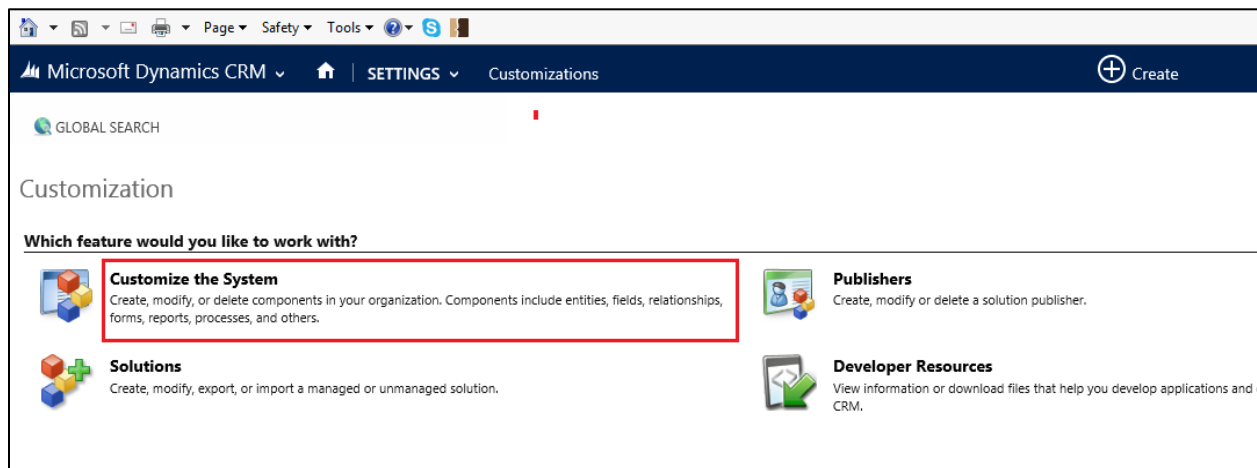


Figure 16: Customization

- On the click it opens a new screen as shown below (Example taken here to show MY Invoice View under Invoice Entity for
- Select Invoice
- Select Views under Invoice
- Select the My Invoice View record as shown

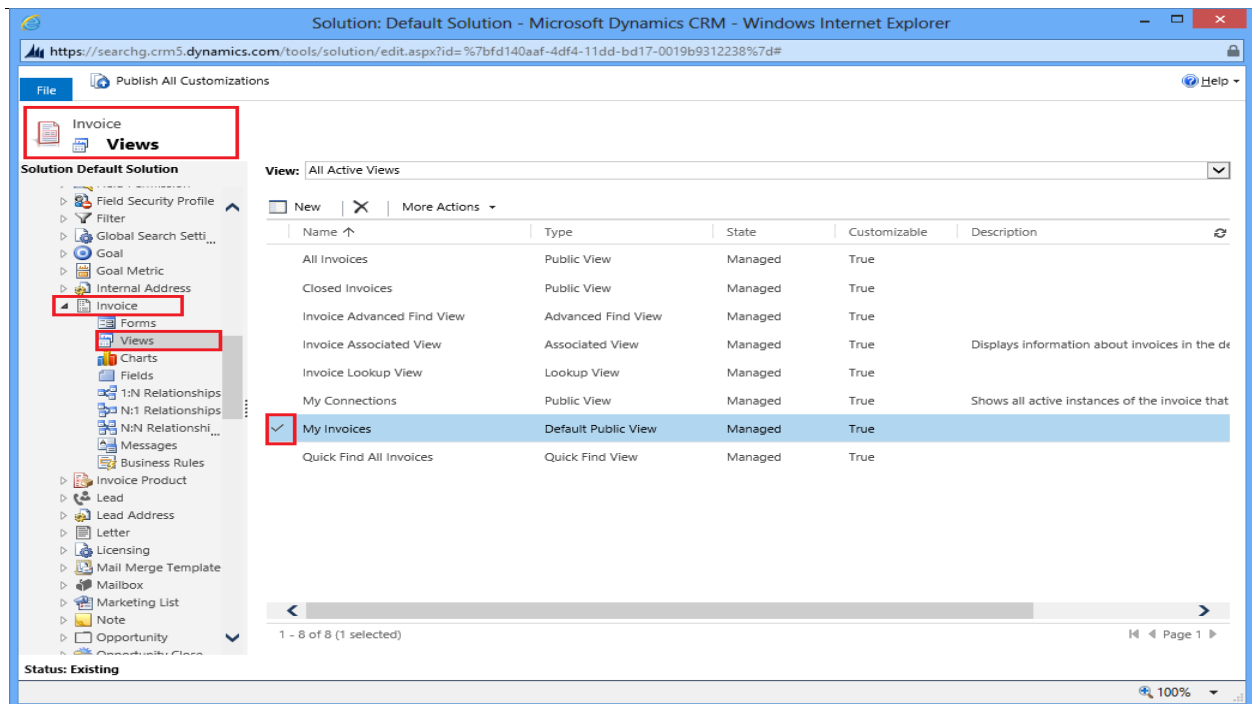


Figure 17: Invoice Views

- Double click on My Invoice
- In View: My invoice Screen (As shown below) opens
- Select Edit Filter Criteria as shown

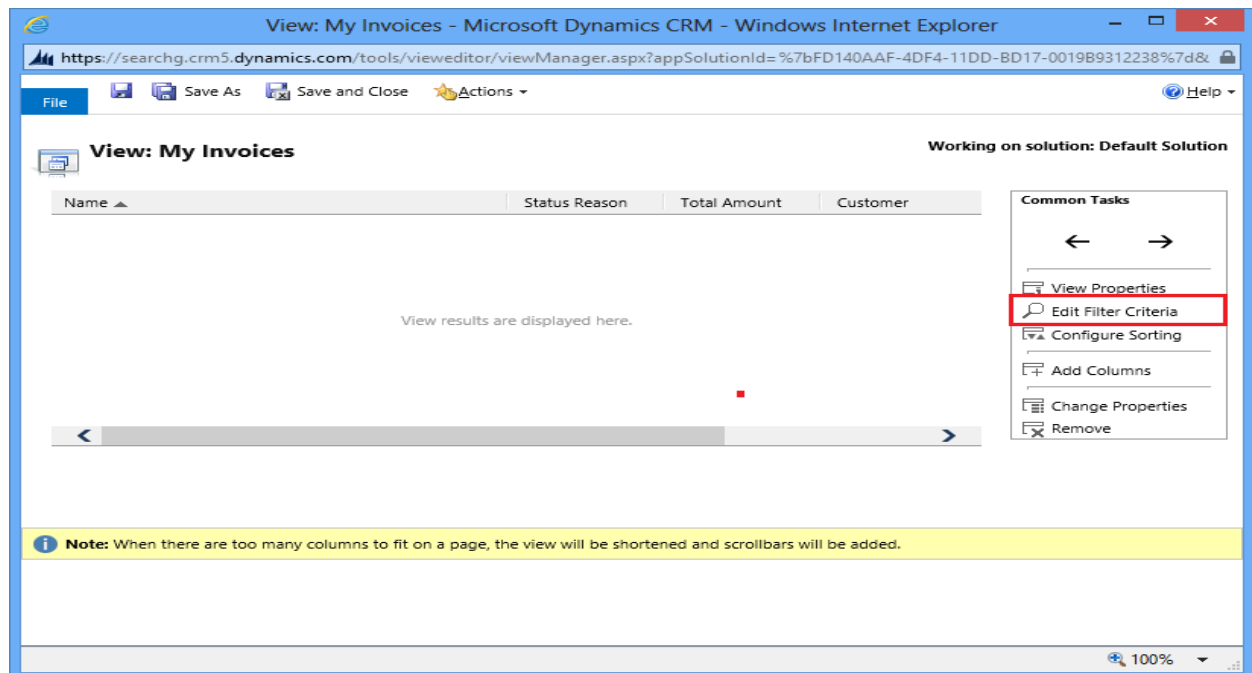
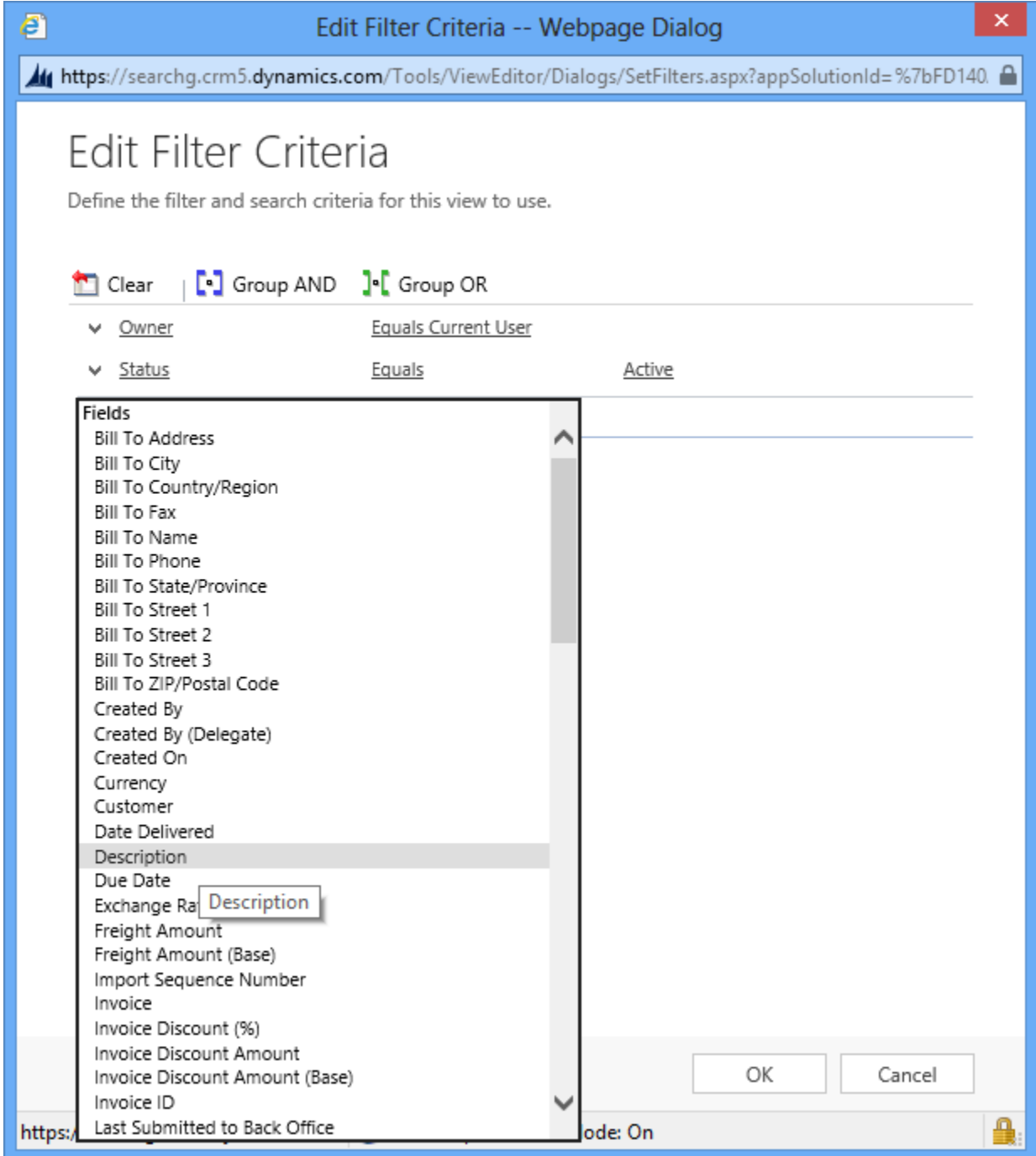


Figure 18: View: My Invoices

- Since we want to search in MY Invoice View, Select Description in Fields as shown below



**Edit Filter Criteria -- Webpage Dialog**

https://searchg.crm5.dynamics.com/Tools/ViewEditor/Dialogs/SetFilters.aspx?appSolutionId=%7bFD140

## Edit Filter Criteria

Define the filter and search criteria for this view to use.

✓ Owner      Equals Current User

✓ Status      Equals      Active

**Fields**

- Bill To Address
- Bill To City
- Bill To Country/Region
- Bill To Fax
- Bill To Name
- Bill To Phone
- Bill To State/Province
- Bill To Street 1
- Bill To Street 2
- Bill To Street 3
- Bill To ZIP/Postal Code
- Created By
- Created By (Delegate)
- Created On
- Currency
- Customer
- Date Delivered
- Description
- Due Date
- Exchange Rate
- Freight Amount
- Freight Amount (Base)
- Import Sequence Number
- Invoice
- Invoice Discount (%)
- Invoice Discount Amount
- Invoice Discount Amount (Base)
- Invoice ID
- Last Submitted to Back Office

OK Cancel

Code: On

Figure 19: Edit Filter - Fields

- **Note: Important:** Only Contains has to be selected as shown below

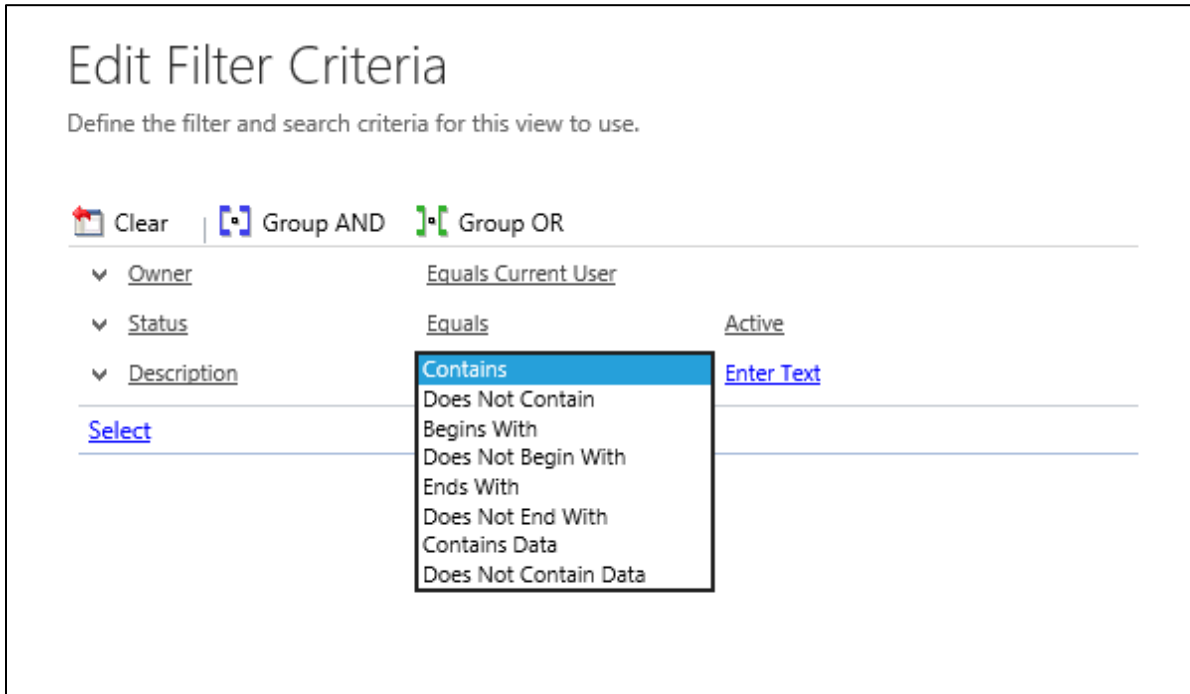


Figure 20: Edit Filter - Fields ... Condition

- Enter only {0} as Value as shown

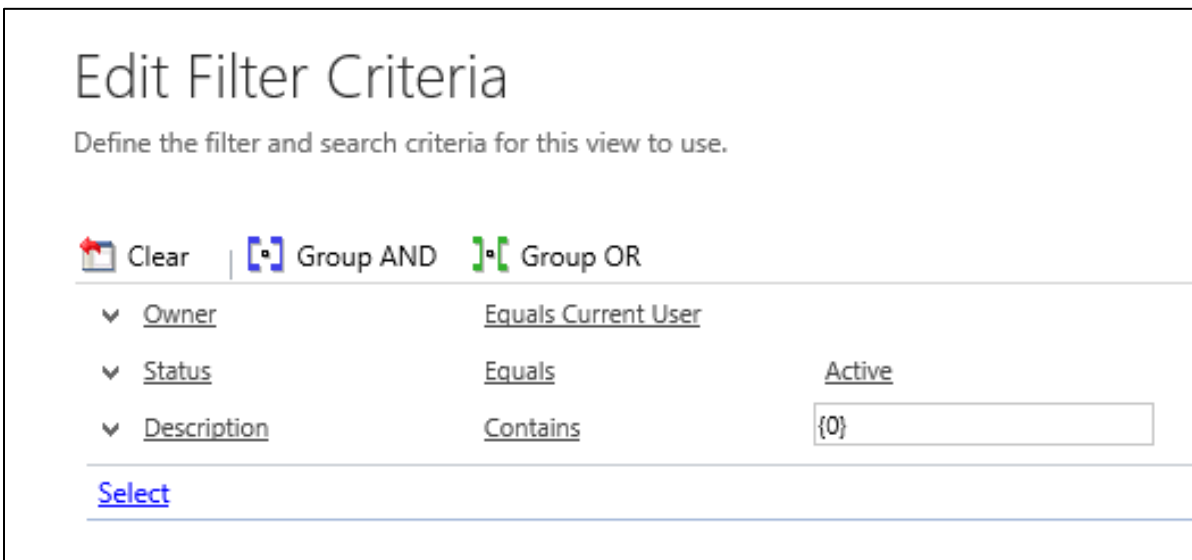
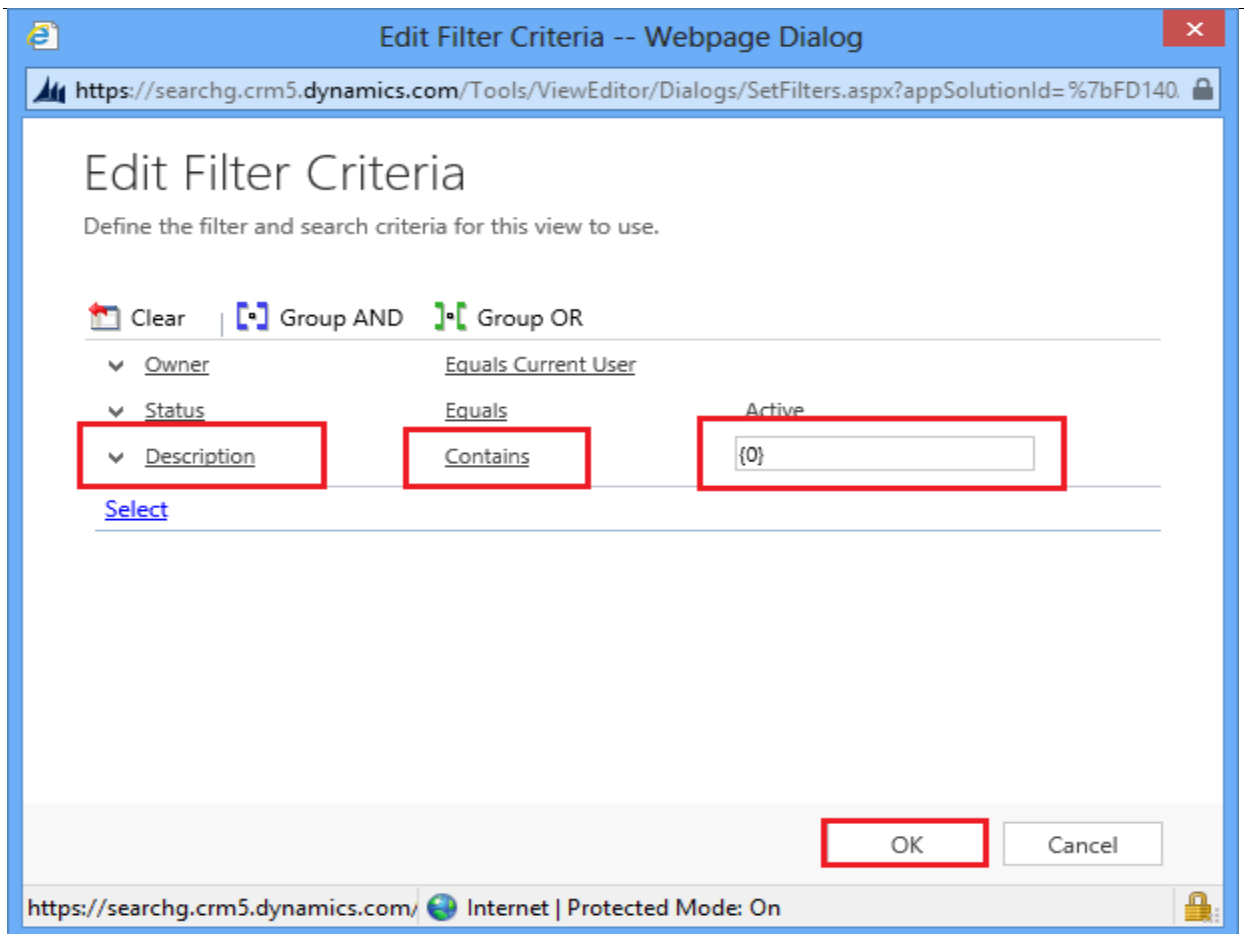


Figure 21: Edit Filter - Value



Edit Filter Criteria -- Webpage Dialog

https://searchg.crm5.dynamics.com/Tools/ViewEditor/Dialogs/SetFilters.aspx?appSolutionId=%7bFD140...

## Edit Filter Criteria

Define the filter and search criteria for this view to use.

Field	Operator	Value
Owner	Equals Current User	
Status	Equals	Active
Description	Contains	{0}

[Select](#)

OK Cancel

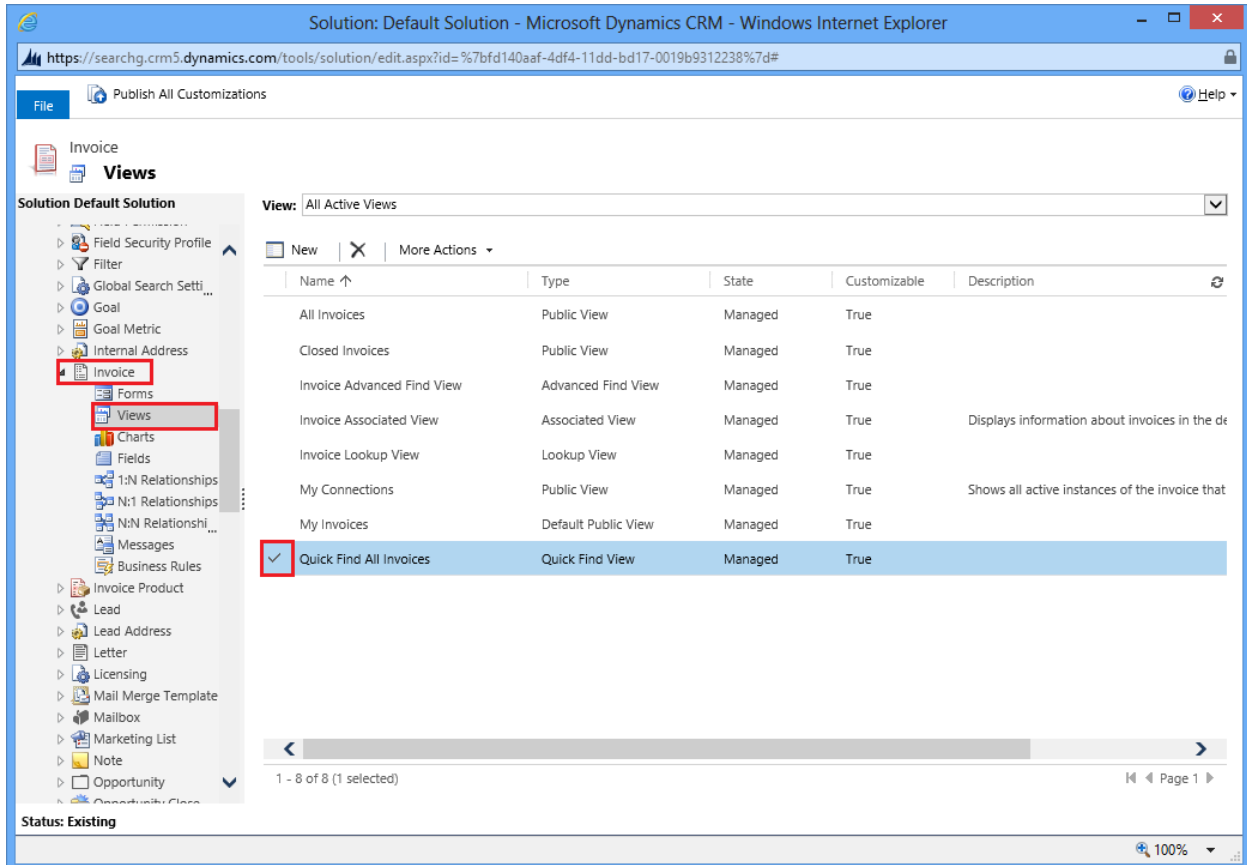
https://searchg.crm5.dynamics.com/ Internet | Protected Mode: On

- Click on Ok to continue
- Save and Close the View by Clicking on Save and Close button shown above in Figure 18.
- Publish all Customizations by clicking on Button shown in Figure 17.
- Now reload the Global search Settings area, and select the My Invoice View and Save
- This will help you in Search the desired word or field from the description field also from the My Invoice view of Invoice Entity.

On doing the above settings, entering "Microsoft" on global search page. It gets all the Active invoices owned by the user and description containing "Microsoft".

## Adding a Column to Quick Find view

- If the User wishes to add a Column to Quick Find View form then
- Open the Invoice View and Select Quick Find All Invoices as shown



The screenshot shows the Microsoft Dynamics CRM interface in Windows Internet Explorer. The browser address bar displays the URL: <https://searchg.crm5.dynamics.com/tools/solution/edit.aspx?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d#>. The page title is "Solution: Default Solution - Microsoft Dynamics CRM - Windows Internet Explorer".

The left sidebar shows the "Solution Default Solution" tree. The "Invoice" entity is selected, and the "Views" sub-item is highlighted with a red box. The main area displays a list of views for the "Invoice" entity. The "Quick Find All Invoices" view is selected, indicated by a checkmark in the first column and a blue highlight. The view is a "Quick Find View" and is "Managed".

Name	Type	State	Customizable	Description
All Invoices	Public View	Managed	True	
Closed Invoices	Public View	Managed	True	
Invoice Advanced Find View	Advanced Find View	Managed	True	
Invoice Associated View	Associated View	Managed	True	Displays information about invoices in the de
Invoice Lookup View	Lookup View	Managed	True	
My Connections	Public View	Managed	True	Shows all active instances of the invoice that
My Invoices	Default Public View	Managed	True	
Quick Find All Invoices	Quick Find View	Managed	True	

The status bar at the bottom indicates "Status: Existing" and "1 - 8 of 8 (1 selected)".

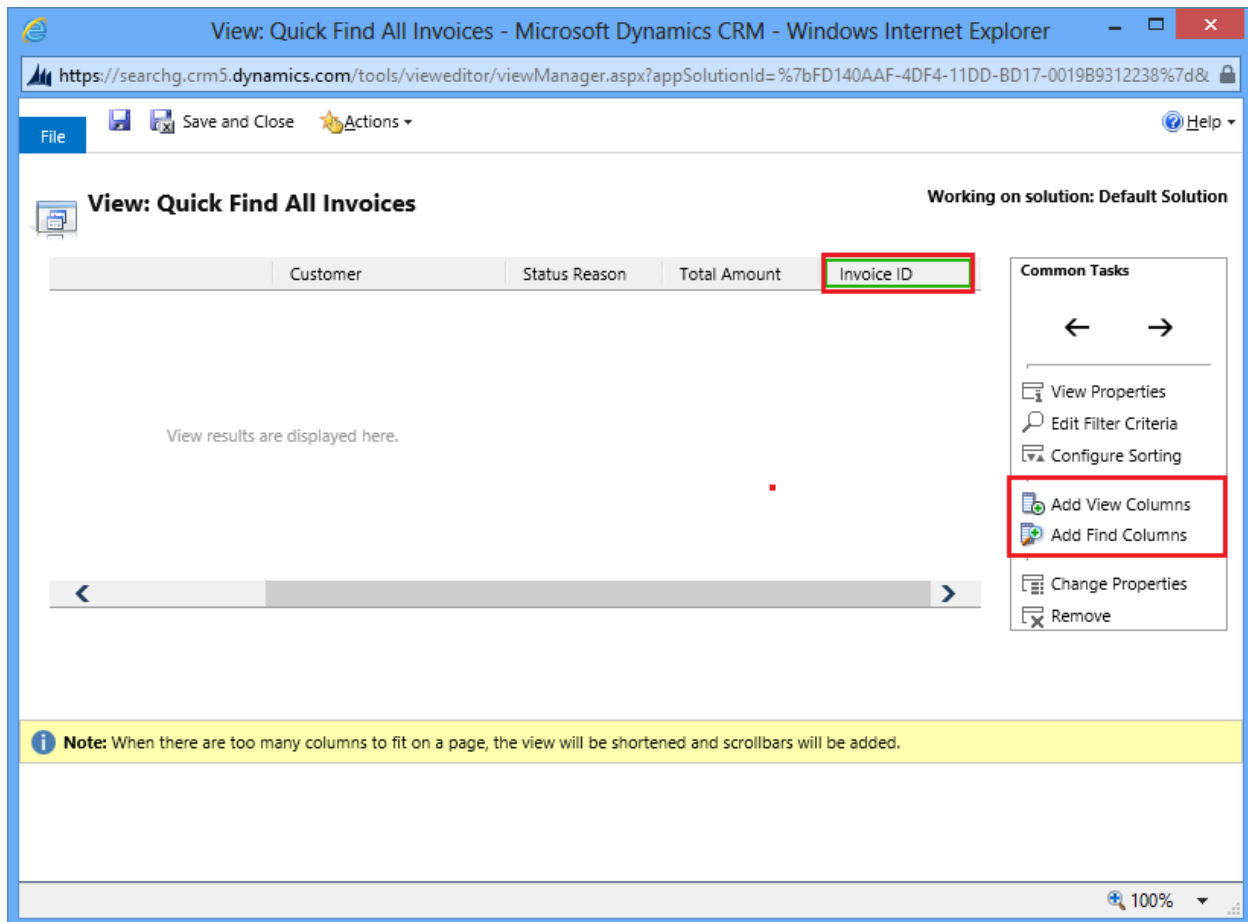


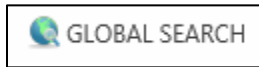
Figure 22: Quick Find All Invoices

- Click on **Add find Columns** to add any Fields to the Quick Find Views of Invoices. For example here we have added Invoice ID to the View. **Note:** Here you can filter the Data from the required search field but cannot be displayed.
- Click on **Add View Columns** to display the Field. **Note:** This helps only in displaying the Field but there will not be any provision for Filtering data in the view. If you desire to have filter facility then you should also select the field in **Add find Columns**

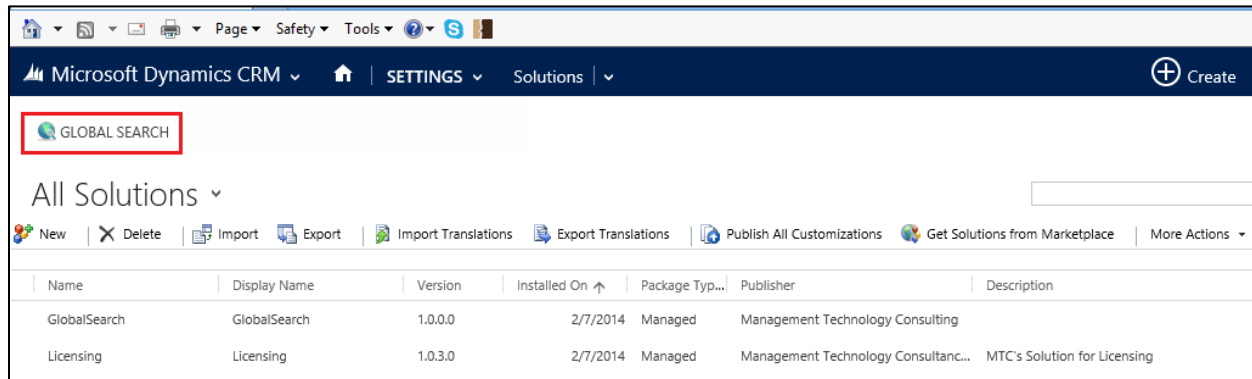


## Global Search – Functionality

- On importing the solution you will be able to see the new icon



Click on this icon to get the result for your configured entities.



- On Click on Global Search button a New screen pops up as shown below

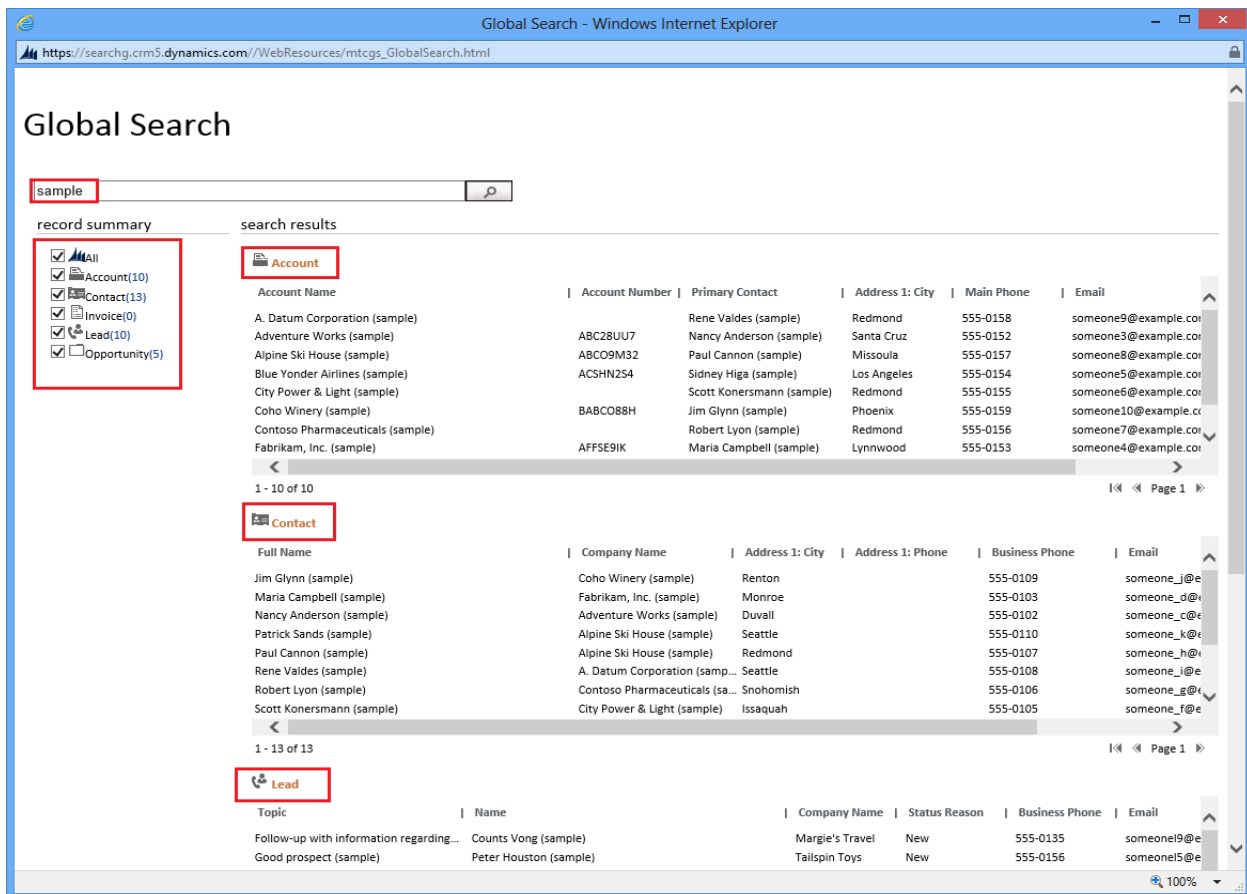


Figure 23: Global Search Screen

- 
- Firstly select the record Summary which is shown on top left corner for example, do you want to check all the entities or one or more entities like Account, Contact or Invoice etc.
  - Now for example we have given “Sample” as a word to search in the CRM
  - For all the Entities selected, as per the selected choice of view, the data is displayed.
  - This CRM form shows Accounts, Cases and Contact. For more entities you have to scroll down to get information.
  - All the records displayed will have the word searched “Sample” as per the view selected.

## Uninstallation Process

- Open CRM on your system with right credentials. Click on **settings**→**solution**

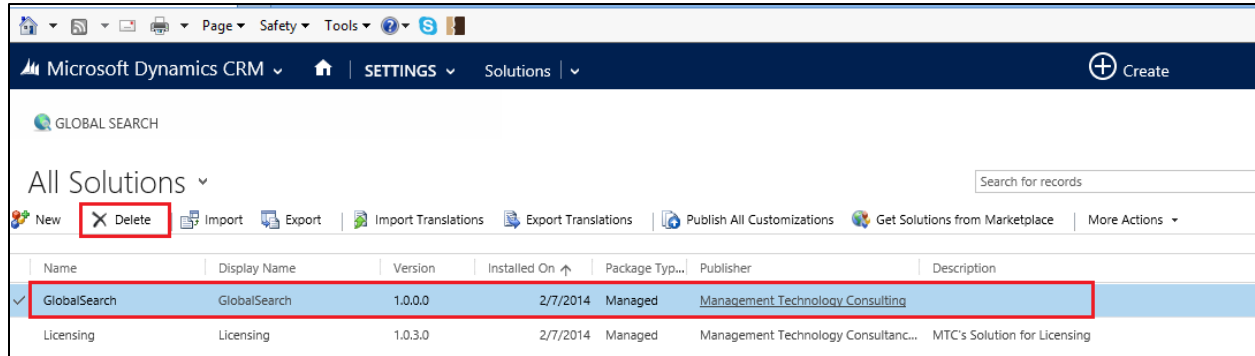


Figure 24: Delete a solution

- Select the required Solution by selecting the check box
- Click on Delete button on the ribbon as shown above

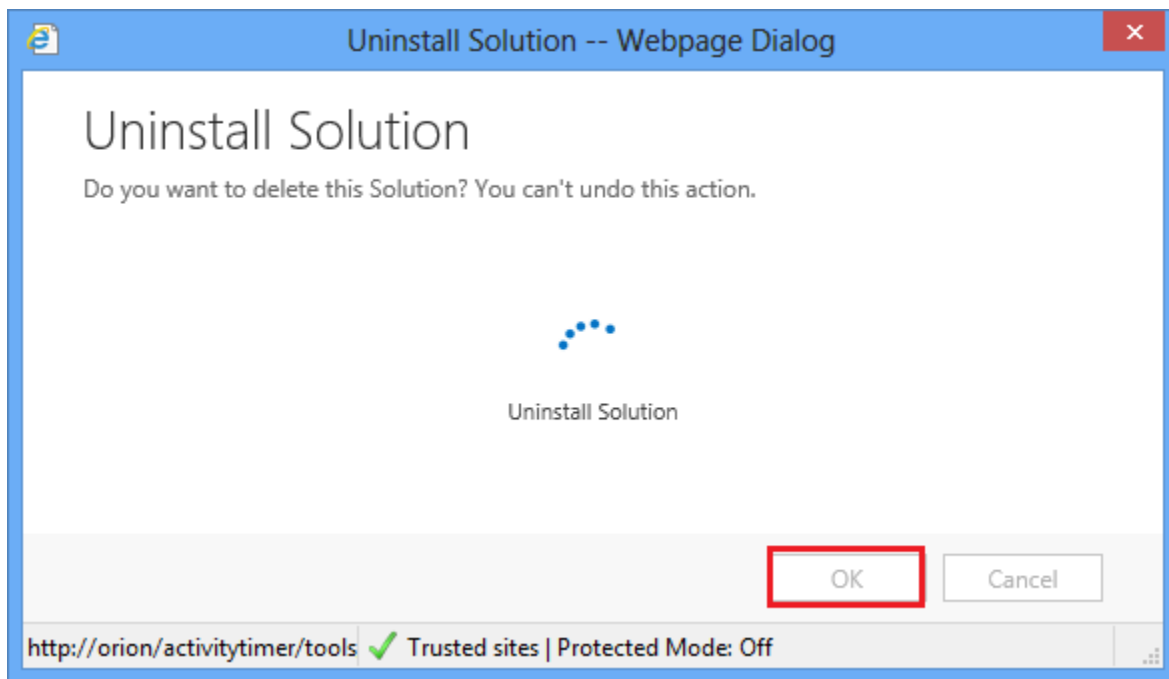


Figure 25: Uninstall solution

- Click Ok to uninstall solution from CRM

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## MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Dynamics 365 / CRM platform. MTC supports a product development effort with a highly efficient global Dynamics 365 / CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Dynamics 365 / CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

**SMB Custom Enterprise** is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Dynamics 365 / CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

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## The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Dynamics 365 / CRM platform Community at [www.DynamicsExchange.com](http://www.DynamicsExchange.com). Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Dynamics 365 / CRM platform with unique and innovative social networking and knowledge resource allocation processes.

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Dynamics Exchange is the leading community free and open to Dynamics 365 / CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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6. This license authorizes use of the Product on a single CRM Organizational Unit, which shall mean a single Organizational Unit  
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9. End-User agrees that MTC and its affiliates may collect and use technical information End-User provide as a part of support services related to the Product.
10. End-User acknowledges that the Dynamics 365 / CRM Managed Solution "Product" is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.
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14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
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### **F. Customer Care details**

MTC is always open to global community of Dynamics 365 / CRM platform Software Users



**Availability and hours of operation: Monday to Friday**  
**USA PST 323-851-5008 - 8:00 AM to 6:00 PM**  
**India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST**

**USA Headquarters:**  
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