



Multi Search

For Dynamics CRM 2013



Installation Guide

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What's In This Manual

This manual provides guidelines for installing and configuring the Multi Search add-on for Microsoft Dynamics CRM 2013. It specifies system requirements, contains step-by-step installation guide, gives tips on troubleshooting and describes post installation configuration procedures.

The manual is divided into the following sections:

➤ **Introduction**

In this chapter you can find basic information about Multi Search, its licensing and compatibility with Dynamics CRM.

➤ **Installation**

In this chapter you can find information about system requirements, how to install and uninstall Multi Search on your Microsoft Dynamics CRM server. It also contains information about post installation configuration procedures.

Introduction

This section contains a list of the supported databases and operating environments for Multi Search module, as well as the recommended system requirements for servers and client computers.

Multi Search Overview

Multi Search enables you to perform one search that simultaneously looks across all of Dynamics CRM data or your own collection of record types (entities). The search results are presented in a single window and can be filtered and sorted as required.

Users can define their own personal searches while administrators can create global search definitions. Decide what fields to search against, how results should be displayed or simply use Quick Find settings already defined in your organization.

Product Licensing

This product is licensed per organization.

Evaluation Licenses

You can request a 14 day evaluation license that will allow testing our product on your production company. Visit our web site at <https://www.dynamics-pros.com/evaluation-license-request/> and fill a "Request Evaluation Licenses". You will need to provide your CRM organization name in order to receive a valid registration key by email.

Compatibility

Multi Search is compatible with Microsoft Dynamics CRM version 2013, and all installation types (on-premises live, etc).

Installation Instruction

In this chapter you can find information about system requirements, how to install and uninstall Multi Search on your Microsoft Dynamics CRM server. It also contains information about post installation configuration procedures.

System Requirements

This chapter contains a list of the supported databases and operating systems, as well as components that must be installed on a server before you can start Multi Search installation process.

➤ **Supported client operating systems**

Windows 8 (64-bit and 32-bit versions)
Windows 7 (64-bit and 32-bit versions)
Windows Vista SP2 (6-bit and 32-bit versions)

➤ **Supported browsers***

Internet Explorer 10 (Windows)
Internet Explorer 9 (Windows)
Internet Explorer 8 (Windows)
Latest version of Chrome (Windows)
Latest version of Firefox (Windows)
Latest version of Safari (Mac OSX)

**) Make sure you that have disabled popup blocker in your browser for the CRM domain (please refer to your browser documentation).*

➤ **Required components**

Silverlight 5.0 (it should install automatically, but can be also installed manually from <http://www.microsoft.com/getsilverlight>).

Installation

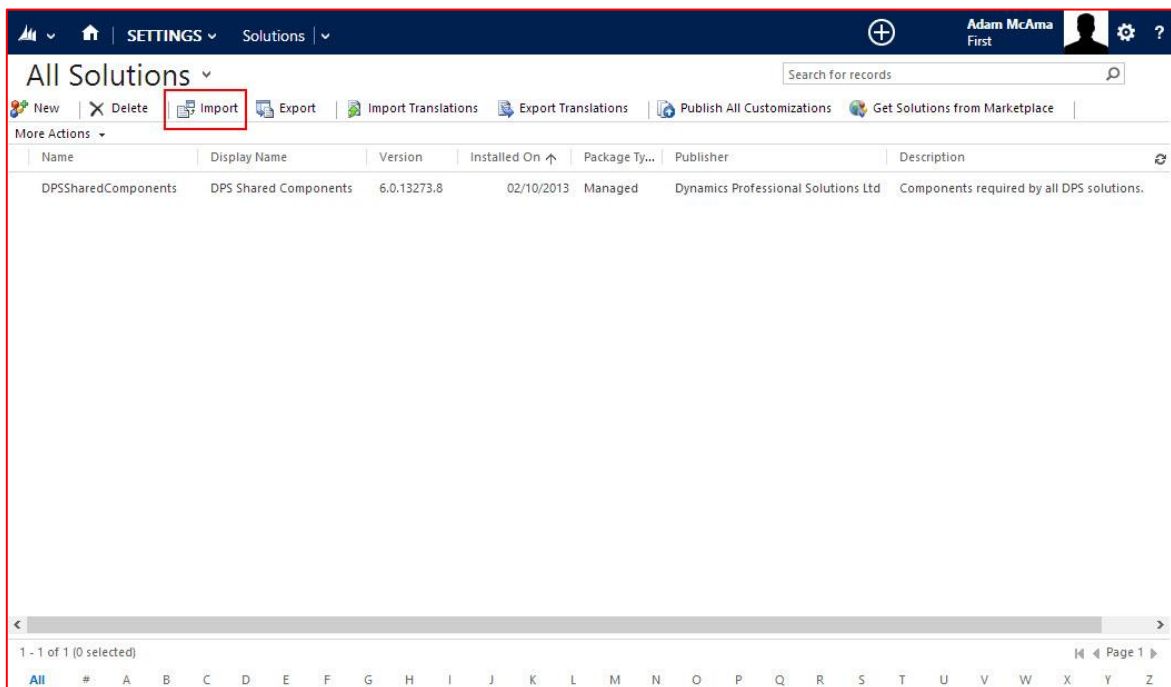
To use Multi Search no client or server side installation is needed. Product is packaged as managed solution so you only need to import two compressed (zip) files into your Dynamics CRM deployment. You must have administrator privileges in the Dynamics CRM in order to install this solution.

1. Obtain required files

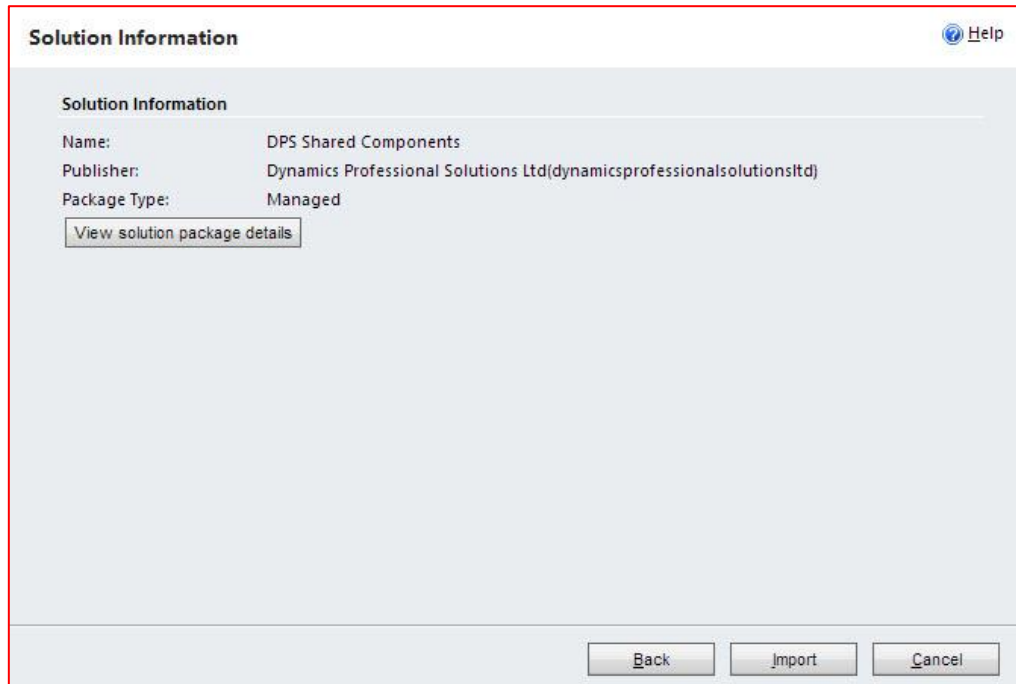
- a. Go to <http://downloads.dynamics-pros.com>
- b. Click on “Download trial versions of our products link” (login will be required) and download the latest version of the Multi Search 2013 (MultiSearch_2013.zip).
- c. Unzip MultiSearch_2013.zip. It contains two more zip files (these are the files that you will be importing into Dynamics CRM 2013):
 - i. Shared_6.0.xxxx.x.zip (import first)
 - ii. MultiSearch_6.0.xxxxx.x.zip (import second)

2. Import managed solution

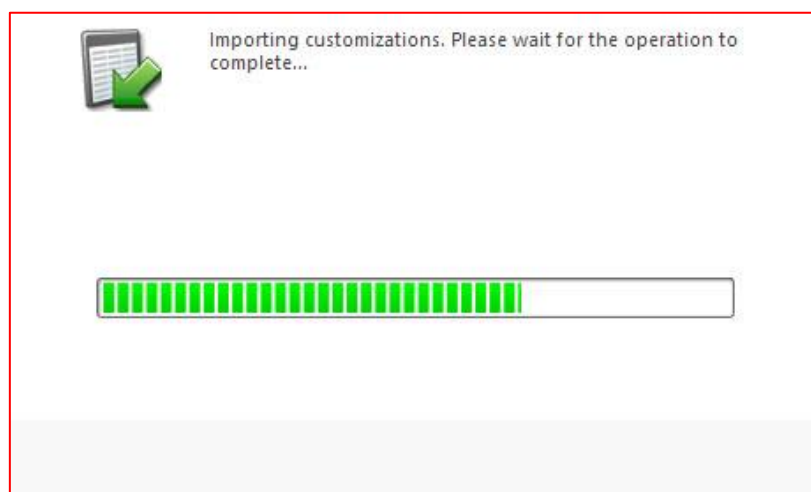
- a. Login to your Dynamics CRM and go to Solutions in the Settings Area. Click “Import” option in the toolbar.



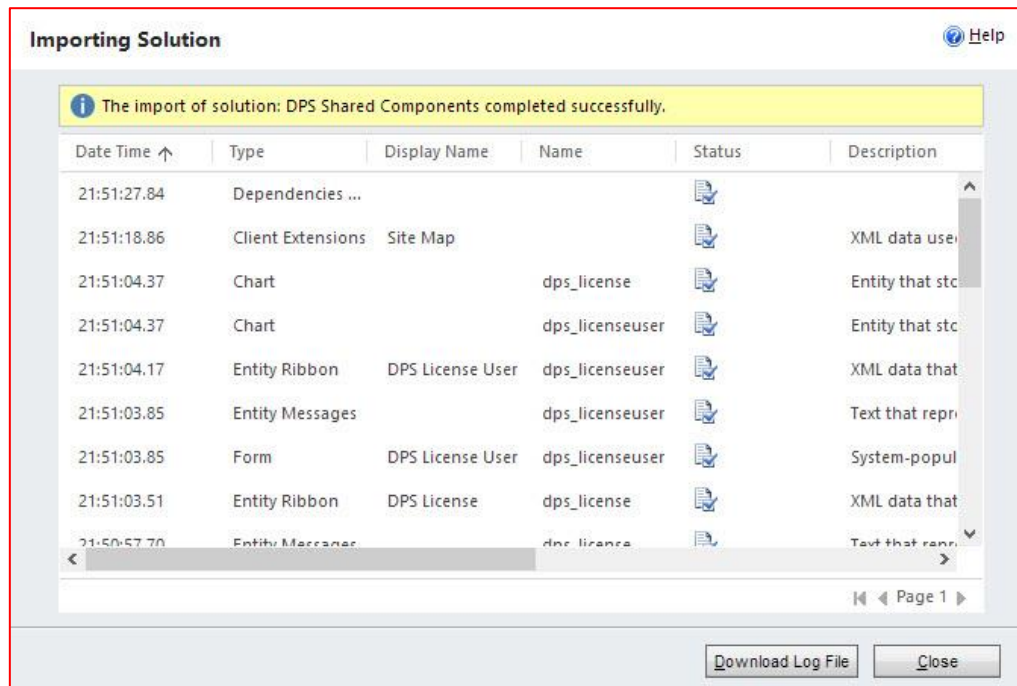
- b. In the Select Solution Package screen select the **Shared_6.0.xxxx.x.zip** file you have downloaded in the previous step. Click “Next”.



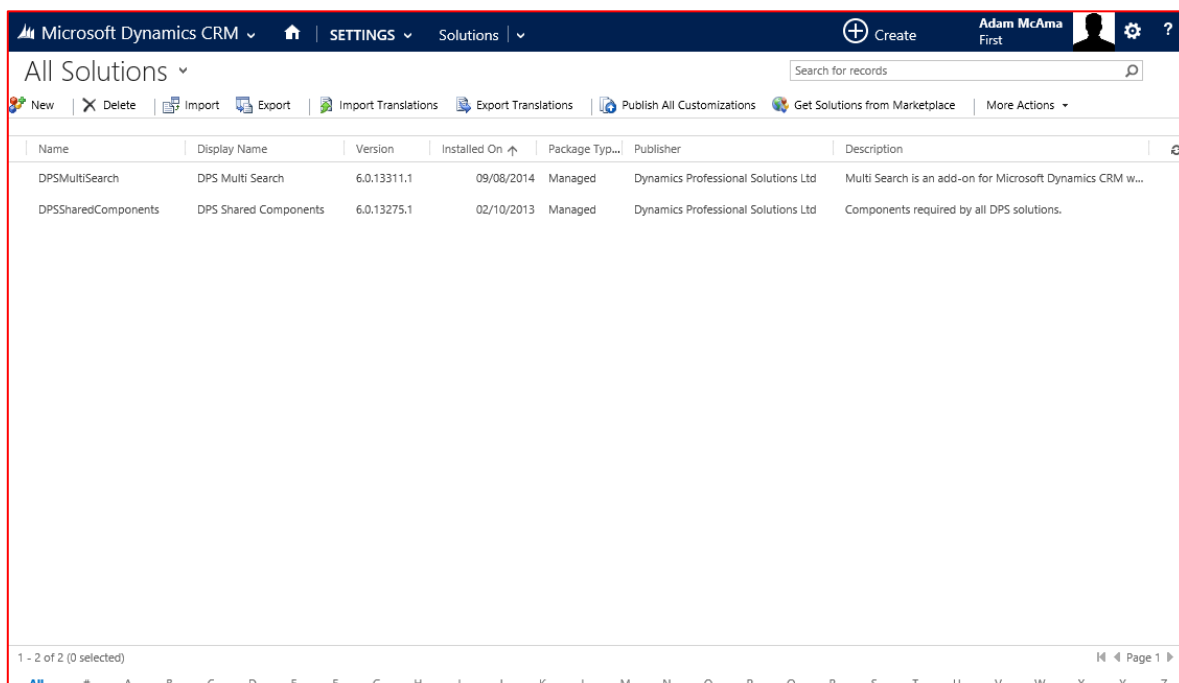
- c. Importing Solution screen will open and progress can be monitored. It may take some time to complete the import.



- d. When system finishes review that process was completed successfully. At this point you can also download a log file.



- e. Repeat above steps and import **MultiSearch_6.0.xxxxx.x.zip** file.
- f. After that step you should have two managed solutions from Dynamics Professional Solutions Ltd publisher.

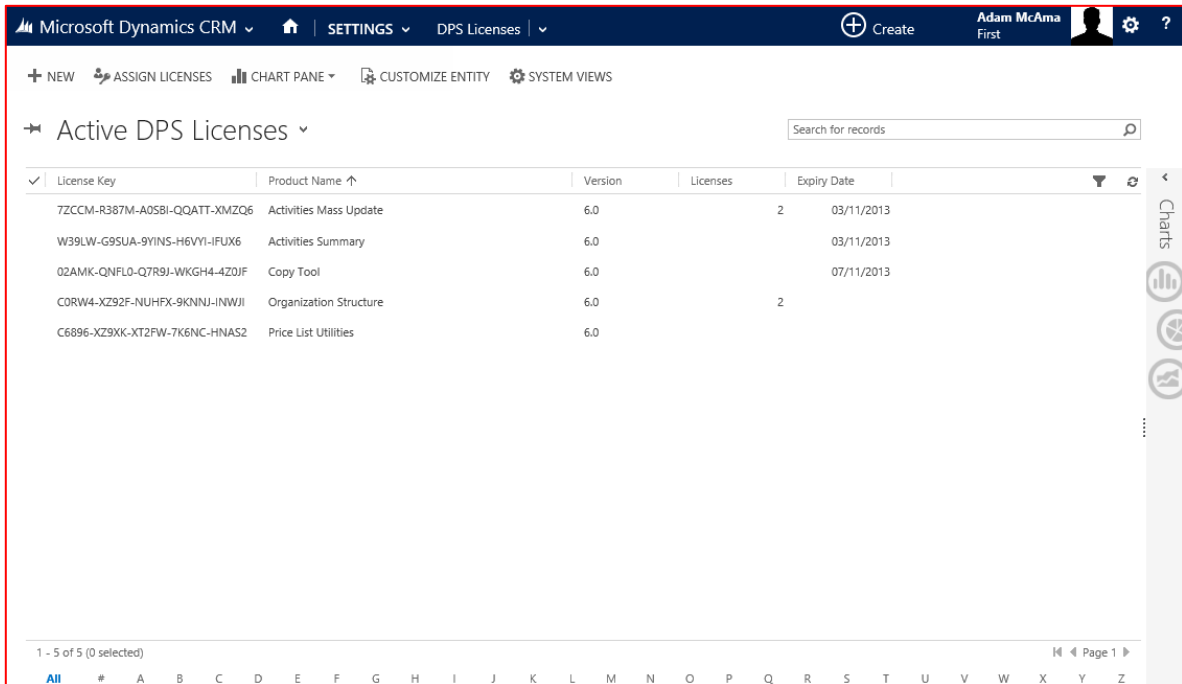


Post Installation Configuration

If you have purchased Multi Search product follow below steps to register your product. Follow the same steps to evaluate our product.

1. Login to Dynamics CRM and access Settings Area.

Select DPS Licenses option from the Extensions section.

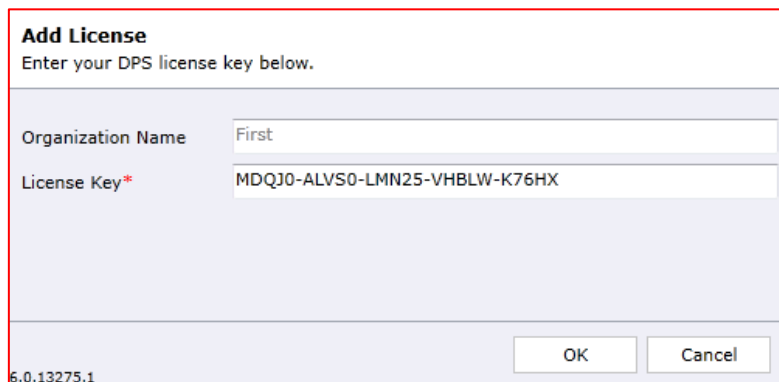


The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SETTINGS', and 'DPS Licenses'. The main content area displays a table titled 'Active DPS Licenses' with a search bar. The table has columns for License Key, Product Name, Version, Licenses, and Expiry Date. The data rows are as follows:

License Key	Product Name	Version	Licenses	Expiry Date
7ZCCM-R387M-A05BI-QQATT-XMZQ6	Activities Mass Update	6.0	2	03/11/2013
W39LW-G95UA-9VINS-H6VYI-IFUX6	Activities Summary	6.0		03/11/2013
02AMK-QNFLO-Q7R9J-WKGGH4-4Z0JF	Copy Tool	6.0		07/11/2013
C0RW4-XZ92F-NUHFX-9KNNJ-INWJI	Organization Structure	6.0	2	
C6896-XZ9XK-XT2FW-7K6NC-HNAS2	Price List Utilities	6.0		

2. Select New from Command Bar to add Dynamics Professional License.

In the Add License screen verify that your Organization Name is displayed correctly and enter the license key that was emailed to you.

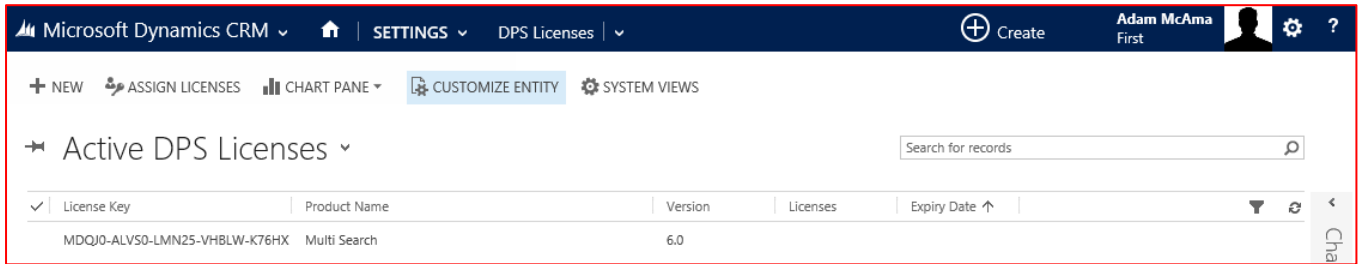


The screenshot shows the 'Add License' dialog box. It contains the following fields and buttons:

- Add License** (Title)
- Enter your DPS license key below. (Instruction)
- Organization Name: First
- License Key*: MDQJ0-ALVS0-LMN25-VHBLW-K76HX
- OK button
- Cancel button
- 6.0.13275.1 (Version number)

3. Verify Licences

After entering a valid set of license keys verify information displayed in “Licenses” screen. You should see version and licence number for each product that you own.



Permissions

After installing Multi Search solution two new security roles will be available in your Organization.

- DPS Multi Search Administrator
- DPS Multi Search User

Assign appropriate roles to your Dynamics CRM users or amend their existing security roles by adding privileges included in ours.

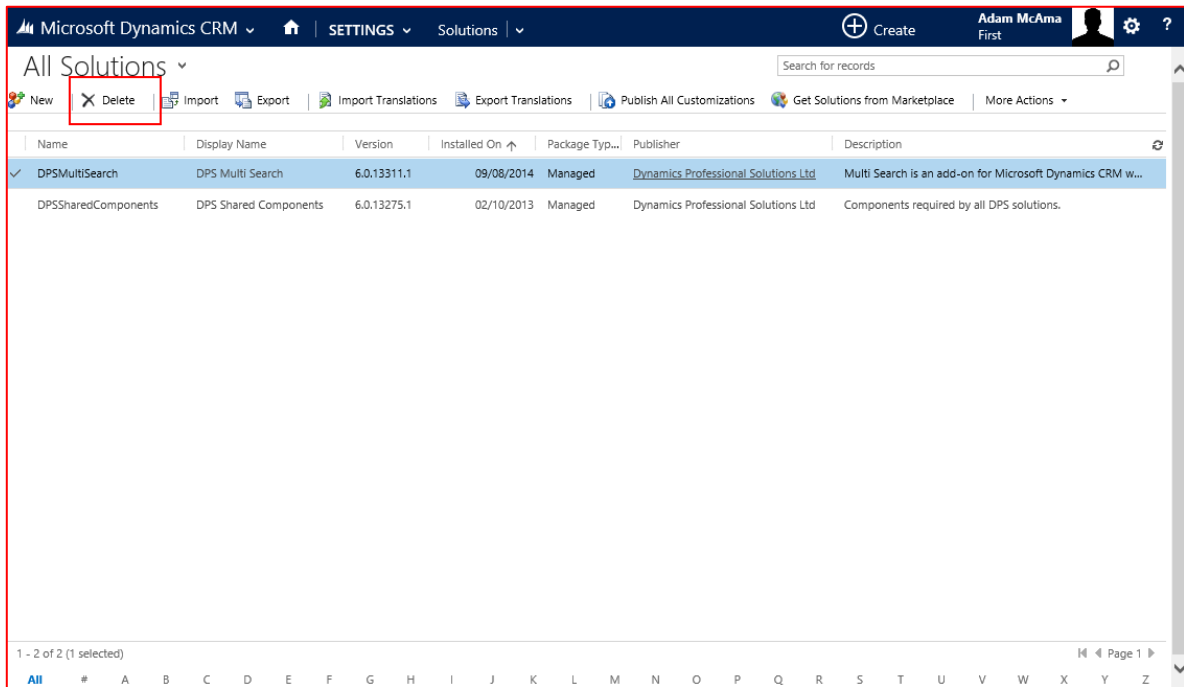
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
DPS License	●	●	●	●	●	●		
DPS License User	●	●	●	●	●	●		
DPS Multi Search	●	●	●	●	●	●	●	●
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Wall View	○	○	○	○	○	○		

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
DPS License	○	●	○	○	○	○		
DPS License User	○	●	○	○	○	○		
DPS Multi Search	⚠	●	⚠	⚠	○	○	⚠	⚠
Filter	○	○	○	○	○	○	○	○
Post Configuration	○	○	○	○	○	○		
Post Rule Configuration	○	○	○	○	○	○		
Profile Album	○	○	○	○	○	○	○	○
Wall View	○	○	○	○	○	○		

Uninstall

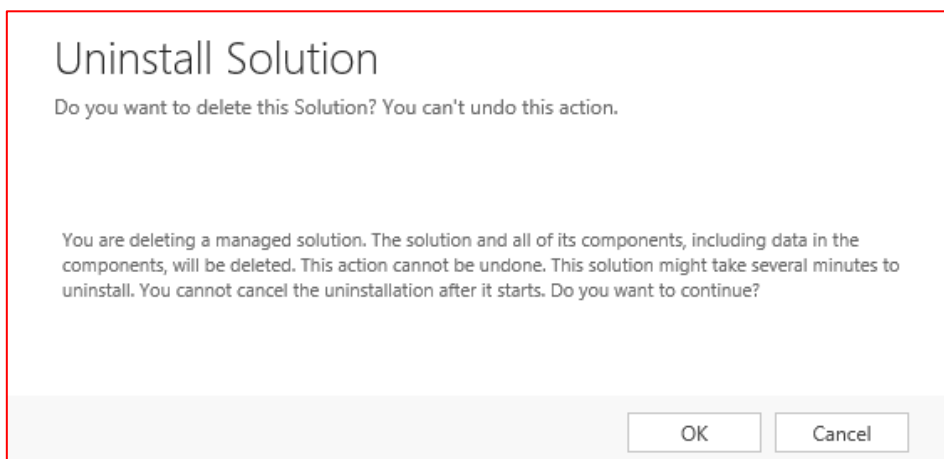
1. Login to Dynamics CRM and go to the Solutions in Settings Area.

Mark the solution you wish to uninstall and click delete button. Note that you will have to delete DPS Multi Search first. You will not be able to delete DPS Shared Components if there is at least one DPS product still installed.



2. Confirm Deletion

Confirm deletion screen will open. Click OK button to delete the solution.



Support

If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

Support: <http://www.dynamics-pros.com/support>

Download: <http://www.dynamics-pros.com/downloads>

