

CRM Partners Quick Find

Find your data, quick and easy!

Getting Started

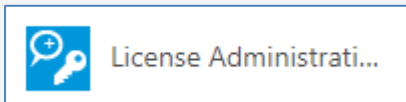
Once you have installed CRM Partners Quick Find from Microsoft App Source, you only need to install a trial license before you can start using Quick Find.

A standard configuration data set is automatically installed, allowing you to start without additional setup.

Install a trial license

Perform these steps to install a trial license:

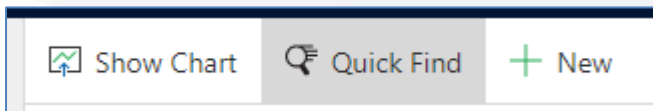
- Navigate to Settings > CRM Partners Licensing > License Administration.



- Click 'Register Customer' to register for your free trial and complete the registration process.
- Once registered, click the 'Request Licenses' button, which will automatically install a 30 day trial license.

Quick Find

In order to use Quick Find, navigate to the Account or Contact view. Just click the new command bar button 'Quick Find' and try the standard search forms.



You can change the search forms in the Search Configuration entity (navigate to Settings > Quick Find > Search Configuration). Read the manual for instructions how to configure your own search forms.

In case of any issues, don't hesitate to contact us on support@crmpartners.com.