

AvePoint SearchAll 3.0.2 for Microsoft Dynamics® CRM

User Guide

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Overview

SearchAll for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM 2011 enables users to quickly find entity records by using a keyword search. Information within entity records that meets the searched keywords are displayed in the search results. Entities and information within columns are only searchable if configured in the SearchAll settings.

Getting Started

Refer to the sections below for information on using the SearchAll solution.

Understanding the SearchAll User Interface

Log into Dynamics CRM as a user that has the **SearchAll User** security role and navigate to **Workspace > My Work > SearchAll**. Refer to the screenshot below and the following descriptions to navigate through the SearchAll user interface.

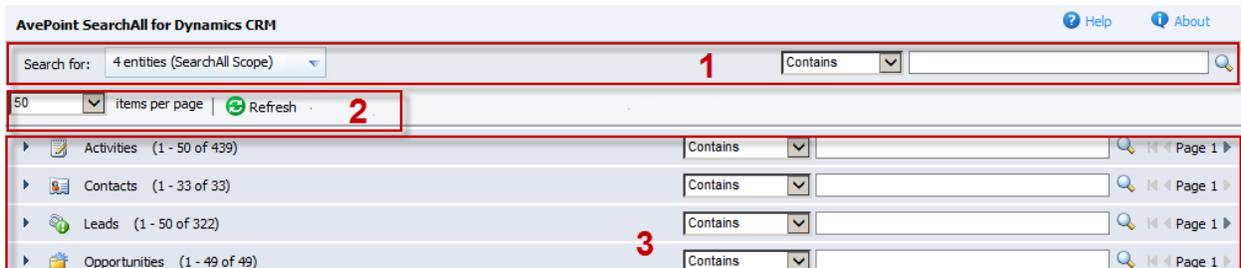


Figure 1: SearchAll general view.

1. **Search scope and the Global Search function** – Here you can narrow down which entities are to be searched through for the keywords that are being searched for from Dynamics CRM content database and use the Global Search function. Global Search searches the column content of entities (selected in the **Search for** drop-down list) for the keyword you specified. Refer to [Global Search](#) for details of how to perform the Global Search operation.
 - **Search Scope** – Click the drop-down list next to **Search for** to view the selected entities (as marked in the screenshot below). You are able to search the column content of the entities listed here. Click the settings (⚙️) button to add, remove, and edit the entities in this list.

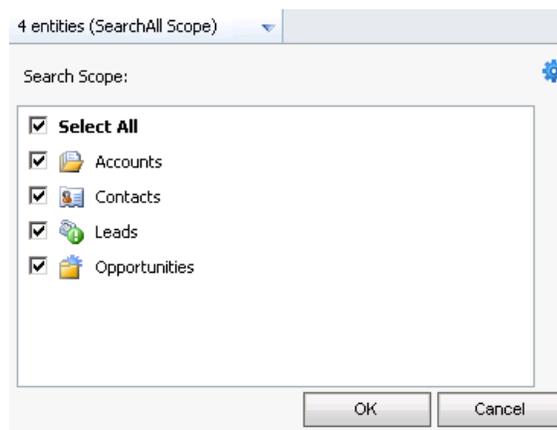


Figure 2: SearchAll scope configuration.

- **Global Search** – Click the down arrow (▼) button to set the search condition and click the search (🔍) button to perform the search. There are four search conditions as follows. If the column content of the entity meets the search condition and the keyword, the entity's corresponding records are displayed in the search results in Area 3.
 - **Contains** – The column content contains the keyword you entered in the text box.
 - **Equals** – The column content equals the keyword you entered in the text box.
 - **Begins With** – The column content begins with the keyword you entered in the text box.
 - **Ends With** – The column content ends with the keyword you entered in the text box.



Figure 3: Selecting the search condition.

***Note:** If you do not enter the keyword in the text box, when you perform a search by clicking the search (🔍) button, all records of the entities selected in the **Search for** drop-down list are displayed.

2. The following options can be accessed here:
 - **Items per page** – Click the down arrow (▼) button next to **Items per page** to specify how many items to be displayed on one page for each entity.
 - **Refresh** – Refreshes the current view.
3. **Search results and the Local Search function** – Search results are grouped by the entity name. The number of the entity records displaying under each entity is based on the **items per page** settings. On the right of the Area 3 is the Local Search function for each entity. Local Search searches the column content of the individual entity for the keyword you specified. Refer to [Local Search](#) for details of how to perform the Local Search operation.

Using Global Search and Local Search

Use Global Search and Local Search to quickly find the entity records. Refer to the sections below for details of how to perform the search.

Global Search

Global Search searches the column content of selected entities (selected in the **Search for** drop-down list) for the keyword you specified. After the search completes, you can double-click an entity records in the search results to open it, view the details, and edit it.

Follow the steps below to perform a Global Search operation.

1. In the **Search for** drop-down list, select the entities to specify the search scope. For each selected entity, only the content of the columns configured on the **Search Columns** tab can be searched.
2. Specify the search condition and enter the keyword in the text box (marked in the screenshot below). For example, select **Contains** and enter **a** as the keyword.

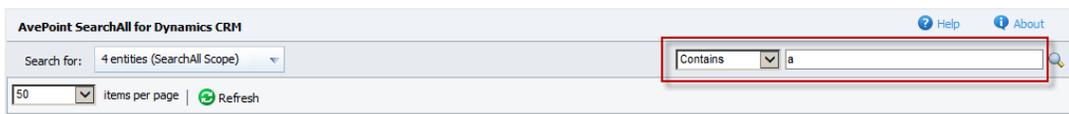


Figure 4: Specifying the search condition and enter the keyword.

3. Click  to start the search.
4. After the search completes, view the search results. The entity records whose column content contains/equals/begins with/ends with the keyword are displayed in the search result. In this case, two entity records' **Full Name** columns contain **a**, so they have been found and displayed in the search results and the information of the columns configured on the **Display Columns** tab are displayed. You can also click the column name to arrange the records order to be ascending or descending.



Figure 5: Viewing the search results.

Local Search

Local Search searches the column content of the individual entity for the keyword you specified. After the search results are displayed, you can double-click the entity records to open it, view the details, and edit it.

Follow the steps below to perform a Local Search operation.

1. In the search results, locate the entity that you want to perform the Local Search operation. For each entity, only the content of the columns configured on the **Search Columns** tab can be searched. For example, locate the **Contact** entity.
2. Click the right arrow (▶) button next to the entity name to view the current entity records. Then select the search condition and enter the keyword. For example, select **Equals** and enter **Dirk Norman** as the keyword (marked in the screenshot below).

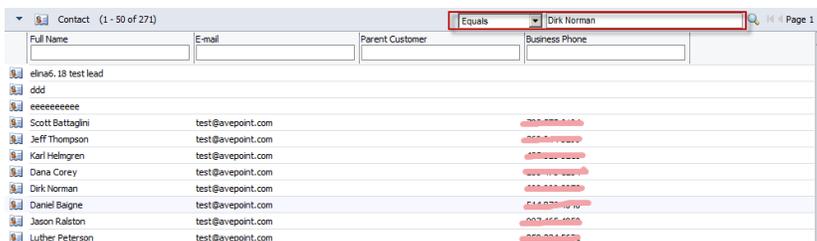


Figure 6: Selecting the search condition and enter the keyword.

3. Click the search (🔍) button to start the search.
4. After the search completes, view the search results. The entity records whose column content contains/equals/begins with/ends with the keyword are displayed in the search result. In this case, the entity record's **Full Name** column contains **Dirk Norman**, so it is found and displayed in the search result, and the information of the columns configured on the **Display Columns** tab are displayed.



Figure 7: Viewing the search result.

5. For each displayed column of the entity, enter the keyword in the text box under the column name (as marked in the screenshot below) to find the desired entity records whose specified column contains the entered keyword. The search result will be displayed automatically. You can also enter the keyword in other columns meanwhile to locate the desired entity records quickly and exactly.

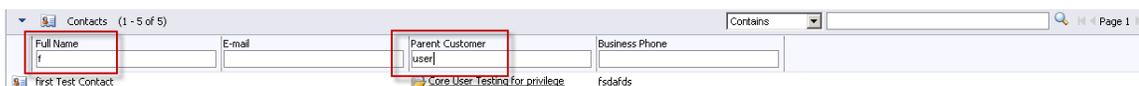


Figure 8: Searching the keyword to locate the desired entity records.

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