

FRM Solutions, Inc

Power User Guide

Updated 05/30/2016



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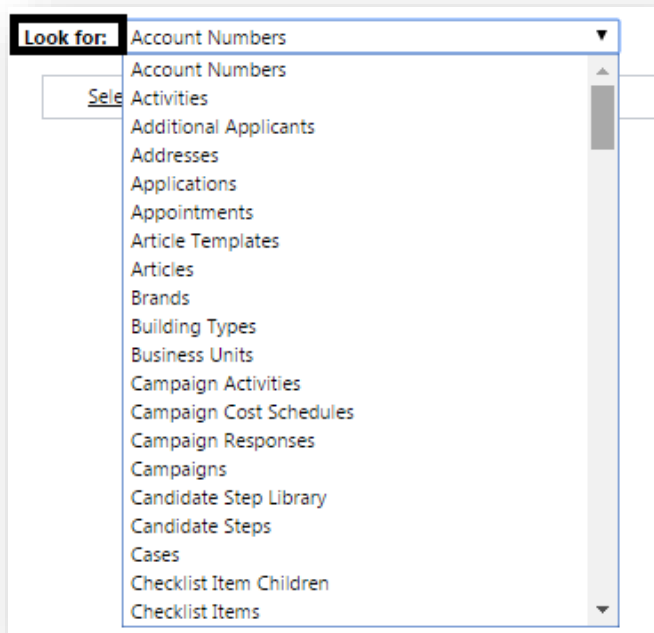
Advanced Find Queries

The **Advanced Find** function is used to query entity records within the FRM database.

1. The **Advanced Find** icon is available in the **Microsoft Dynamics CRM** ribbon for all entities (top right side of the page):

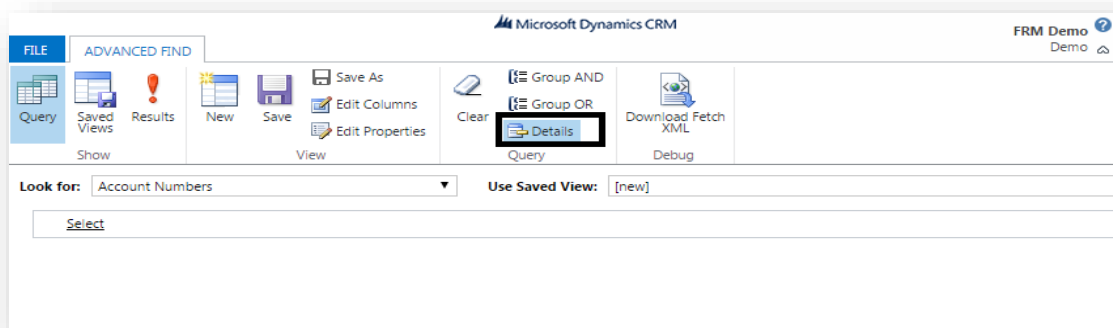


2. Select the icon and the query builder page will appear;
3. In the **Look for** field, select the Entity you would like to search from the drop-down:



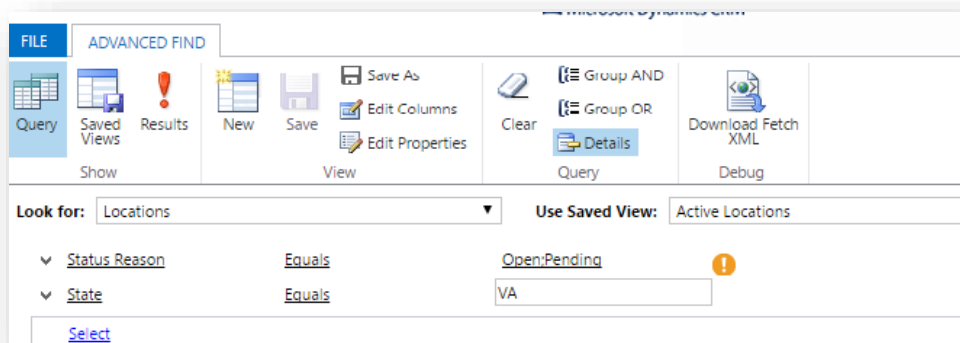


4. If you want to Filter your search, click on **Details** option:



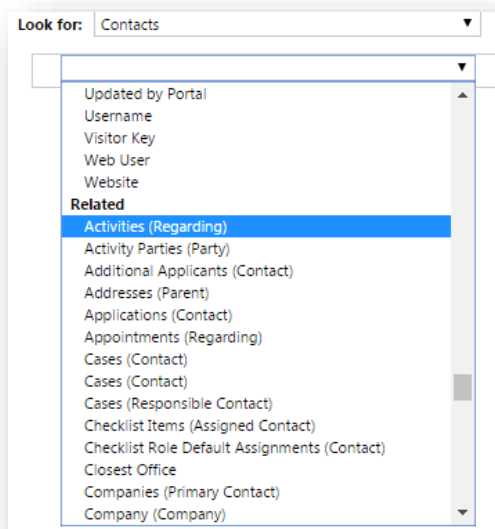
5. From the drop-down, you can add any of the filters corresponding to your search.

For example, below we will query the **Locations** entity and based on 2 filters: **Status Reason** and **State**. By clicking select in the screenshot below you can continue adding filters to further refine your query results.

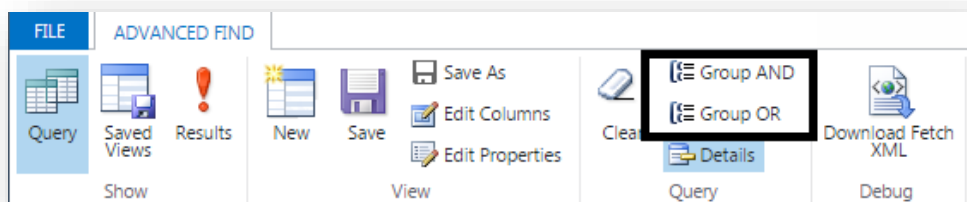




6. One can also filter on **related** entities from the same drop-down. By scrolling you will notice a number of related entities that one can select and pull into the query.



7. If you have multiple filtering criteria added and would like to implement conditions on those you may also consider using: **Group AND** or **Group OR**:
- **Group AND**: the results will include only records that match all the grouped lines;
 - **Group OR**: the results will include records that match any of the grouped lines.





Below is an example of grouped filters on a look up for Companies. This search is based on **Group AND** function and will only show companies from Georgia (State equals GA) that have Prospect as their Relationship Type.

Look for: Companies Use Saved View: Active Companies

Status Equals Active

AND

State Equals GA

Relationship Type Equals Prospect

Select

8. In order to retrieve the results of your advanced Search, click on **Results (!)**.

9. If the results provided do not offer the fields you expected to see, you have the option to add more fields into the query by selecting the **Edit Columns** option:

Microsoft Dynamics CRM

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Debug

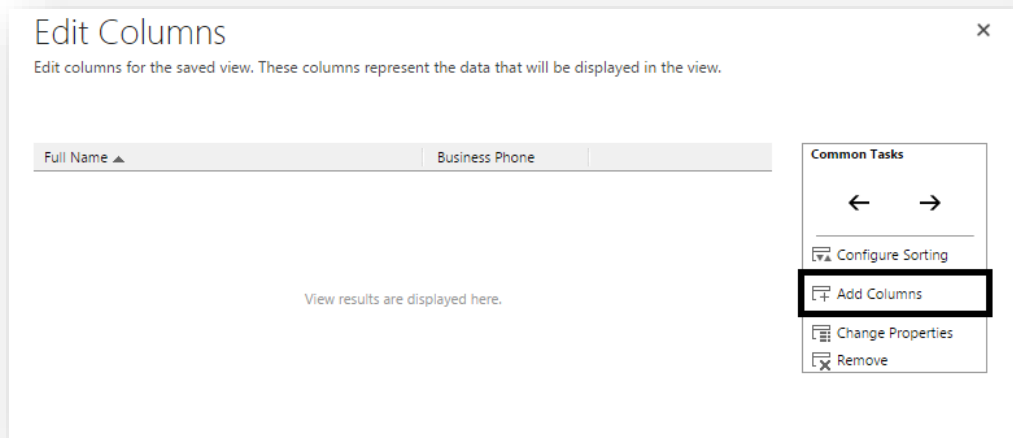
Show View Query Debug

Look for: Account Numbers Use Saved View: [new]

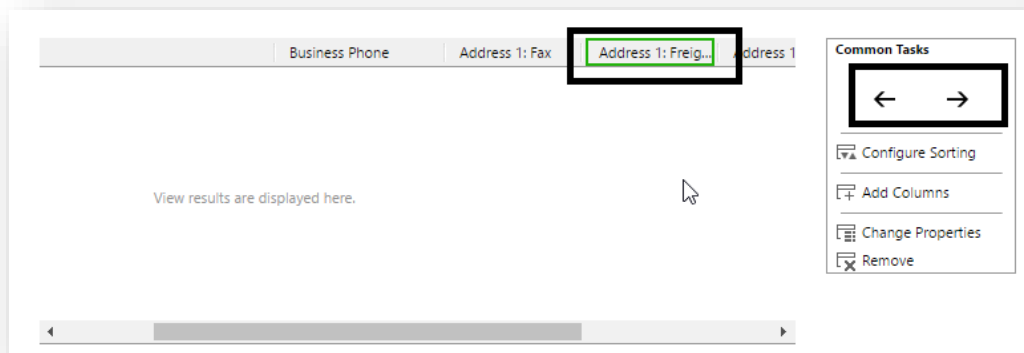
Select



10. From the pop-up window, select the option **Add Column**. This will allow you to choose the columns you need from a drop-down list.

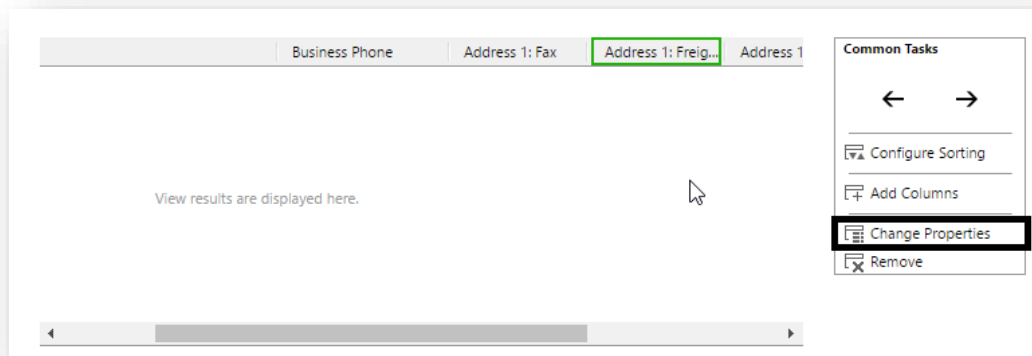


11. The new columns be ordered after the already existing fields, however, you can rearrange them by selecting the field and moving them left and right with the arrows indicated below:

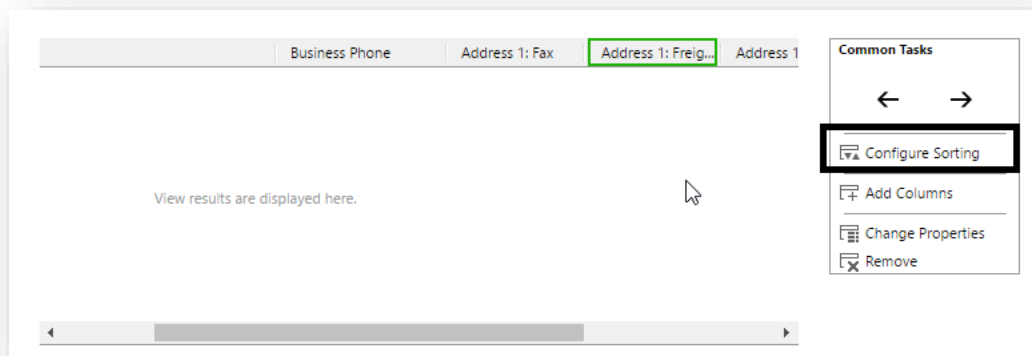




12. You may also change properties of a selected column/field in your query/view. This may prove useful if you would like to edit the column width to be larger or smaller:



13. If you would like to order your results a certain way you may do so by using the Configure Sorting option indicated below:



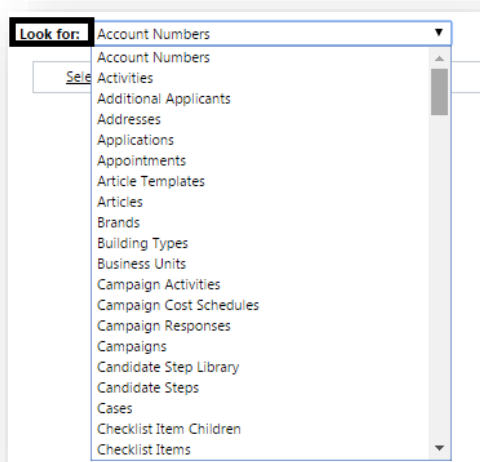


Creating Personal Views

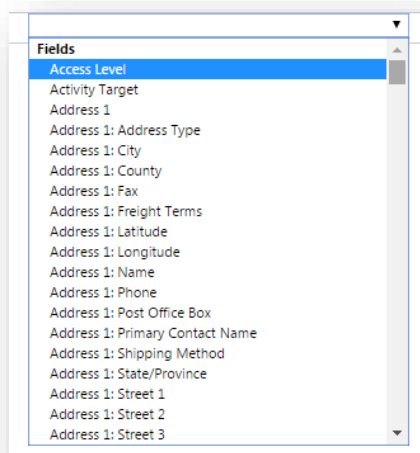
1. Select the **Advanced Find** icon in the **Microsoft Dynamics CRM** ribbon:



2. Select the entity in the Look for field from the available options in the drop-down.

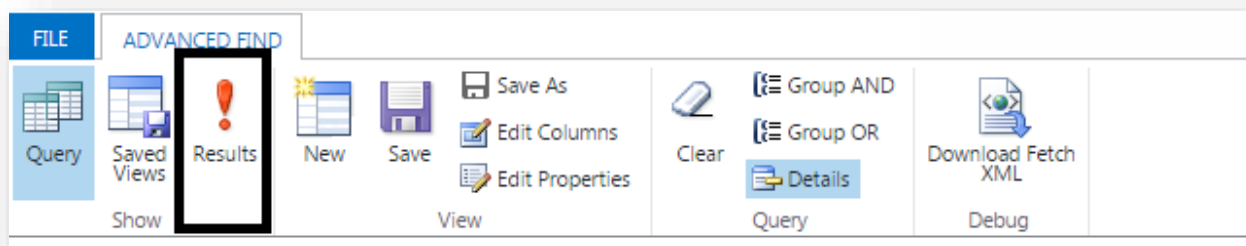


3. Add the necessary filters to your personalized view from the fields drop-down.

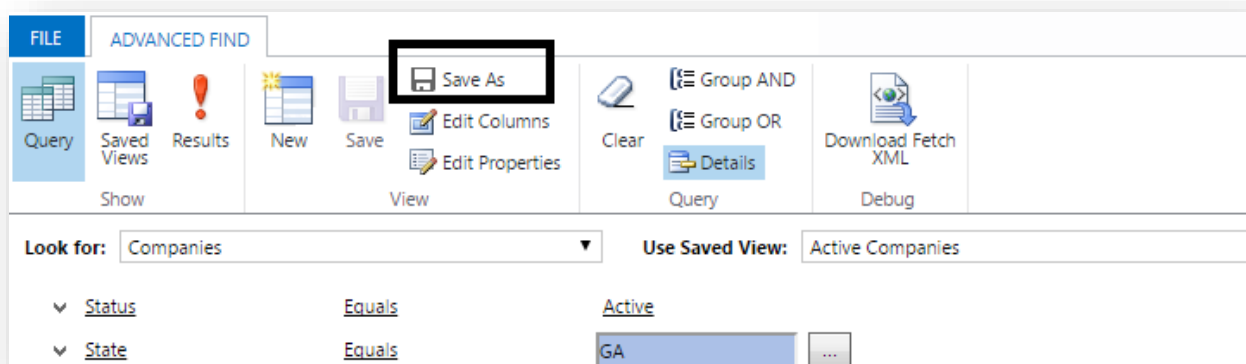




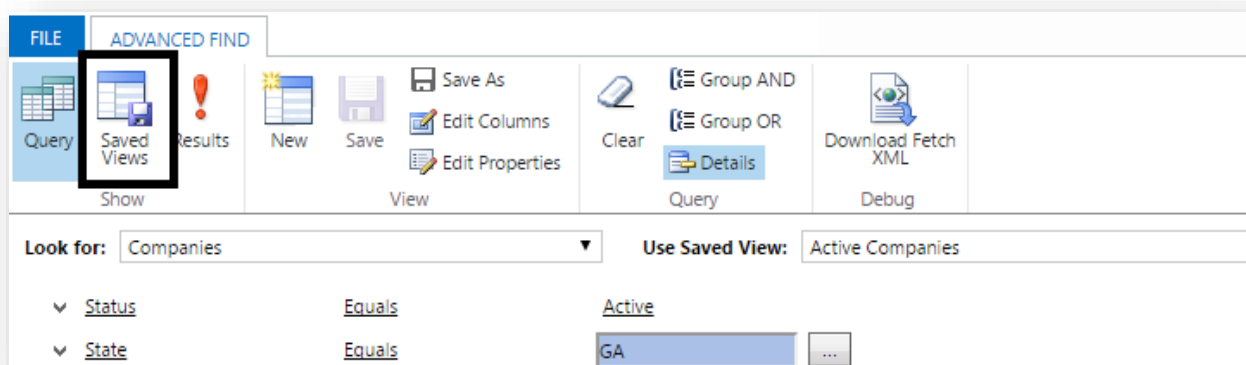
4. You can click on **Results** to verify if the filters are correct and the data is reflecting accurate results according to your business needs:



5. Click **“Save As”** to save this as a Personal View.



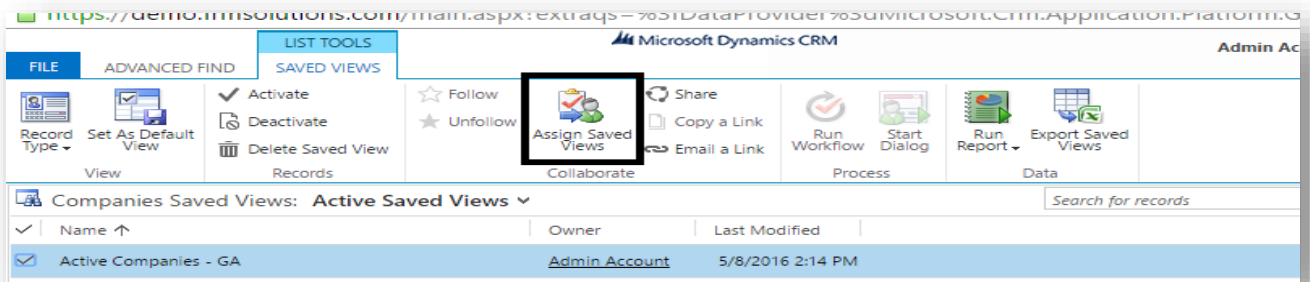
6. In the pop-up window you provide a name for your view.
7. Click **Save** to finalize your actions.
8. The view you created will be available under **Saved Views**:



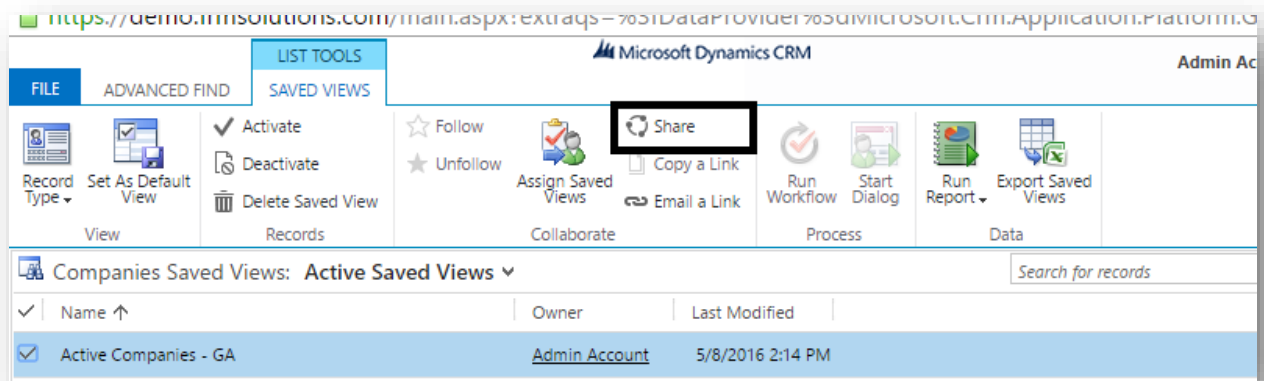
9. Open the newly created view by double-clicking on it.



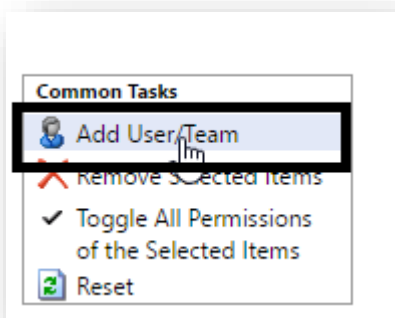
10. You have the option to make another user the owner of this view select **Assign Saved Views**. This will make that assignee the owner of this view moving forward.



11. If you want other users to be able to see views that you have created click the **Share** button:



12. In the new window, select **Add User/team** option:





13. You must grant permissions to the newly added user or team, and you can do this by either the **Toggle All Permissions of the Selected Items** option, or by manually selecting the options you would like to provide the user you are sharing the view with:

	Name	Read	Write	Delete	Append	Assign	Share
<input checked="" type="checkbox"/>	Arke Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Creating Personal Dashboards

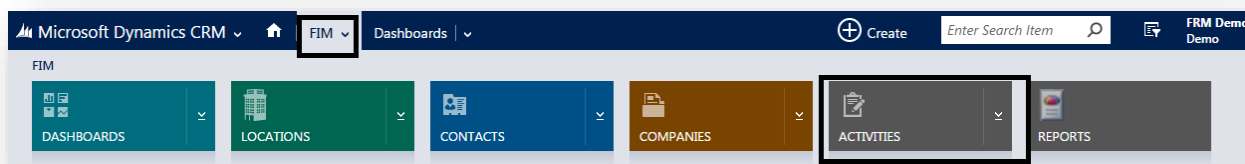
There are several components that can be used to create a dashboard. The most commonly used are charts & views. Dashboards can showcase any types of records within FRM. In the example below we will be creating a chart based on activities and adding it to our new personal Dashboard.

Note: Dashboards can be created for any record types within FRM and the process outlined below will not change.

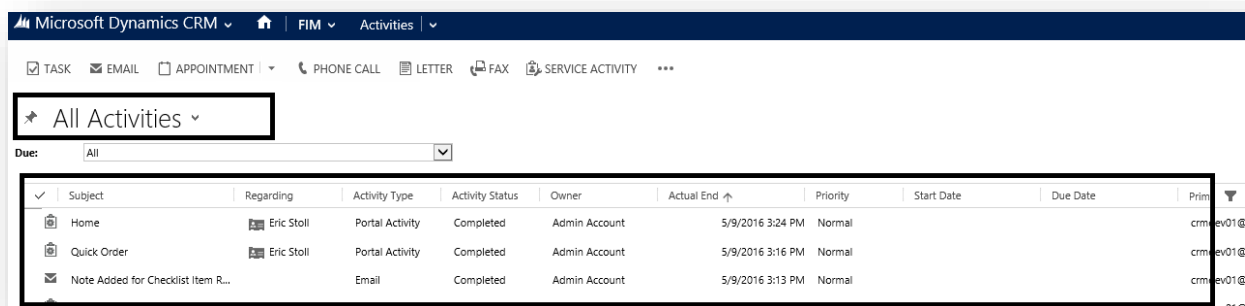
We will begin by first creating our chart.

Chart Creation

1. Select the **Microsoft Dynamics CRM** ribbon and navigate to **Activities**:

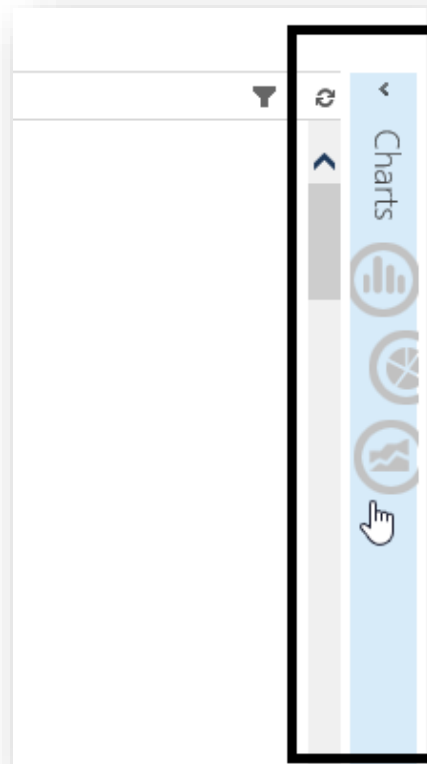


2. Please note that your chart will be built off of the data in a given view. Once you have selected the view that contains the necessary data you would like to represent in a chart look to the right-hand side of the screen and open the **Chart Designer**.

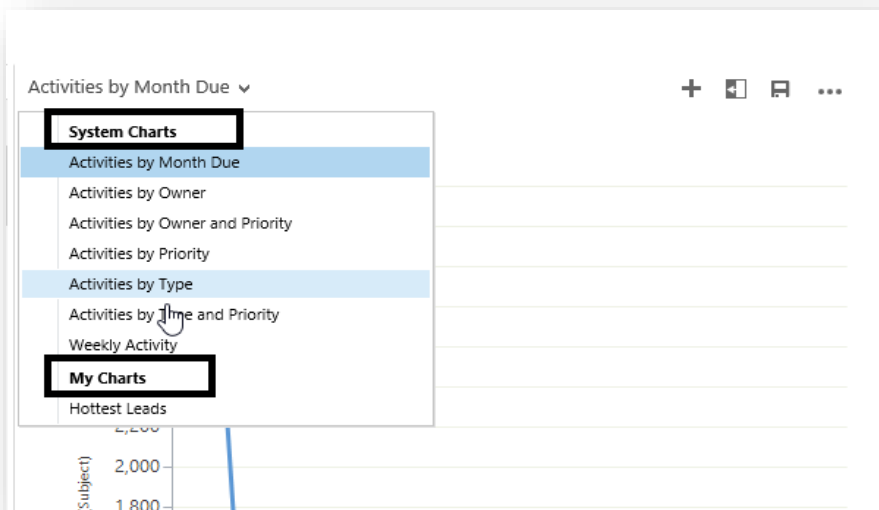




3. Once you have identified the Chart Designer, click to expand.

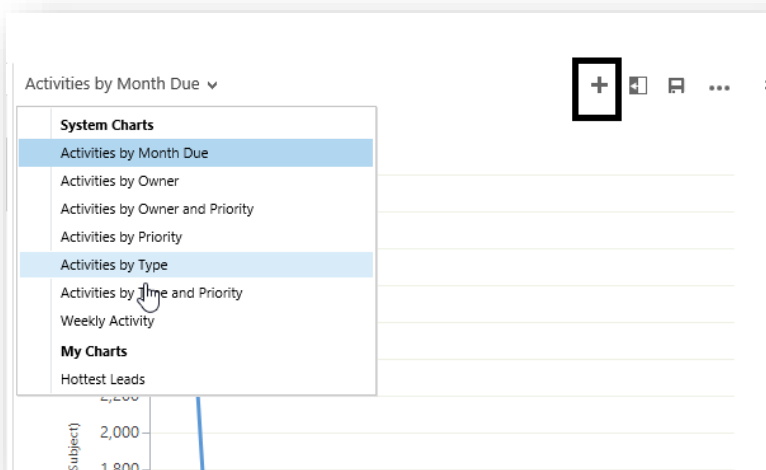


4. This feature comes with a list of predefined **System Charts** or one can create their own personal chart. These personalized charts will appear under **My Charts** once created:

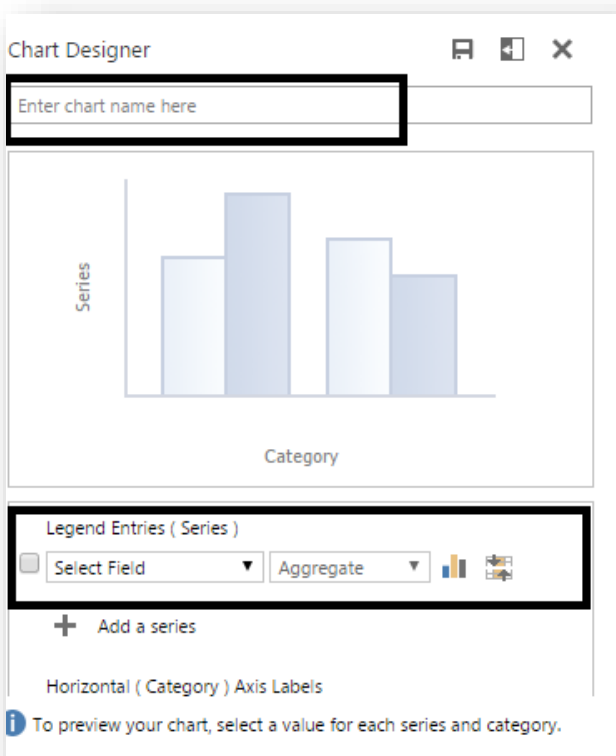




5. To create your own chart click on the + icon:

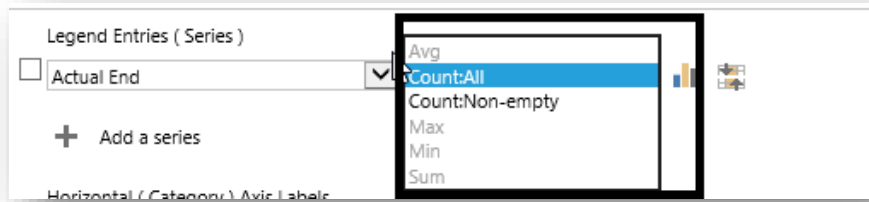


6. In the **Chart Designer** section you need to enter the chart name and then select the data of interest for the chart from the **Select field** drop-down. This will become your **Vertical / Y-Axis** value.



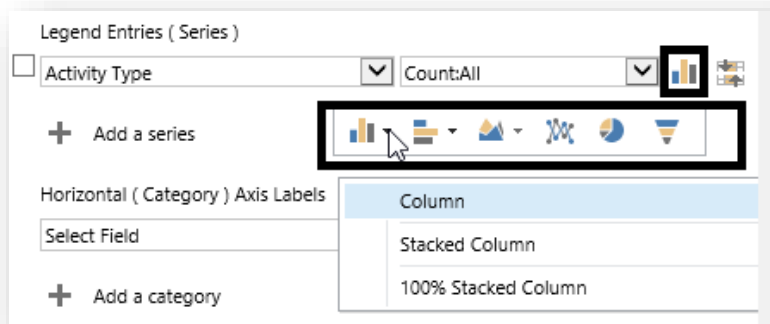


7. In the **Aggregate** field choose the calculation method for the chart data (if you have numeric values you can calculate **Avg, Min, Max, Sum**)

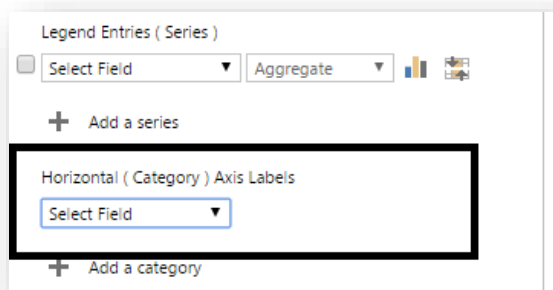


8. You have the option to select the visual form of your analysis from the available options:

- Column
- Bar
- Area
- Line
- Pie
- Funnel



9. Select the **Category** for the **Horizontal / X-Axis** from the drop-down:

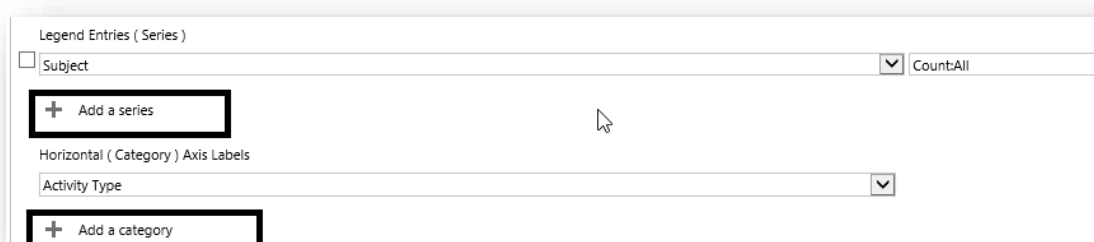




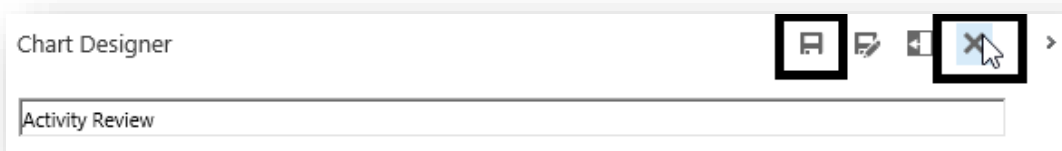
10. Once completed you have the option to **expand** the view of the chart designer page:



11. You can choose to add another layer to the chart if so desired:



12. When your chart is completed click on the **save** icon and then you can **close** the chart designer window:

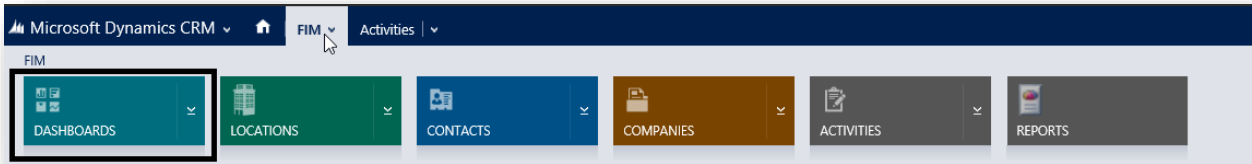


13. Once you have created your chart you can proceed to create a new Dashboard using the process detailed in the following section.

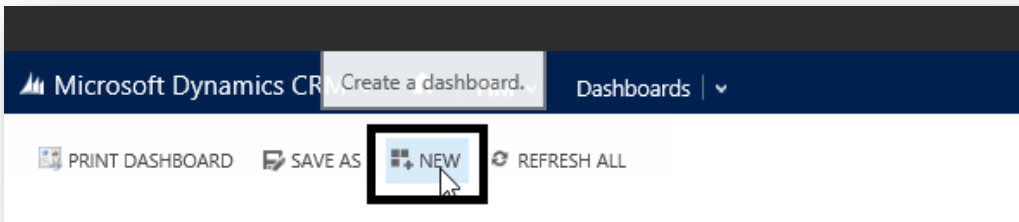


Dashboard Creation

1. The **Dashboards** icon is available in the menu of every entity of FRM:

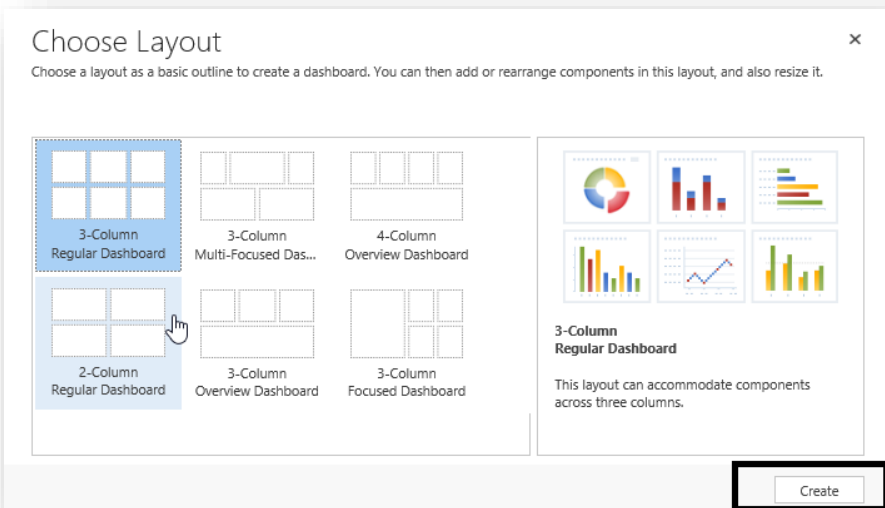


2. Select **New** to create a new dashboard:



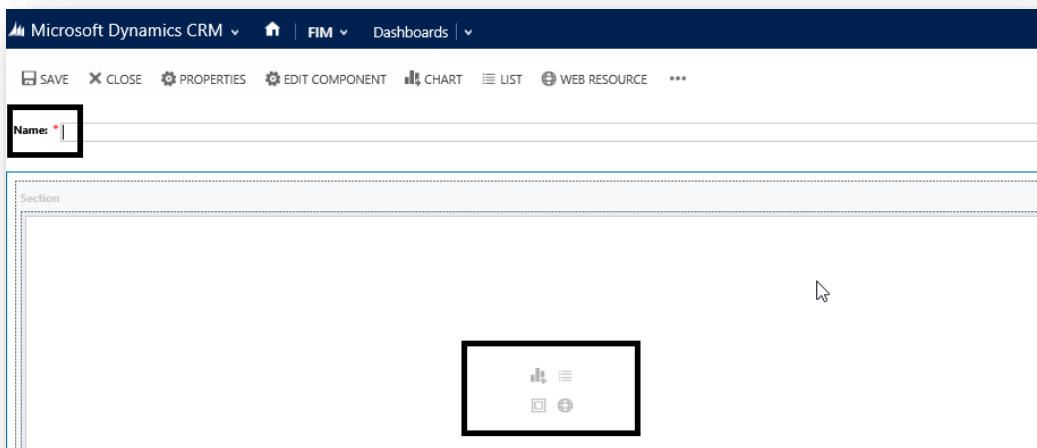
3. In the pop-up window you are provided several templated layouts to start with. After making your selection click on **Create**.

Please note that this selection is not permanent and layout can be changed at any time. These are only suggested starting points.

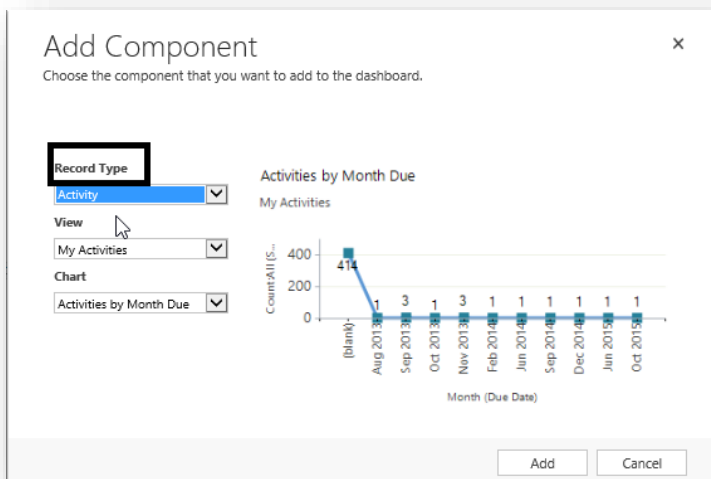




4. Provide a **name** for your personalized dashboard.
5. You will notice 4 small icons in each section that determine what data will be shown in that section. By hovering over each section a tool-tip will appear indicating what data will be provided if chosen. The 4 available data-types are below:
 - Insert web resource
 - Insert list (view)
 - Insert Iframe
 - Insert chart



6. In order to insert the chart created previously select the option **Insert chart** from the above.
7. In the pop-up window select the record type & view for the chart you created. Select the chart you would like to add.





8. Click **Add**.

Add Component

Choose the component that you want to add to the dashboard.

Record Type: **Activity**

View: **My Activities**

Chart: **Activities by Month Due**

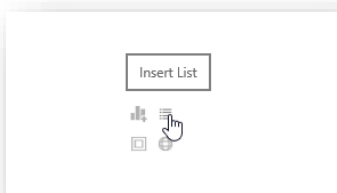
Activities by Month Due
My Activities

Count All

Month (Due Date)

Add Cancel

9. You can choose to add the view for the chart you added in a different section of the dashboard by selecting a new section and clicking the **Insert list** icon:



10. In the pop-up window choose the view you would like to add to the dashboard then select **Add**. *Note: The data won't populate until the dashboard is created.*

Add Component

Choose the component that you want to add to the dashboard.

System Views

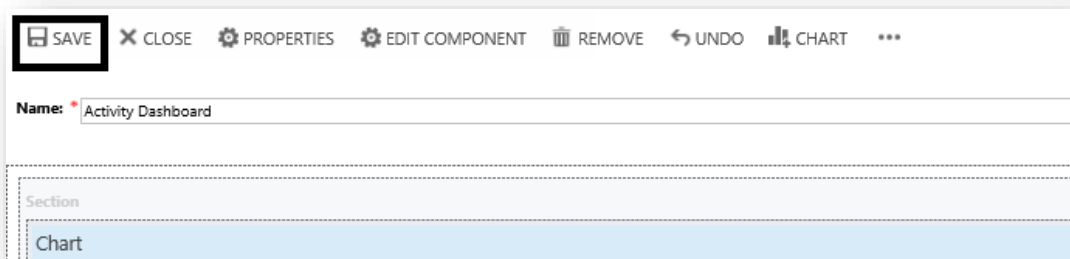
- All Activities
- All Emails/Phone Calls Last 2 Weeks
- All Emails/Phone Calls Last 4 Weeks
- Closed Activities
- Emails Associated View
- Last Year of Activities
- My Activities**
- My Closed Activities
- My Closed Activities (this year)
- My Closed Franchisee Activity (This Year)
- My Open Franchisee Activity
- My Team Members' Activities
- Open Activities
- Scheduled Activities

Column Column Column

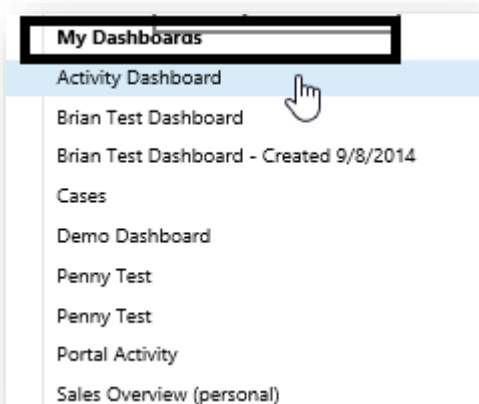
Add Cancel



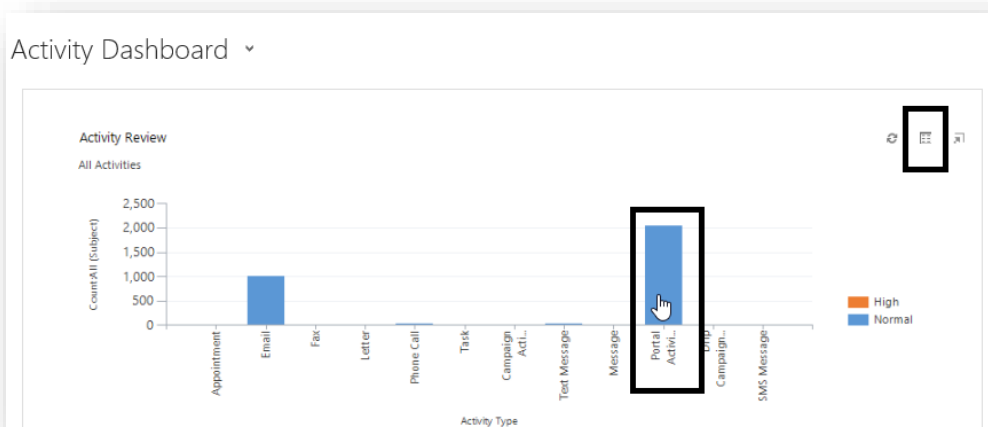
11. Once you have added the needed views/charts click on **Save** option.



12. You will find the newly created Dashboard under **My Dashboards** section in the **Personal Dashboard** drop-down:

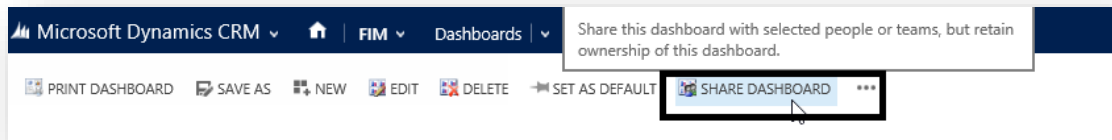


13. If you are interested in seeing the data behind the charts, you can view it by clicking selecting the icon indicated below:

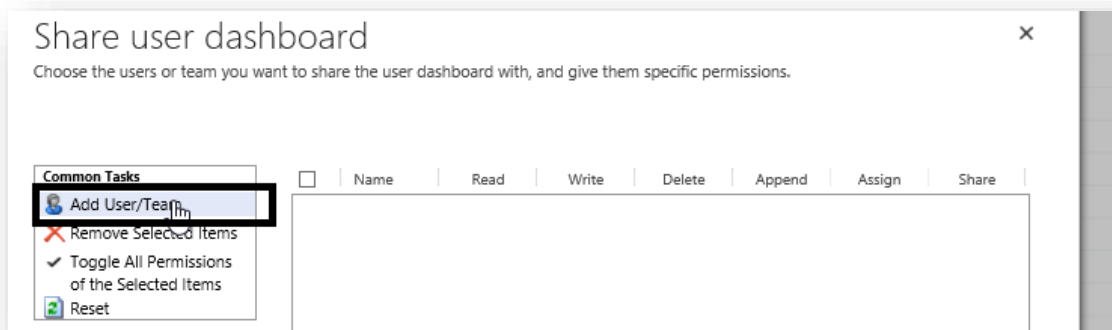




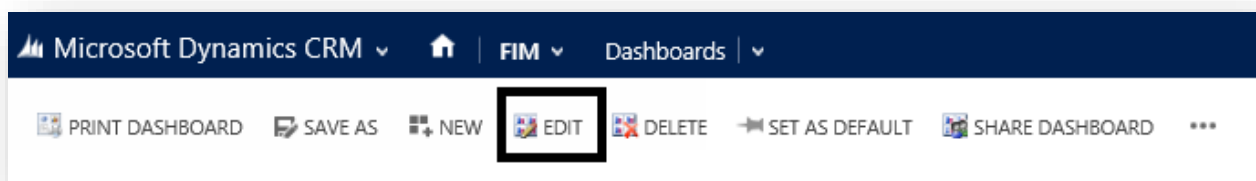
14. You may also **share** the dashboard with users/teams by selecting the **Share Dashboard** button indicated below:



15. In the pop-up window, click on **Add User/Team** to look up the users you would like to share the dashboard with:

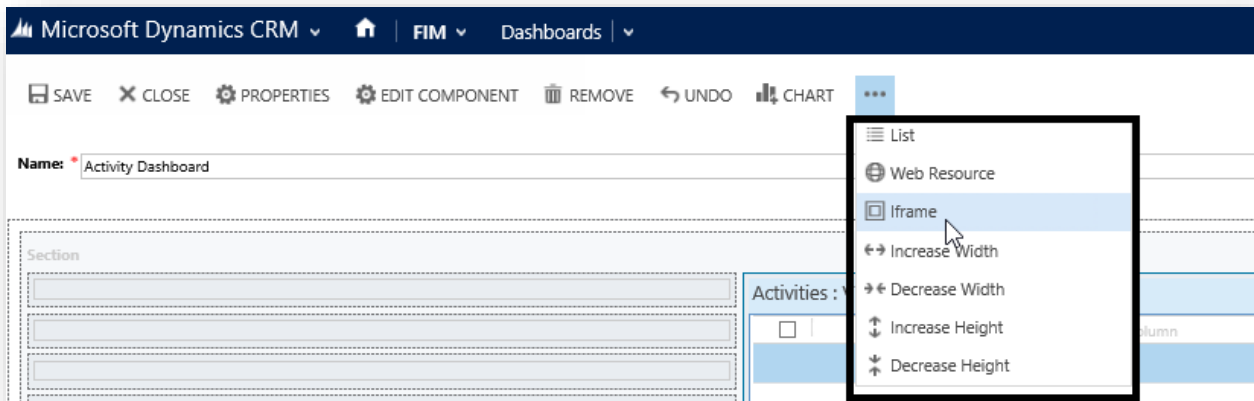


16. Once your dashboard has been completed you can edit its contents by selecting the **Edit** button indicated below. Please note only owners or users with appropriate permissions will have this option available to them.

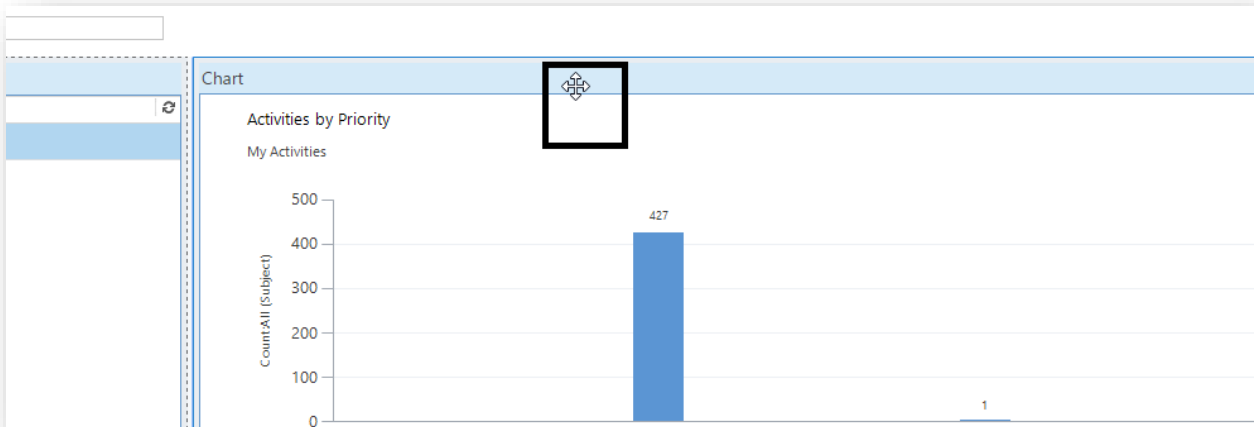




17. When editing the dashboard you have the ability to adjust the look & feel by **increasing/decreasing the width** of your charts/lists:



18. In order to rearrange objects on your dashboard, hover over the blue margins and drag and drop:

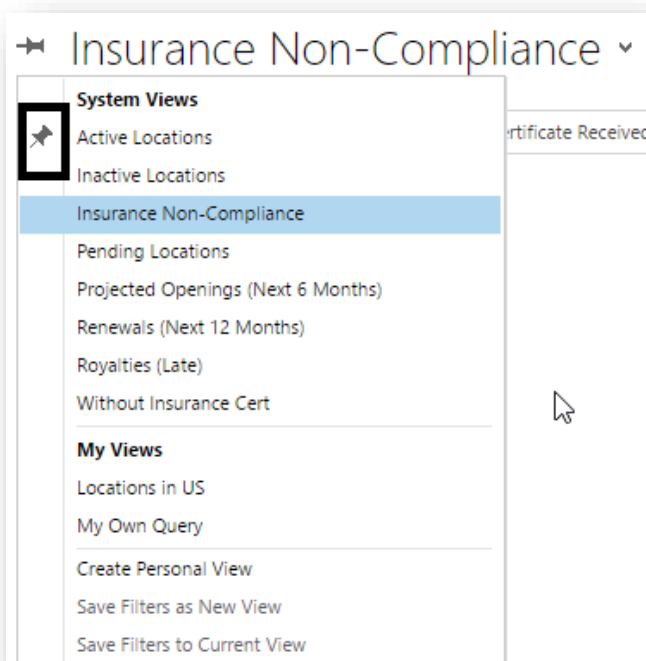


19. Don't forget to **Save** your changes.

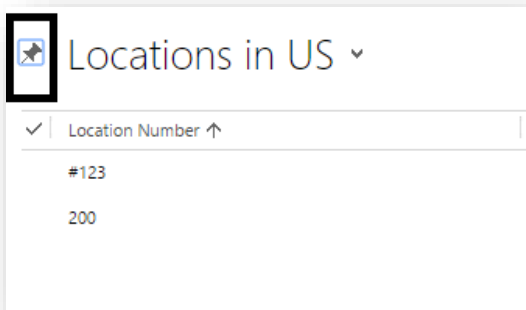


Pin Frequently Used Records

1. The option to pin a view is available in FRM for each entity. You can identify the view that is currently pinned by the small thumbtack icon next to its name:



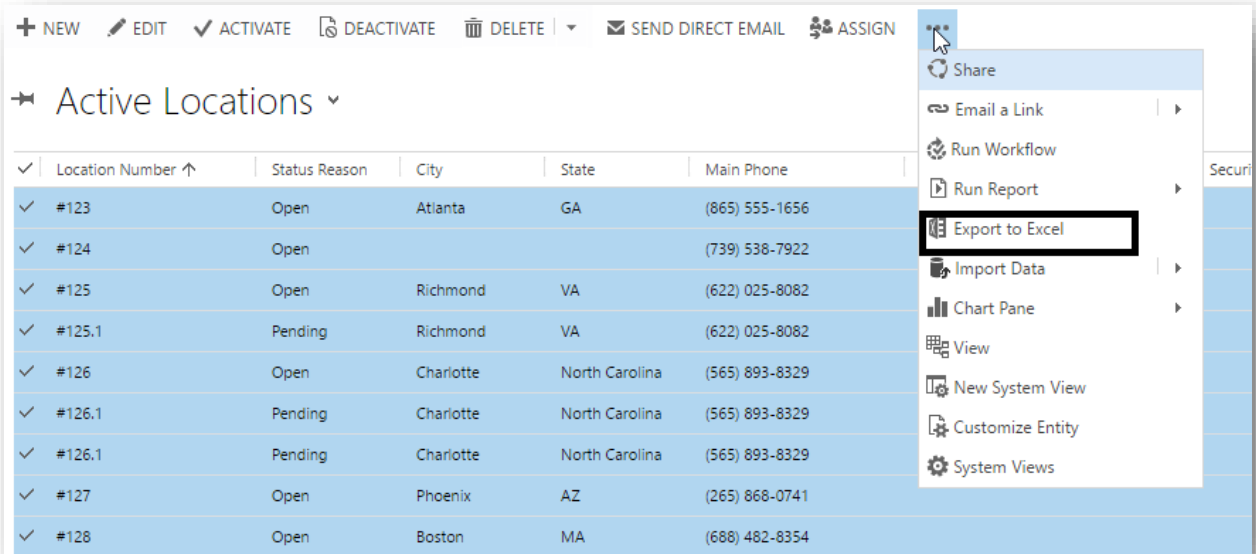
2. Once you have successfully pinned a view the thumbtack will point downwards as indicated below:



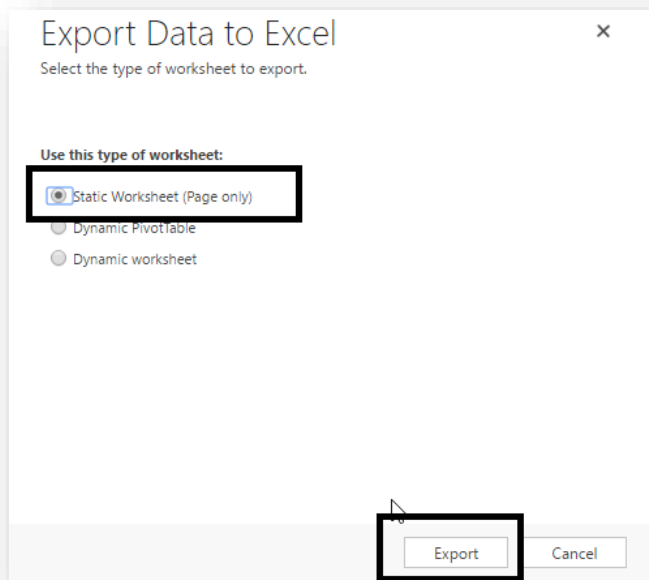


Exporting & Importing Data

1. You may begin by selecting a view to export or exporting the results of an **Advanced Find query**.
2. Select all the data that you need and from the drop-down menu select **Export to Excel** option:



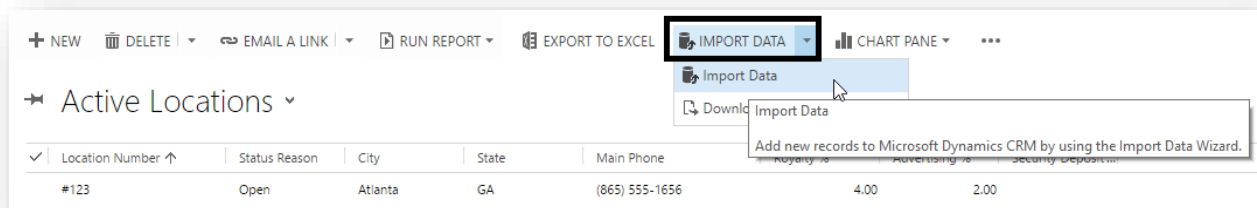
3. In the pop-up window select Static Worksheet (Page Only).





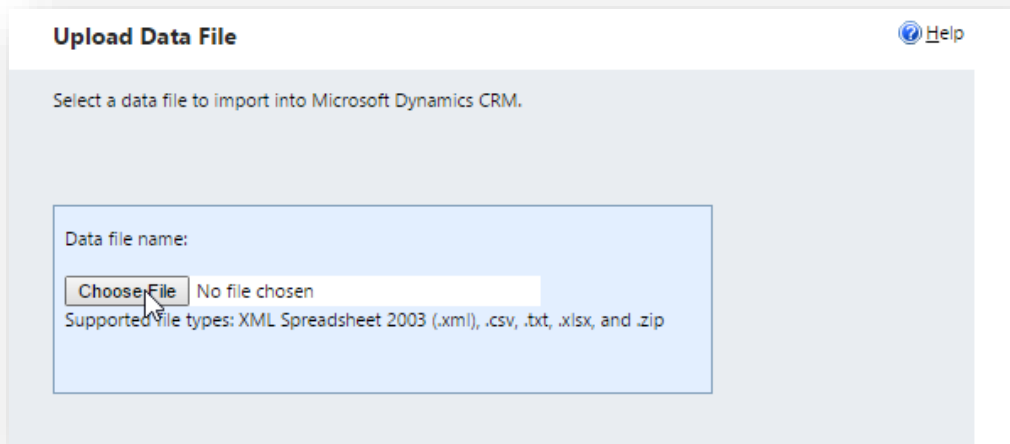
*Note: If the view / query you are looking at possesses records that cannot be fit onto a single page you will see a 4th option labeled **Static Worksheet**. Selecting this option will allow one to export all records in the view or query regardless of the number of pages. If you select **Static Worksheet (page only)** you will only export those records available on the current page*

4. Modify the data in the Excel spreadsheet as needed (except for hidden columns A to C. **Do not modify columns A – C: modifying these columns will prevent your data from being re-imported**).
5. Save and close the document.
6. In order to import the updated document into FRM select the **Import data** button indicated below:



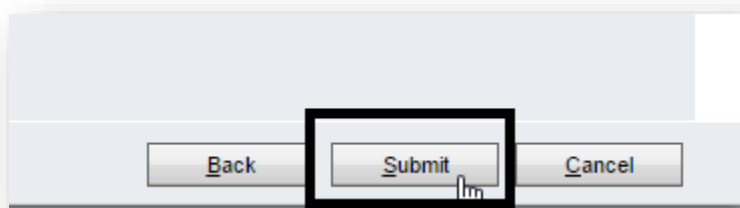
Note: If you have selected any records on the page the Import Data button will be hidden from view.

7. **Upload** the document in the pop-up window:

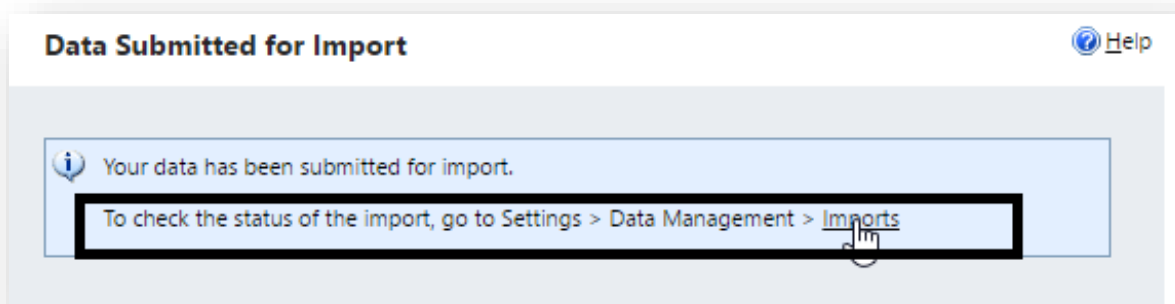




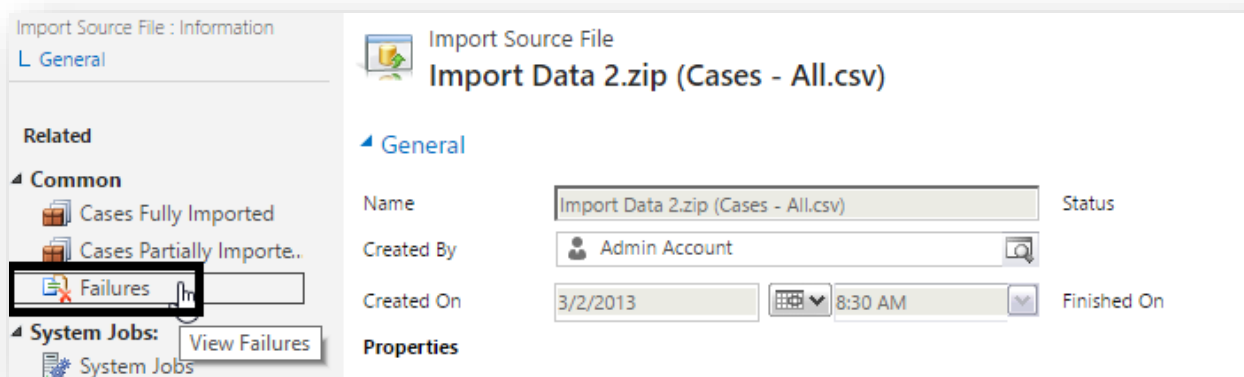
- Click **Next** then **Submit** to start the upload.



- The file won't be uploaded immediately. The upload is performed in the background. You can check the progress and the status of your import action if you follow the steps below or click on **Imports** before submitting the import:



- One can review any import failures by double clicking their import record and selecting **Failures** as indicated below. This will allow the user to see if any records were not imported/updated and why.

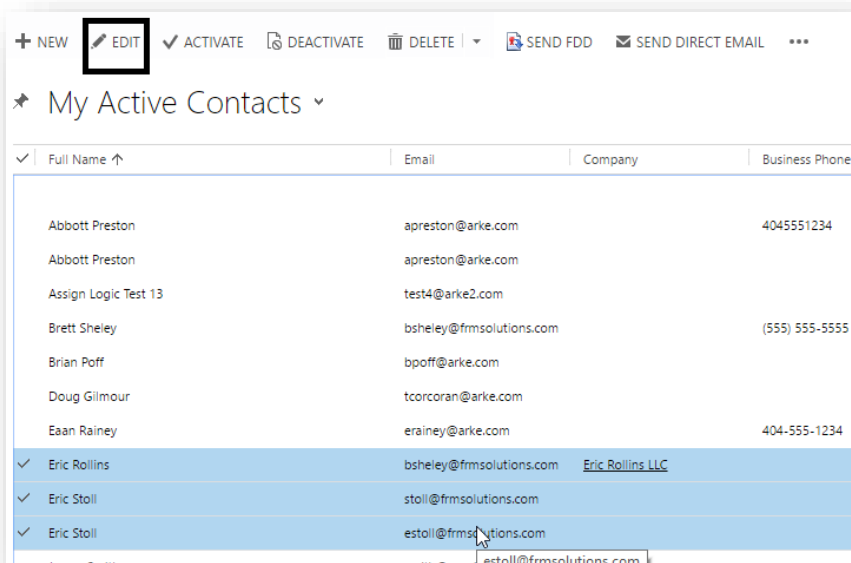




Committing Bulk Edits of Data

If you would like to execute the same change to multiple records at the same time please follow the process below.

1. Select the records you would like to update simultaneously and then click the **Edit** option. One may do this from any view OR from an **Advanced Find** query.



2. A blank form page will appear for the record. Feel free to update the fields available. **Any changes you make will be applied to every record selected.**



Change Multiple Records

Enter your changes in the fields that you want to modify.

► Header

◄ Summary

CONTACT INFORMATION

Salutation	<input type="text"/>	Job Title	<input type="text"/>
Relationship Type *	<input type="text"/>		
First Name +	<input type="text"/>		
Middle Name	<input type="text"/>		
Last Name *	<input type="text"/>		
Business Phone	<input type="text"/>	Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>	Fax	<input type="text"/>
Email *	<input type="text"/>	Preferred Method of Contact	<input type="text"/>

Notes functionality is disabled when editing multiple records.

3. Select the **Change** button at the end of the pop-up page to have the information added/updated to the selected records.

Street 1	<input type="text"/>
Street 2	<input type="text"/>
Street 3	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text"/>
ZIP/Postal Code	<input type="text"/>
Country/Region	<input type="text"/>

Change