



Account Explorer Users Guide

Microsoft Dynamics CRM 4.0

CRM Addins
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Introduction

Overview

This document details shows possibilities of Account Explorer for Microsoft Dynamics CRM 4.

Account Explorer is an integrated Add-in module that allows you to show Accounts with all related elements in one view.

- You can select fields which you want to show for Account, Contact, Opportunity, Case
- You can select only Inactive Accounts, Inactive Contacts
- You can make visible only this elements that you're the owner
- You can expand/collapse elements which have sub-elements
- Easy to use
- You can print result

Configuration

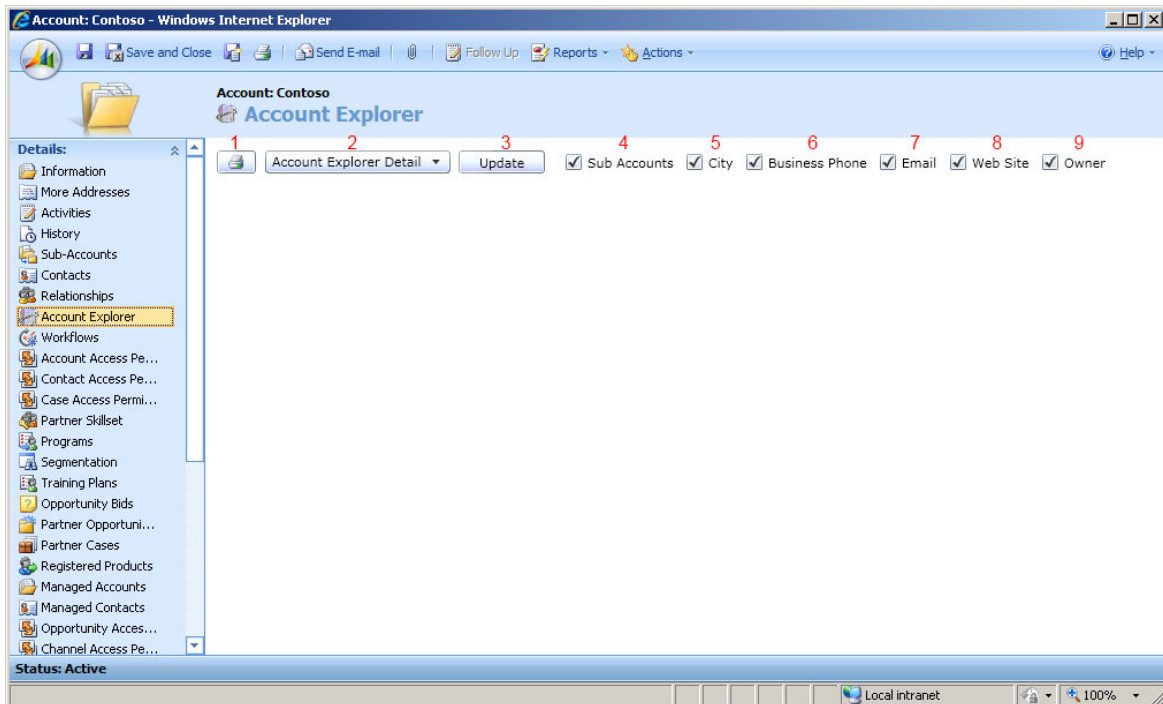
All information about installation and configuration are included in Account Explorer Installation Guide.



Using Account Explorer

Account Explorer interface is very easy to use. There are two buttons, one drop-down list and 5 to 7 options to check. There are five option views which are dependent of drop-down list:

Account Explorer Detail

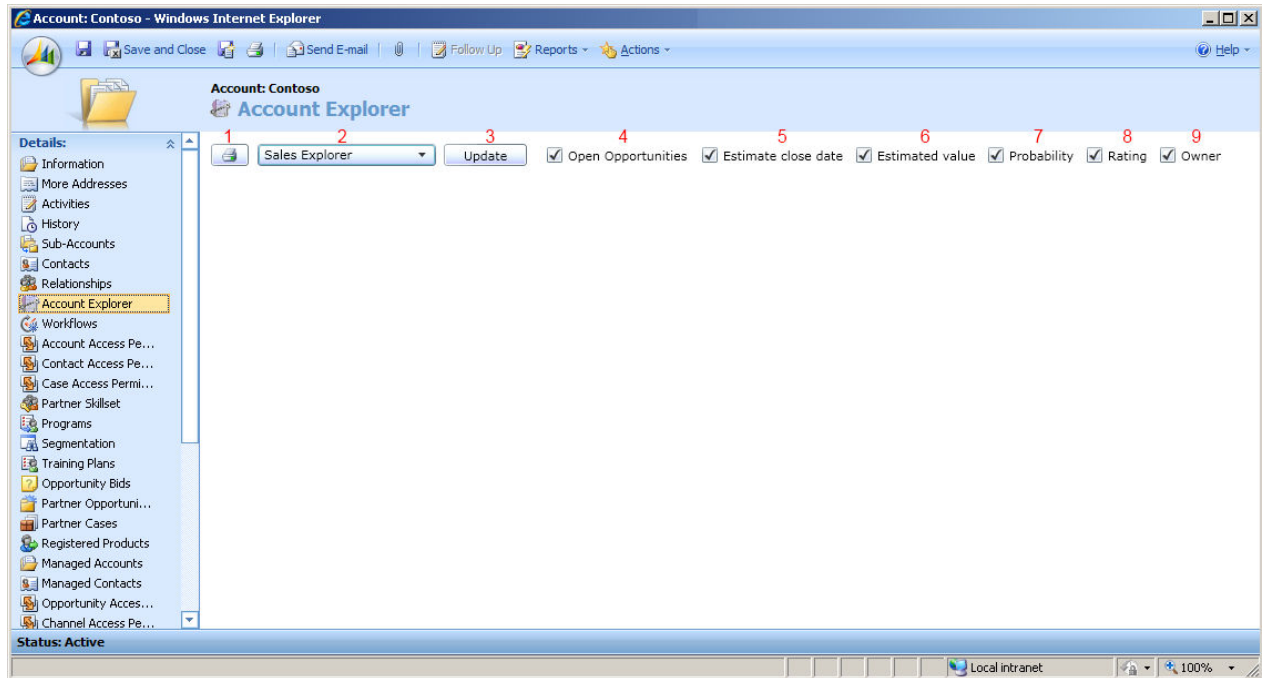


Account Explorer Detail

1. Print button – prints table content.
2. Drop-down list with option Account Explorer Detail – shows filter options for account records.
3. Update – to show table view this button needs to be clicked. All filter changes make effects after update button has been clicked.
4. Sub Accounts option – displaying sub accounts related to the current account.
5. City option – displaying city name column in table view.
6. Business Phone option – displaying business phone number column in table view.
7. Email option - displaying email column in table view.
8. Web Site option – displaying web site column in table view.
9. Owner option – displaying account record owner column in table view.



Sales Explorer

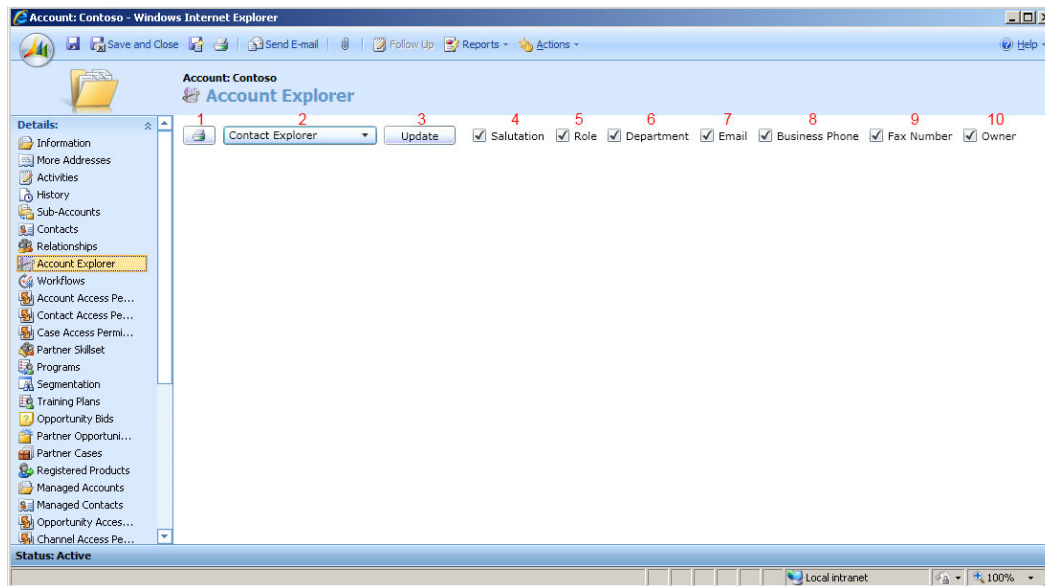


Sales Explorer

1. Print button – prints table content.
2. Drop-down list with option Sales Explorer – shows filter options for opportunity records.
3. Update – to show table view this button needs to be clicked. All filter changes make effects after update button has been clicked.
4. Open Opportunities option – displaying only opportunities which are opened.
5. Estimate close date option – displaying estimate close date column in table view.
6. Estimated value option – displaying estimate value column in table view.
7. Probability option – displaying probability column in table view.
8. Rating option – displaying rating column in table view.
9. Owner option – displaying case record owner column in table view.



Contact Explorer

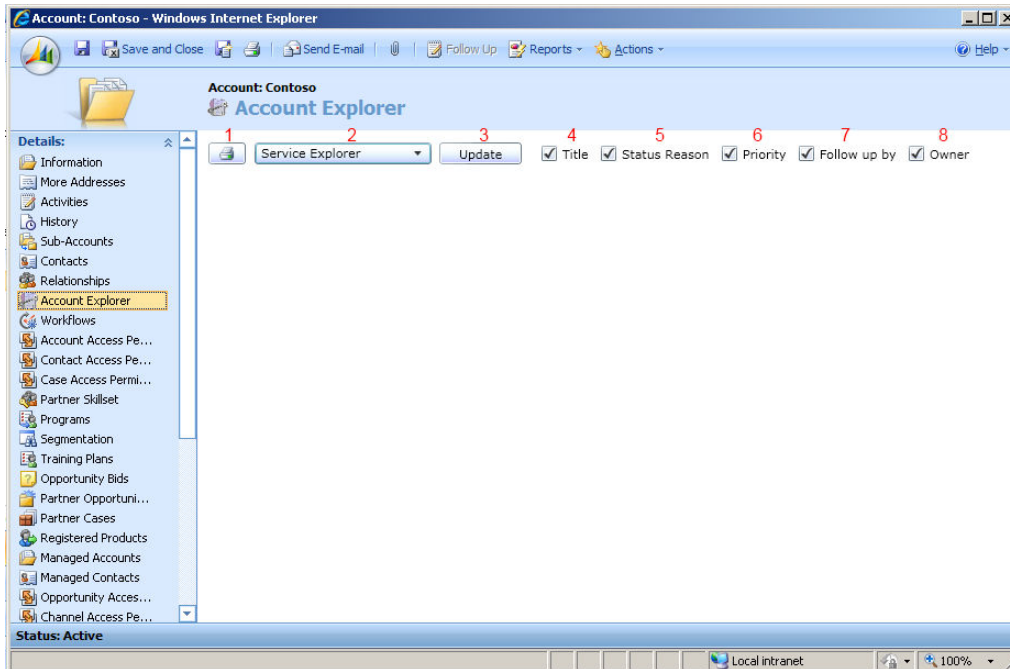


Contact Explorer

1. Print button – prints table content.
2. Drop-down list with option Contact Explorer – shows filter options for contact records.
3. Update – to show table view this button needs to be clicked. All filter changes make effects after update button has been clicked.
4. Salutation option – displaying salutation column in table view.
5. Role – displaying role column in table view.
6. Department option – displaying department column in table view.
7. Email option - displaying email column in table view.
8. Business Phone option – displaying business phone number column in table view.
9. Fax number option – displaying fax number column in table view.
10. Owner option – displaying contact record owner column in table view.



Service Explorer

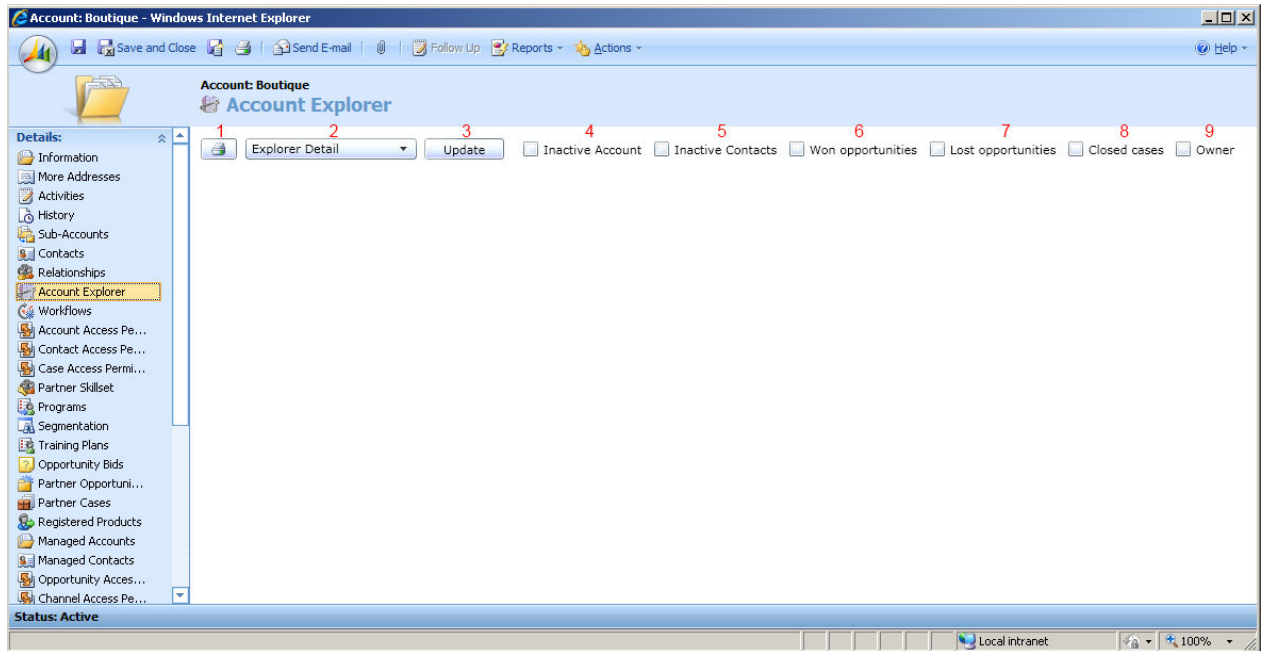


Service Explorer

1. Print button – prints table content.
2. Drop-down list with option Service Explorer – shows filter options for contact records.
3. Update – to show table view this button needs to be clicked. All filter changes make effects after update button has been clicked.
4. Title option – displaying title column in table view.
5. Status Reason option – displaying status reason column in table view.
6. Priority option – displaying priority column in table view.
7. Follow up by option - displaying follow up by date column in table view.
8. Owner option – displaying case record owner column in table view.



Explorer Detail



Explorer Detail

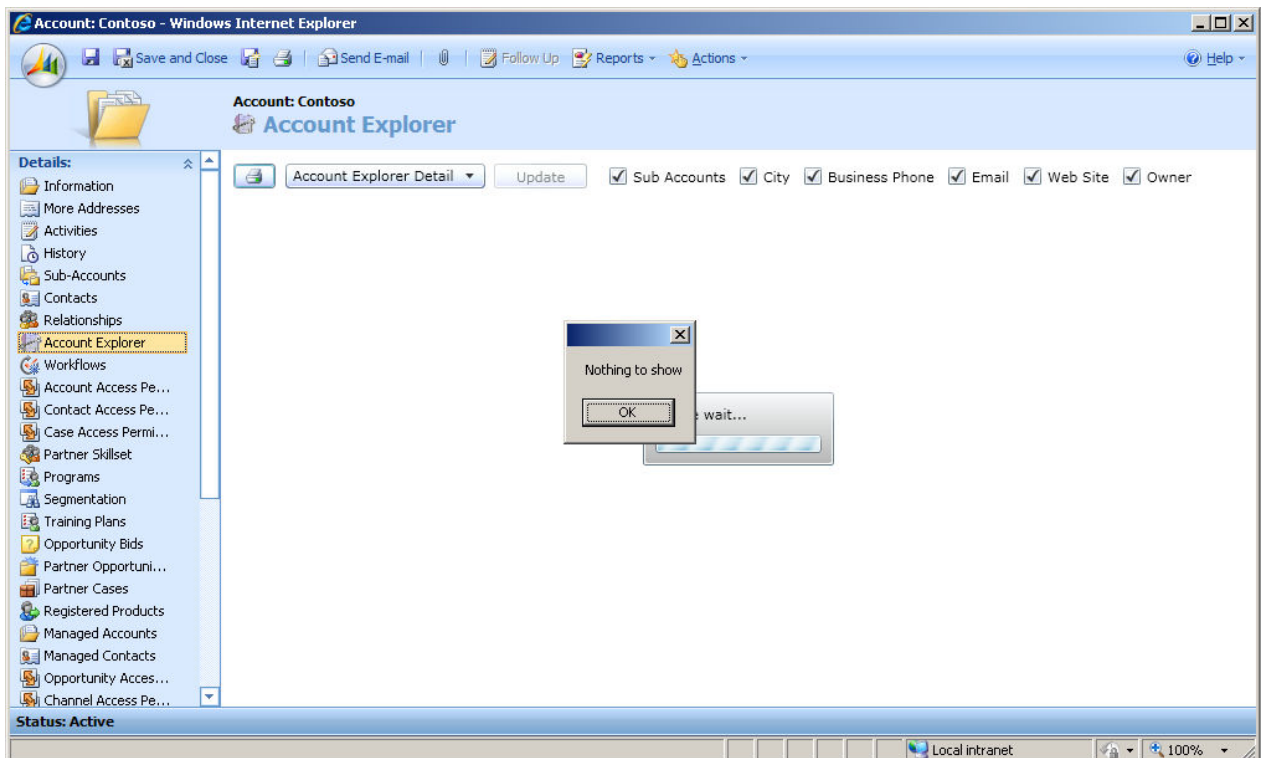
1. Print button – prints table content.
2. Drop-down list with option Service Explorer – shows filter options for contact records.
3. Update – to show table view this button needs to be clicked. All filter changes make effects after update button has been clicked.
4. Inactive Account option – displaying accounts including inactive contacts.
5. Inactive Contacts option – displaying contacts including inactive contacts.
6. Won opportunities option – displaying opportunities including won opportunities.
7. Lost opportunities option – displaying opportunities including lost opportunities.
8. Closed cases option – displaying only closed cases.
9. Owner option – displaying only records which user is an owner.



Views

A view where no results are returned.

If all selected filters are included at the same time no data may be returned since there are no records that match the multiple selections.



Nothing to show



A view where data has been found to match the selection criteria.

Next screen shows table view with results. This time you may get more records that fit on the screen so there is a vertical scroll bar on the right side of your screen.

Account Name	City	Business Phone	Email	Web Site	Owner
Boutique	Las Vegas	(800) 555-0471	info@live.com	http://www.live.com	System Administrator
Better Shop	W. Linn	(800) 555-0476	info@live.com	http://www.live.com	Mark Hassall
Katherine Gray	Decision Maker	649-555-0191	katherine18@live.bettershop.com	649-555-3789	Corporate Mark Hassall
Katherine James	Decision Maker	195-555-0129	katherine20@live.bettershop.com	195-555-4375	Corporate Mark Hassall
Katherine Ramirez	Influencer	358-555-0171	katherine19@live.bettershop.com	358-555-3281	Corporate Mark Hassall
Katherine Torres	Influencer	452-555-0116	katherine17@live.bettershop.com	452-555-3825	Corporate Mark Hassall
ORDER-7594	70	\$2,599.00		1/21/2011 12:00:00 AM	Warm Mark Hassall
ORDER-7265	50	\$2,744.00		11/27/2010 12:00:00 AM	Warm Mark Hassall
ORDER-13623	10	\$7,371.00		7/24/2010 12:00:00 AM	Warm Mark Hassall
Big-Time Store	Merritt Islan	(800) 555-0382	info@live.com	http://www.live.com	Anton Kirilov
Central Discount Store	Seattle	(800) 555-0182	info@live.com	http://www.live.com	Robert Lyon
Barbara Wisnewski	Employee	757-555-0100	barbara8@live.centraldiscountstore.com	757-555-4033	Corporate Robert Lyon
Charlene Wojcik	Influencer	459-555-0100	charlene0@live.centraldiscountstore.co	459-555-2309	Corporate Robert Lyon
Kathleen Winter	Influencer	842-555-0125	kathleen1@live.centraldiscountstore.com	842-555-3057	Corporate Robert Lyon
Mark Wistrom	Influencer	890-555-0100	mark6@live.centraldiscountstore.com	890-555-3091	Corporate Robert Lyon
ORDER-13329	80	\$8,019.00		7/25/2010 12:00:00 AM	Warm Robert Lyon
Channel Outlet	Los Angeles	(800) 555-0235	info@live.com	http://www.live.com	William Ngo
Designer Department Stores	Saugus	(800) 555-0369	info@live.com	http://www.live.com	System Administrator
ORDER-13516	30	\$7,452.00		9/14/2011 12:00:00 AM	Warm System Administrator
Distant Inc.	Bothell	(800) 555-0084	info@live.com	http://www.live.com	Anton Kirilov
John McClane	Employee	455-555-0144	john24@live.distantinc.com	455-555-3457	Corporate Anton Kirilov
Stacie Mcanich	Decision Maker	1 (11) 500 555-0179	stacie0@live.distantinc.com	1 (11) 500 555-4415	Corporate Anton Kirilov
ORDER-13335	80	\$8,505.00		6/8/2010 12:00:00 AM	Warm Anton Kirilov
Distinctive Store	Portland	(800) 555-0287	info@live.com	http://www.live.com	William Ngo
Economy Center	Clarkston	(800) 555-0408	info@live.com	http://www.live.com	Steve Masters
Tiffany Ye	Decision Maker	175-555-0153	tiffany9@live.economycenter.com	175-555-3772	Corporate Steve Masters
Tiffany Zhao	Decision Maker	1 (11) 500 555-0111	tiffany10@live.economycenter.com	1 (11) 500 555-4747	Corporate Steve Masters
Max Hernande	Decision Maker	1 (11) 500 555-0142	max4@live.economycenter.com	1 (11) 500 555-5562	Corporate Steve Masters

Data displayed



Scrolling data in a small display.

When you decrease window size all columns may not fit on the screen, you will get a horizontal scroll bar at the bottom of your screen to manipulate the view. The first column will always be static.

Account Name	Business Phone	Email	Web Site
Boutique	(800) 555-0471	info@live.com	http://www.live.com
Better Shop	(800) 555-0476	info@live.com	http://www.live.com
Katherine Gray	649-555-0191	katherine18@live.bettershop.com	649-555-3789
Katherine James	195-555-0129	katherine20@live.bettershop.com	195-555-4375
Katherine Ramirez	358-555-0171	katherine19@live.bettershop.com	358-555-3281
Katherine Torres	452-555-0116	katherine17@live.bettershop.com	452-555-3825
ORDER-7594	\$2,599.00		1/21/2011 12:00:00 AM
ORDER-7265	\$2,744.00		11/27/2010 12:00:00 AM
ORDER-13623	\$7,371.00		7/24/2010 12:00:00 AM
Big-Time Store	(800) 555-0382	info@live.com	http://www.live.com
Central Discount Store	(800) 555-0182	info@live.com	http://www.live.com
Barbara Wisniewski	757-555-0100	barbara8@live.centraldiscountstore.com	757-555-4033
Charlene Wojcik	459-555-0100	charlene0@live.centraldiscountstore.co	459-555-2309
Kathleen Winter	842-555-0125	kathleen1@live.centraldiscountstore.com	842-555-3057
Mark Wistrom	890-555-0100	mark6@live.centraldiscountstore.com	890-555-3091

Decreased window size



Changing column order.

You can change column order by dragging column header and dropping between the other columns.

Account Name	City	Business Phone	City	Email	Web Site
Boutique	Las Vegas	(800) 555-0471		info@live.com	http://www.live.c
Better Shop	W. Linn	(800) 555-0476		info@live.com	http://www.live.c
Katherine Gray	Decision Maker	649-555-0191		katherine18@live.bettershop.com	649-555-3789
Katherine James	Decision Maker	195-555-0129		katherine20@live.bettershop.com	195-555-4375
Katherine Ramirez	Influencer	358-555-0171		katherine19@live.bettershop.com	358-555-3281
Katherine Torres	Influencer	452-555-0116		katherine17@live.bettershop.com	452-555-3825
ORDER-7594	70	\$2,599.00			1/21/2011 12:00
ORDER-7265	50	\$2,744.00			11/27/2010 12:00
ORDER-13623	10	\$7,371.00			7/24/2010 12:00
Big-Time Store	Merritt Islan	(800) 555-0382		info@live.com	http://www.live.c
Central Discount Store	Seattle	(800) 555-0182		info@live.com	http://www.live.c
Barbara Wisniewski	Employee	757-555-0100		barbara8@live.centraldiscountstore.com	757-555-4033
Charlene Wojcik	Influencer	459-555-0100		charlene0@live.centraldiscountstore.co	459-555-2309
Kathleen Winter	Influencer	842-555-0125		kathleen1@live.centraldiscountstore.com	842-555-3057
Mark Wistrom	Influencer	890-555-0100		mark6@live.centraldiscountstore.com	890-555-3091

Changing column order



CRM Addins Productivity solution for Microsoft Dynamics CRM 4

Account Explorer

Account Explorer Detail | Update | Sub Accounts | City | Business Phone | Email | Web Site | Owner

Account Name	Business Phone	City	Email	Web Site
Boutique	(800) 555-0471	Las Vegas	info@live.com	http://www.live.c
Better Shop	(800) 555-0476	W. Linn	info@live.com	http://www.live.c
Katherine Gray	649-555-0191	Decision Maker	katherine18@live.bettershop.com	649-555-3789
Katherine James	195-555-0129	Decision Maker	katherine20@live.bettershop.com	195-555-4375
Katherine Ramirez	358-555-0171	Influencer	katherine19@live.bettershop.com	358-555-3281
Katherine Torres	452-555-0116	Influencer	katherine17@live.bettershop.com	452-555-3825
ORDER-7594	\$2,599.00	70		1/21/2011 12:00
ORDER-7265	\$2,744.00	50		11/27/2010 12:00
ORDER-13623	\$7,371.00	10		7/24/2010 12:00
Big-Time Store	(800) 555-0382	Merritt Islan	info@live.com	http://www.live.c
Central Discout Store	(800) 555-0182	Seattle	info@live.com	http://www.live.c
Barbara Wisnewski	757-555-0100	Employee	barbara8@live.centraldiscountstore.com	757-555-4033
Charlene Wojcik	459-555-0100	Influencer	charlene0@live.centraldiscountstore.co	459-555-2309
Kathleen Winter	842-555-0125	Influencer	kathleen1@live.centraldiscountstore.com	842-555-3057
Mark Wistrom	890-555-0100	Influencer	mark6@live.centraldiscountstore.com	890-555-3091

Status: Active

Local intranet | 100%

Changing the column order



Views within the different areas of Account Explorer.

The column headings are record related and will automatically change for the different type of records that relate to an Account record when a sub record is selected.

The display columns are listed below for each type of record that Account Explorer displays.

Column names depend on the selected record.

- **Account Record displays:-** Account Name, City, Business Phone, Email, Web Site, Owner – for Accounts and Sub-Accounts,
- **Contact Record displays:-** Full name, Role, Business Phone, Email, Fax number, Department, Owner, Salutation – for Contacts and Sub-Contacts,
- **Opportunity Record displays:-** Topic, Probability, Estimated value, Estimate close date, Rating, Owner – for opportunities,
- **Case Record displays:-** Subject, Priority, Status Reason, Title, Follow up by, Owner – for cases.
- **Activity Record displays:-** Subject, Regarding, Activity Status, Priority, Date Created, Due Date, Created By, and Owner for activities.

Account Name	City	Business Phone	Email	Web Site	Owner	
▼ Boutique	Las Vegas	(800) 555-0471	info@live.com	http://www.live.com	System Administrator	
▼ Better Shop	W. Linn	(800) 555-0476	info@live.com	http://www.live.com	Mark Hassall	
Katherine Gray	Decision Maker	649-555-0191	katherine18@live.bettershop.com	649-555-3789	Corporate	Mark Hassall
Katherine James	Decision Maker	195-555-0129	katherine20@live.bettershop.com	195-555-4375	Corporate	Mark Hassall

Column names for an Account and Sub-Account records

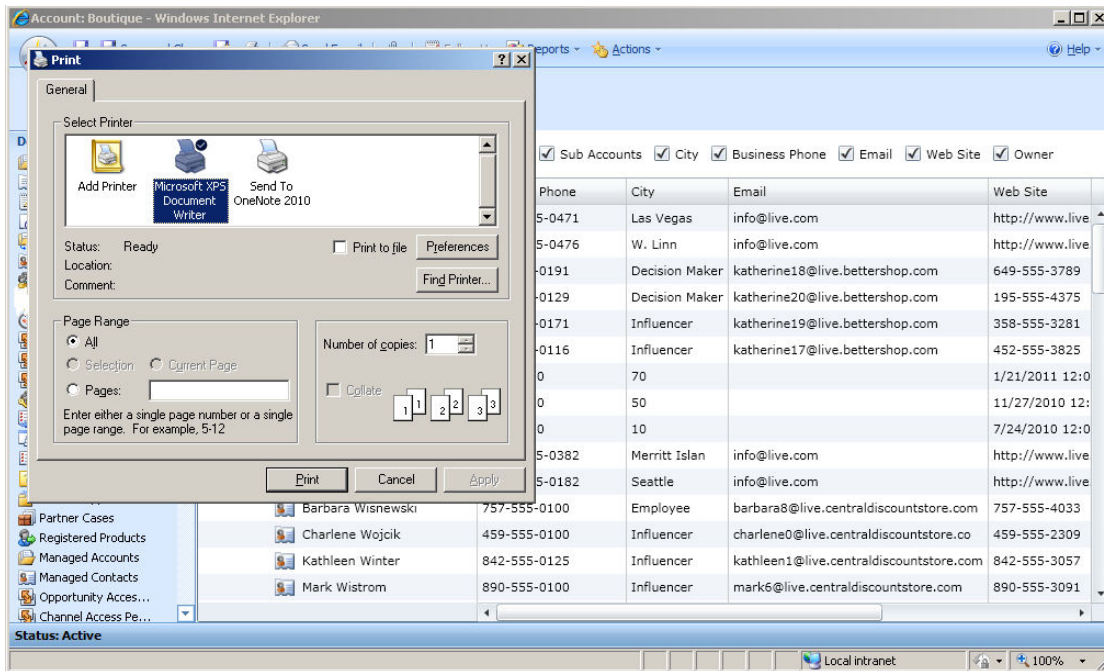
Fullname	Role	Business Phone	Email	Fax Number	Department	Owner	Salutation
▼ Boutique	Las Vegas	(800) 555-0471	info@live.com	http://www.live.com		System Administrator	
▼ Better Shop	W. Linn	(800) 555-0476	info@live.com	http://www.live.com		Mark Hassall	
Katherine Gray	Decision Maker	649-555-0191	katherine18@live.bettershop.com	649-555-3789	Corporate	Mark Hassall	
Katherine James	Decision Maker	195-555-0129	katherine20@live.bettershop.com	195-555-4375	Corporate	Mark Hassall	
Katherine Ramirez	Influencer	358-555-0171	katherine19@live.bettershop.com	358-555-3281	Corporate	Mark Hassall	

Column names for a Contact and Sub-Contact record



Printing

When you get results in table view you can simply print it by clicking the Print button. Standard select printer window will show.



Select printer window

By clicking Print you can get printout.



CRM Addins

Productivity solution for Microsoft Dynamics CRM 4

Account Name	City	Business Phone	Email	Web Site		Owner
Boutique	Las Vegas	(800) 555-0471	info@live.com	http://www.live.com		System Administrator
Better Shop	W. Linn	(800) 555-0476	info@live.com	http://www.live.com		Mark Hassall
Katherine Gray	Decision Maker	649-555-0191	katherine18@live.bettershop.com	649-555-3789	Corporate	Mark Hassall
Katherine James	Decision Maker	195-555-0129	katherine20@live.bettershop.com	195-555-4375	Corporate	Mark Hassall
Katherine Ramirez	Influencer	358-555-0171	katherine19@live.bettershop.com	358-555-3281	Corporate	Mark Hassall
Katherine Torres	Influencer	452-555-0116	katherine17@live.bettershop.com	452-555-3825	Corporate	Mark Hassall
ORDER-7594	70	\$2,599.00		1/21/2011 12:00:00 AM	Warm	Mark Hassall
ORDER-7265	50	\$2,744.00		11/27/2010 12:00:00 AM	Warm	Mark Hassall
ORDER-13623	10	\$7,371.00		7/24/2010 12:00:00 AM	Warm	Mark Hassall
Big-Time Store	Merritt Islan	(800) 555-0382	info@live.com	http://www.live.com		Anton Kirilov
Central Discount Store	Seattle	(800) 555-0182	info@live.com	http://www.live.com		Robert Lyon
Barbara Wisniewski	Employee	757-555-0100	barbara8@live.centraldiscountstore.com	757-555-4033	Corporate	Robert Lyon
Charlene Wojcik	Influencer	459-555-0100	charlene0@live.centraldiscountstore.com	459-555-2309	Corporate	Robert Lyon
Kathleen Winter	Influencer	842-555-0125	kathleen1@live.centraldiscountstore.com	842-555-3057	Corporate	Robert Lyon
Mark Wistrom	Influencer	890-555-0100	mark6@live.centraldiscountstore.com	890-555-3091	Corporate	Robert Lyon
ORDER-13329	80	\$8,019.00		7/25/2010 12:00:00 AM	Warm	Robert Lyon
Channel Outlet	Los Angeles	(800) 555-0235	info@live.com	http://www.live.com		William Ngo
Designer Department Stores	Saugus	(800) 555-0369	info@live.com	http://www.live.com		System Administrator
ORDER-13516	30	\$7,452.00		9/14/2011 12:00:00 AM	Warm	System Administrator
Distant Inc.	Bothell	(800) 555-0084	info@live.com	http://www.live.com		Anton Kirilov
John McClane	Employee	455-555-0144	john24@live.distantinc.com	455-555-3457	Corporate	Anton Kirilov
Stacie Mcanich	Decision Maker	1 (111) 500 555-0179	stacie0@live.distantinc.com	1 (111) 500 555-4415	Corporate	Anton Kirilov
ORDER-13335	80	\$8,505.00		6/8/2010 12:00:00 AM	Warm	Anton Kirilov
Distinctive Store	Portland	(800) 555-0287	info@live.com	http://www.live.com		William Ngo
Economy Center	Clarkston	(800) 555-0408	info@live.com	http://www.live.com		Steve Masters
Tiffany Ye	Decision Maker	175-555-0153	tiffany9@live.economycenter.com	175-555-3772	Corporate	Steve Masters
Tiffany Zhao	Decision Maker	1 (111) 500 555-0111	tiffany10@live.economycenter.com	1 (111) 500 555-4747	Corporate	Steve Masters
Max Hernande	Decision Maker	1 (111) 500 555-0142	max4@live.economycenter.com	1 (111) 500 555-5562	Corporate	Steve Masters
Isabella Griffin	Influencer	994-555-0112	isabella31@live.economycenter.com	994-555-2353	Corporate	Steve Masters
ORDER-7766	10	\$2,971.00		3/3/2011 12:00:00 AM	Warm	Steve Masters
ORDER-13555	30	\$7,533.00		9/2/2010 12:00:00 AM	Warm	Steve Masters
Alexandr Silva	Employee	463-555-0100	alexandre0@live.distinctivestore.com	463-555-2916	Corporate	William Ngo
Ben Smith	Decision Maker	660-555-0100	ben3@live.distinctivestore.com	660-555-3143	Corporate	William Ngo
Christop Underwood	Influencer	688-555-0100	christopher3@live.distinctivestore.com	688-555-3050	Corporate	William Ngo
Shish Shridhar	Influencer	298-555-0100	shish1@live.distinctivestore.com	298-555-3102	Corporate	William Ngo
ORDER-13446	30	\$8,181.00		8/17/2010 12:00:00 AM	Warm	William Ngo

Account Explorer printout



Licensing

Your Account Explorer will be delivered ready licensed for your CRM deployment.

If in the future you plan to upgrade your deployment please contact info@crmaddins.co.uk to obtain an updated installation file.

If you are adding an additional organisation to an enterprise deployment please contact info@crmaddins.co.uk to obtain an updated installation file.

Trial Versions.

A free trial version is available for use with the Microsoft demonstration company 'Adventure Works Cycle'. Please send an email to info@crmaddins.co.uk requesting your trial for the demonstration company and we will contact you to set up your trial.

A 30 day trial can be requested for use on your own system. Please send an email to info@crmaddins.co.uk requesting your trial and we will contact you to set up your trial.

Additional Organisations

These steps are primarily aimed at clients running multiple organisations as part of an enterprise deployment.

Installing an additional Organisation

1. Save and run the new installation file that you have been sent.
2. Continue the installation as normal.

Removing an Organisation

1. Run the installation file for the organisation that you wish to remove.
2. Select the organisation to remove in the right hand list box and move them to the left hand list box.
3. Continue the installation as normal.