



PowerSearch

Getting Started from AppSource

Hello!

Thank you for your interest in PowerSearch. This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our [guides](#) or [blogs](#).

There are basically two ways to install PowerSearch from AppSource:

1. Get solution from Marketplace in Dynamics 365

It is possible to open AppSource directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the **[Get Solutions from Marketplace]**-button, highlighted in yellow in the figure below.

The screenshot shows the 'Solutions' page in the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar, there is a search bar and a 'More Actions' button. The main content area displays a table of solutions. The table has columns for Name, Display Name, Version, Installed On, Package Type, Publisher, and Description. The solutions listed include 'PowerApps Checker', 'AutoMergeGlobalButt...', 'AutoMergeServerCore', 'DocumentsCorePack b...', 'MSCRM-ADDONS.co...', 'Crm Hub', and 'Common Data Service...'. The 'AutoMergeGlobalButt...' button is highlighted with a yellow background.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdyn_PowerAppsCh...	PowerApps Checker	1.0.0.103	5/11/2019	Managed	Microsoft Dynamics 365	PowerApps Checker promotes higher-quality mo...
AutoMergeGlobalButt...	AutoMergeGlobalButt...	2017.1	5/9/2019	Managed	PTM EDV Systeme GmbH	
AutoMergeServerCore	DocumentsCorePack b...	2017.5	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains basic settings for Docume...
DocumentsCorePackS...	MSCRM-ADDONS.co...	2017.2	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains the data for DocumentsCo...
MSCRMADDONScom...	MSCRM-ADDONS.co...	2017.39	5/9/2019	Managed	PTM EDV Systeme GmbH	General MSCRM-ADDONS.com Solution.
msdynce_CRMHub	Crm Hub	1.0.20170...	5/4/2019	Managed	Microsoft Dynamics 365	
Crb330e	Common Data Service...	1.0.0.0	5/3/2019	Unmanag...	CDS Default Publisher	

Figure 1: Get solutions from Marketplace

This leads you to the AppSource website where you can search for PowerSearch and is described below.

2. Get solution from AppSource

The second option is to go to the AppSource website and search for PowerSearch. Use this [link](#) to find all add-ons provided by mscrm-addons.com (figure below).

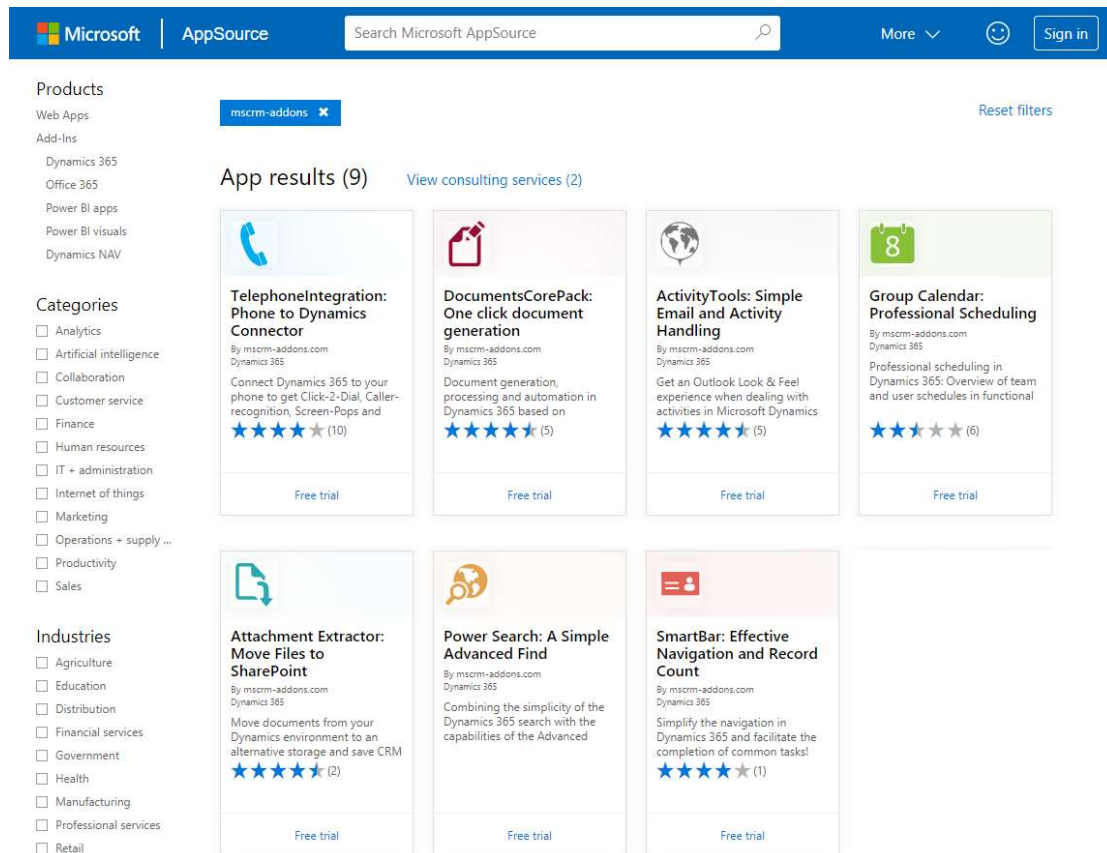


Figure 2: AppSource – solutions by mscrm-addons.com

Next, please select PowerSearch. The so opened window provides you with information regarding PS. Here, please click on the **[FREE TRIAL]**-button on the left side.

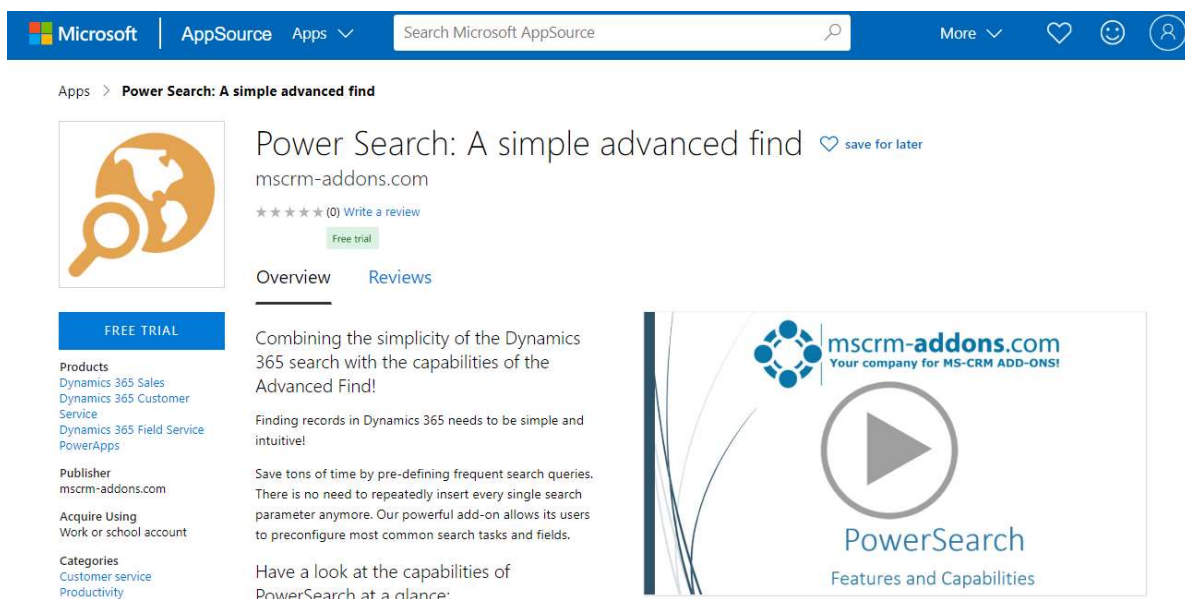
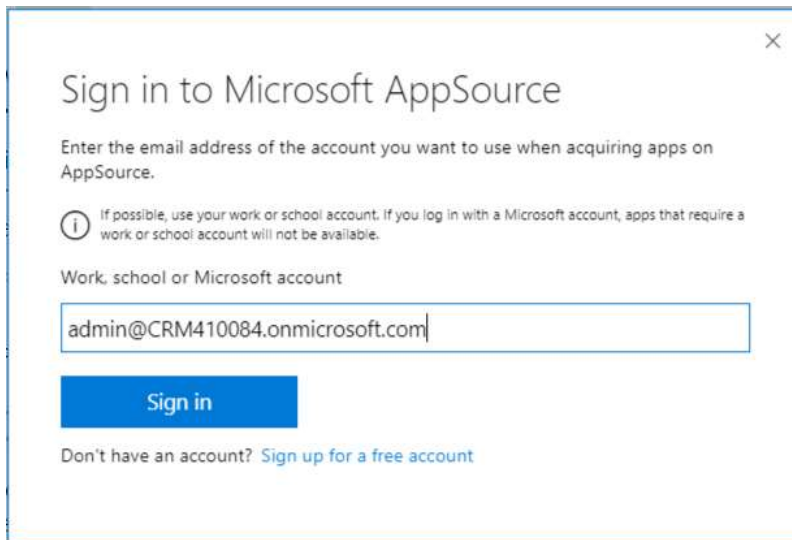



Figure 3: AppSource – PowerSearch

Next, please sign in to Microsoft AppSource. Enter your e-mail address and hit the **[Sign in]**-button as you can see in the figure below.



Sign in to Microsoft AppSource

Enter the email address of the account you want to use when acquiring apps on AppSource.

 If possible, use your work or school account. If you log in with a Microsoft account, apps that require a work or school account will not be available.

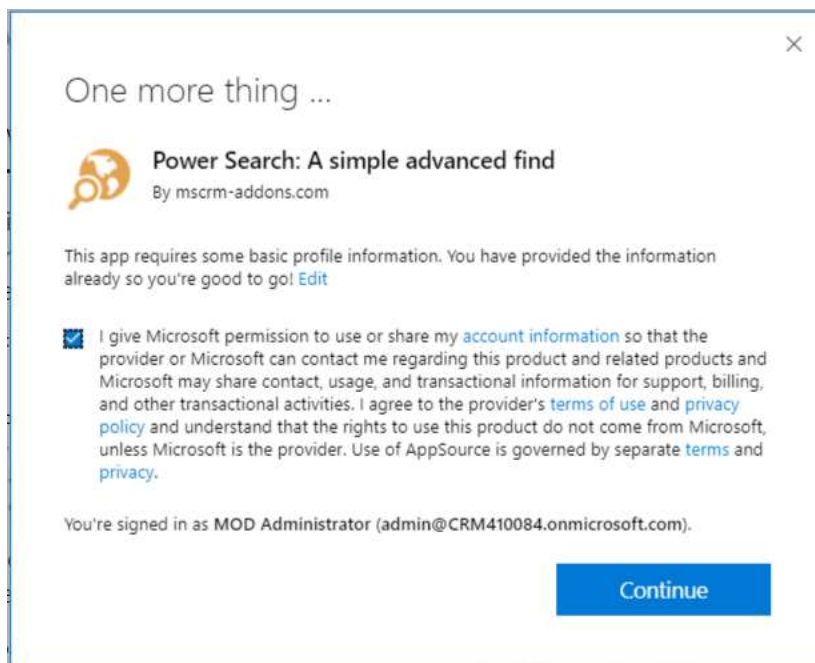
Work, school or Microsoft account

Sign in


Don't have an account? [Sign up for a free account](#)

Figure 4: Sign in to Microsoft AppSource

In the window below please check the Microsoft permission checkbox at the bottom. Click on the **[Continue]**-button to proceed.



One more thing ...

 **Power Search: A simple advanced find**
By mscrm-addons.com

This app requires some basic profile information. You have provided the information already so you're good to go! [Edit](#)

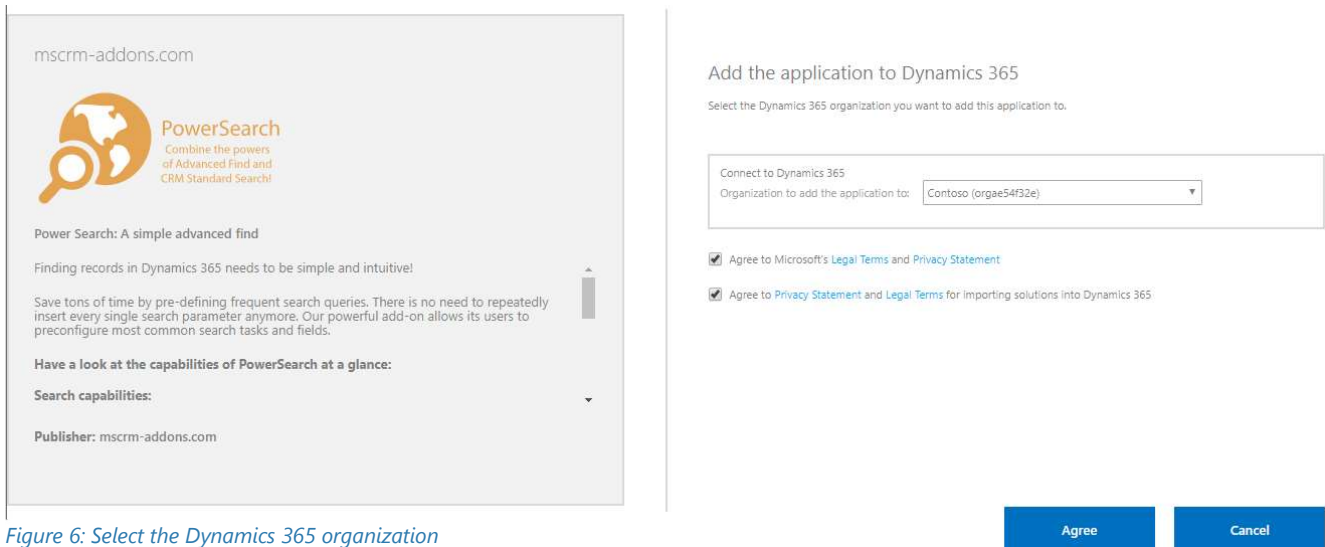
☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products and Microsoft may share contact, usage, and transactional information for support, billing, and other transactional activities. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as MOD Administrator (admin@CRM410084.onmicrosoft.com).

Continue

Figure 5: Check the Microsoft permission checkbox

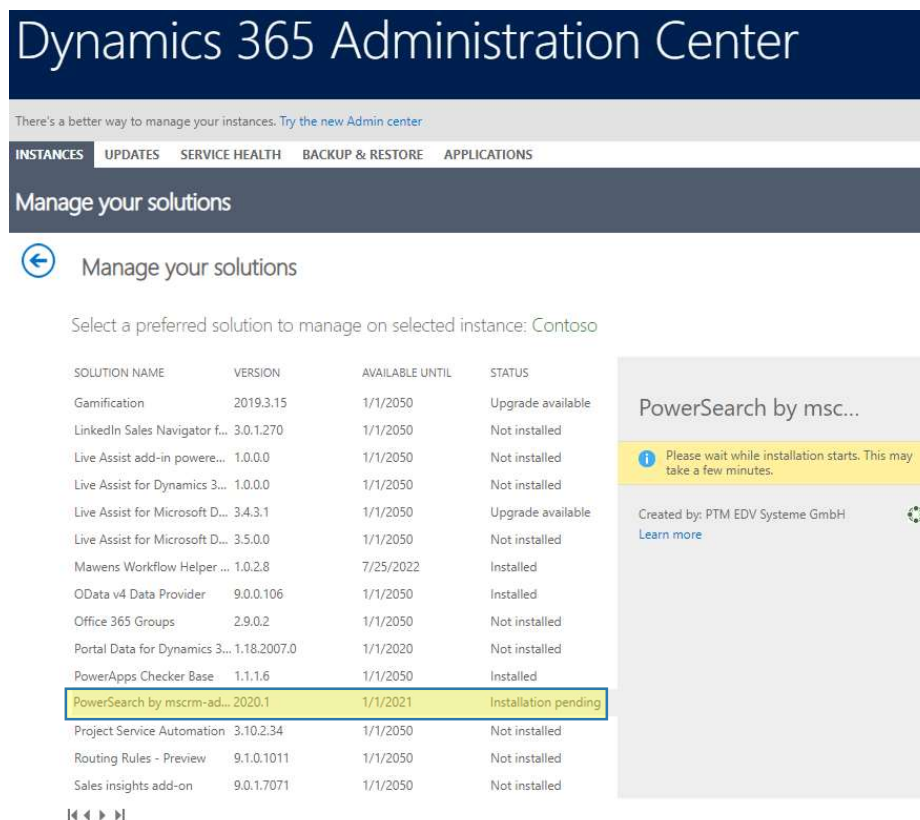
Next, please select the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the **[Agree]**-button.



The screenshot shows two side-by-side panels. The left panel is the mscrm-addons.com PowerSearch application page, which includes a logo, a description of the application, and a list of search capabilities. The right panel is the Dynamics 365 organization selection screen, which includes a dropdown menu to select the organization (Contoso (orgae54f32e)), checkboxes for agreeing to Microsoft's Legal Terms and Privacy Statement, and checkboxes for agreeing to Privacy Statement and Legal Terms for importing solutions into Dynamics 365. At the bottom right, there are 'Agree' and 'Cancel' buttons.

Figure 6: Select the Dynamics 365 organization

This leads you to your organization overview. The installation takes a while – as you can see PowerSearch has the Status “Installation pending” until the installation is completed (highlighted in yellow).



The screenshot shows the Dynamics 365 Administration Center interface. The top navigation bar includes 'INSTANCES', 'UPDATES', 'SERVICE HEALTH', 'BACKUP & RESTORE', and 'APPLICATIONS'. The main section is titled 'Manage your solutions' and shows a table of solutions for the selected instance 'Contoso'.

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Gamification	2019.3.15	1/1/2050	Upgrade available
LinkedIn Sales Navigator f...	3.0.1.270	1/1/2050	Not installed
Live Assist add-in powere...	1.0.0.0	1/1/2050	Not installed
Live Assist for Dynamics 3...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.4.3.1	1/1/2050	Upgrade available
Live Assist for Microsoft D...	3.5.0.0	1/1/2050	Not installed
Mawens Workflow Helper ...	1.0.2.8	7/25/2022	Installed
OData v4 Data Provider	9.0.0.106	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics 3...	1.18.2007.0	1/1/2020	Not installed
PowerApps Checker Base	1.1.1.6	1/1/2050	Installed
PowerSearch by mscrm-ad...	2020.1	1/1/2021	Installation pending
Project Service Automation	3.10.2.34	1/1/2050	Not installed
Routing Rules - Preview	9.1.0.1011	1/1/2050	Not installed
Sales insights add-on	9.0.1.7071	1/1/2050	Not installed

On the right side of the table, there is a card for 'PowerSearch by msc...' with a message: 'Please wait while installation starts. This may take a few minutes.' Below this, it says 'Created by: PTM EDV Systeme GmbH' and 'Learn more'.

Figure 7: Organization overview – PS installation pending

Meanwhile, you will receive an e-mail with more information about PS and its usage.


To see when the installation is finished, please refresh the page in between. Only when the status is on “Installed” you can continue with the process (highlighted in yellow below).

Dynamics 365 Administration Center

There's a better way to manage your instances. [Try the new Admin center](#)

INSTANCES **UPDATES** SERVICE HEALTH BACKUP & RESTORE APPLICATIONS


Manage your solutions

 **Manage your solutions**

Select a preferred solution to manage on selected instance: Contoso

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Gamification	2019.3.15	1/1/2050	Upgrade available
LinkedIn Sales Navigator f...	3.0.1.270	1/1/2050	Not installed
Live Assist add-in powere...	1.0.0.0	1/1/2050	Not installed
Live Assist for Dynamics 3...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	3.4.3.1	1/1/2050	Upgrade available
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Mawens Workflow Helper ...	1.0.2.8	7/25/2022	Installed
OData v4 Data Provider	9.0.0.106	1/1/2050	Installed
Office 365 Groups	2.9.0.2	1/1/2050	Not installed
Portal Data for Dynamics 3...	1.18.2007.0	1/1/2020	Not installed
PowerApps Checker Base	1.1.1.6	1/1/2050	Installed
PowerSearch by mscrm-ad...	2020.1	1/1/2021	Installed
Project Service Automation	3.10.2.34	1/1/2050	Not installed
Routing Rules - Preview	9.1.0.1011	1/1/2050	Not installed
Sales insights add-on	9.0.1.7071	1/1/2050	Not installed

Gamification



UPGRADE
Microsoft Dynamics 365 - Gamification

Created by: Microsoft
New version: 2019.11.1
[Learn more](#)

Figure 8: Organization overview – PS installation finished

Congratulations! You have successfully completed the installation of PowerSearch from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – PowerSearch (highlighted in yellow).

Dynamics 365 Settings Customizations

Business

- Business Manageme...
- Templates
- Unified Service Desk
- Product Catalog
- Service Management
- Mobile Offline

Customization

- Customizations
- Solutions
- Microsoft AppSource
- Plug-In Trace Log
- Solutions History

System

- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing

Process Center

- Processes
- Microsoft Flows

MSCRM-ADDONS

- Products
- PowerSearch**

Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: PowerSearch

A click on PowerSearch leads you to the PS *Getting Started* page. This provides you with information about the next steps to finalize the setup.

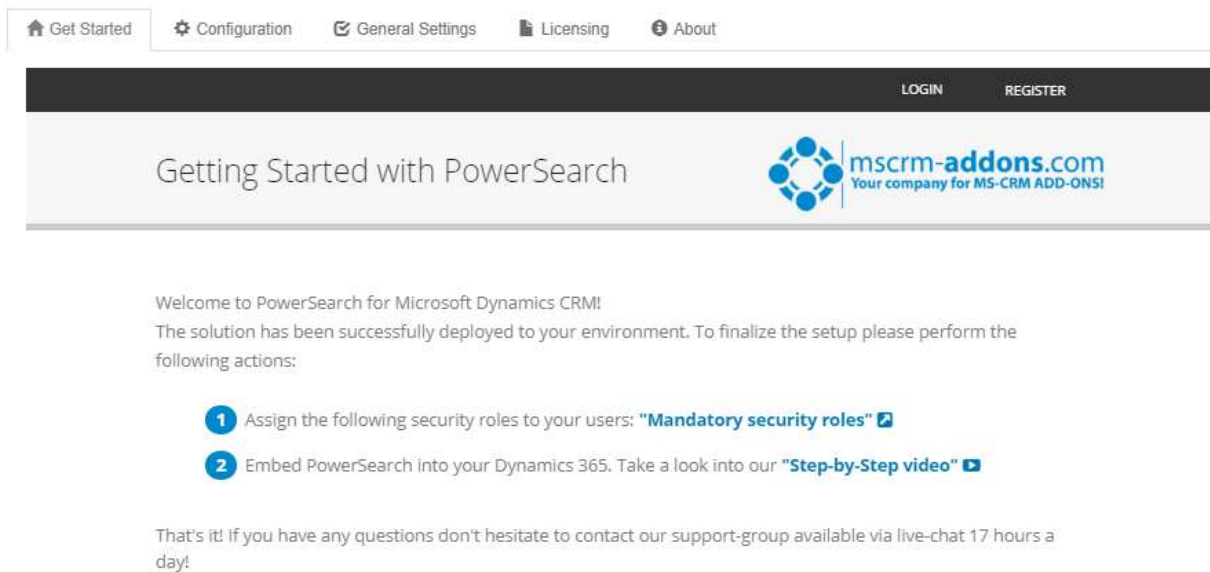


Figure 10: PowerSearch Getting Started page

1 ASSIGN SECURITY ROLES

First, you have to assign security roles for the users who should be able to use PS. Therefore, go to **Settings > Security** and select **Users**. Please open a user account and click on the '**Manage roles**'-option as you can see it highlighted in yellow below.

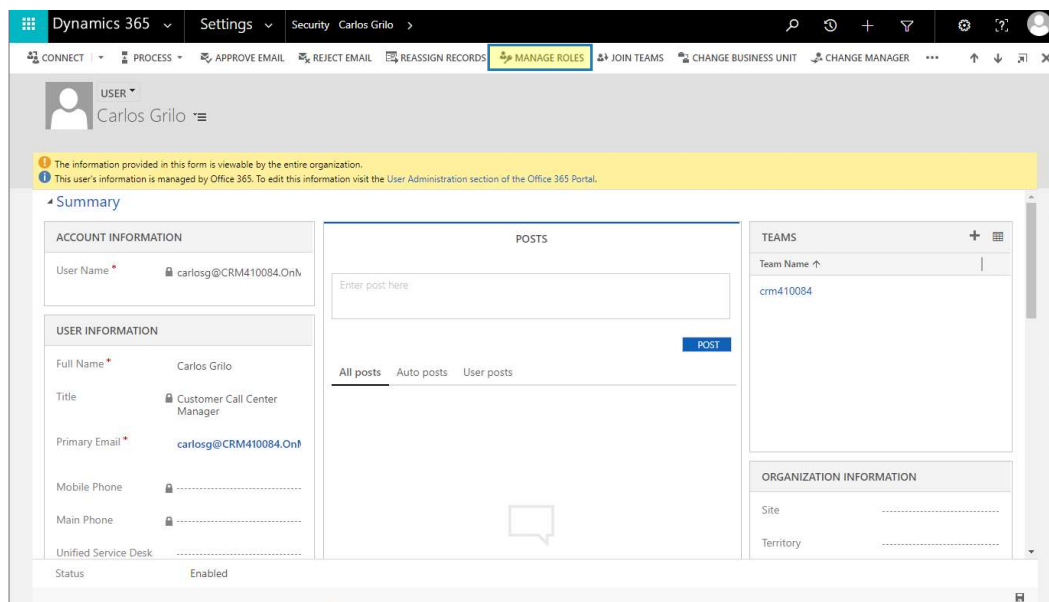


Figure 11: Manage roles

In the so opened window please enable the two security roles you can see in the figure below by checking the checkbox.

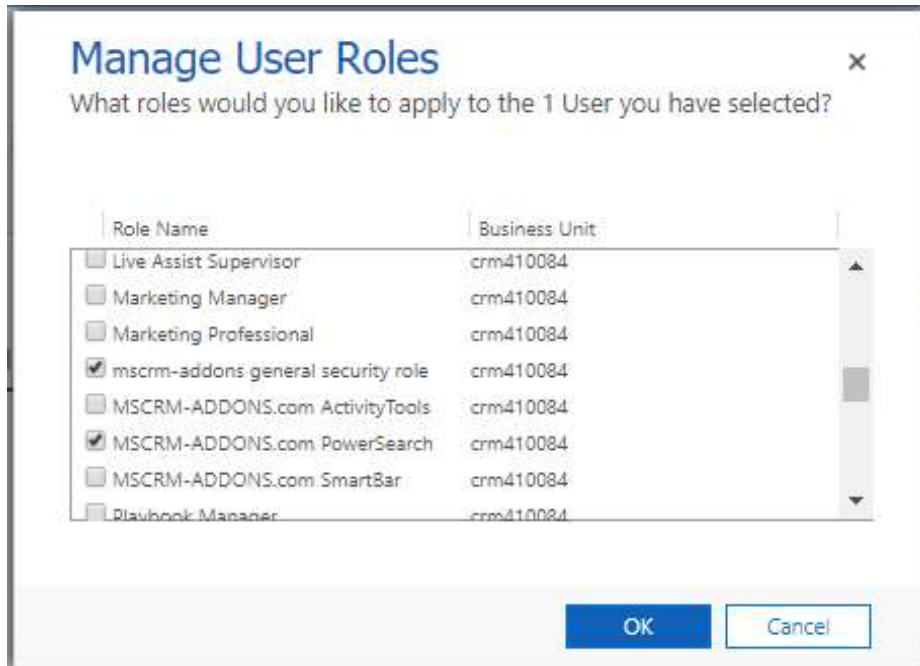


Figure 12: Manage user roles

Congratulation! You have finished the setup of PowerSearch. More information can be found in the corresponding [PowerSearch Installation & User Guide](#).

After installing PS and assigning the security roles, you are now able to launch PowerSearch. It is automatically added to the sitemap of your default application (Dynamics 365 – custom).

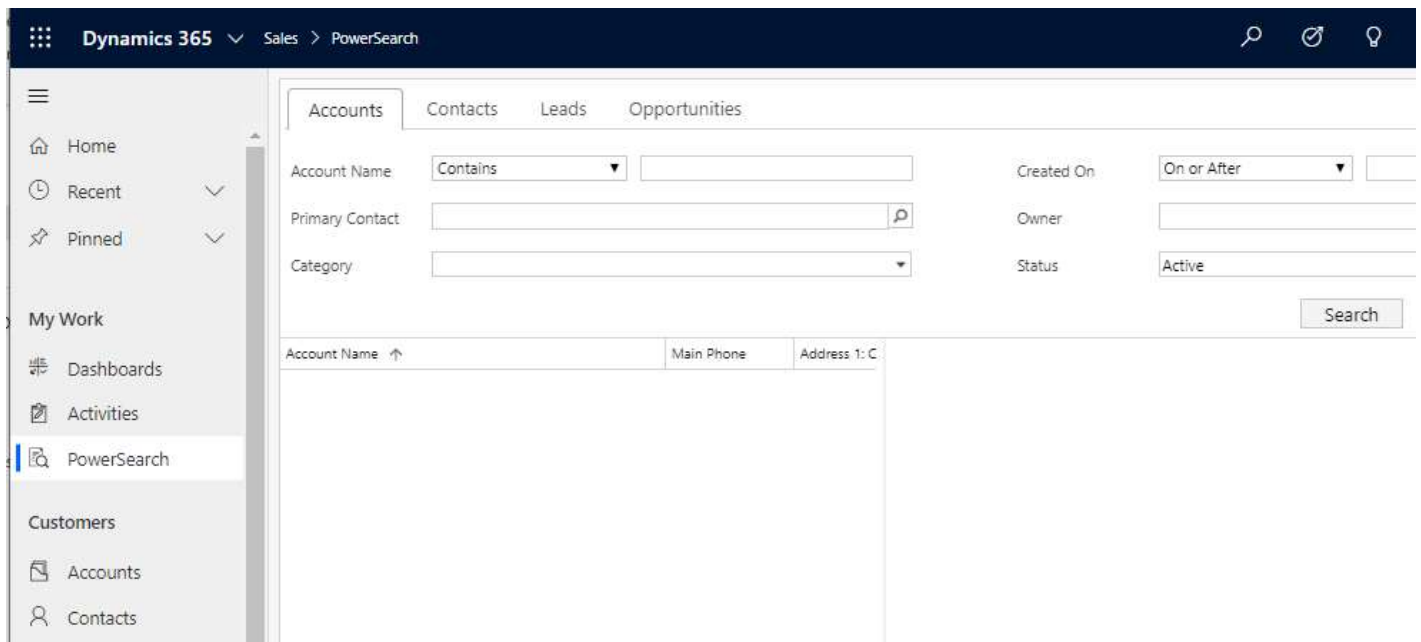


Figure 13: Main page of PowerSearch

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Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:

7AM - 8PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14
sales@mscrm-addons.com

www.ptm-edv.at

www.mscrm-addons.com



Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046
ussales@mscrm-addons.com

www.mscrm-addons.com