Management Technology Consulting LLC

**Microsoft Dynamics CRM/XRM Platform**

Super Grid

# User Guide

Microsoft Dynamics CRM

**CRM Versions Supported:**
**CRM 2011/2013/2015/2016**

Super Grid for Microsoft Dynamics CRM from MTC is a self-installable and Configurable Managed Solution for enhancing existing standard or custom entity CRM views and Sub Grids with Excel like in-place editing and fast new record entry.

Super Grid adheres to the business logic and security of CRM while allowing advanced features of field level security, scripting and filtering to application. Super Grid is powerful flexible, fast and efficient and represents a unique and advanced CRM data user interface for solving specialized application changes.

Super Grid is intended for implementation by solution professionals.

Coding Version: 201601.032016.4.7
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Date of Document: June 9, 2016

## Copyright



## Disclaimer



## IMPORTANT TO NOTE

This User Guide was prepared with reference that Super Grid solution was run on Microsoft Dynamics CRM 2015 Online on a PC with IE10 Browser and Microsoft Windows 8 OS. Thus, all images being displayed in this User Guide reflect the Microsoft CRM 2015 environment.

However, the Super Grid functionality would remain the same in other Microsoft CRM environments (i.e., CRM 2011, CRM 2013 & CRM 2016) except that the look and feel might vary a bit.

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## Product Overview

Super Grid for Microsoft Dynamics CRM is an industrial-strength add-on for implementing intuitive custom CRM in-place record edit and entry to any View and Sub-Grid to save lots of time and clicks in any CRM Entity. Build your own unique "**My Work**" dedicated editable work areas.

**Super Grid** Works by adding a HTML graphical UI "overlay", to CRM standard or custom Views and works with all field types, all CRM Views including sub-grids standard and custom. Settings area allows easy complete grid implementation Entity Administration and Enhanced Scripting and Security above Role compliance - allows easy configuration control. **Super Grid is a joy to work with.**

Edit all data in any set without ever leaving the grid, **even down a column of records** - *as with **Excel***, to maximize data handling speed. Data accuracy improves by the ease of data correction - encouraging data error maintenance in all levels of the company, which is a big return for your investment in Super Grid.

The significant improvement in the efficiency of adding and editing records results in greater data sets being included in CRM resulting in more marketing reach, improved sales.

Super Grid adds a new layer of control of your data UI. CRM Forms and fields have scripting but the data record in the grid is not in a form, so Super Grid includes intuitive tools to script as if on the form and with added flexibility.

## User Experiences:

- ✓ Sales Administration will be delighted with the new ease of creating, and refining through in-grid editing, data sets they use in handling of quotes, orders, invoices, leads, products, and other high-volume work functions.
- ✓ The Marketing team will wonder how they ever added and manipulated all the records of data they constantly need to update without Super Grid. Building new and accurate data sets now becomes a snap!
- ✓ The Accounting staff will appreciate the familiarity now brought to the Customer Relationship Management xRM solution with the 10-key movement controls they are so used to and expect in their job.
- ✓ C-Level Managers will appreciate the enhanced user control of CRM data now afforded them as more appropriate, comfortable, and efficient for their periodic updating needs
- ✓ Easy intuitive In-place Editing
- ✓ Auto Save or On-demand Save
- ✓ View Search and Paging Enabled
- ✓ Works with All Ribbon buttons
- ✓ Works on All Dashboards and Forms

## Super Grid Settings w.r.t Users

- Sales Administration will absolutely love the ease of editing records from now on where single records to large groups of datasets need minor changes.
- The Marketing team will wonder how they ever manipulated all the columns of data they constantly need to update without Super Grid. Updating columns of data now becomes a snap!
- C-Level Manages will appreciate the enhanced user control of CRM data now afforded them as more appropriate, comfortable, and efficient for their periodic editing needs
- Sales staff and Sales Management appreciate the general improvement in their ability to more easily adjust one or more records directly from the View Listings of their choice greatly saving time.
- The CFO approves of the enhanced editing capability and productivity gains because the CRM User privilege controls continue to manage access and security of company data.

## Key Benefits

- The whole ribbon works with Super Grid Multiple new records can now be added without opening any new sub-windows or forms and edited without ever leaving the grid to substantially reduce data entry time.
- The significant improvement in the efficiency of adding and editing records results in greater data sets being included in CRM resulting in more marketing reach, and improved sales.
- The sorting of records makes the sales, marketing peoples work more easy and Data accuracy is improved thereby encouraging data error maintenance in all levels of the company which improves the company image.
- Faster lookup search, Look up Filter and Auto Save enable settings helps you to save a lot of time.
- The use of super Grid allows you to easily display or edit records that are selected in the sub grid of that record.
- Super Grid is also available on Dashboards and All Forms, with Some settings to be incorporated
- Grouping Columns of any entity in the CRM

## Client Side Caching

Client-side caching is a feature that stores frequently used information on the client's machine. It provides performance enhancements on the client side by allowing the client to quickly access a file that would have normally be accessed from a server. Client caching is especially effective when the client disconnects from the server, in that case files can still be accessed from the local cache. Client-Side caching is usually defined in the client's browser settings. Caching improves the performance and saves lot of time.

## Installation Process

To install the Super Grid for CRM 2015 the following steps has to be followed

- To install the Super Grid for Microsoft Dynamics CRM 2015 the following steps has to be followed
- Go to http://www.dynamicsexchange.com/SG.aspx click on Download to get Solution.
- Go to http://www.mtccrm.com/Products?ProductId=1000
- On Downloading you will get **SuperGridSolution.zip** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.

SuperGridSolution_201601.032016.4.7_managed.zip

Licensing_201601.032016.4.7_managed.zip

**NOTE: To install the SUPER GRID SOLUTION the above two files need to be imported into CRM**

## Installing Licensing Solution

- **Firstly you need to import Licensing Solution and then followed by Super Grid Solution only.**
- Open your CRM click on **settings→solution→import** it will open import Solution window.

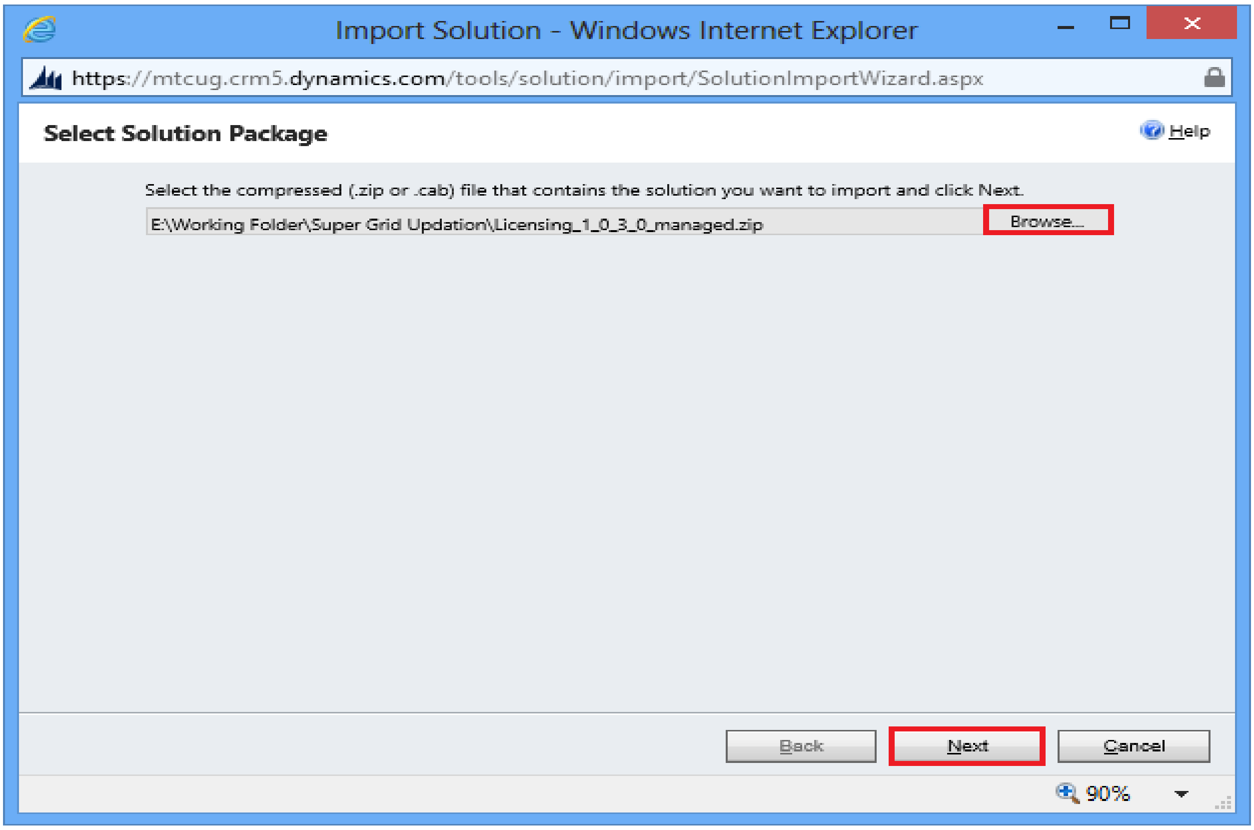



Figure 01: Select Solution Package

- To get Licensing Solution navigate through Browse button from the downloads and click 

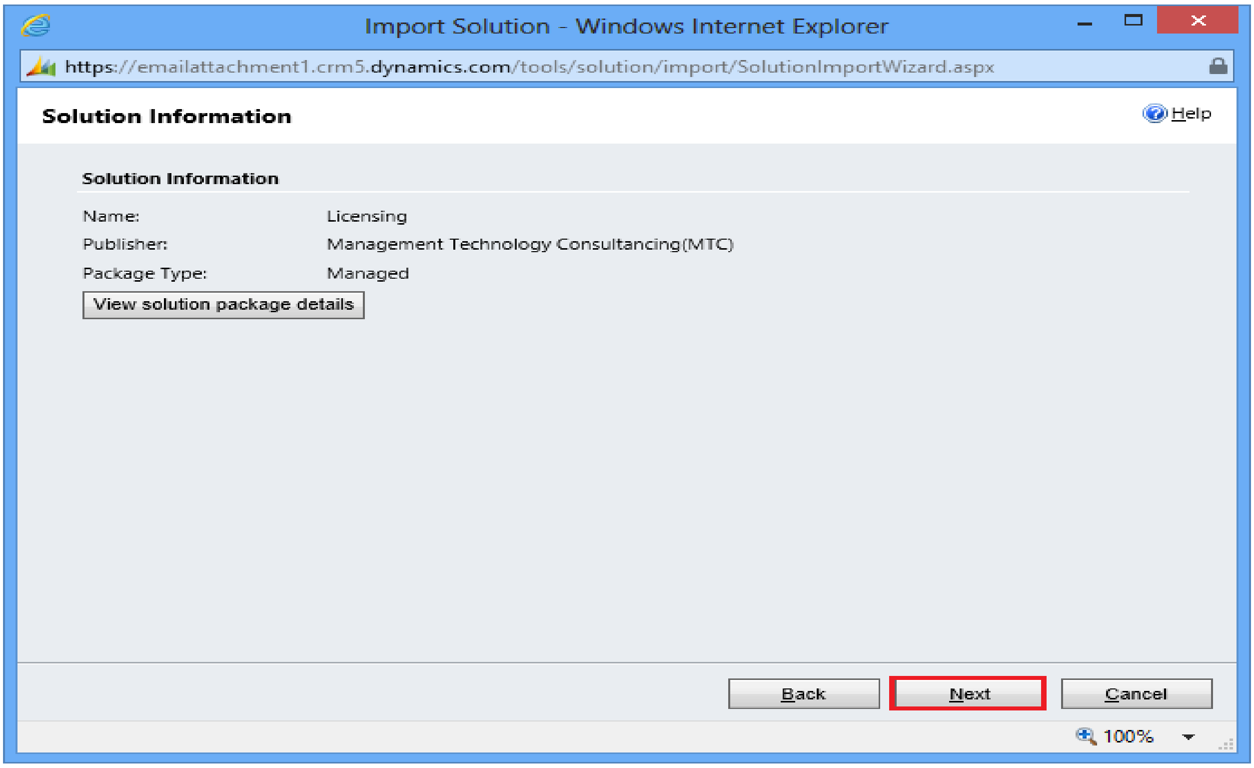



Figure 02: Solution Information

- Click Next and also Activate the Check box for Post Import Actions

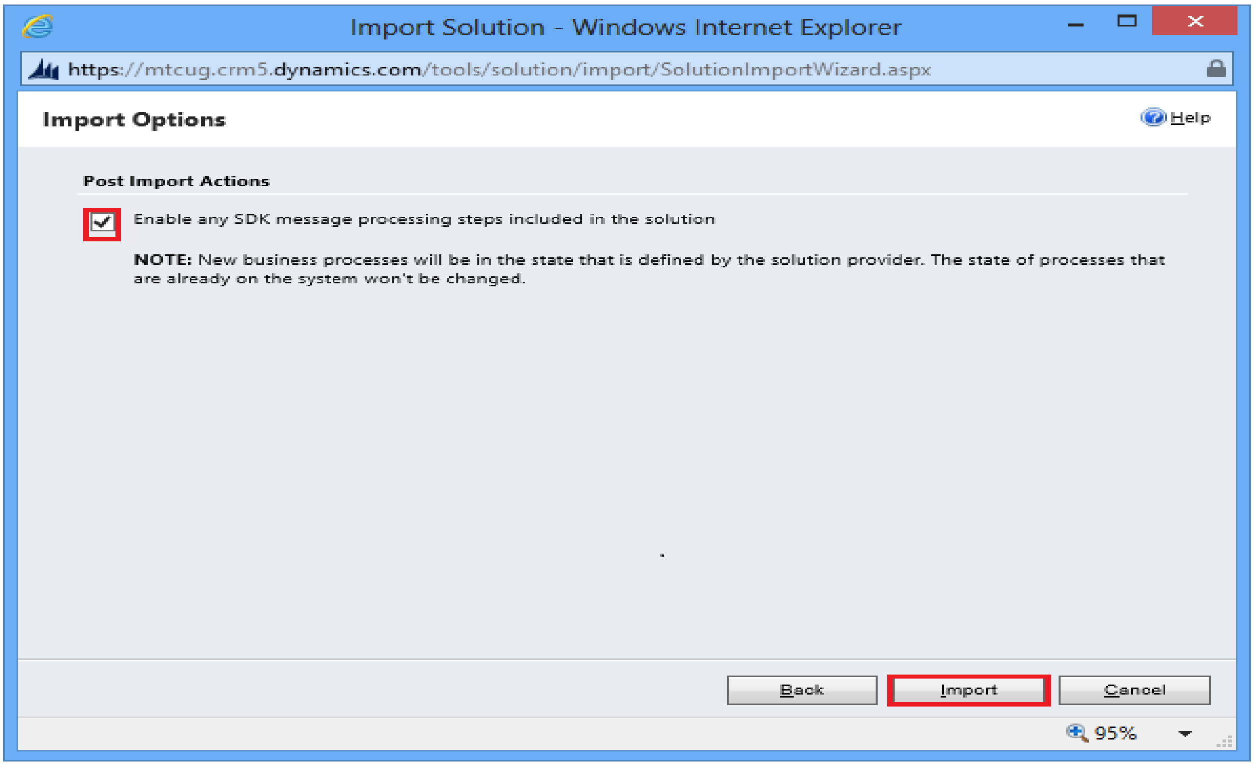



Figure 03: Import Options

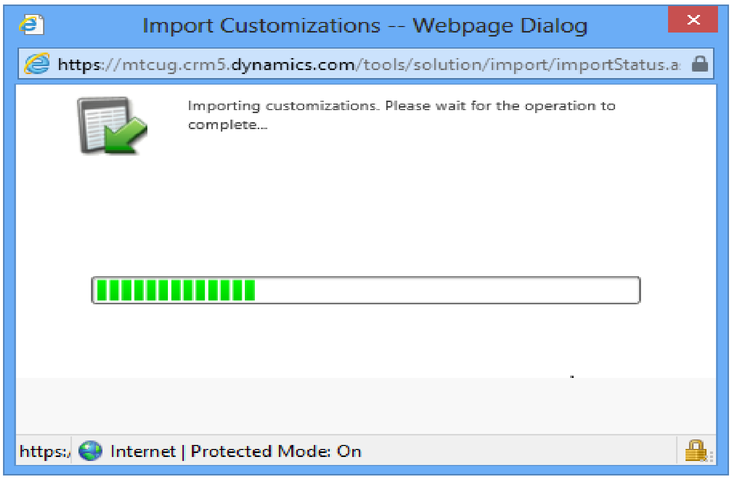



Figure 04: Importing customizations

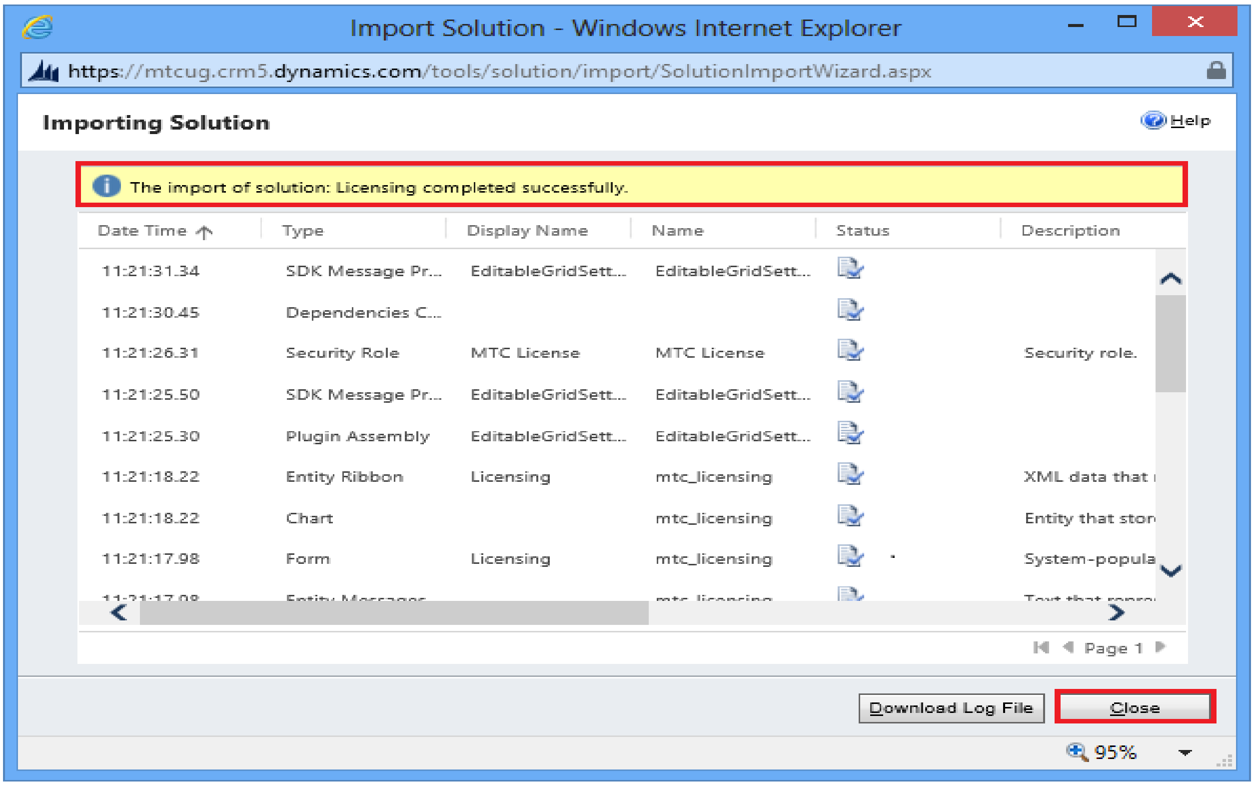



Figure 05: Importing Solution successfully

- On completion of Licensing you can see the solution in CRM

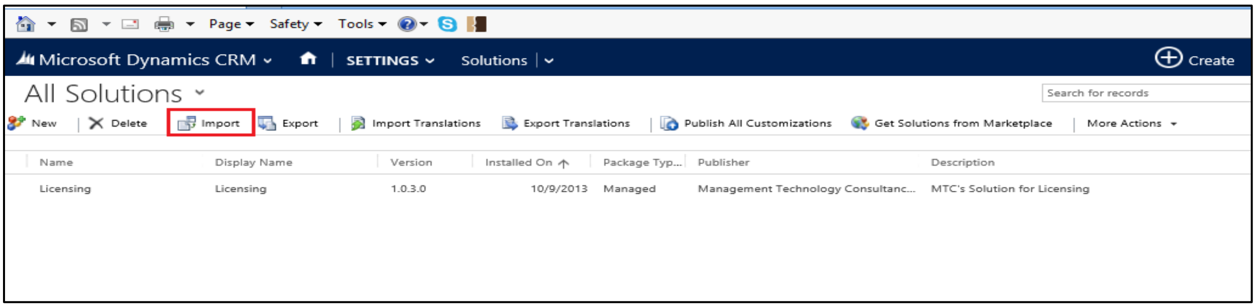



Figure 06: Import Solution

## Installing Super Grid Solution

- Now after importing the Licensing solution, install the Super grid Solution also.

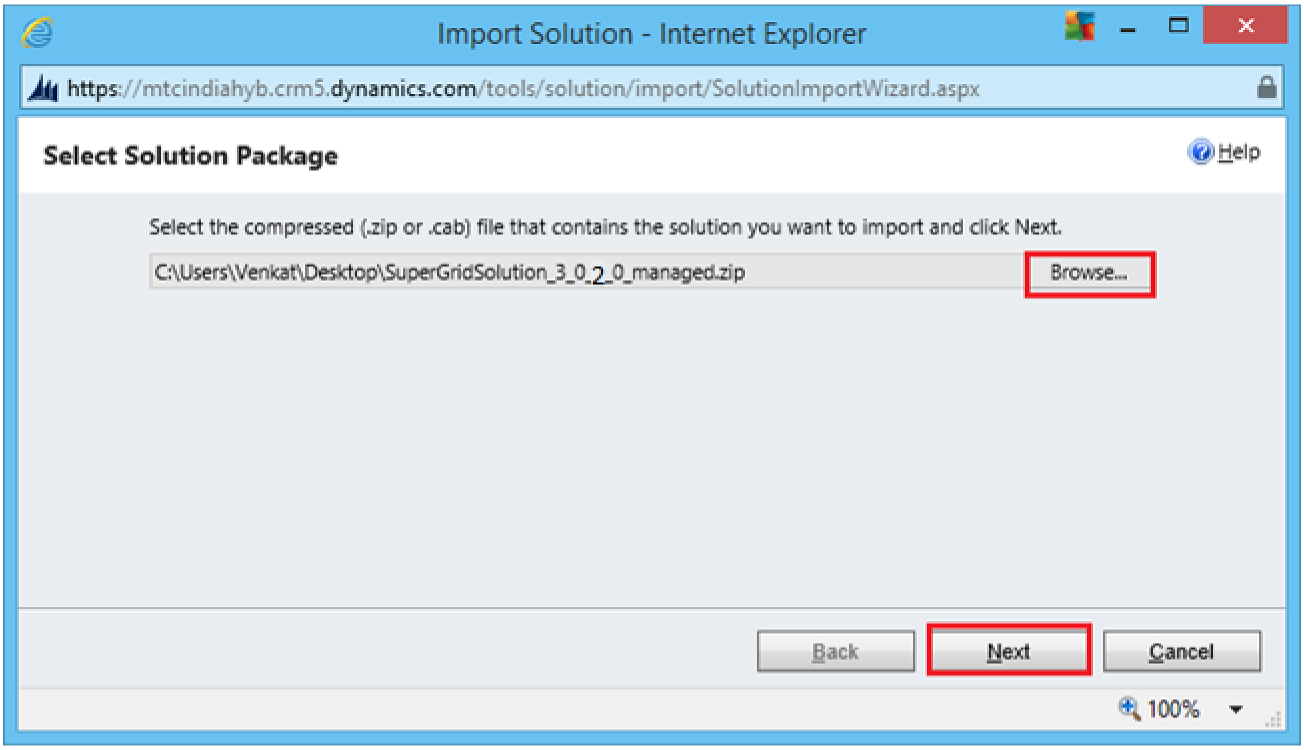



Figure 07: Select Solution Package

- Solution information window will open. It gives the solution package details and general information. Click on Next to continue.

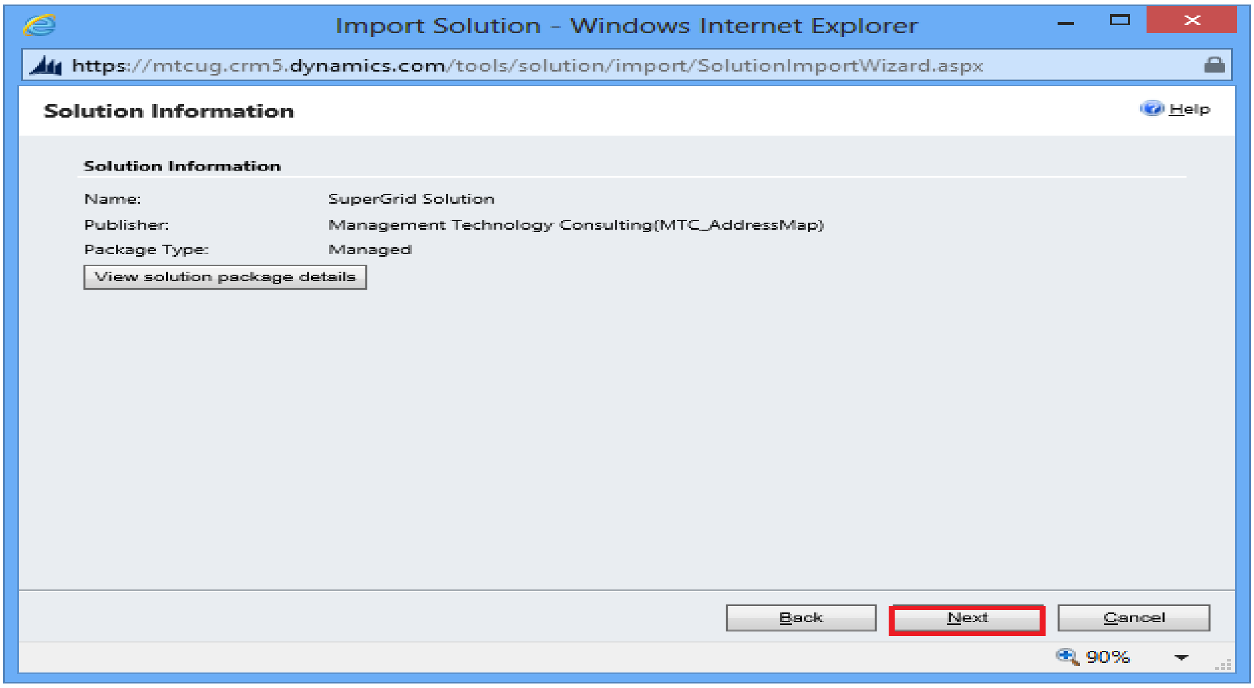



Figure 08: Solution Information

- Click on Next it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

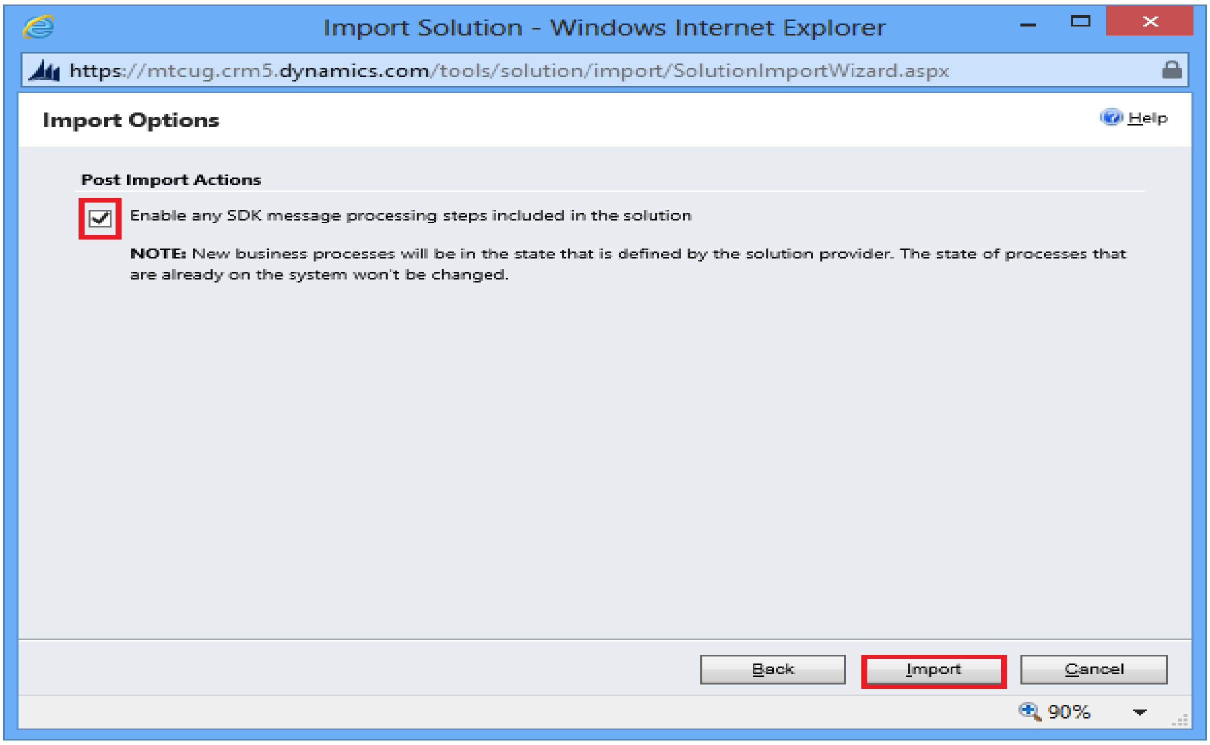



Figure 09: Import Option

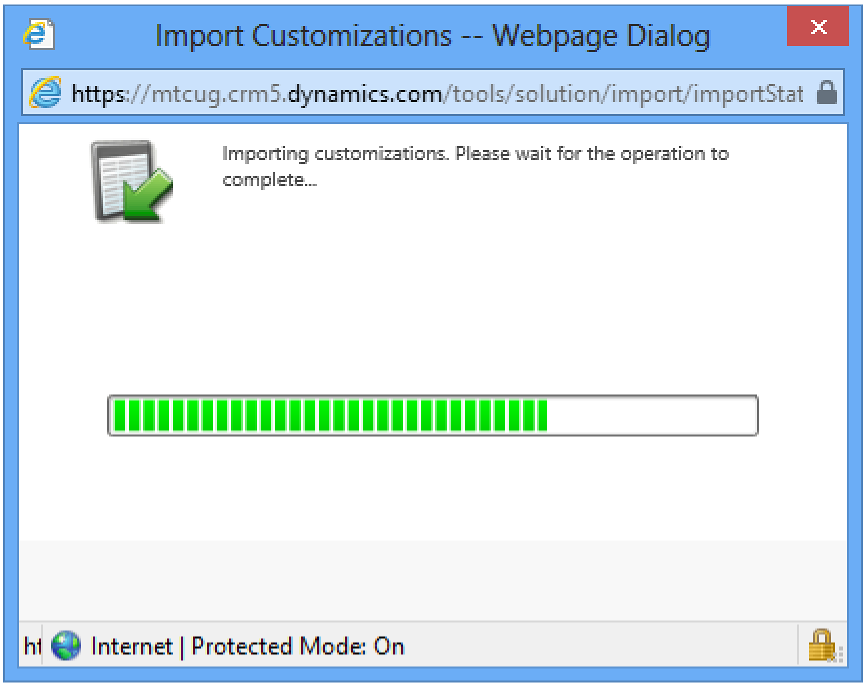



Figure 10: Importing customization

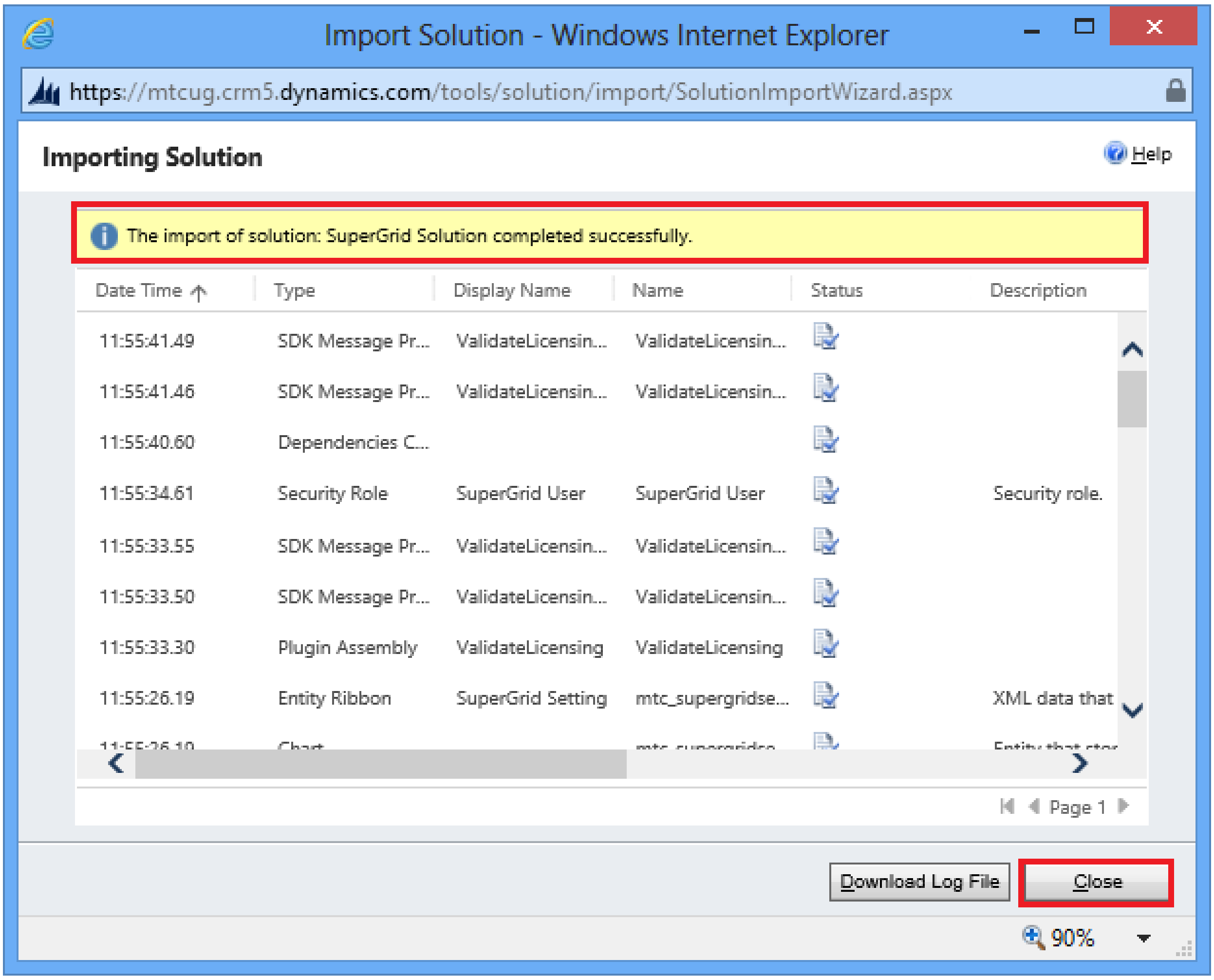


Figure 11: Import Solution Successfully

- Click on Close and refresh the CRM
- After importing the Super Grid Solution you need to place the License key navigate to **settings→solution→**Click on **SuperGridSolution**

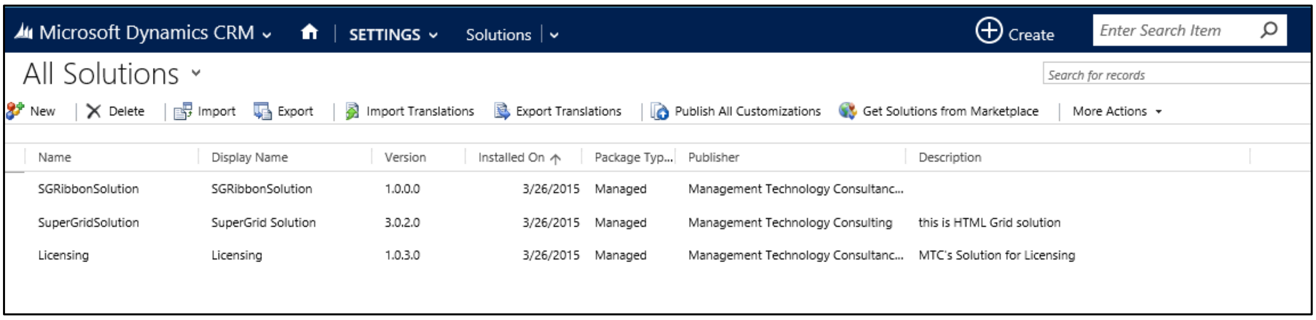


Figure 12: CRM showing both the Solutions

## License Key

- To install Super Grid you will require License key, which you can get by sending an email Request to salesteam@mtccrm.com with your Organization Unique name.
- To access your Organization Unique name click on **settings→Customizations→Developer Resources** as shown below figure

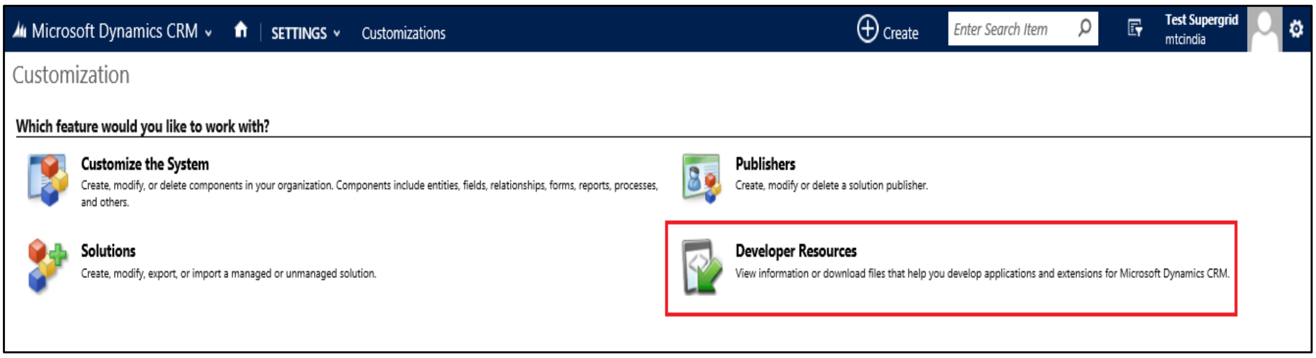



Figure 13: Developer Resources

- A window will pop up with **Organization Unique Name** as shown

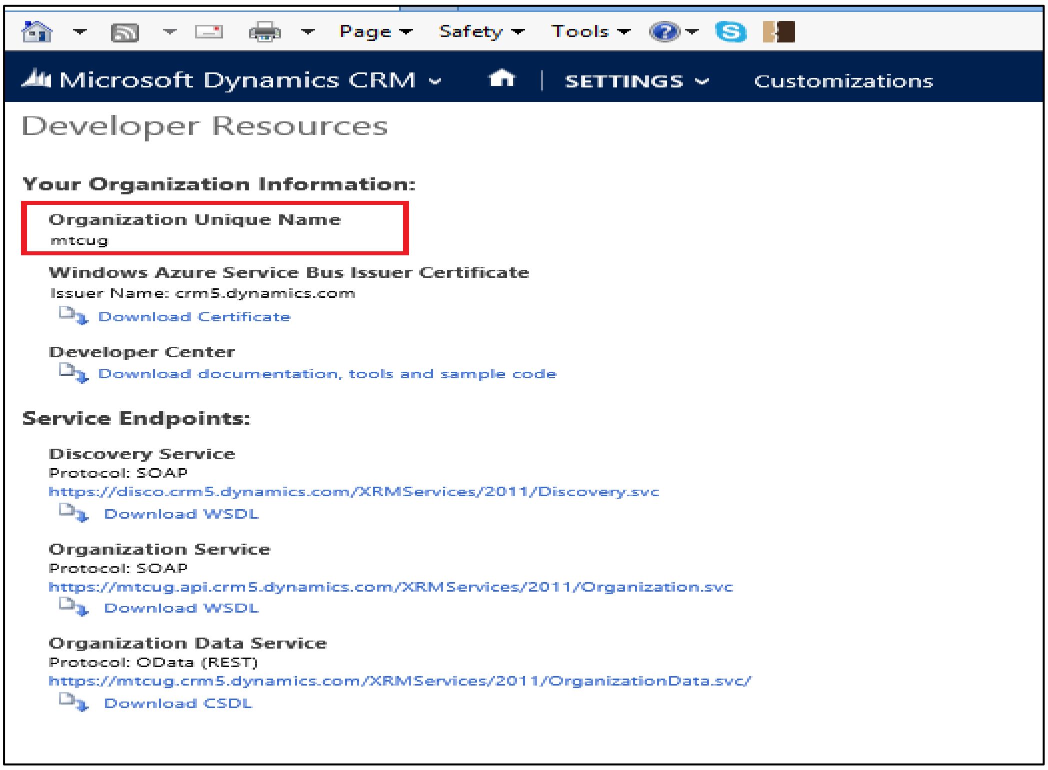



Figure 14: Organization Unique Name

**NOTE: After placing the request you will receive the LICENSE KEY within 24**

## How to Place License Key?

- Select the product as **Super Grid** double click on it to open a window
- Click on Licensing  as shown below

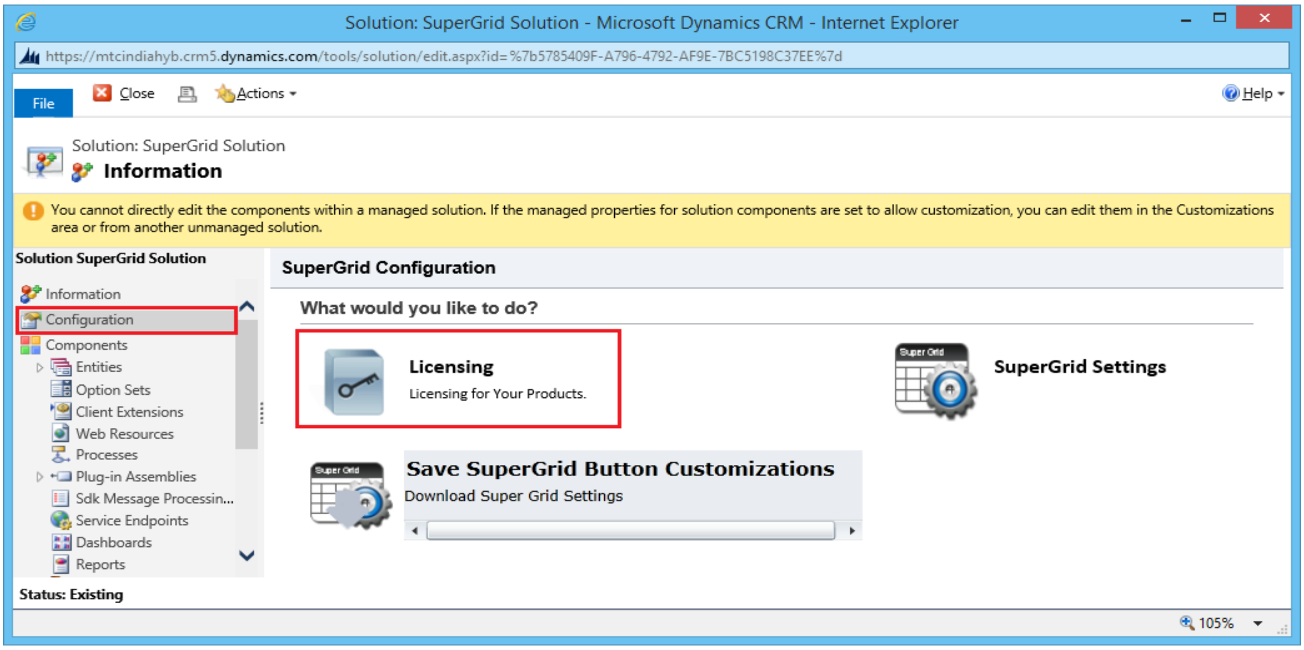



Figure 15: Super Grid Configuration

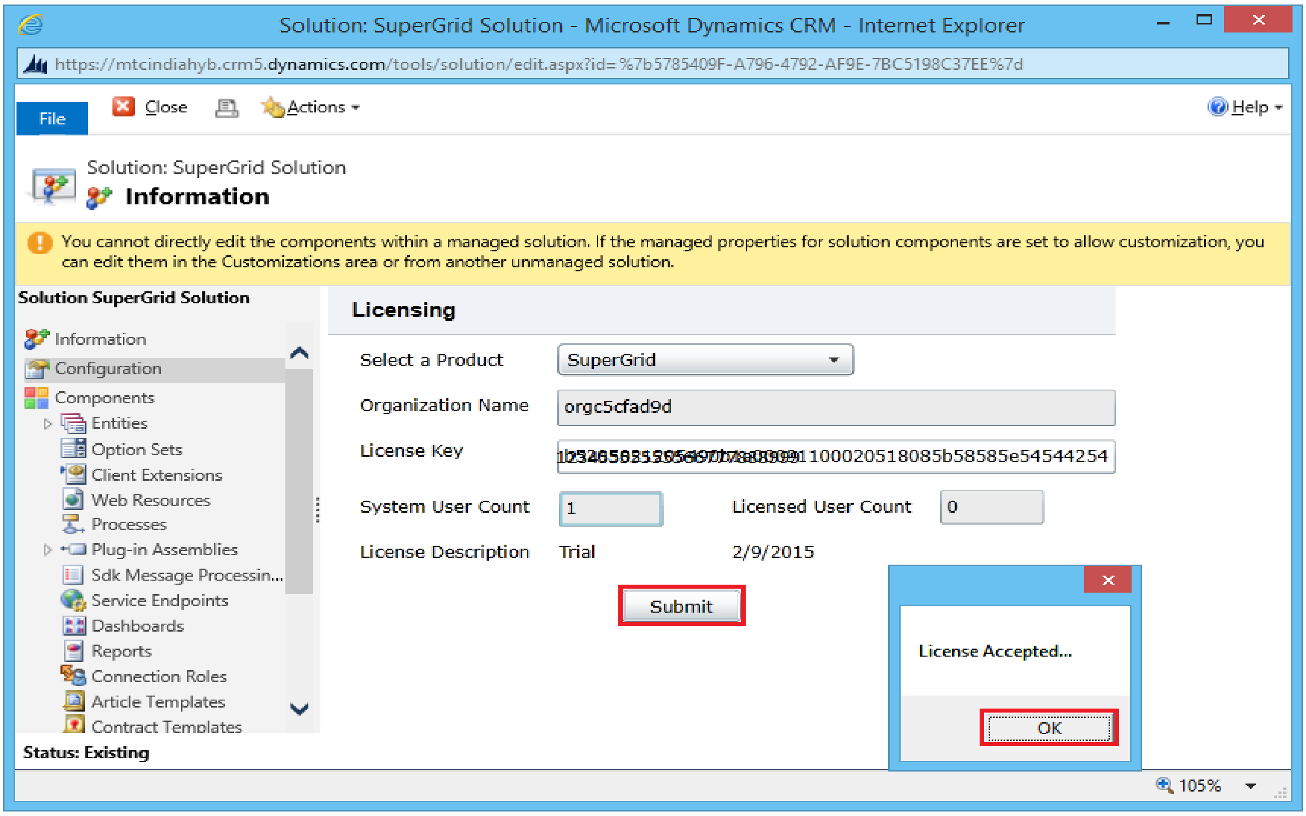



Figure 16: Licensing - License Key submission

- Select  Product  as **Super Grid** from the pickup list

- Copy & Paste the License key which you have received against License Key column
- Click on Submit
- A pop up window appears and displays the message as **License Accepted**. Click on **OK**.

## Trouble shooting with License key

If the Existing user or new user does not have a security privileges and performing some operations then a message will be displayed as "License key required". Click on ok.

- Assign security roles to the user then only the user can perform operations.

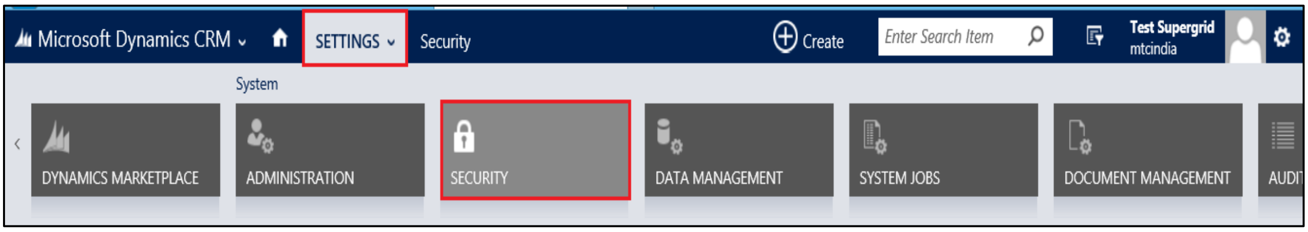
## Security Role Privileges

Security Roles are a standard function of Microsoft Dynamics CRM and Super Grid is compliant to the privileges controlled by Security Roles. Your User's access privileges to add or "Create" records and modify or "Write" records from Super Grid can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help".

A security role defines how different types of records can be accessed by one category of users, such as all salespeople. To control access to data, you can modify existing security roles, create new security roles, or change which security roles are assigned to each user. Each user can have multiple security roles.

Security role privileges (A user's rights to perform specific actions on specific record types or to perform tasks. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update Account and Publish Customizations.) Are cumulative: when a user has more than one security role, the user will have any privilege allowed in any of the assigned security roles.

- You can set your own guidelines for Security Roles privileges, Navigate to **Settings → Security →Users** as shown below



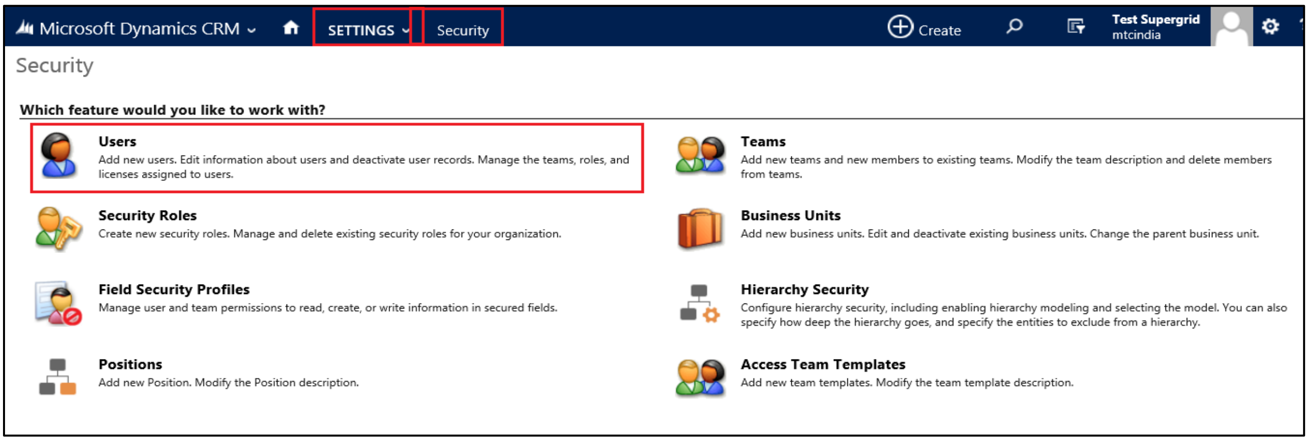



Figure 17: Security Window

- It opens a new window with a list of **Enabled User** as shown in Figure.
- Select the check box of user name to make a modification, which opens a new window, click on **Manage Roles** in the ribbon as shown

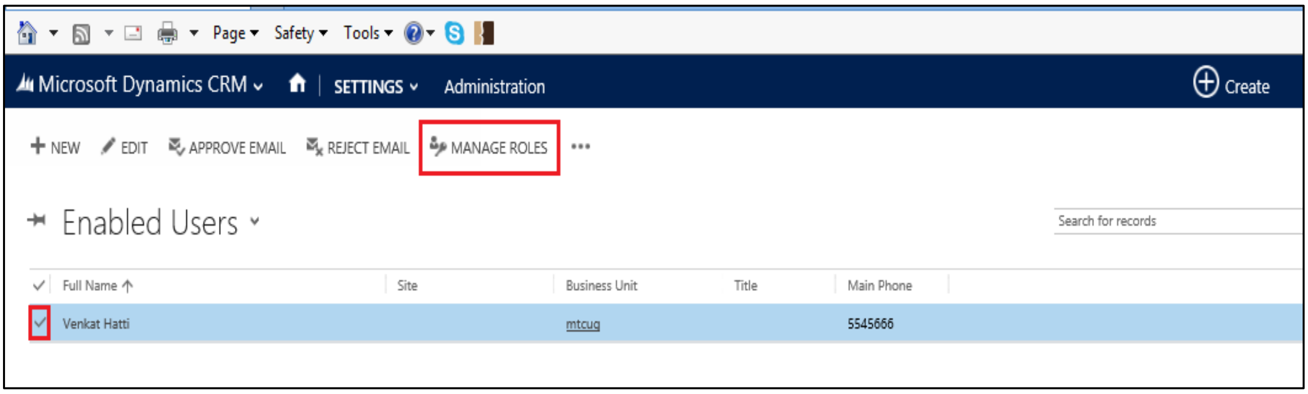



Figure 18: List of Enable Users

- A new window will open as shown.
- Select the role as "**Super Grid User**" and "**MTC License**" and click on **Ok** to assign the role to the user.

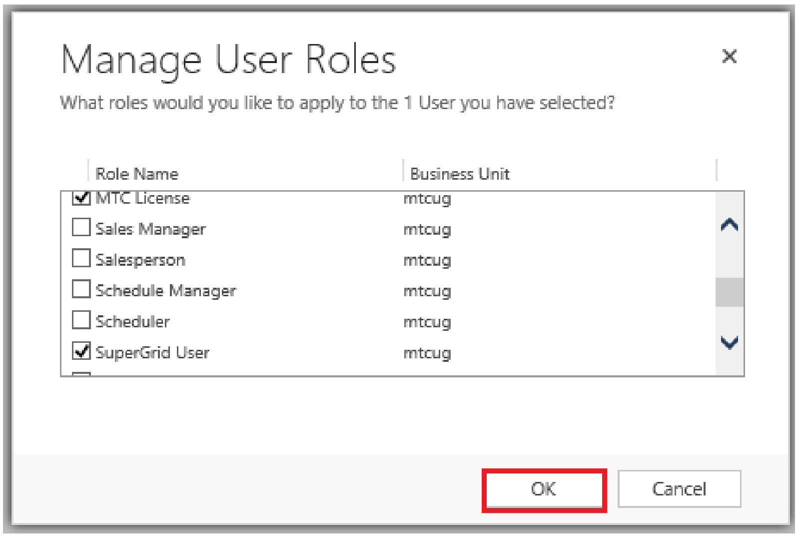



Figure 19: Manage User Roles

## Super Grid Configuration

To access the Super Grid from your CRM you have to add "**Super Grid Button**" to the Entities.

- To navigate to the Super Grid Settings **go to settings** of CRM→**Solution**→**Super Grid Solution**→ it will navigate to the Super Grid Configuration area as shown and click on **Super Grid Settings**.

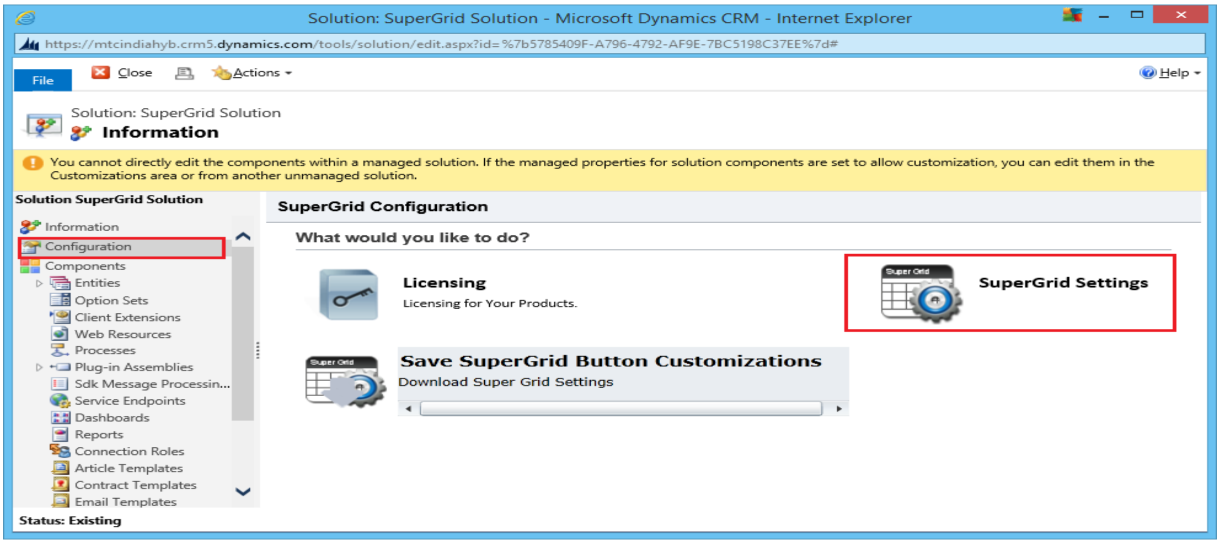



Figure 20: Super Grid Configuration area

## Super Grid Settings

- Click on "**NEW**" tab as shown below

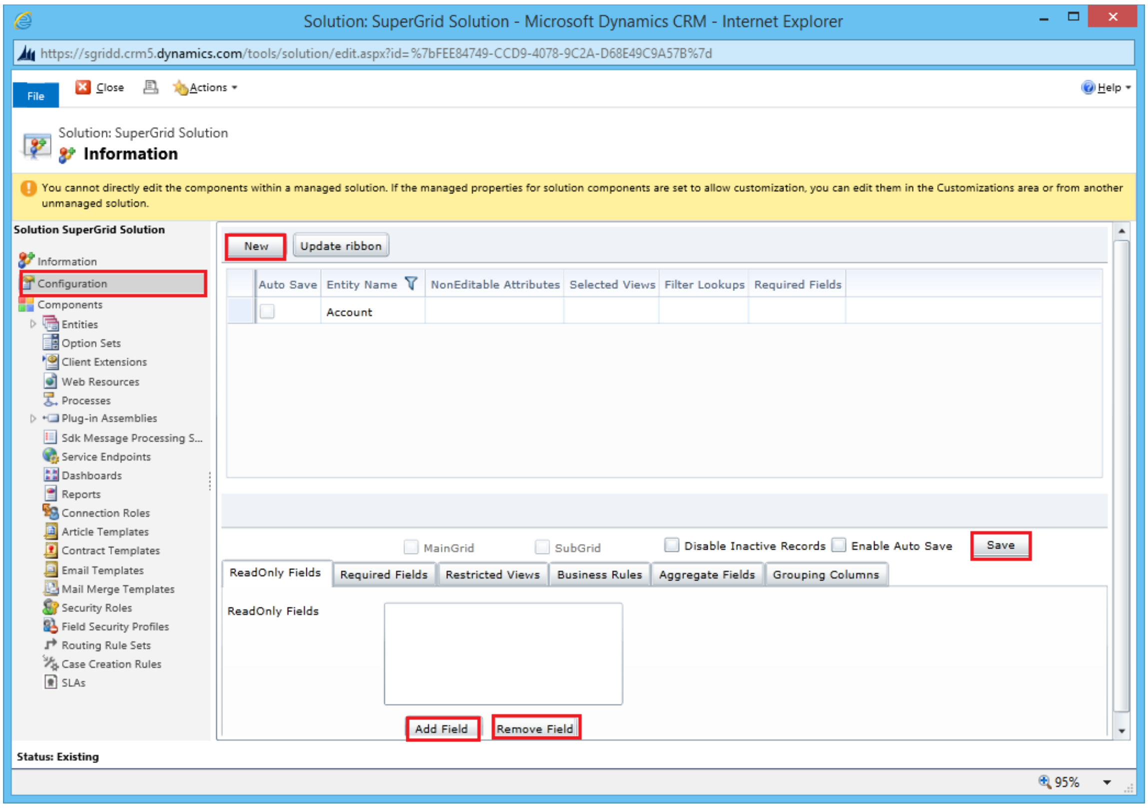



Figure 21: To Create New Entity

- It takes you to the following screen

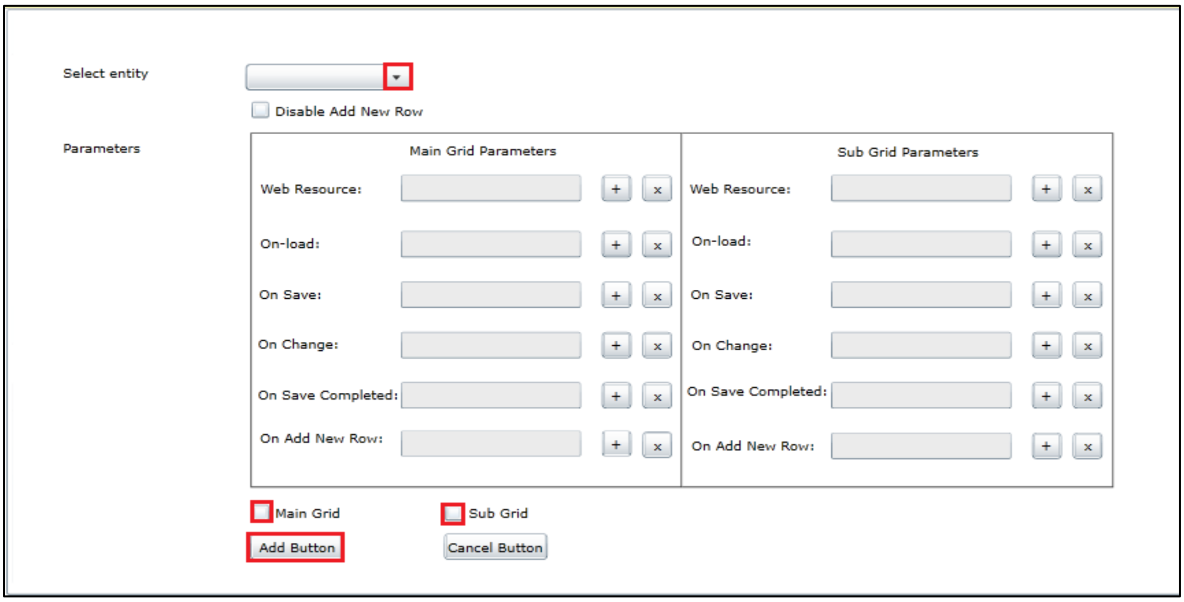



Figure 22: Select the Entity for Main Grid or Sub Grid

- Select Entity from the popup list as shown below

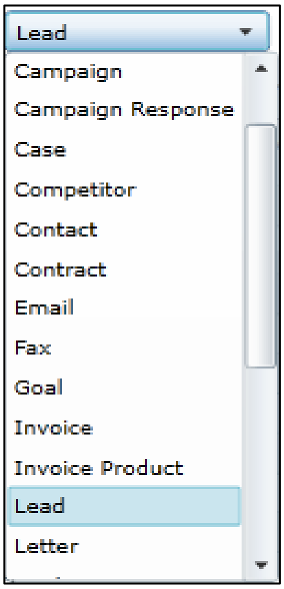
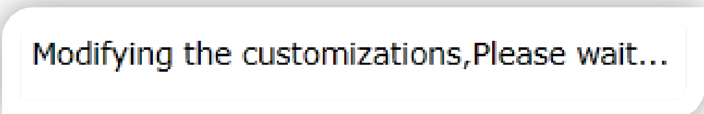



Figure 23: Pop up window of Entities

- Select and check the box against **Main Grid** or **Sub Grid**, You can check both also
- Click on “**Add Button**” tab to install the Super Grid either on Main Grid or Sub Grid.
- Message is displayed as



## One time Super Grid Settings

Using Super Grid Settings you can quickly modify your settings as per your requirement.
To navigate to the Super Grid Settings **go to settings** of CRM→**Solution→Super Grid Solution→**

- Click on the Super Grid Settings you should see a new pop screen something like below

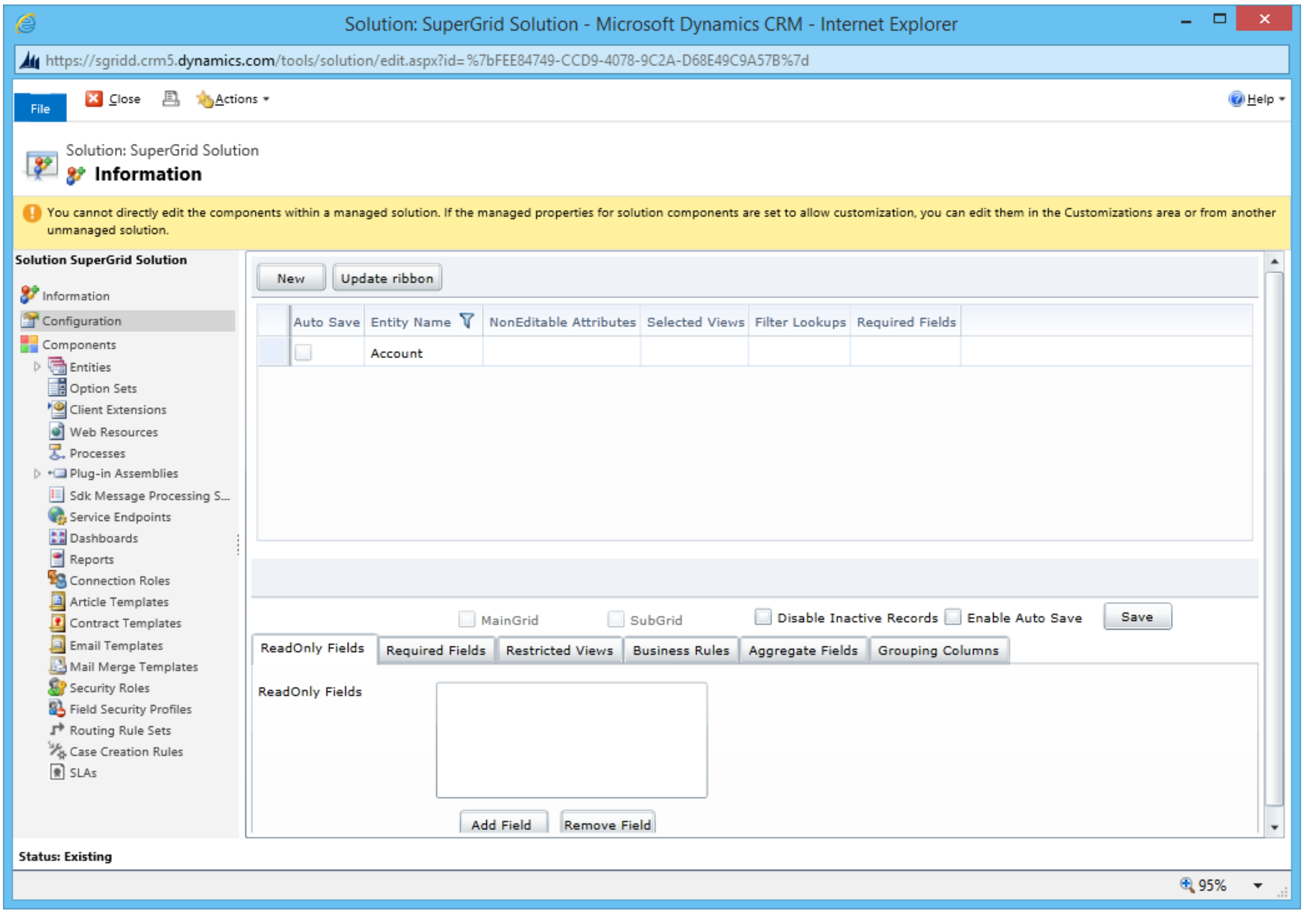



Figure 24: Super Grid Settings area

## AutoSave

To avoid the redundancy of clicking the save tab in manual saving mode, generally it is preferred to enable the Auto Save function, which in turn helps you to automatically save the data whenever it is edited on the grid, helping to reduce the risk or impact of data loss in case of a crash or freeze.

**To Add AutoSave Option**

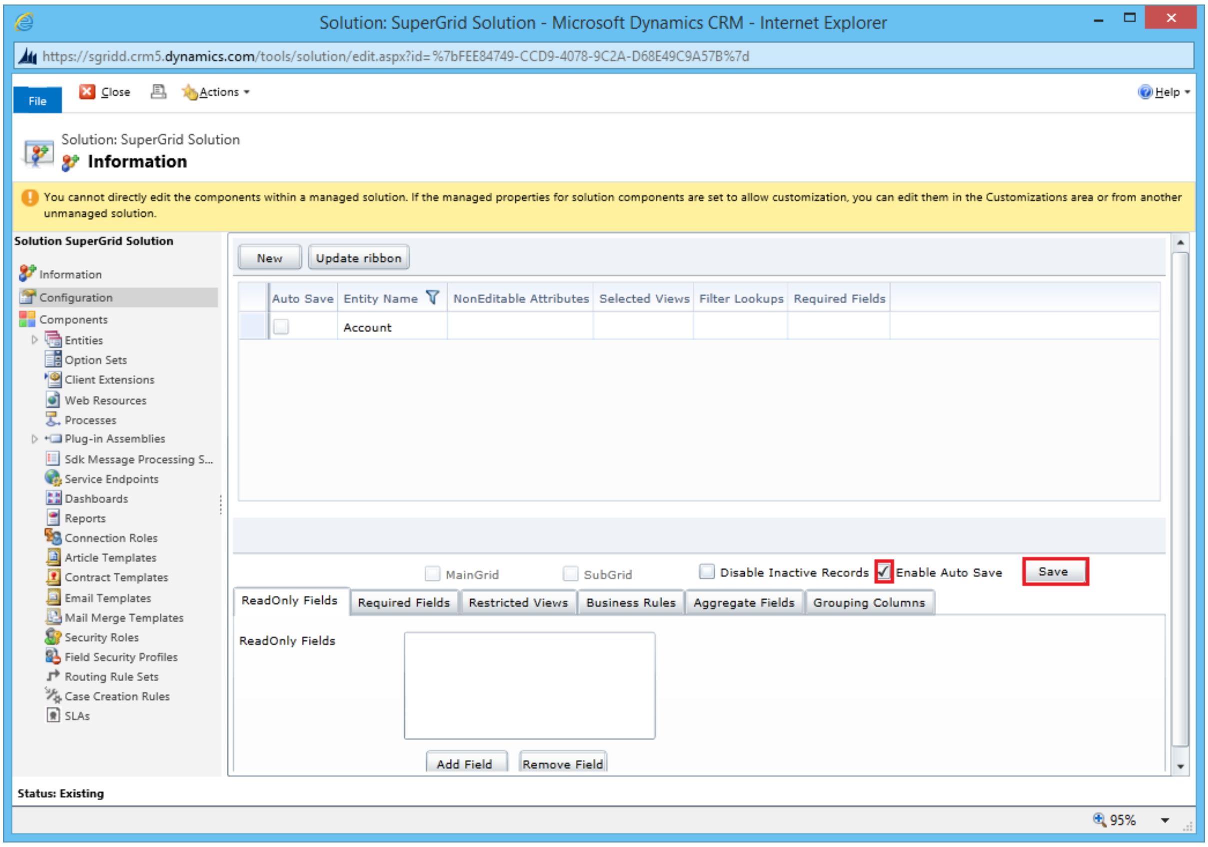



Figure 25: Auto Save of option

- Select or Click on required 'Entity' as shown above
- Click or Check the box next to Enable Auto Save
- Finally click on "SAVE"
- Once Saved the user's will have the Auto Save option permanently for the required Entity
- A popup window will say "Save Completed"

Note: Auto Save will not work for new records

**To Delete AutoSave Option**

- Select or Click on required '**Entity'** as shown above
- Click or Uncheck the box next to Enable Auto Save
- Finally click on "**SAVE**"

## Super Grid Settings on other Fields

The Second half of the screen or the bottom of the screen which is shown, have the following options like

- **Read-only fields**
- **Required Fields**
- **Restricted Views**
- **Business Rules**
- **Aggregate Fields**

### Read-Only Fields

Non Editable Attribute functionality will block the attributes from modifications. It will set the attributes to read only. Helps to protect from manipulation of data.

- To set an attribute to the Non Editable mode
- Go to settings of Super Grid Click on **New → Select the Entity from the list box of the entity field (Ex: Account) Click on Add Button a dialog window will open with selected entity( Account Attributes)** attributes as shown

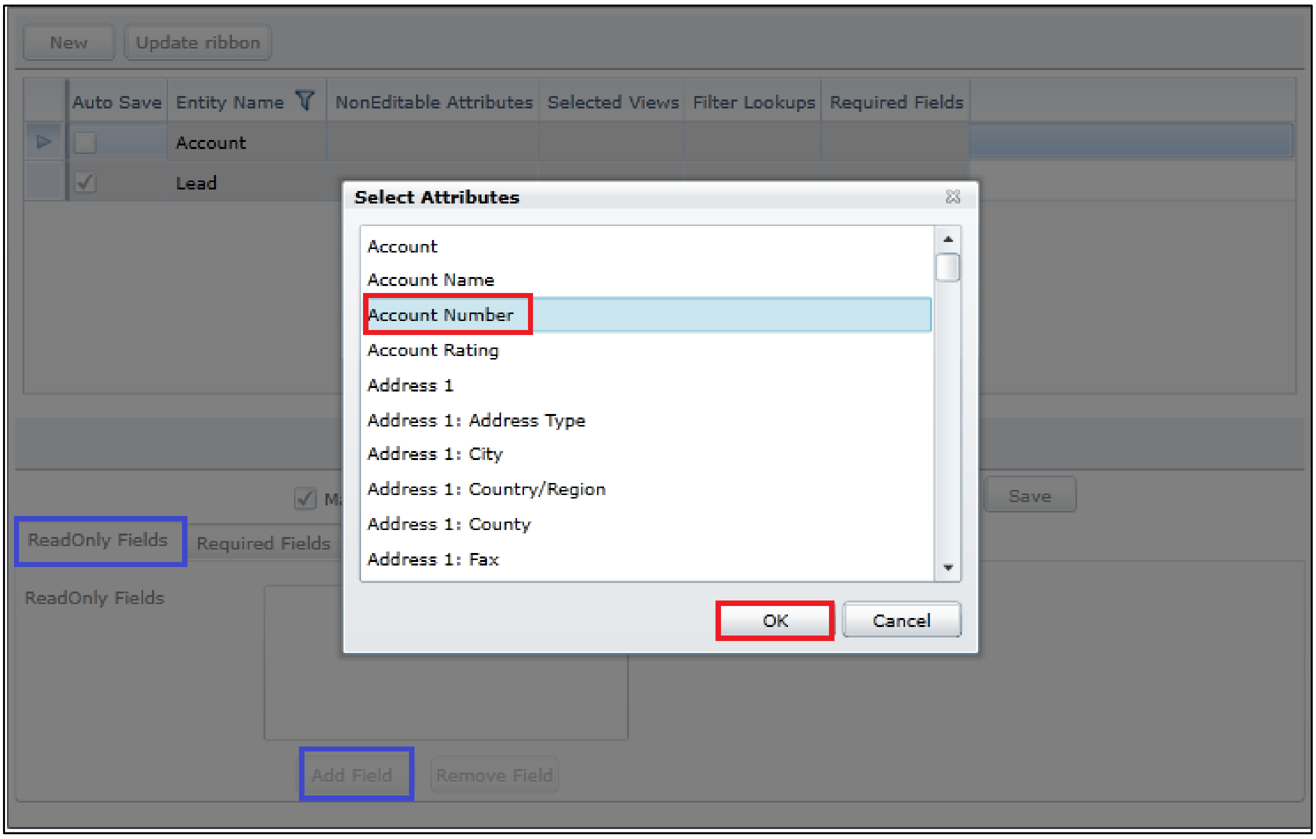



Figure 26: List of Read Only Fields

Note: Select the entities for which you have added the “Super Grid” Button

- **Select the attribute** which you want to be in non-editable mode and click on "OK". The attribute would be added to the Non Editable list of attributes as shown. Multiple attributes could also be added to the list by clicking on **Add.**
- Click on save, a message window will appear showing **Save Completed**.
- To **delete** the attribute from the non-editable mode select the attribute as per your requirement (example Classification) →Click on **Remove Field**→ click on SAVE and refresh the page. (see below)

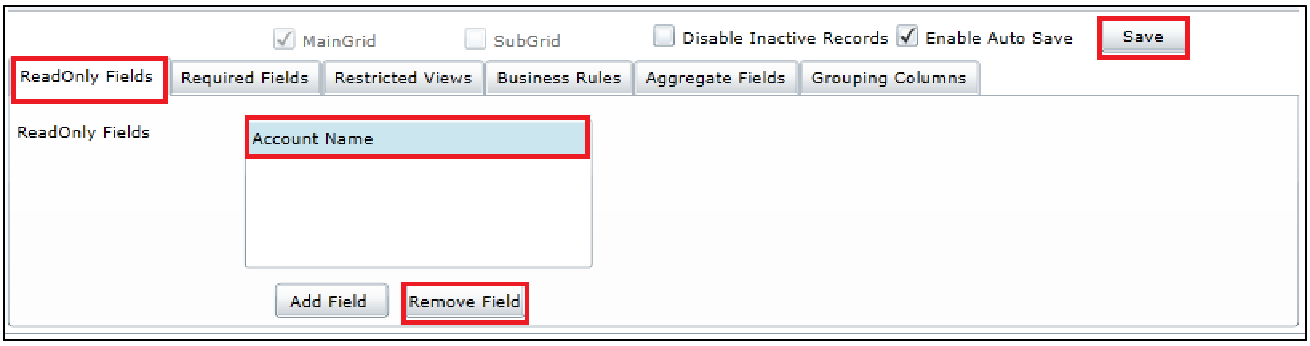



Figure 27: Read Only Fields. Cont.

## Required Fields

This function will help you to add the required fields to the selected entity as per your requirement.

- Click on **Required Field**.
- If you want to use the CRM required fields only then select the check box of Use CRM Required Field.
- To add extra fields as mandatory click on **Add Field** as shown below.
- You can select one or more fields then click on OK.
- Click on save, a message window will appear showing **Save Completed.**

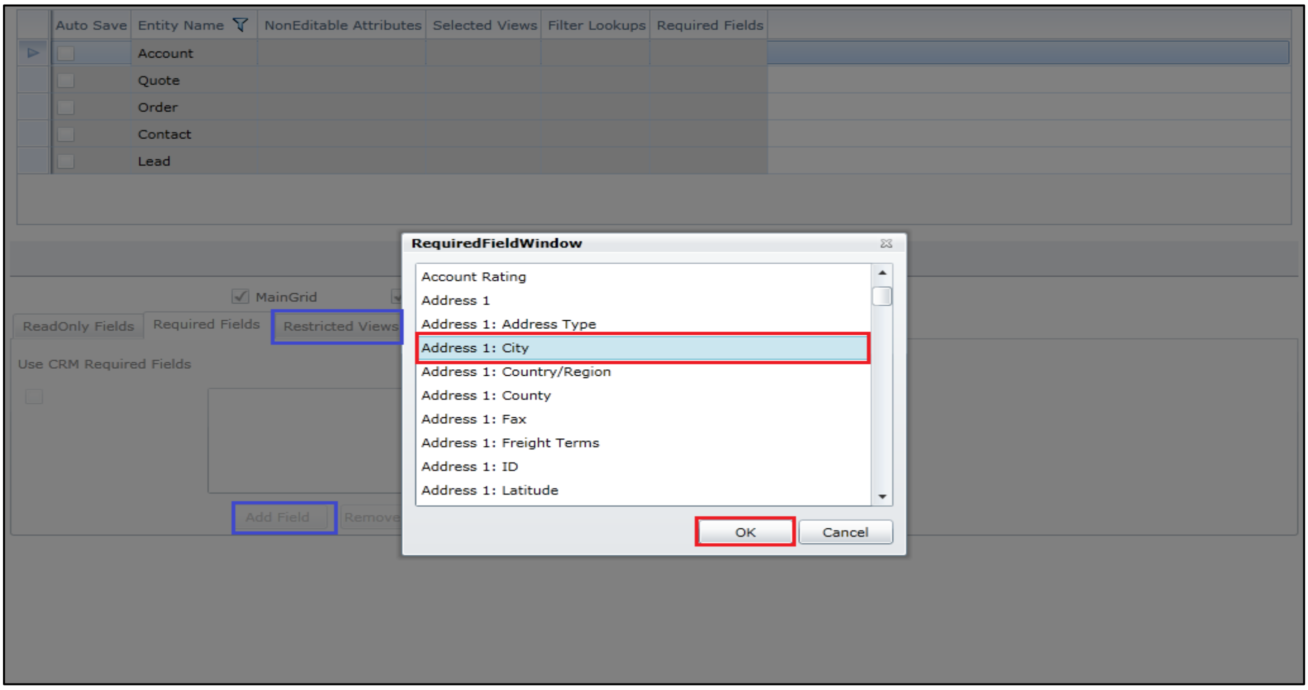



Figure 28: Required Fields

1. To **Delete** the attribute from the non-editable mode select the attribute as per your requirement →Click on **Remove Field**→→ click on SAVE and refresh the page.


Figure 29: Required Fields… cont.

- Now the Primary contact field is a required field.
- Navigation for Account is Workplace → Accounts →Open the Existing record or new record.
- On a click user can edit any field on the CRM grid (as shown below for Active accounts)
- Click on Super Grid to load. If you are editing and saving without giving mandatory field then a pop up message appears as you must provide the values to Primary contact as shown below.

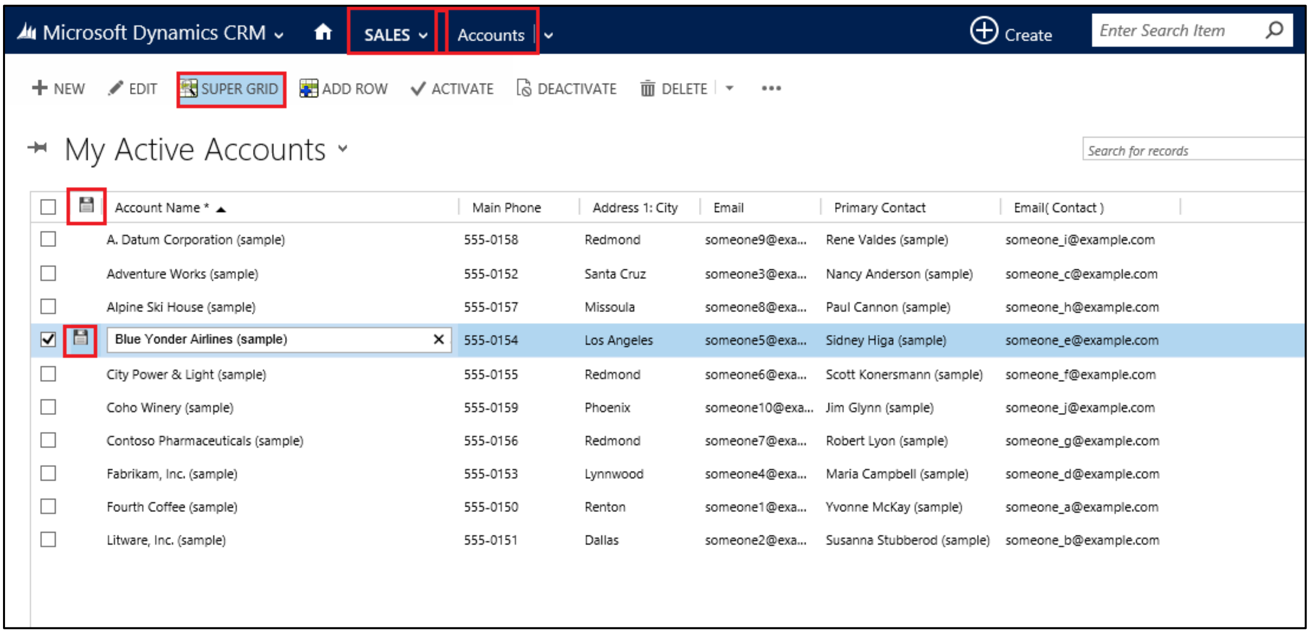



Figure 30: Required Field Message

## Restricted Fields

This functionality will block all the selected View Windows from being displayed on the screen. The below picture will show you how to select the same

- Click on **Restricted Views**
- Click on **Add Views**
- Select option from the list for example **Inactive Accounts**
- Click on **Ok**

- To Select more repeat the above operations and finally click **Save**

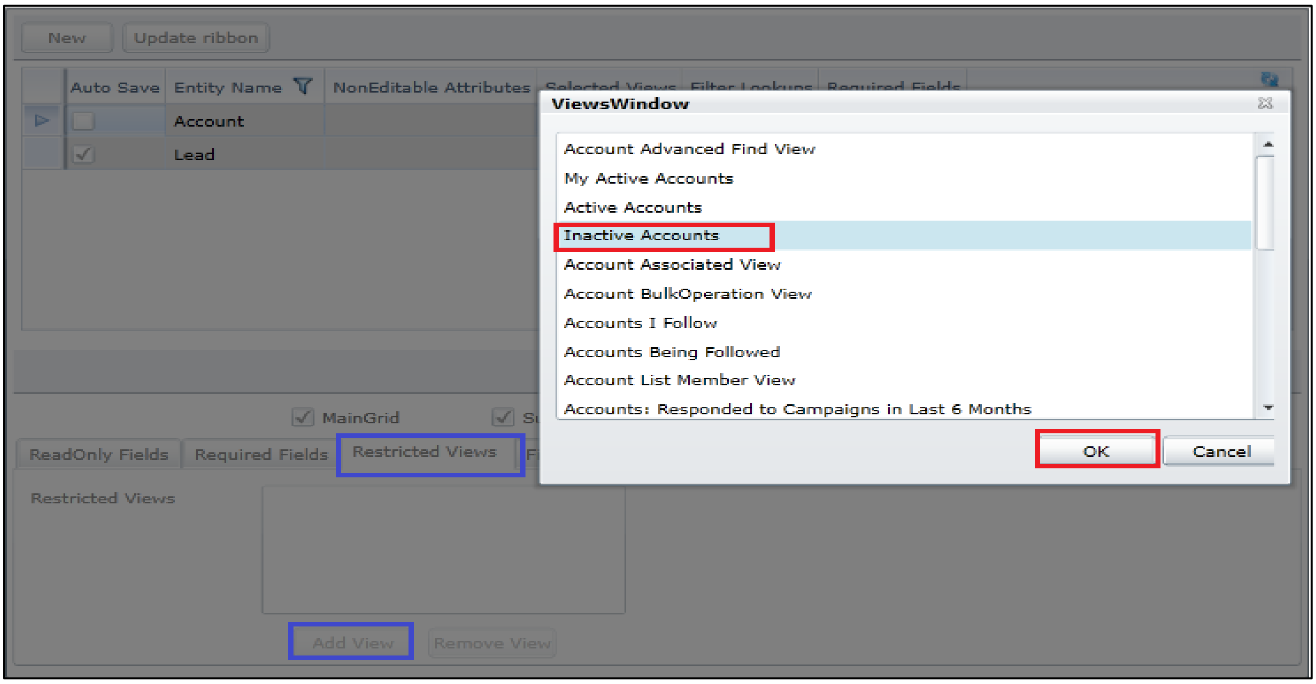



Figure 31: List of Restricted Fields

- To remove the view from the Restricted Views select the view and click on Remove Views then click on Save and refresh the web page.

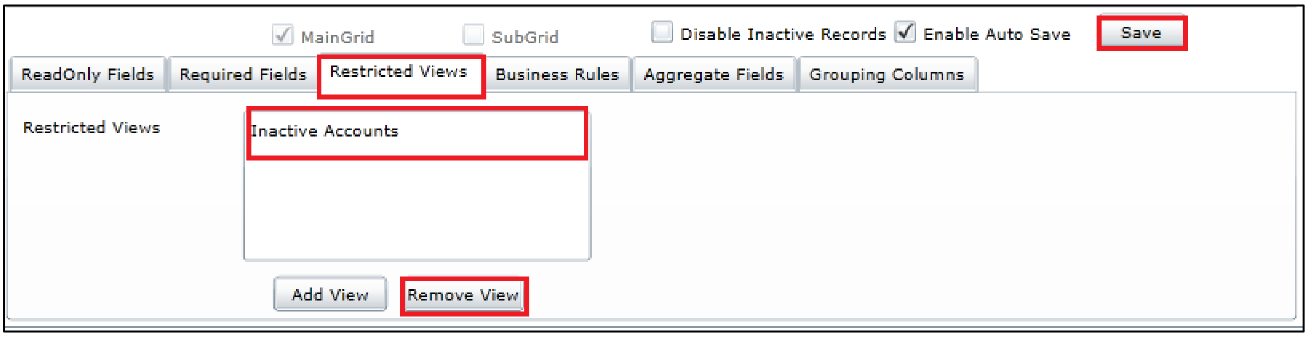



Figure 32: Remove View

## Business Rules

This function will help you to set or define your own Business rules as per convenience. The below Screen shot will show you how to business rules

- Click on **Business Rules**
- Click on **Add**
- Select option from the list for example **Change Account Name On Change of Email**
- Click on **Ok**
- To Select more repeat the above operations and finally click **Save**

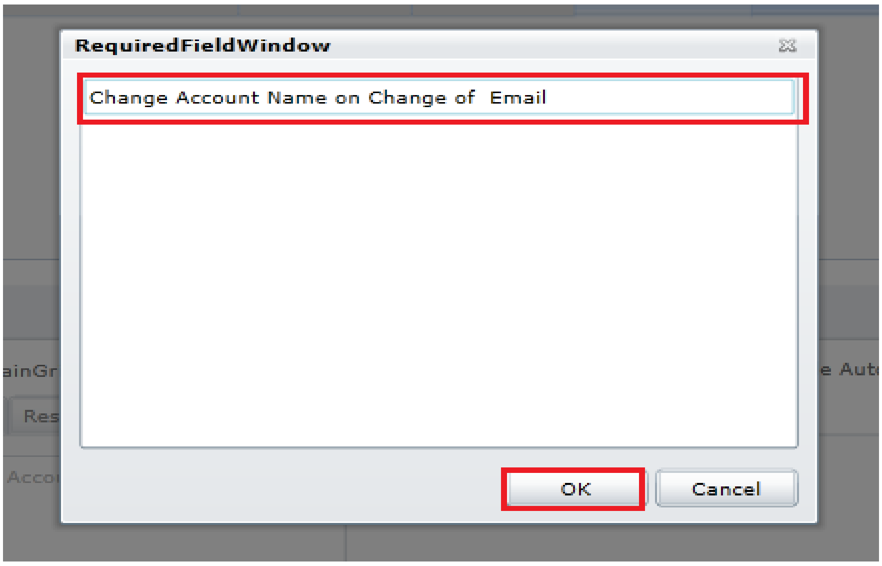


Figure 33: List of Business Rules

- To remove the Business Rule select the Business Rule and click on Remove then click on Save and refresh the web page.
- Only activated business rules are displayed for the user.
- Super Grid does not support Scope property of Business Rules.

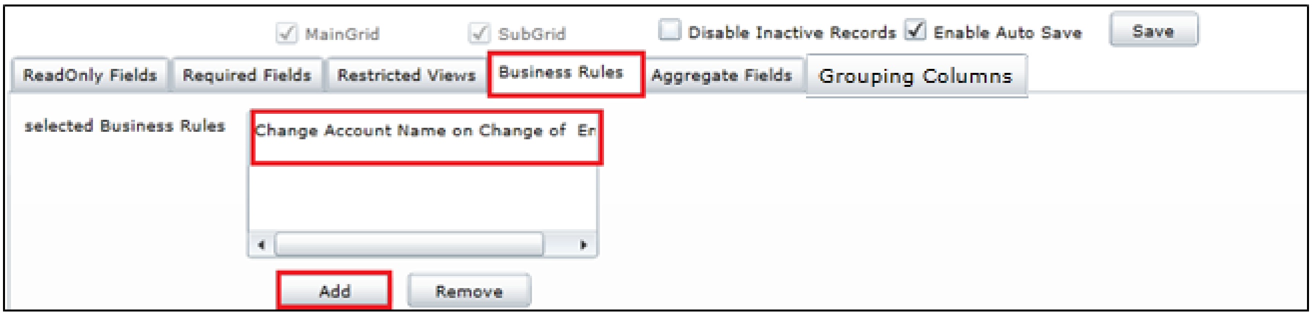


Figure 34: Add Business Rules

- This applies the functionality performed by the select Business Rules.

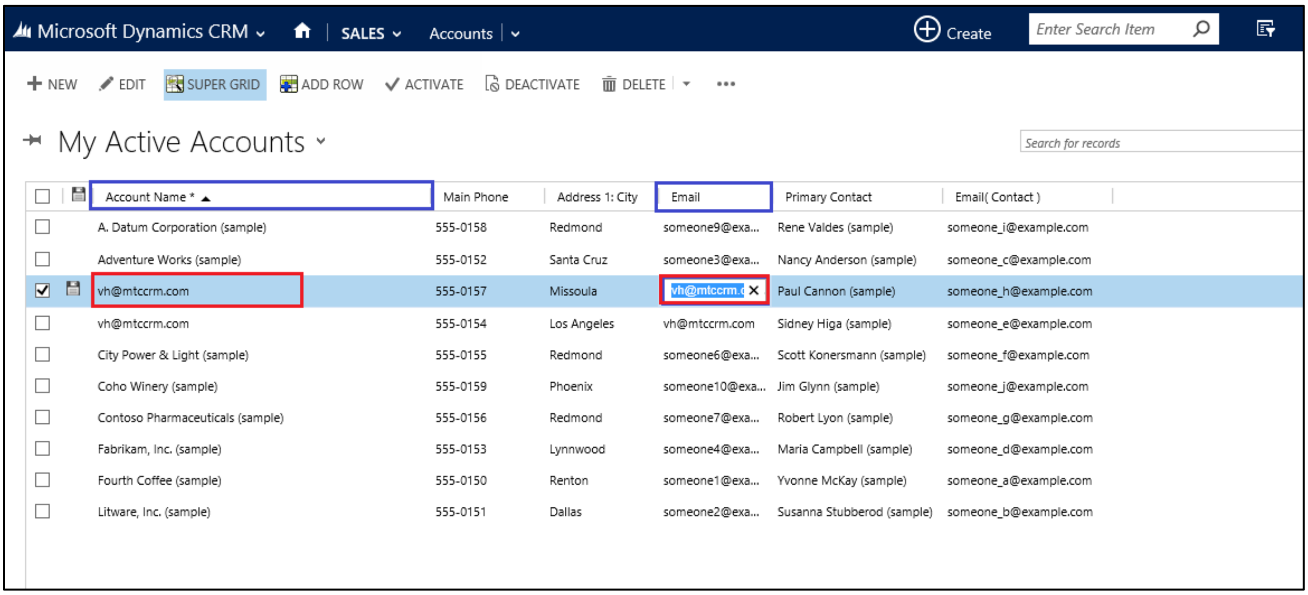



Figure 35: Super Grid showing the Business Rules

## Aggregate Fields

This functionality will get either SUM or AVERAGE of any columns being displayed on the screen. The below picture enables you how to select the same

- Click on **Aggregate Fields**
- Click on **Add Fields**
- Select option from the list for example **Latitude and Longitude**
- **Select either SUM or Average (Radio button)**
- Click on **Ok**

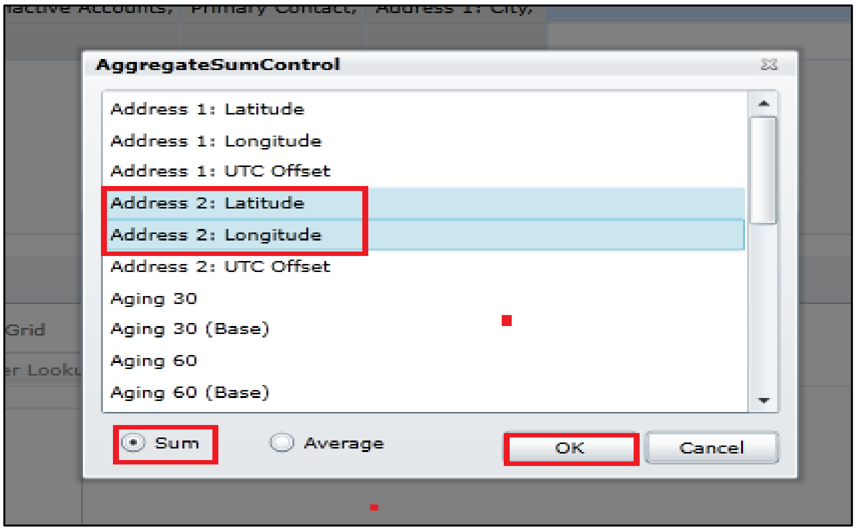



Figure 36: List for Aggregate Fields

- To remove the Aggregate Field select the field, click on Remove Field then click on Save and refresh the web page.

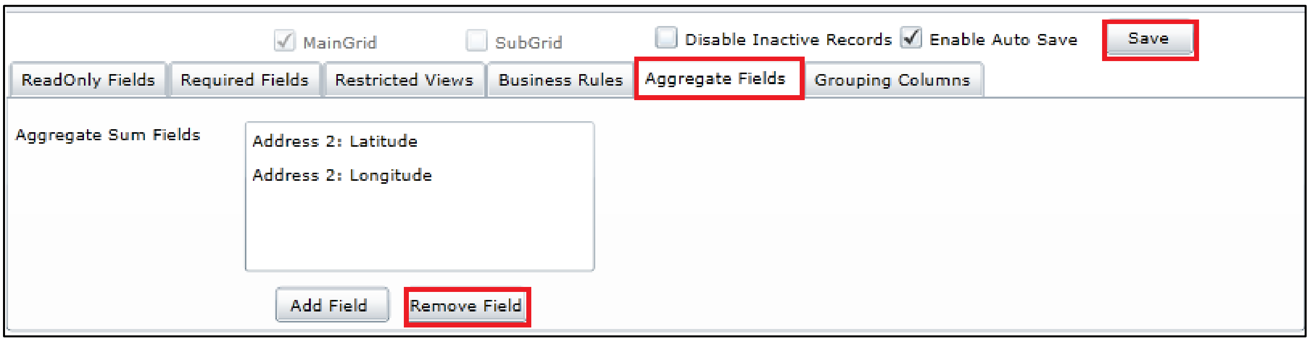



Figure 37: Add Aggregate Fields

Once changes are made, user can see the Aggregate fields as shown below. For example we have selected Sum, hence the same is shown at the bottom of the page.

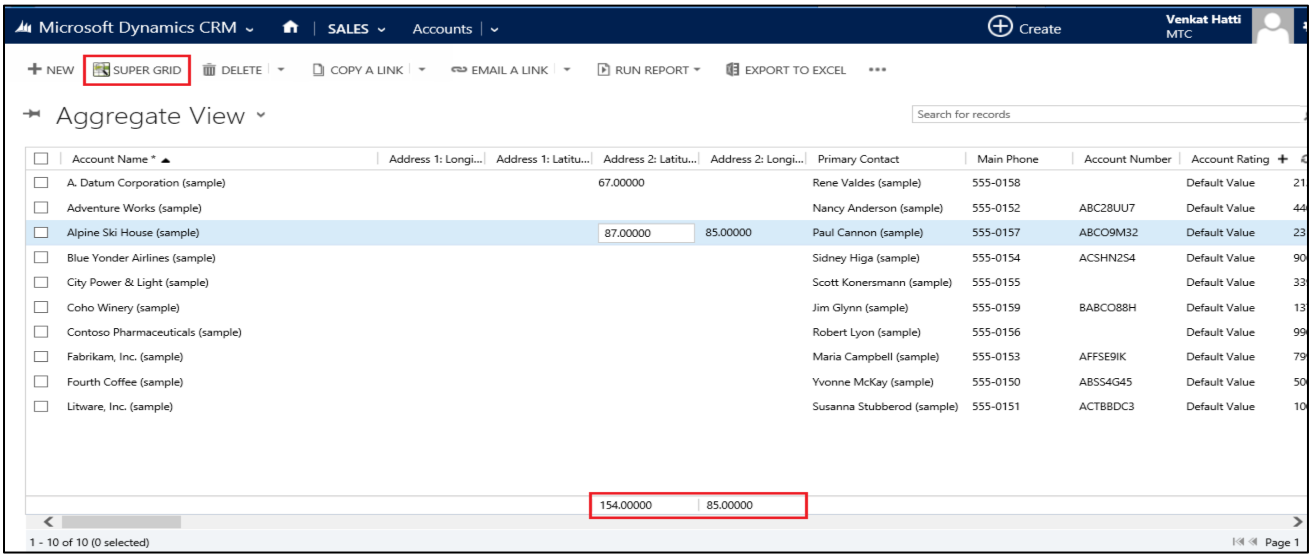



Figure 38: List of showing Aggregate fields

## Grouping Columns

This functionality will help to create groups for any Entity in the CRM. Available on both Main grid and Sub grid. Grouping will work on CRM 2011, CRM 2013, & CRM 2015 and is cross browser compatible. The below picture enables you how to select the same

- Select the Entity
- Click on **Grouping Column**
- Click on **Add Fields**
- Select option from the list for example **Account Name and Account Number**
- Click on **Ok**

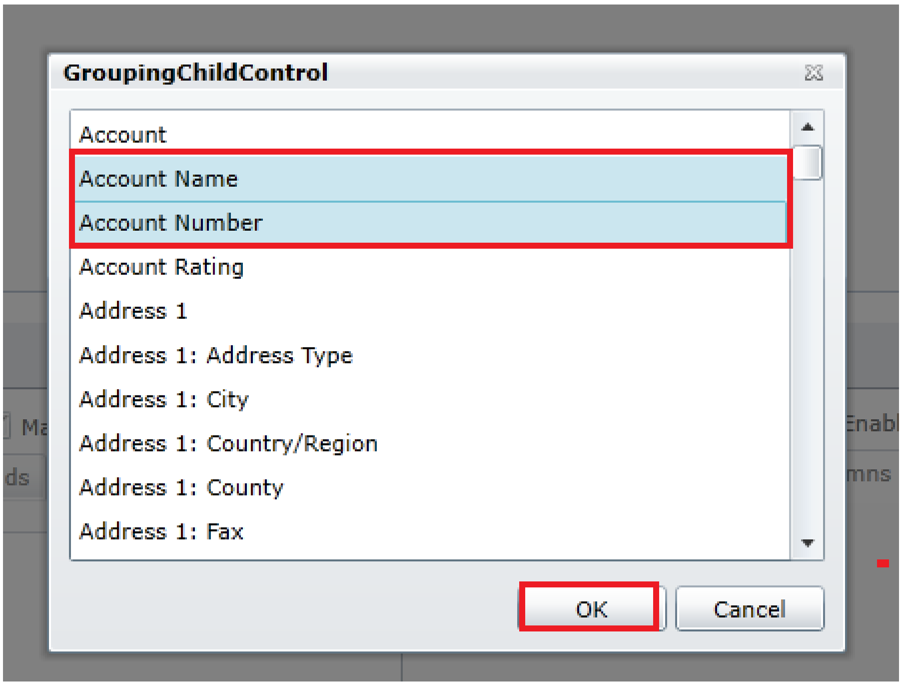



Figure 39: List of grouping child control

- To remove the Grouping Columns select the field, click on Remove Field then click on Save and refresh the web page.

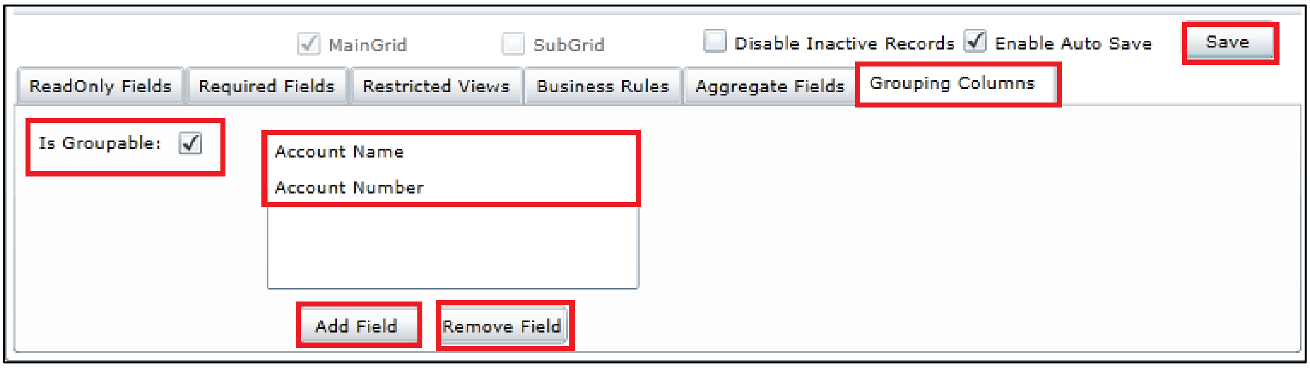



Figure 40: Add grouping Columns

- If the field **Is Groupable** is selected and check box is ticked, then this function will be enabled on the grid. On Right click this is shown on the grid.
- Facility of grouping is available on CRM's versions like 2011, 2013, and 2015.
- Grouping can be done on all Entities of CRM

Once changes are made, user can see the Group Columns as shown below. For example Go to Sales→Account

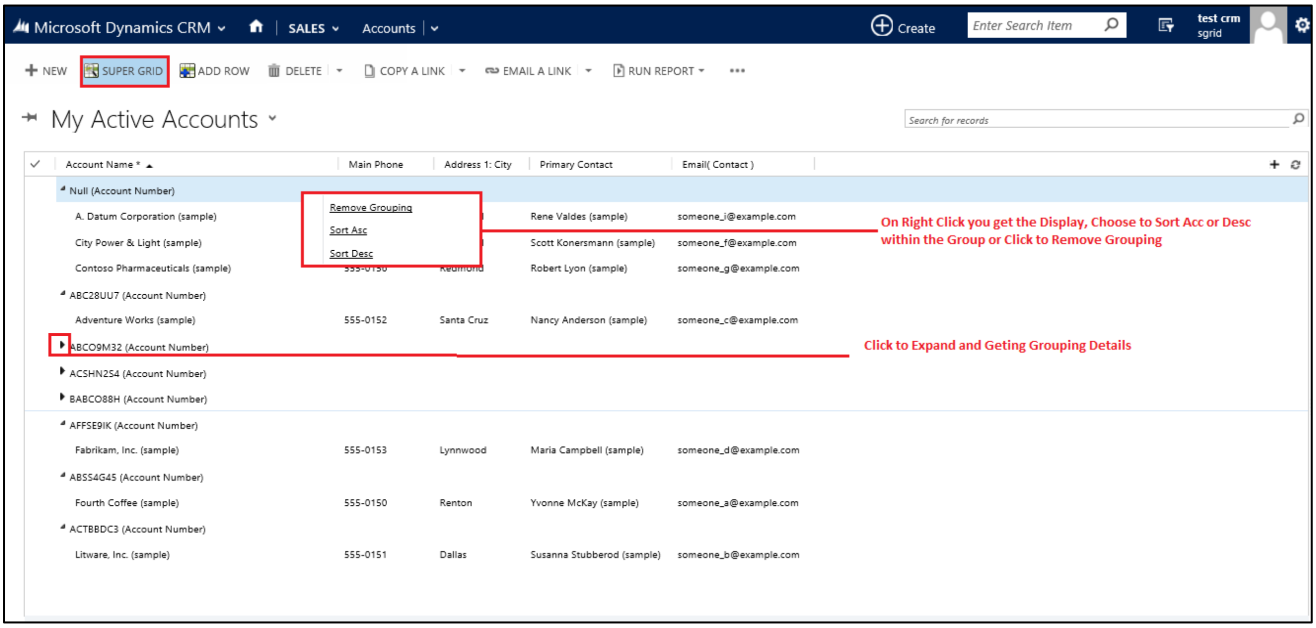



Figure 41: CRM Showing the Grouping Columns in Accounts Entity

- Initially Activate the Super Grid by clicking on the Button as shown above
- The List My Active Accounts are shown here as Grouped.
- In this example, In Account Entity Account Name and Account Number are selected as Groupable Fields
- Against Each Account Number is provided. Click to Expand for the Details or to Close the details
- Select an Account Number and Right Click to get a small pop up message which displays
    - **Remove Grouping** – to Remove group facility for this Account Number
    - **Sort Asc** – Sort Ascending (Account Name) order within the Selected Account Number
    - **Sort Desc** - Sort Descending (Account Name) within the Selected Account Number
- For Grouping Facility
    - This is enabled if the IS Groupable is selected in Settings Area
    - Another option to enable grouping column without selecting IS Groupable. i.e; Add anyone field (Grouping column) in settings area.

## Super Grid Button Customizations

- To navigate to the Super Grid Customizations go **to settings** of CRM→**Solution→Super Grid Solution→** it will navigate to the Super Grid Configuration area as shown and click on **Super Grid Button Customizations**.

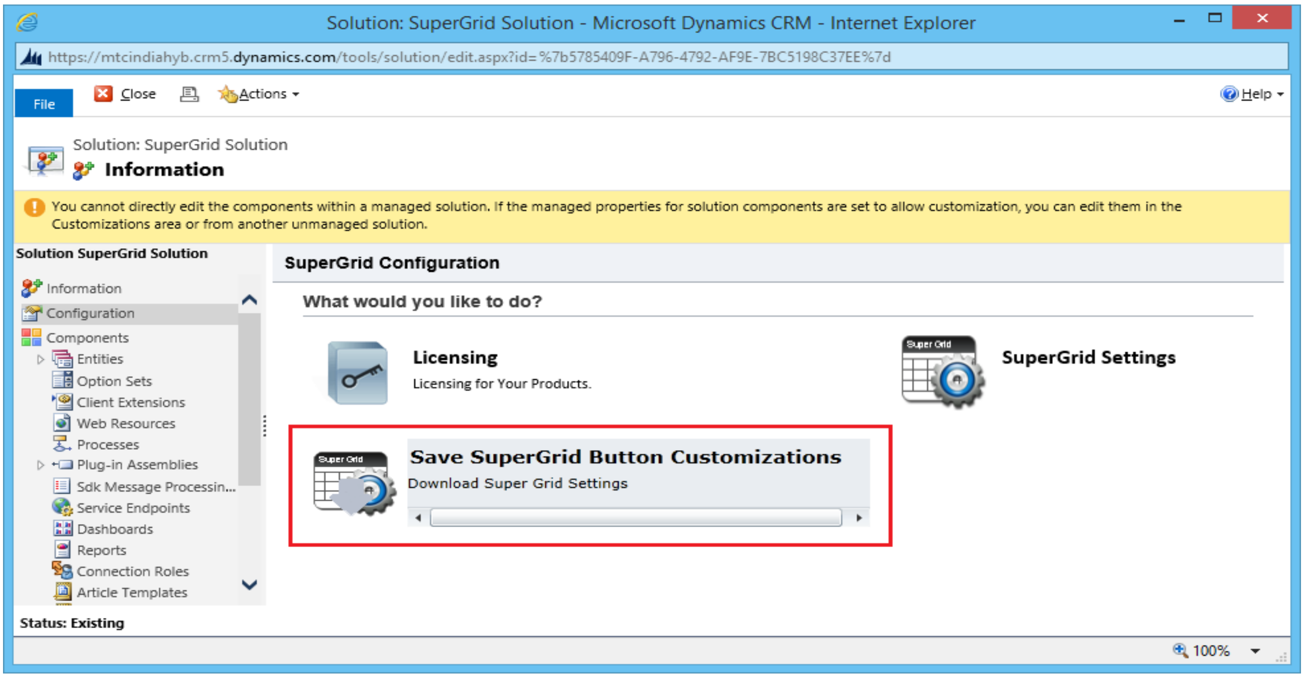
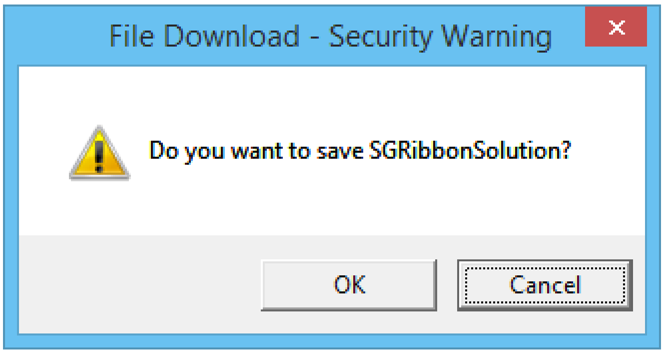


Figure 42: Grid Button Customizations



# Super Grid Functionality

If you want to edit the fields without opening a form, If you want to sort the attributes and save your time, if you want to get the records in no time while you are searching  use this Super Grid functionality. Super Grid saves you a lot of time and many clicks.

- To start with go to **Settings→Solutions→Super Grid Solution→configuration→Super Grid Settings.** Follow the steps of the previous sections to set the settings and to get licensing.
- Now for example if you have added the **Super Grid** in **Account** Entity, go to **Sales→Accounts** account page will  as shown

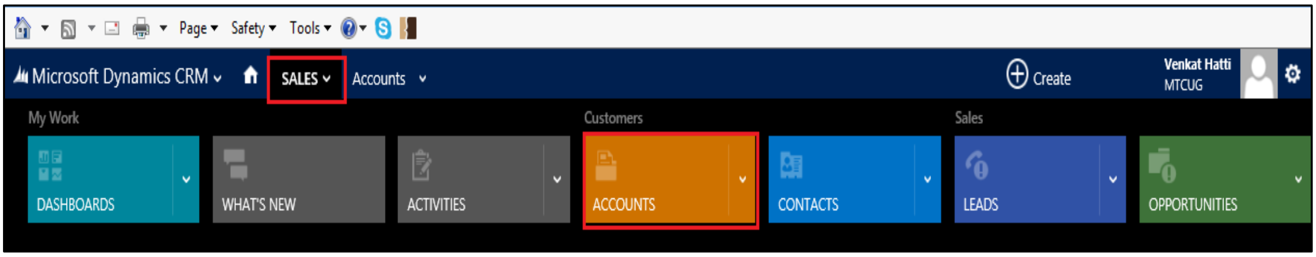



Figure 43: Account Entity has Super Grid Button

- Click on the **Super Grid** from the CRM ribbon, the Super Grid functionality enabled will open as shown

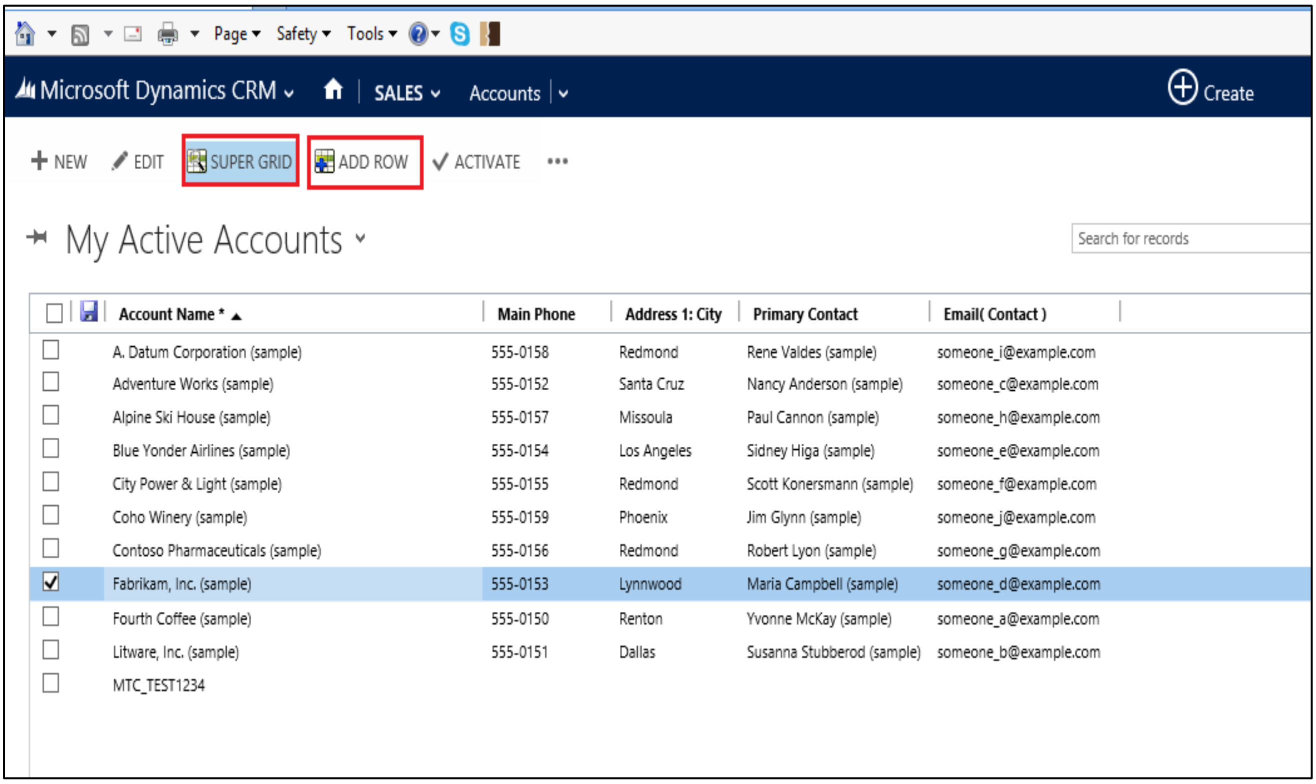



Figure 44: Click on Add Row button in CRM ribbon

**Note:** At any time press **<Ctrl+Shift>+A** to add a new record or Press **<Ctrl+Shift>+S** to save a record.

## Tips for Easy use

When the Super Grid is in Active mode, user can select a record for editing purpose. During this operation if the User wants to Open the Account Form or Edit the Fields he can just do Right Click and the pop up is displayed as shown below. Click to open form or to edit.

After doing some editing and the user feels to undo the changes than he can click on Cancel Changes to undo the changes made.

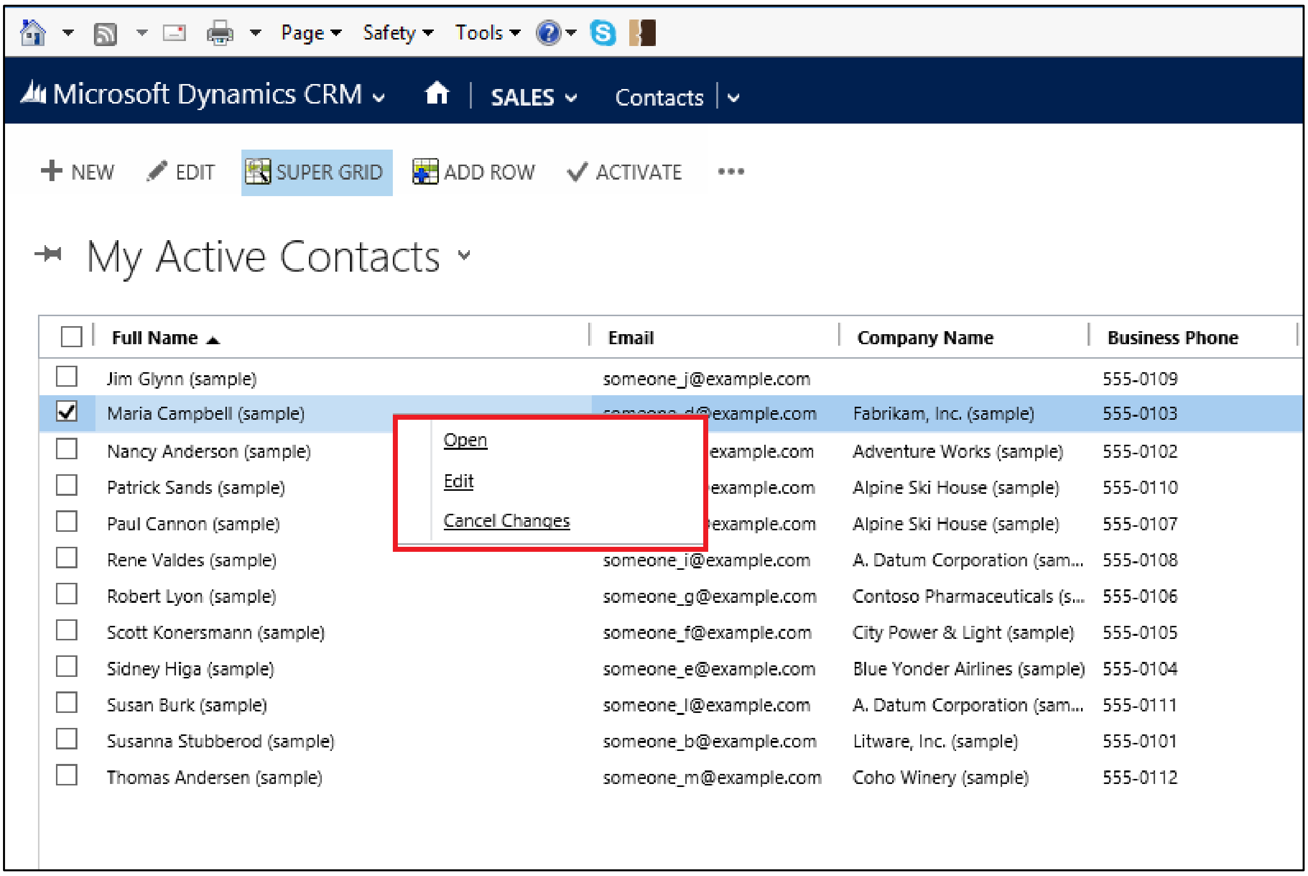
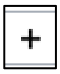



Figure 45: On Right Click - New functionality

## Adding New Record

- To add a new record click on  (or)


- Or you can click on  which is placed in the right corner of the Header (or)
- Can also add new record by **<Ctrl+Shift>+A**.
- Click on the attributes to add the data. Multiple records could be added.

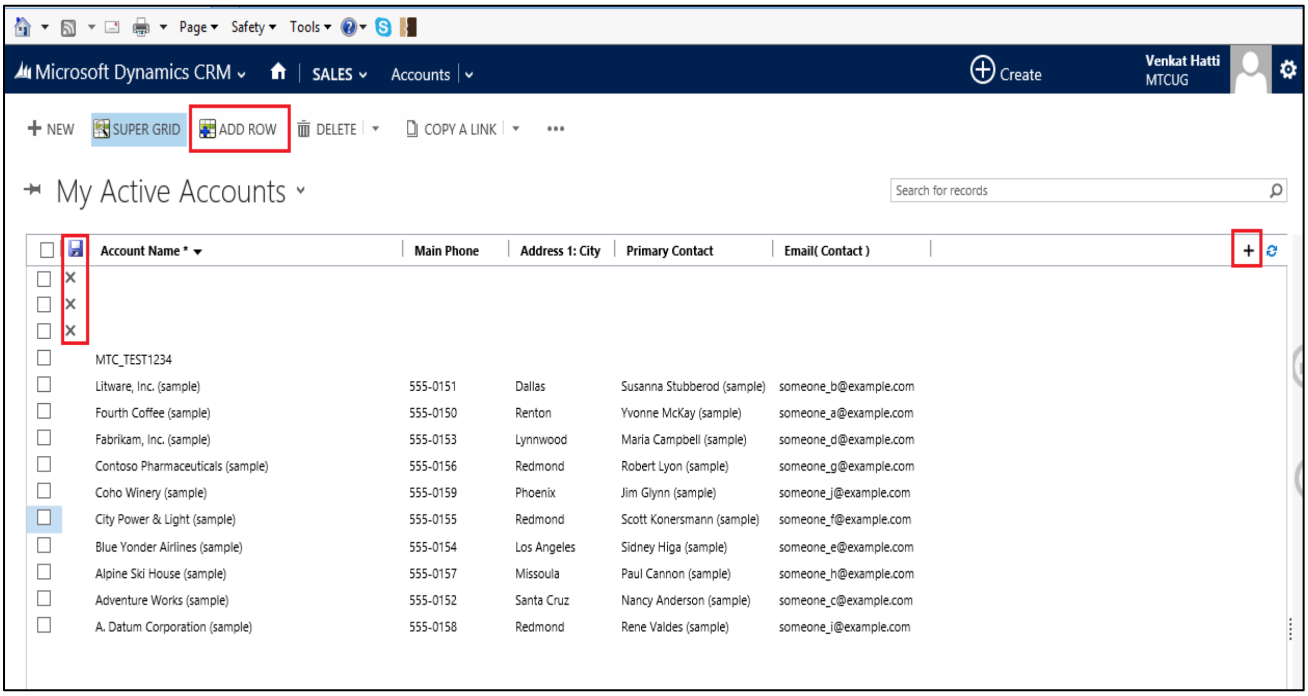
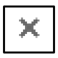



Figure 46: Adding New Record

- Save the record by clicking  or by **<Ctrl+Shift>+S**.
- To delete the record click on  from the ribbon.

Note: Auto Save will not work for new records

## Editing a Record

- To edit a record double click on the record you want to edit and edit the fields as per your need just like an Excel work sheet. You may do the changes in the columns itself.

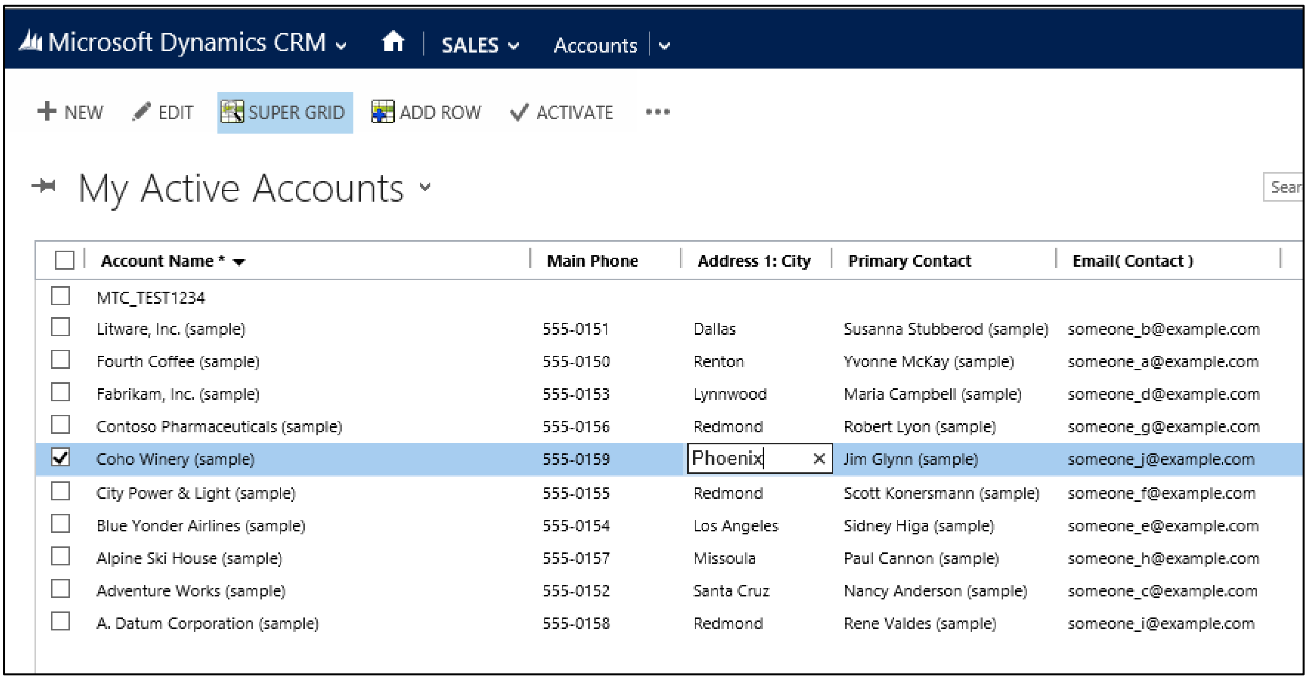
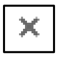



Figure 47: Editing a Record

- Since Auto Save is enabled in this mode, the user will be able to see the  button. The Data is saved automatically. In other words if the Auto Save is not enabled then the user will have to save manually by clicking the save icon.
- The validation check also works in the Super Grid which increases the data accuracy.
- To delete the record click on  from the ribbon.

## Navigation

- Click on **TAB** to move forward (to the next field) with in the record or <**Shitf+TAB**> to go back

## Validations

Super Grid provides **validations** for the fields which improves the data accuracy of the data. A validation in the Super Grid ensures you that the data that are entered fall within the accepted boundaries of the application collecting the data. So if you try to enter the false data into the fields it will show the validation check message as shown.

NOTE: These validations will be performed based on predefined types of related fields.

Shown below is an example for Email Address. If the email address is not entered in correct format, an alert message is displayed saying “Enter valid email address”. This message vary from field to field and appropriate messages are shown.

Until it is entered correctly the focus does not change or proceed to the next field.

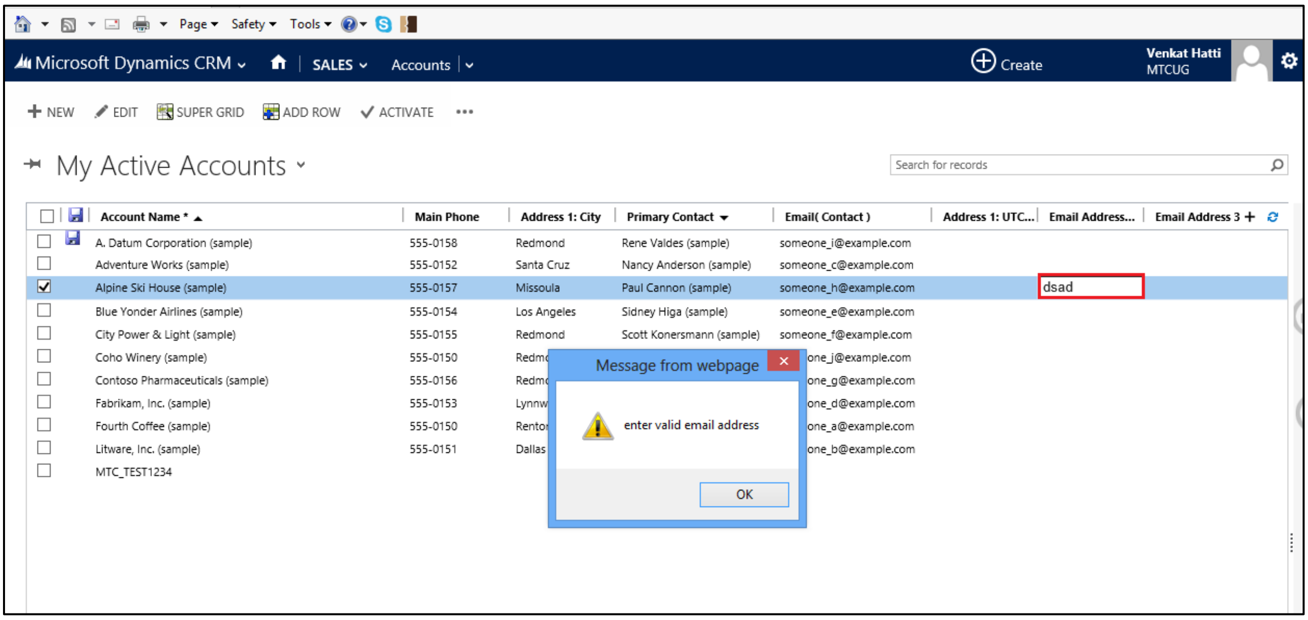



Figure 48: Validation for fields

## On Demand Save

On Demand Save means manually saving the record to store the data. But each time you edit the data, it has to be saved manually. To save the records click on save button as shown.

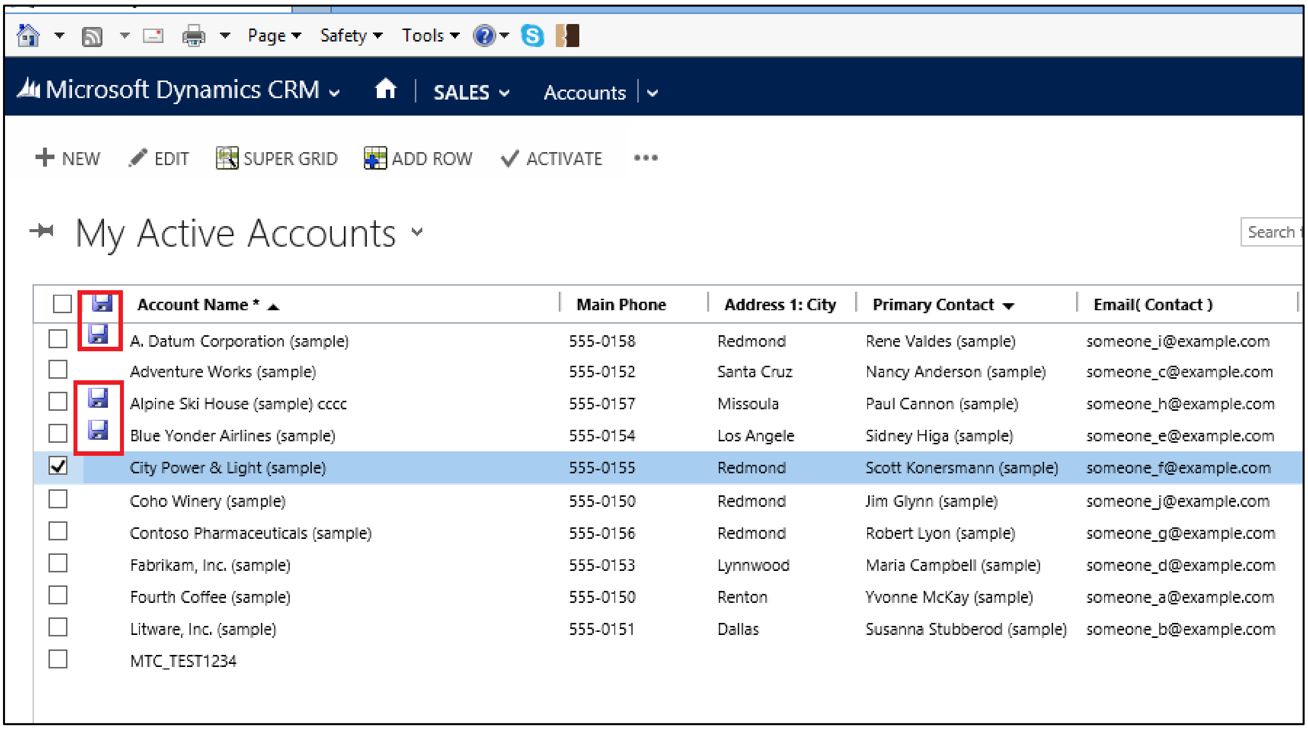



Figure 49: On Demand Save

There are chances of losing the data if the system gets cashed or freeze. For every entry made in the grid you have to keep clicking the Save button to save the data. To avoid this redundancy in saving data, it is suggested to have enabled the Auto save option which in turn makes you comfortable in handling the data.

## Search Enabled

You can search for records of an entity. In the **Search for records** box, type a few letters to narrow your search, and then click the **Lookup.**

- Before search the records available are as below

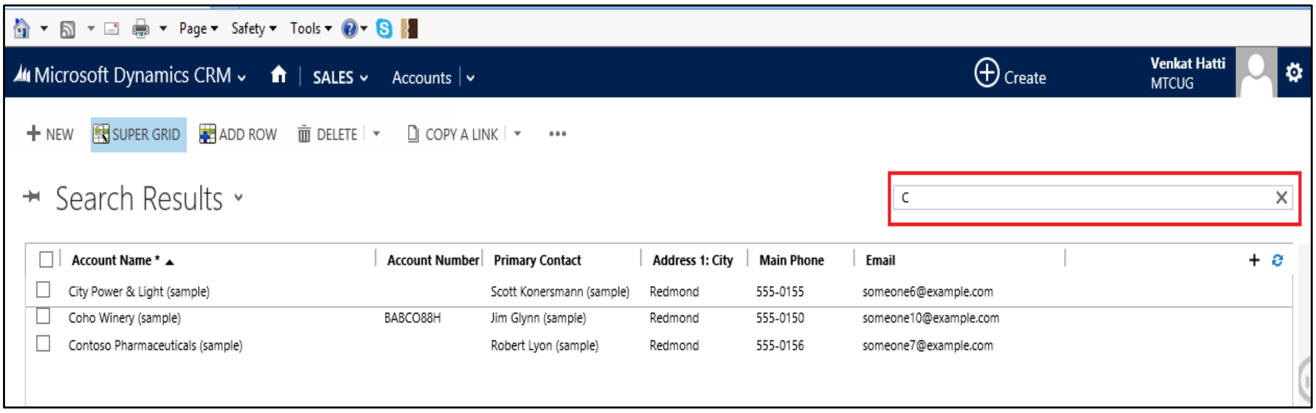



Figure 50: Search Enabled

- If you want the records starts with alphabet “C” then type in the “ search for records” box as “C”, all the records with the alphabet “C” as their starting one will be sorted out as shown below

## Faster Look up Search

Look Up search displays the related entity of the entered text, the form field with the search icon beside it. In Super Grid it allows you to type a value and the validation will either resolve it to an item it knows about, or indicate that the value is wrong. A helpful combination control, that allows users to proceed quickly. Once it has found the item the text changes to a hyperlink so that you can view all of the information on the related entity

- To see the functionality of Look Up Search click on the look up field , for example go to “primary contact” field of an account record**,** as soon as you start typing it shows a list if it has the value related to it as shown

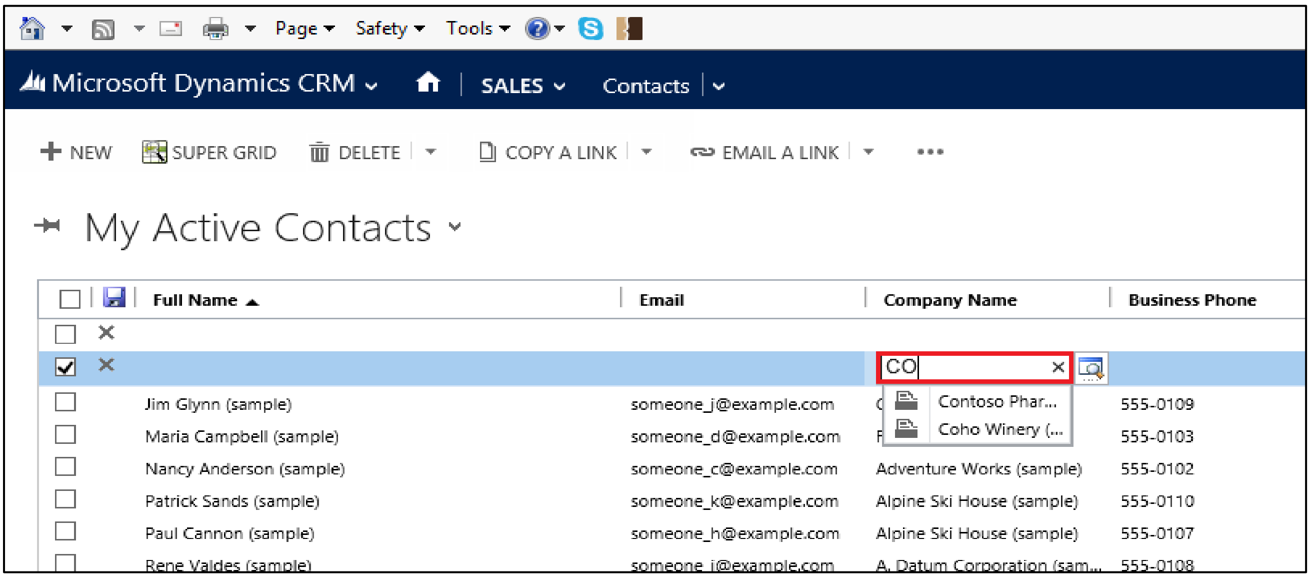



Figure 51: Faster Look up Search

- User can select lookup values by entering the name and selecting the value using up ↑ and down ↓ arrows and by clicking on enter

## Sorting

Sorting helps you to put the fields of a column in certain order. In super Grid you can use this functionality by clicking on the column header. To reverse the order, click the column header again.

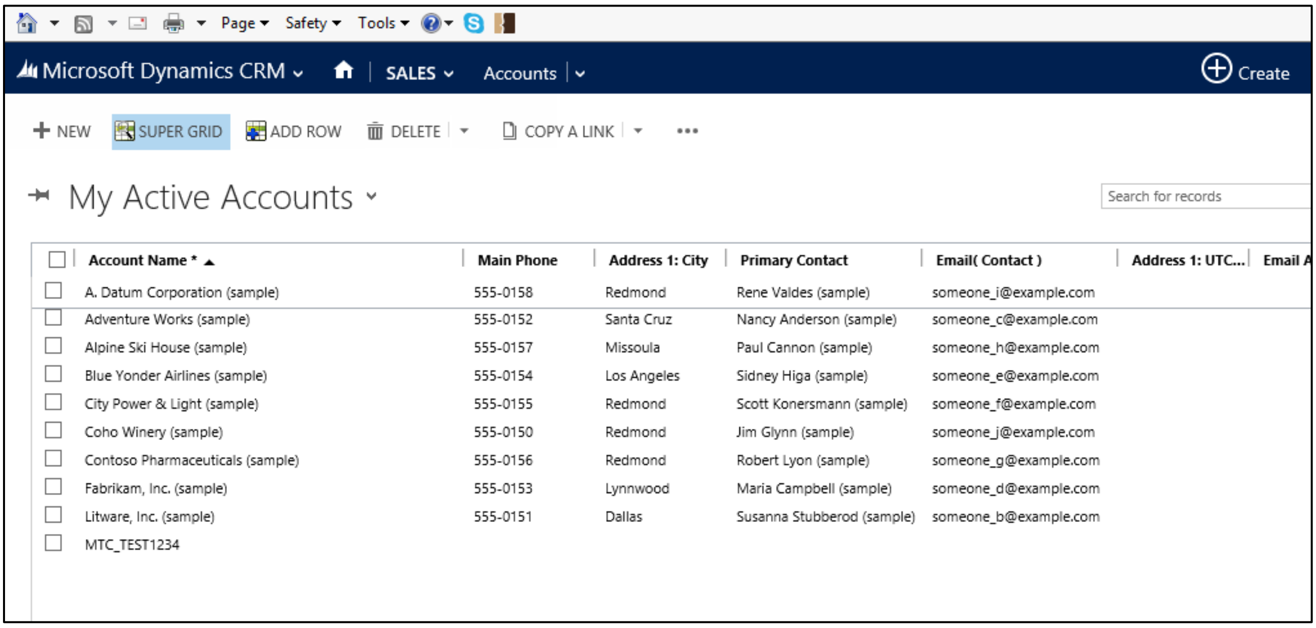



Figure 52: Before Sorting

By clicking on this the records in the CRM with Super Grid Facility gets sorted out

.

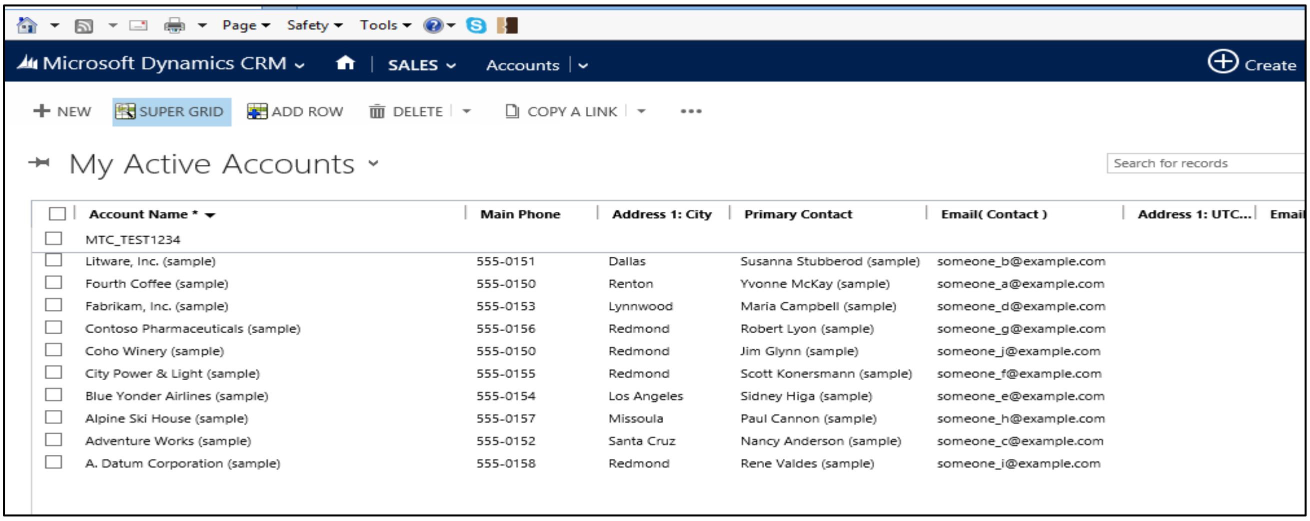



Figure 53: Sorted in descending order

- An arrow icon in the column heading shows that the list is sorted: the **Ascending Sort** icon indicates ascending, and the **Descending Sort** icon indicates descending.
- If there is any field from another entity user cannot sorting on it

## Editable Restriction of Fields

- To make the fields restricted to editing you need set the field to" Non Editable" mode which could be done in settings area. Follow the steps as mentioned in the settings area section of the Non Editable Attributes to set the attributes to non-editable mode.
- Before adding the attribute to **Non Editable** mode.

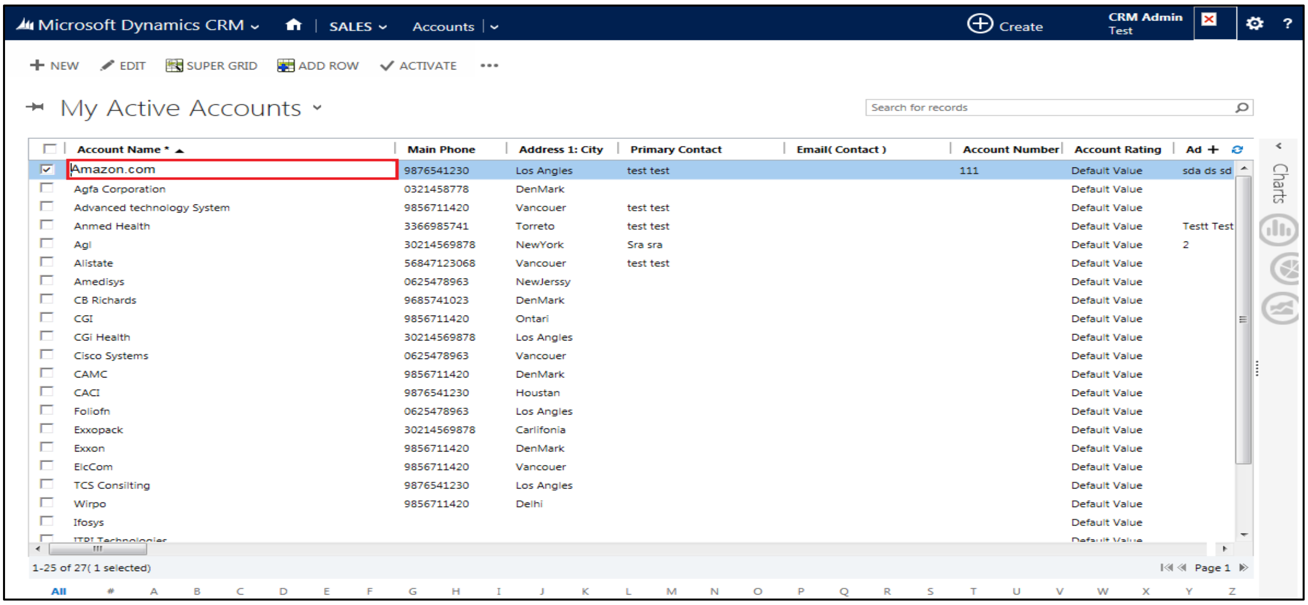



Figure 54: Before Editable Restriction of fields

- After setting the attribute to the **Non Editable** mode

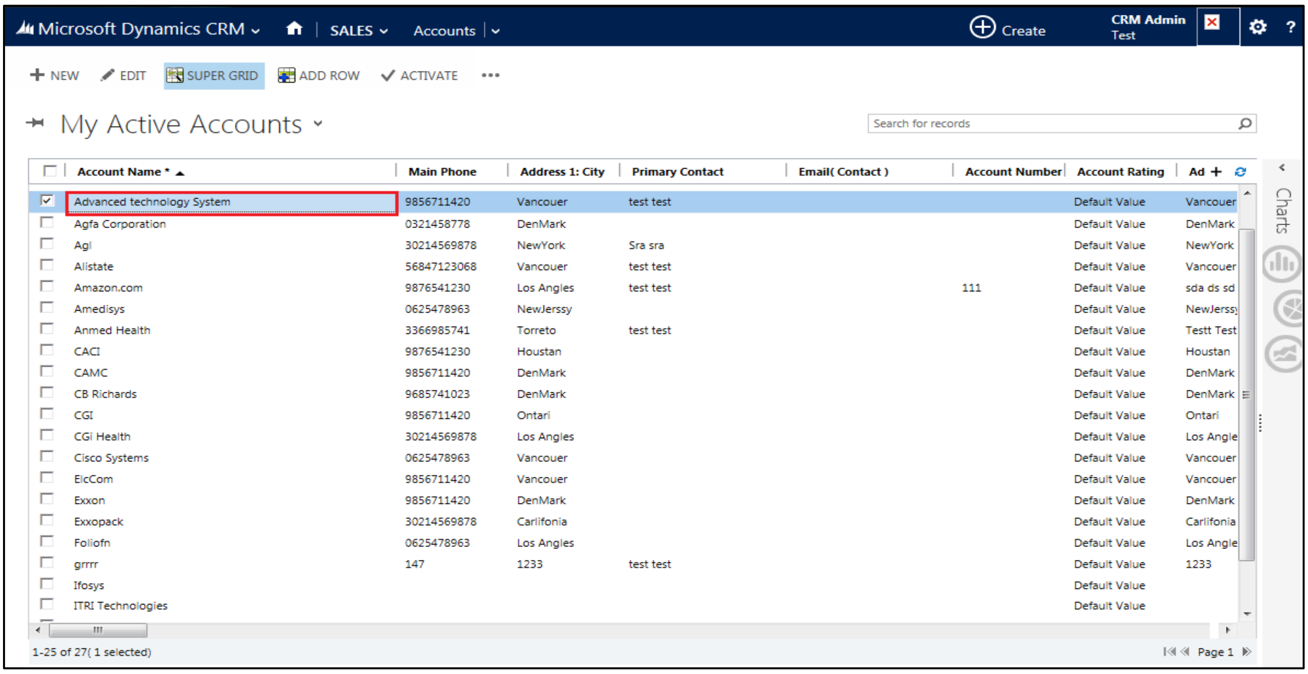



Figure 55: After Editable Restriction of fields

## Views and charts Enabled

- Super Grid is **views enabled**. To see the record of an entity which are available in different views Select a view from the **View** drop-down list at the top of any list of records. This filters the records according to the selected view.

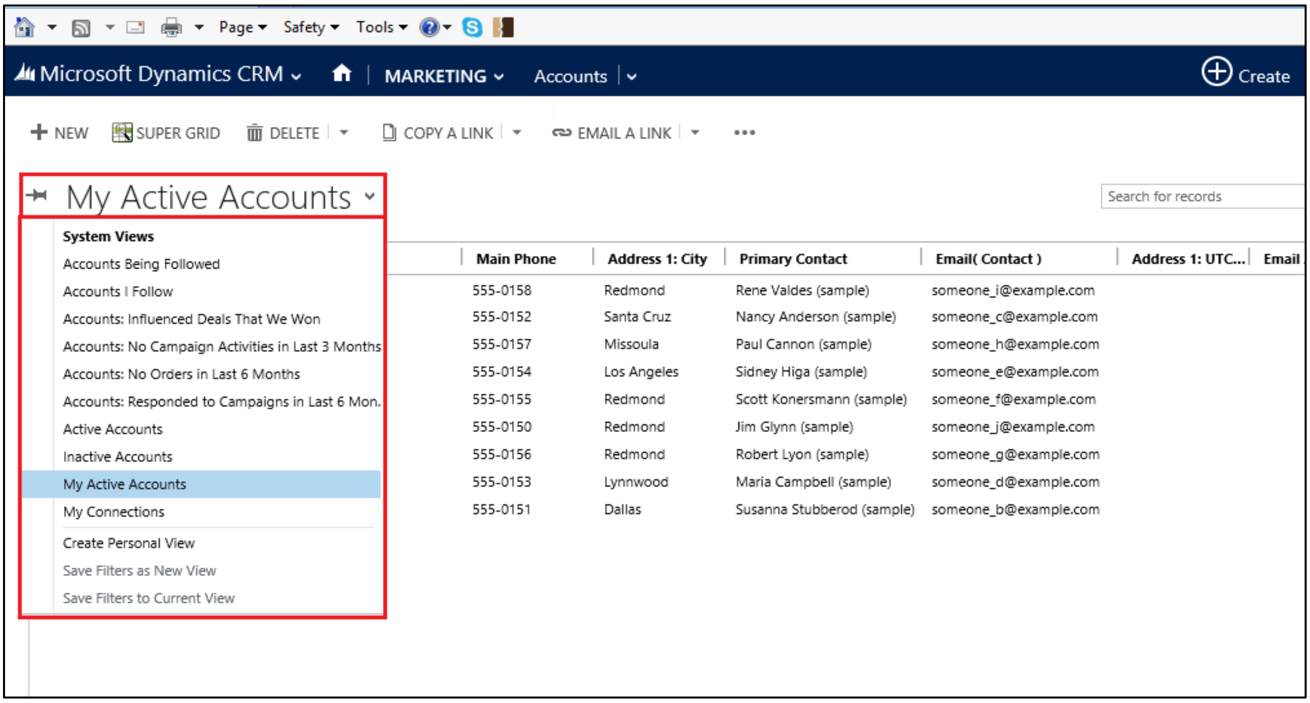



Figure 56: View drop down list

- You can view the data of your entities in the form of charts as Super Grid is a Charts Enabled Grid. To view the data in the form of graphical representation select the **Click here to view the chart** which is on the extreme end of the right pane as shown

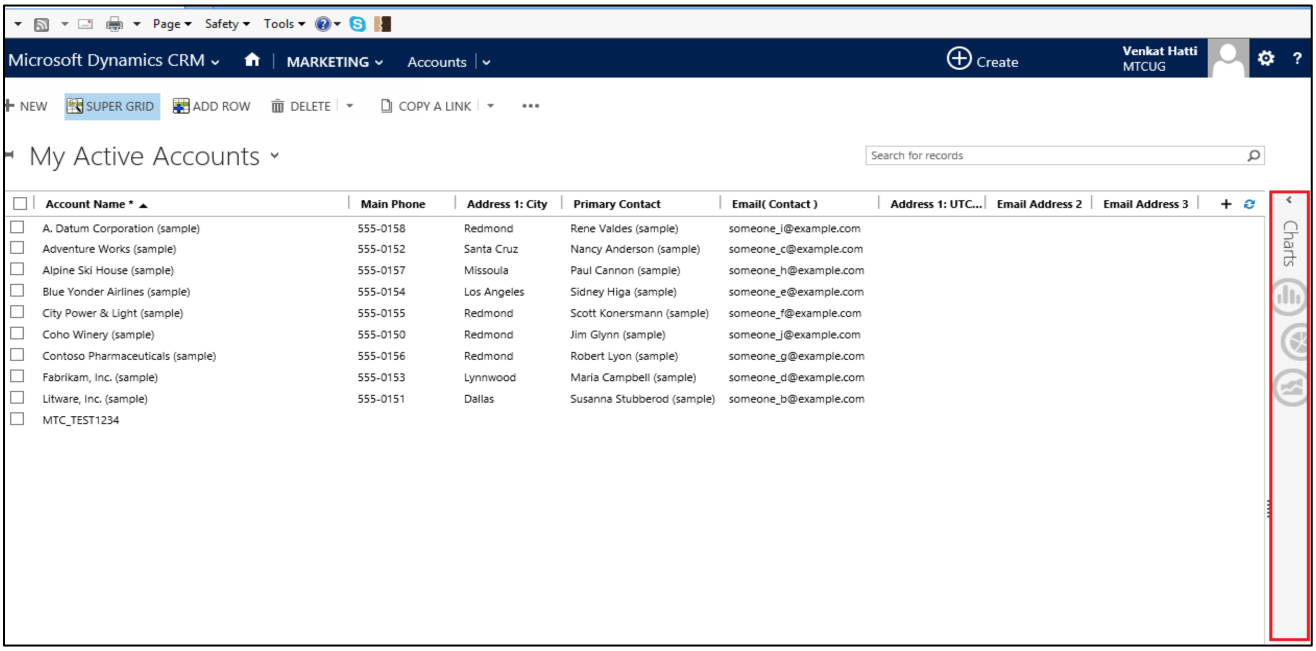


Figure 57: View charts

- Click on the tab you can see your data in the form of chart diagram as below

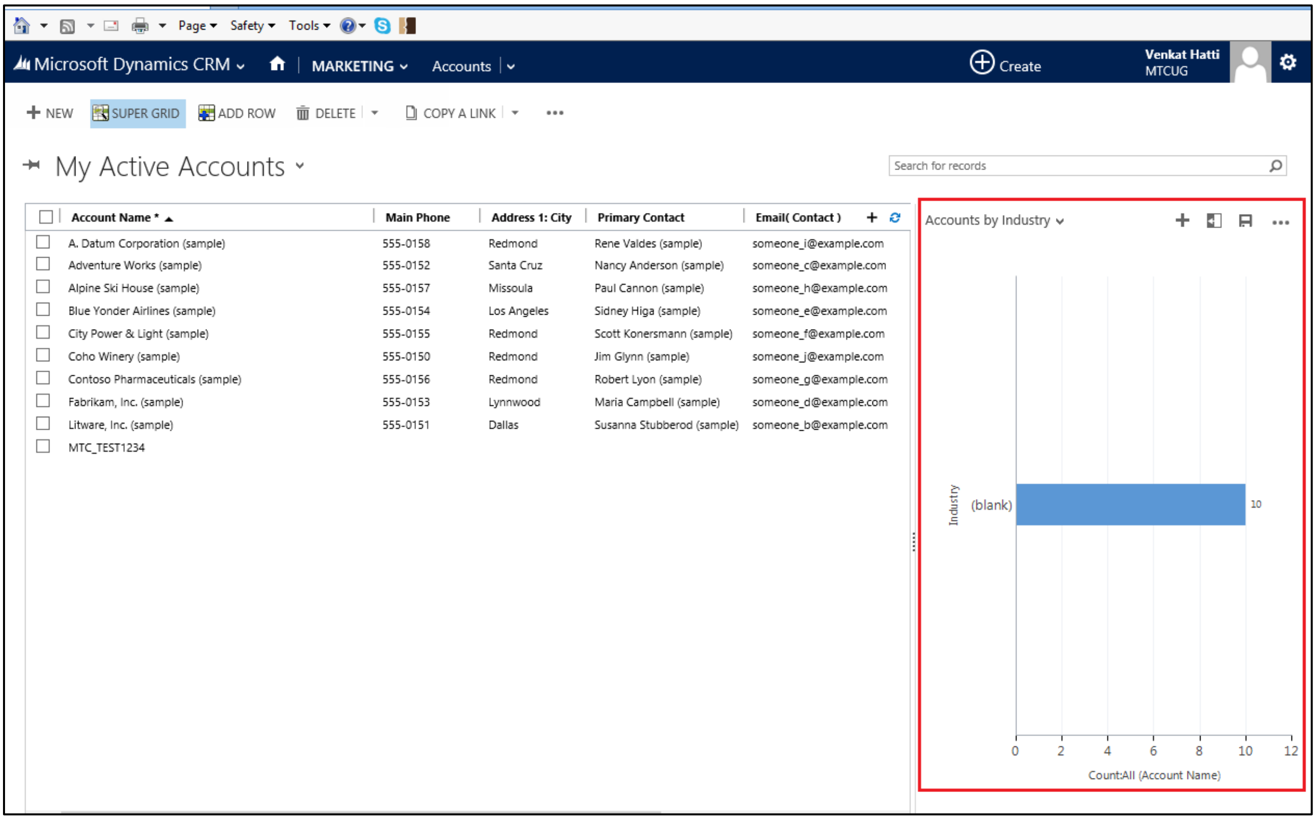


Figure 58: Graphical representation of view chart

## Super Grid in Sub Grid

Super Grid in Sub Grid only works with On-load Script (only for CRM 2013, CRM 2015 & CRM 2016)

### Super Grid On with Form On-Load Script

You can call the Super Grid in Sub Grid by using on Load java script function. Navigation for adding sub grid is **Marketing→Contacts→**select the record from My Active Contacts as shown below

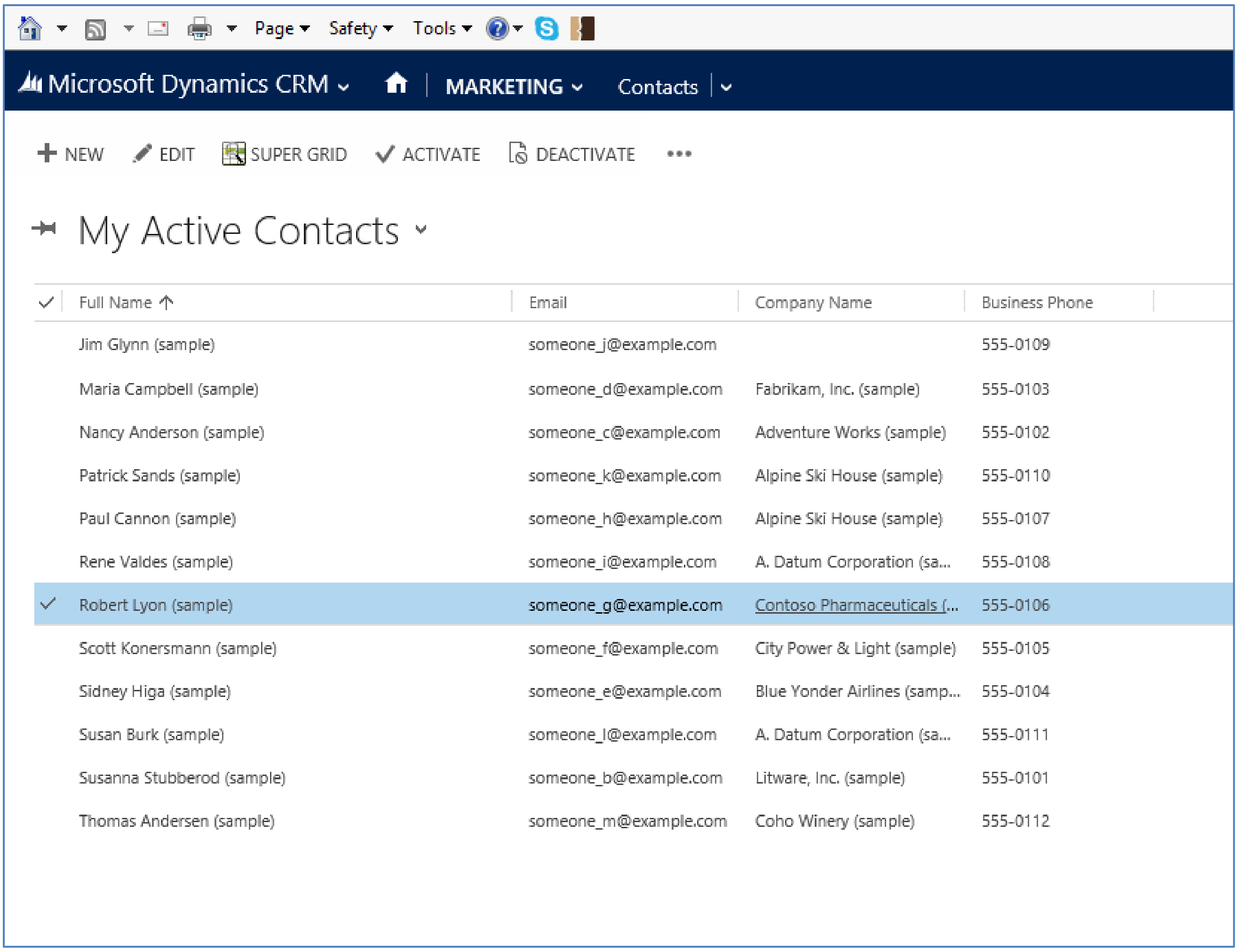



Figure 59: sub grid using on Load JavaScript function

- Selected record will be opened with general information. Click on Customize then click on Form.

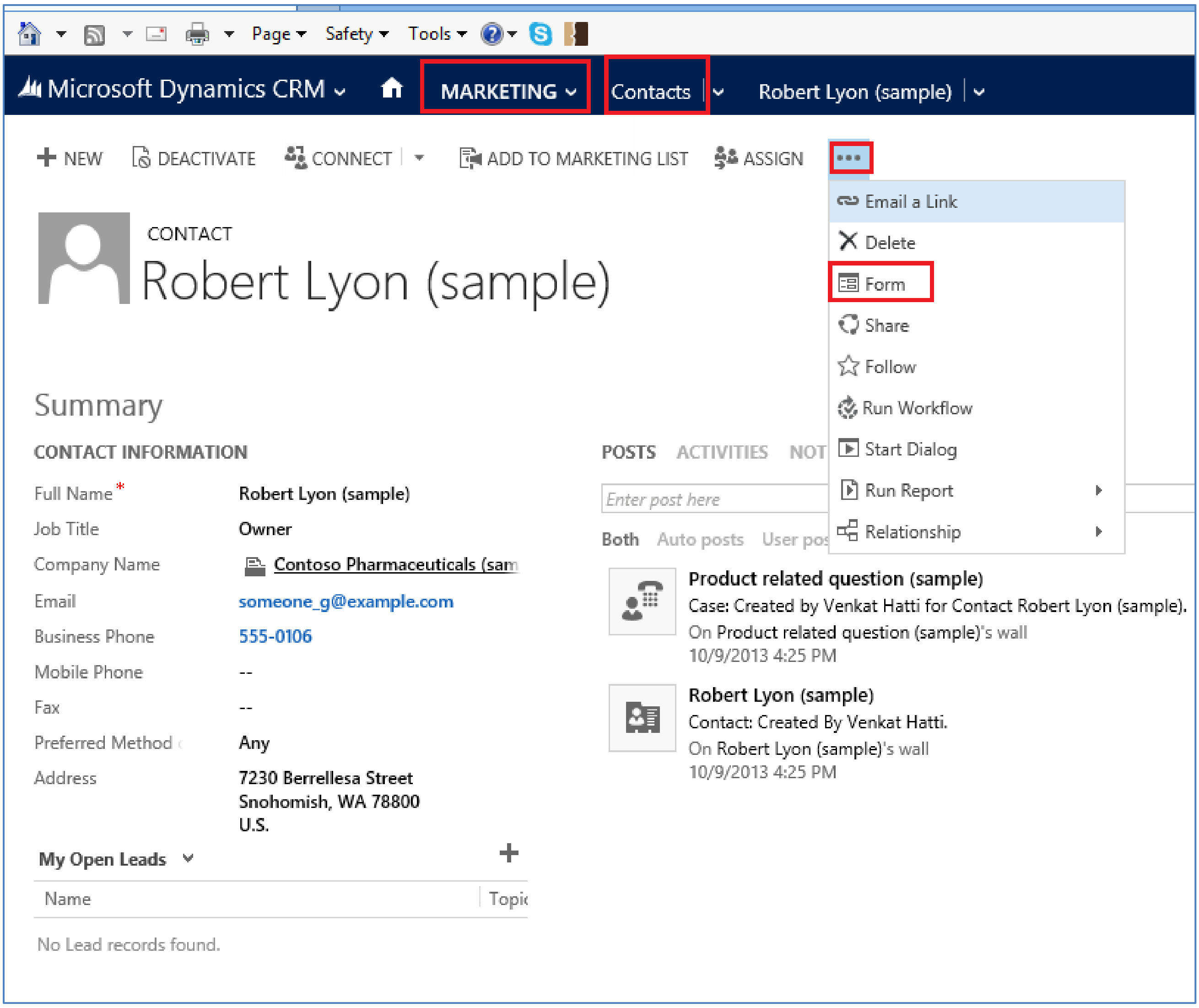



Figure 60: Customize the Form

- A new window will open you click on Insert button which is at CRM ribbon. After clicking this it will show you the options. In that click on Sub-Grid as shown below

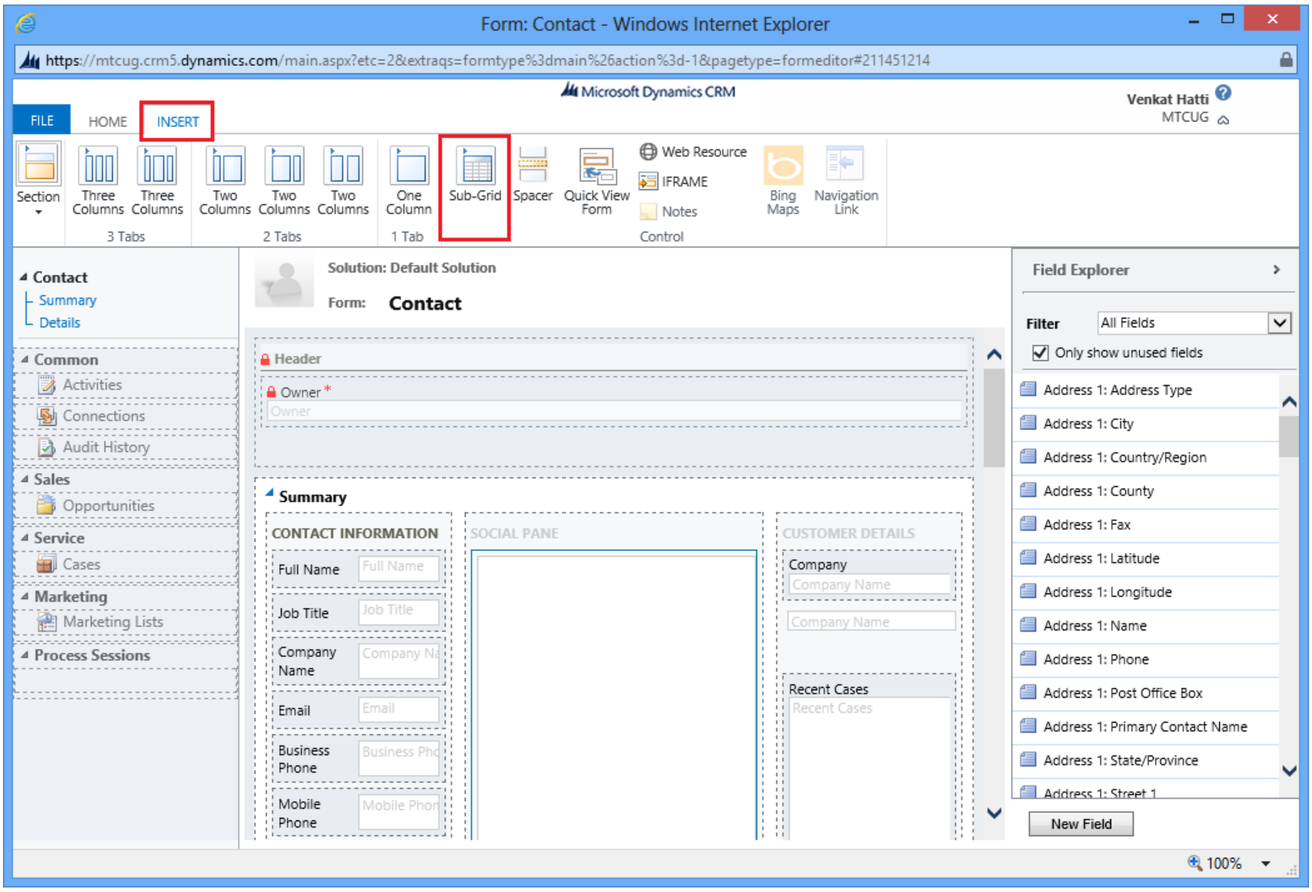



Figure 61: Insert Sub Grid

- List and chart properties window will open. In Display tab you can give unique name to Sub grid. Click on OK. This Unique name you can pass as parameter.

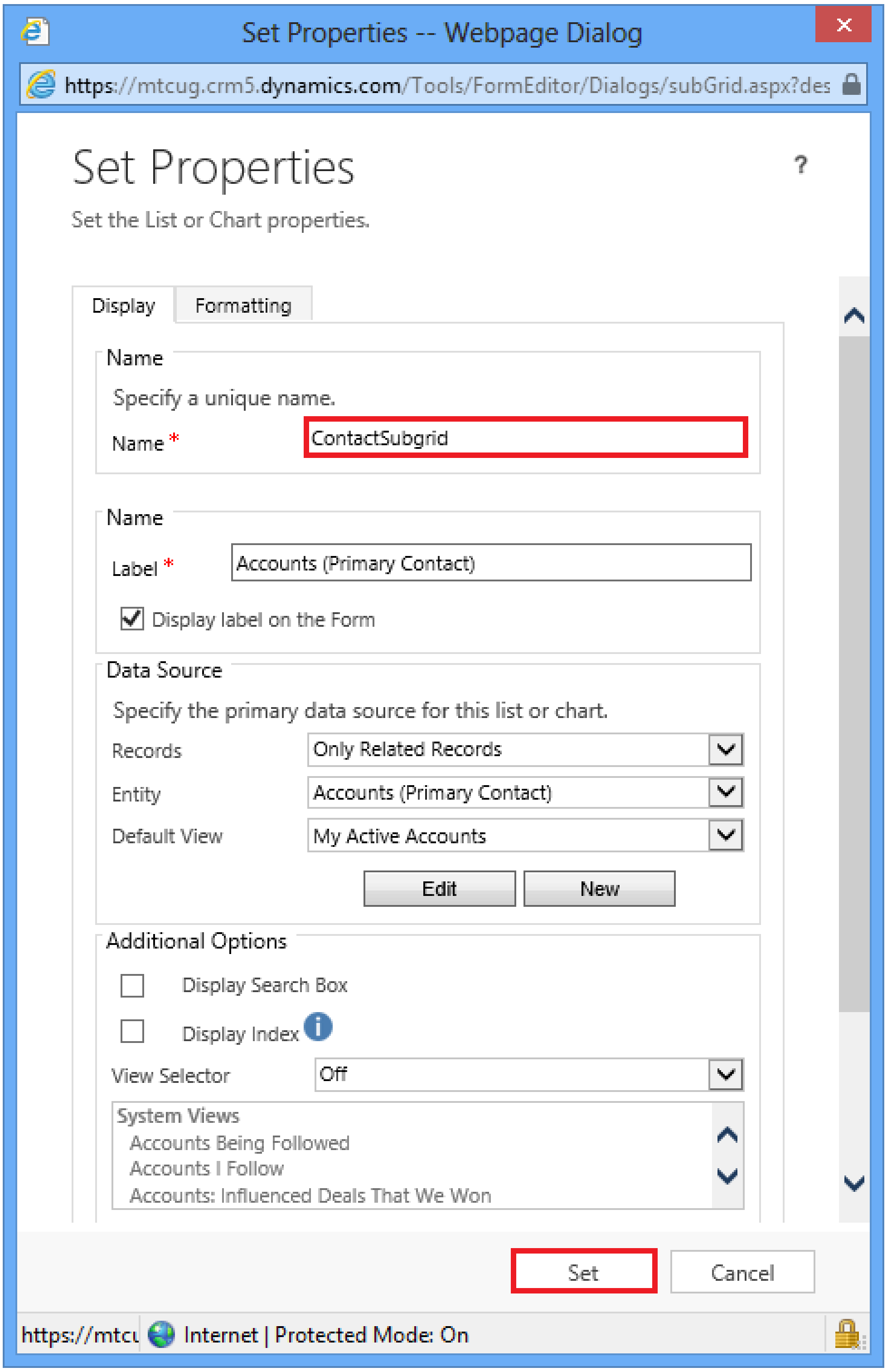



Figure 62: List or Chart Properties

- Open the contact form page and click on Form Properties.

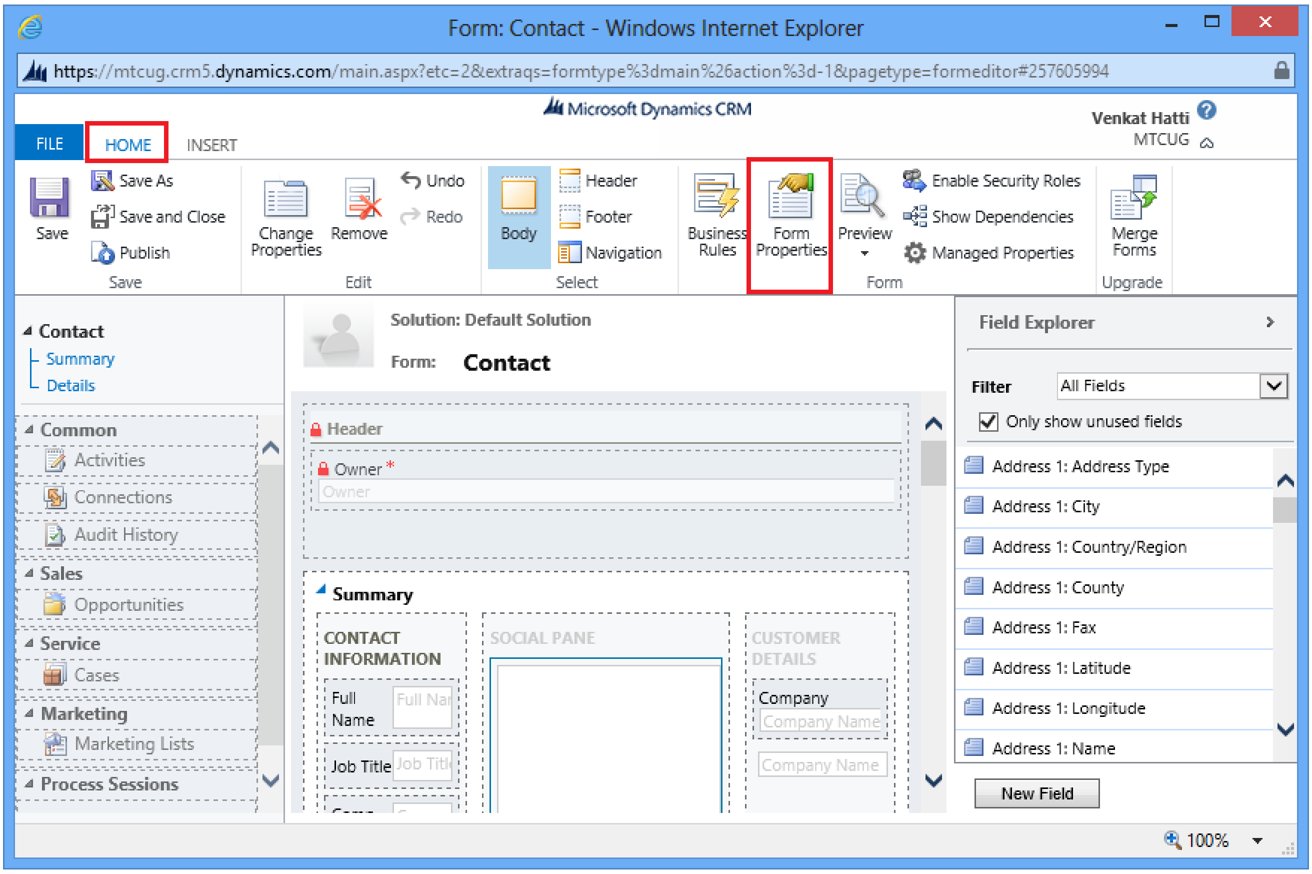



Figure 63: Form Properties

- A Form properties window will open with Form libraries and Event Handlers. Click on **Add button** to add the JavaScript file.

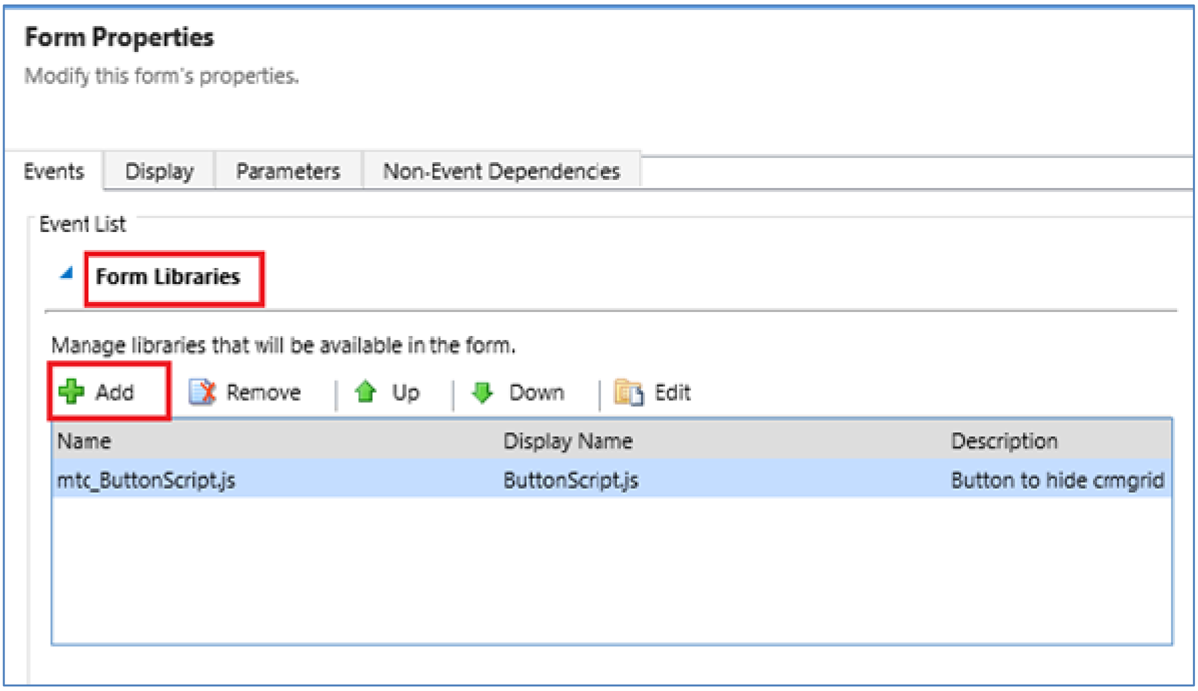



Figure 64: Add Form Libraries

- After clicking Add button a Look up record web page dialog will open. In that select the **mtc_ButtonScript.js** file and click on **OK**.

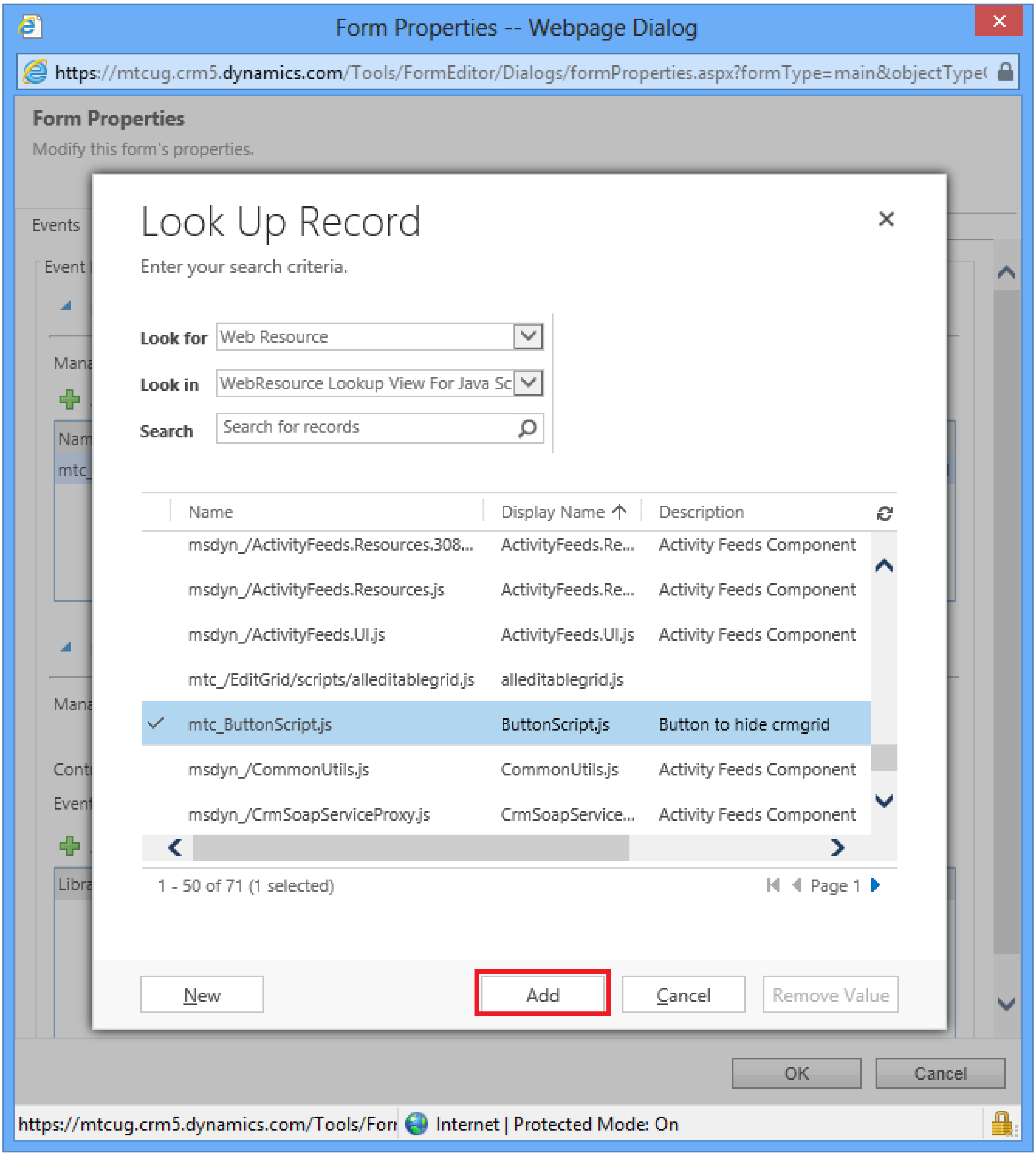



Figure 65: Look Up Record for Web Resource

- Then add the event handler to the JavaScript file. Select the Control as Form and event as **On Load**. Then click the **Add Button**
- Handler properties web page dialog will open. In that select the Library as **mtc_ButtonScript.js** and Function name as **LoadSupergrid.** Select the check box of Pass execution context as first parameter.

- The Unique name what you have given in List and chart Properties **ContactSubgrid** the same here you have to pass as parameter name in double quotes like **"ContactSubgrid".** Click on **Ok**.

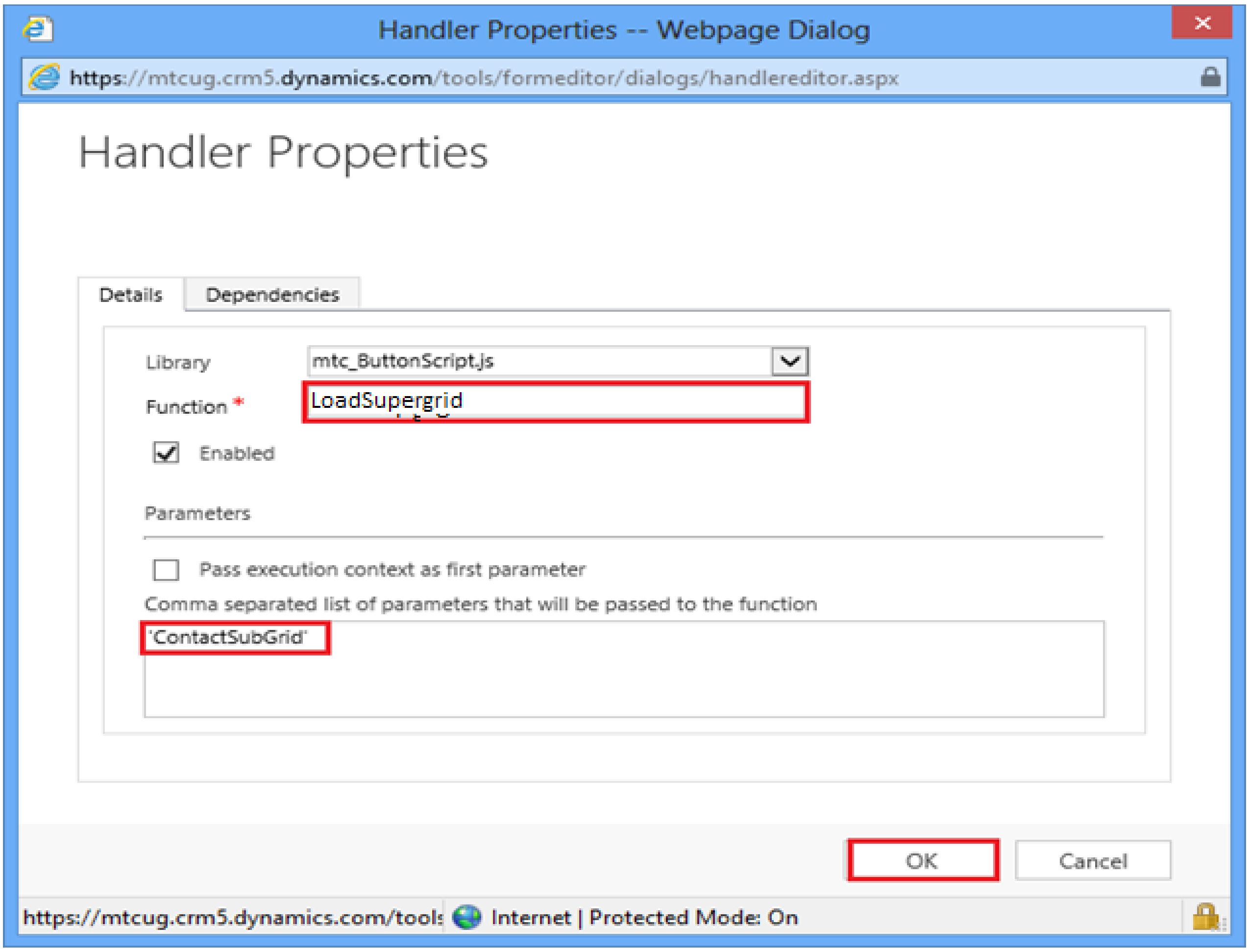



Figure 66: Handler Properties

- Added javascript functions will be visble in Form properties as shown below.Click on **Ok**.
- On Click of "OK button the original CRM 2013 / CRM 2015 Sub grid is retained.

`

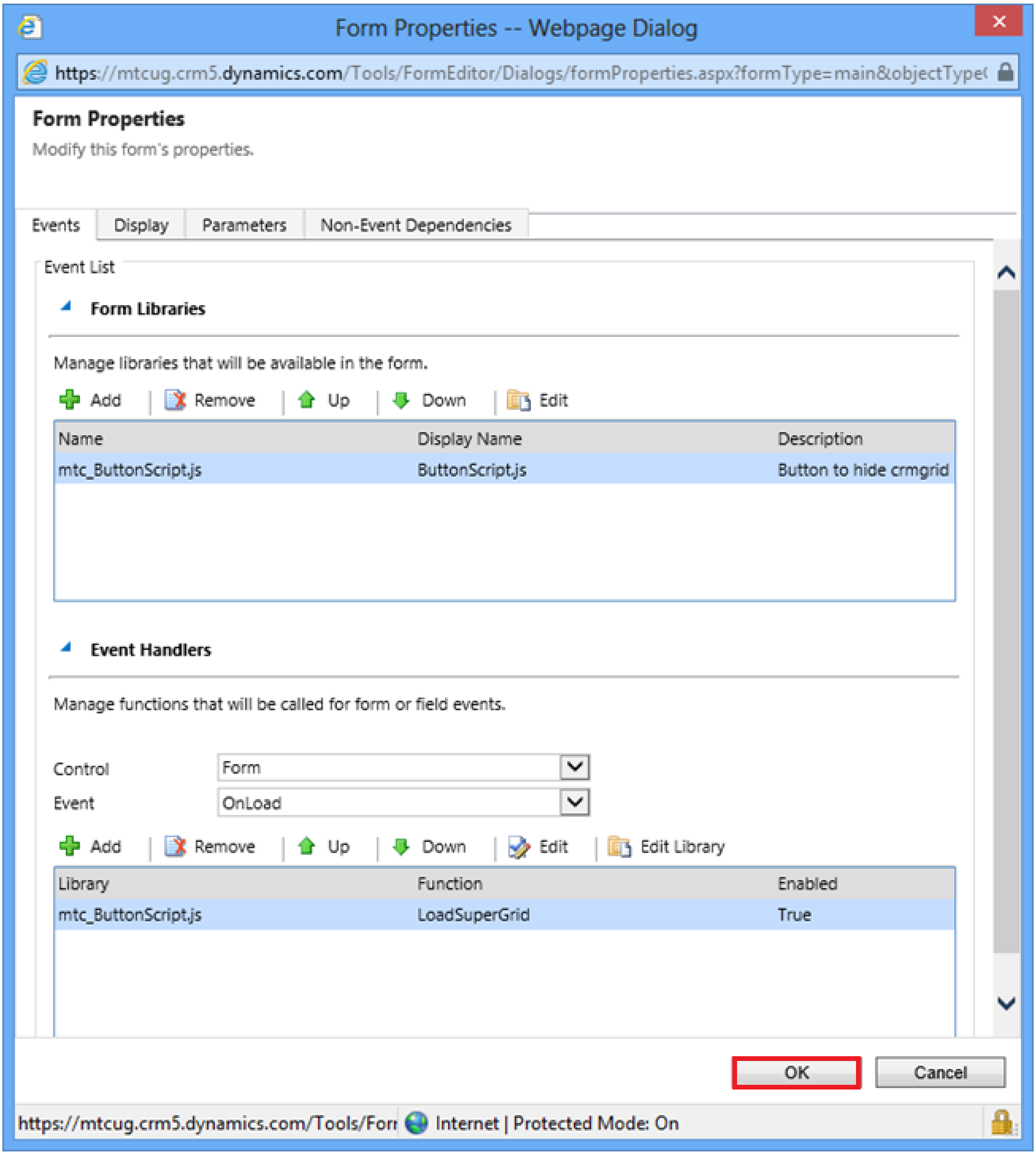



Figure 67 : Form Properties window

- In a Form window click on save and **Publish customizations** then **refresh** the web page.

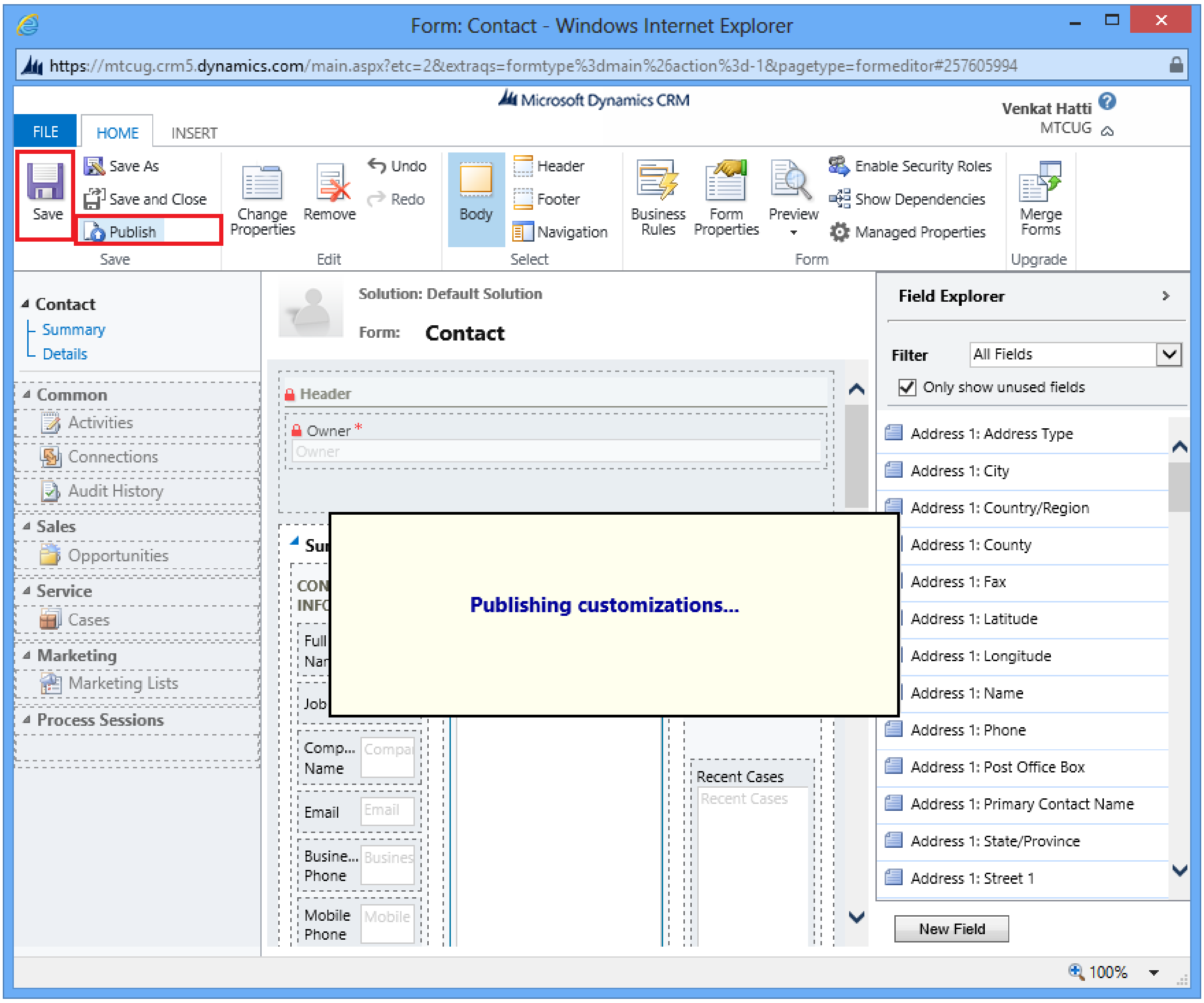
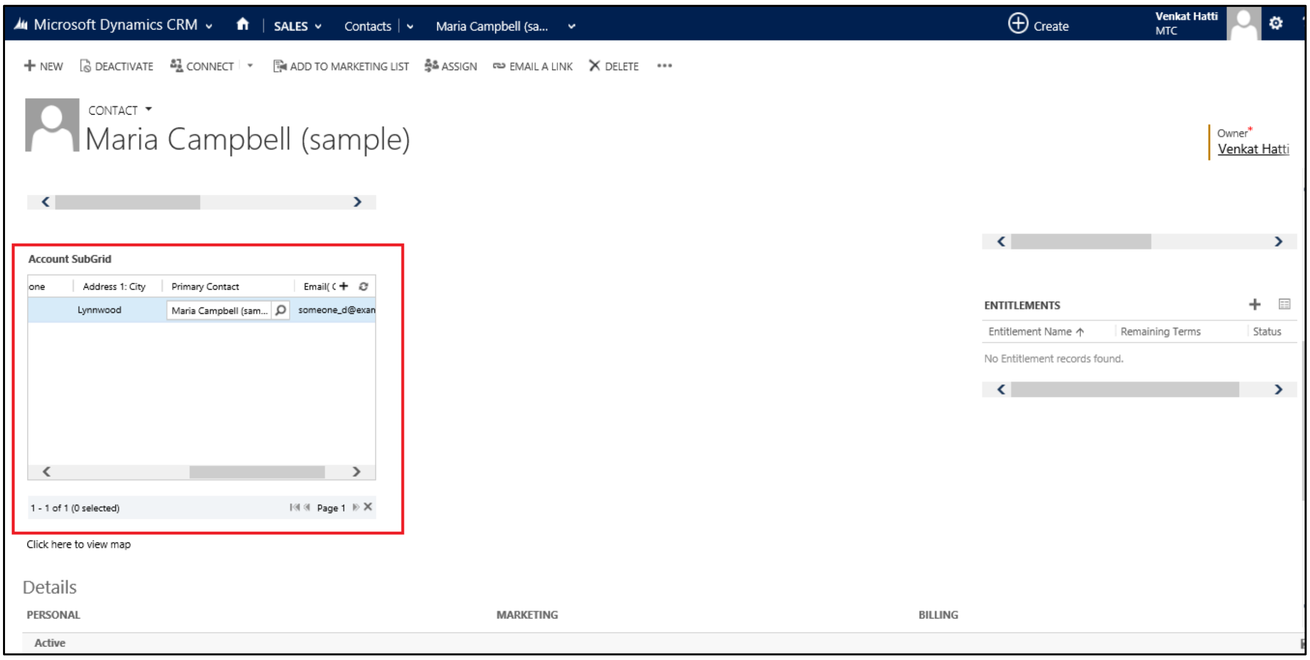



Figure 68 : Save and Publish Customizations

- By using the on Load java script function you have created a sub grid in Contact as shown below figure.




- Part of the form is enlarged here to show that Account grid in detail.

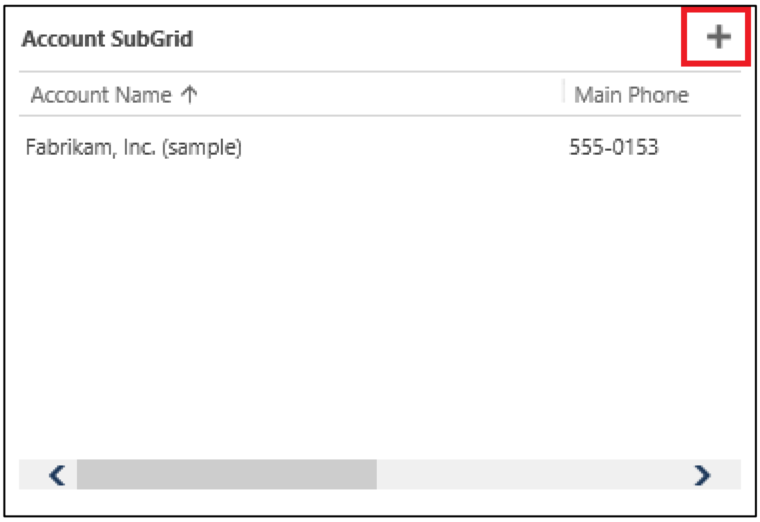
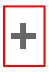



Figure 69: Account Grid in Zoom

- To activate Super Grid in Sub grid, the user has to to use On Load functionality to activate the Super Grid for Sub Grid.

- Once the Super Grid is activated the  shown in Contacts (as shown above) will dissapear and a new button is created in tha bottom as shown below

- Since CRM 2013/2015 does not have the Ribbon facility on the sub grid as compared to CRM 2011, Hence only for for CRM 2013/2015 use we have provided the a new image  as shown below to disable the

Super Grid Functionality in sub grid. When you place your cursor on this, it displays as "disable Super Grid".

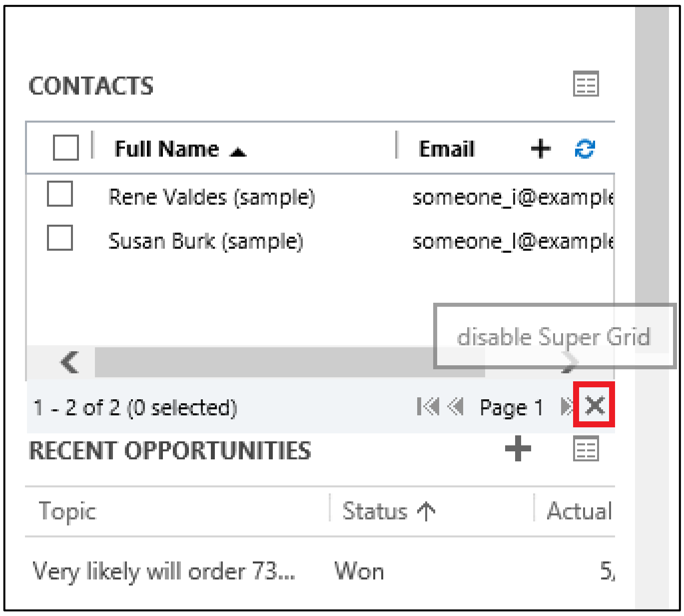



Figure 70: Super Grid disable on Sub Grid for CRM

- When you click on this  it displays a pop up message as shown below

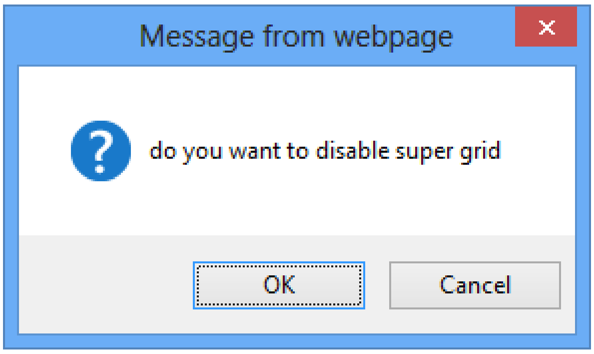



Figure 71: Disable Super Grid Message

- To Quit Super Grid in Sub Grid click "OK"

# Super Grid for Outlook

## Installation of CRM in Outlook Online Mode

- Install Outlook Client initially.
- Click on Configuration Wizard as shown below

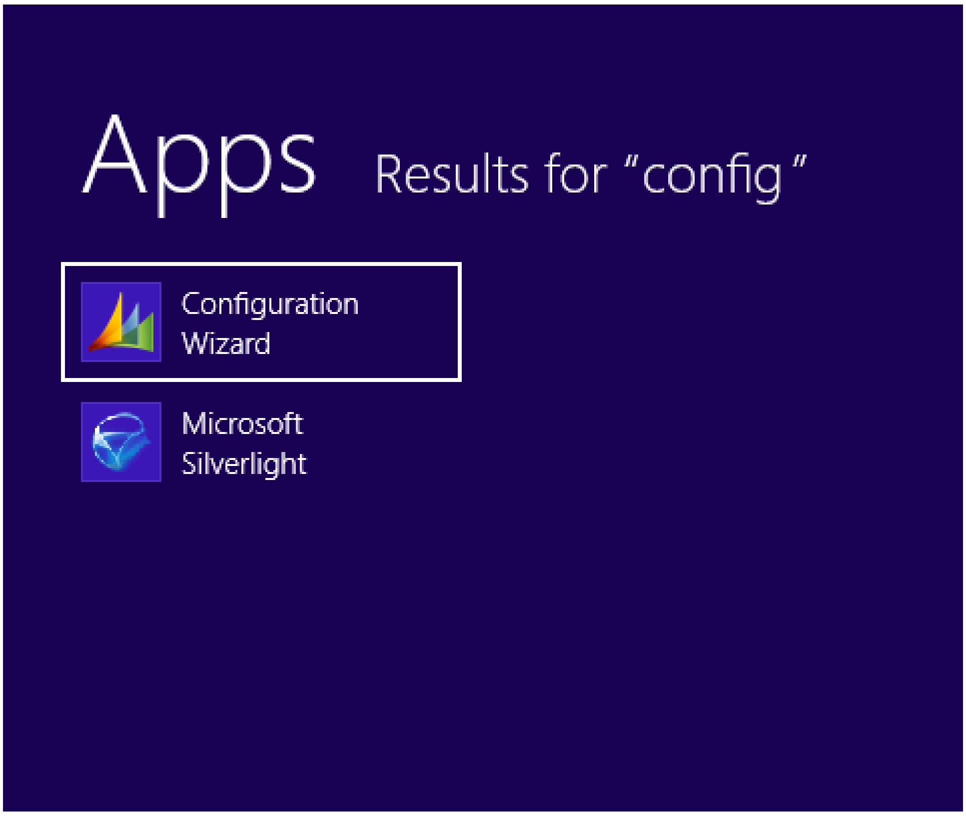
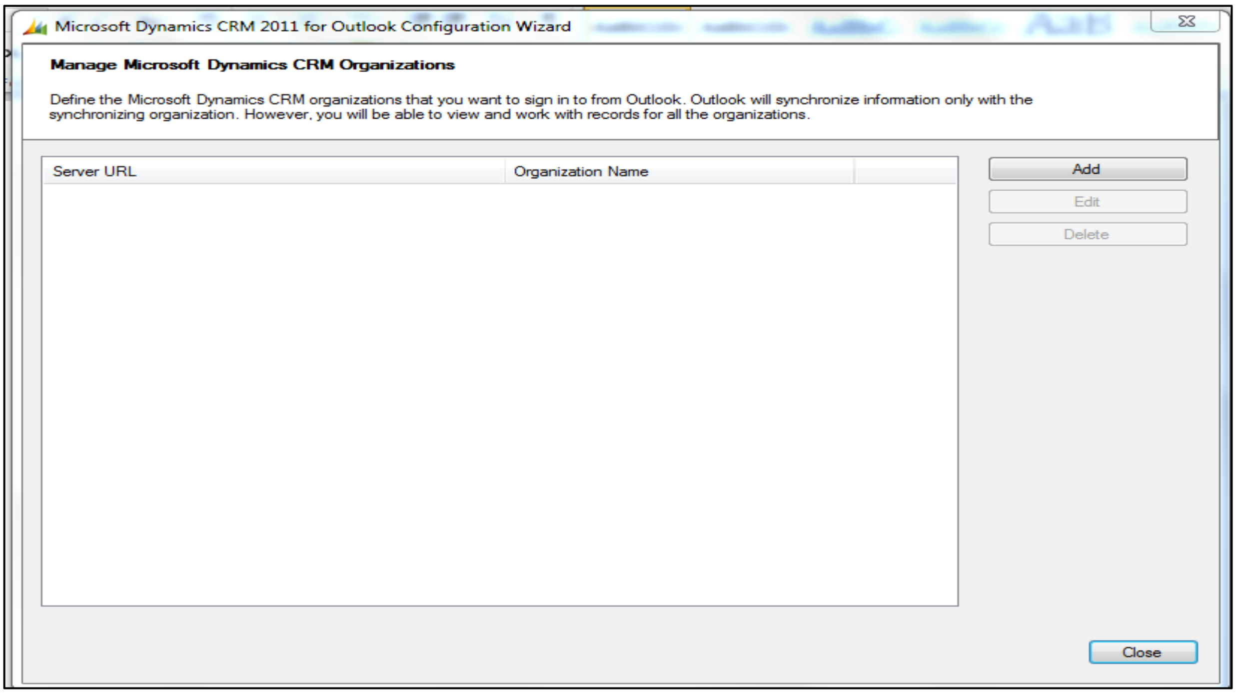



Figure 72: Wizard Screen in Windows 8



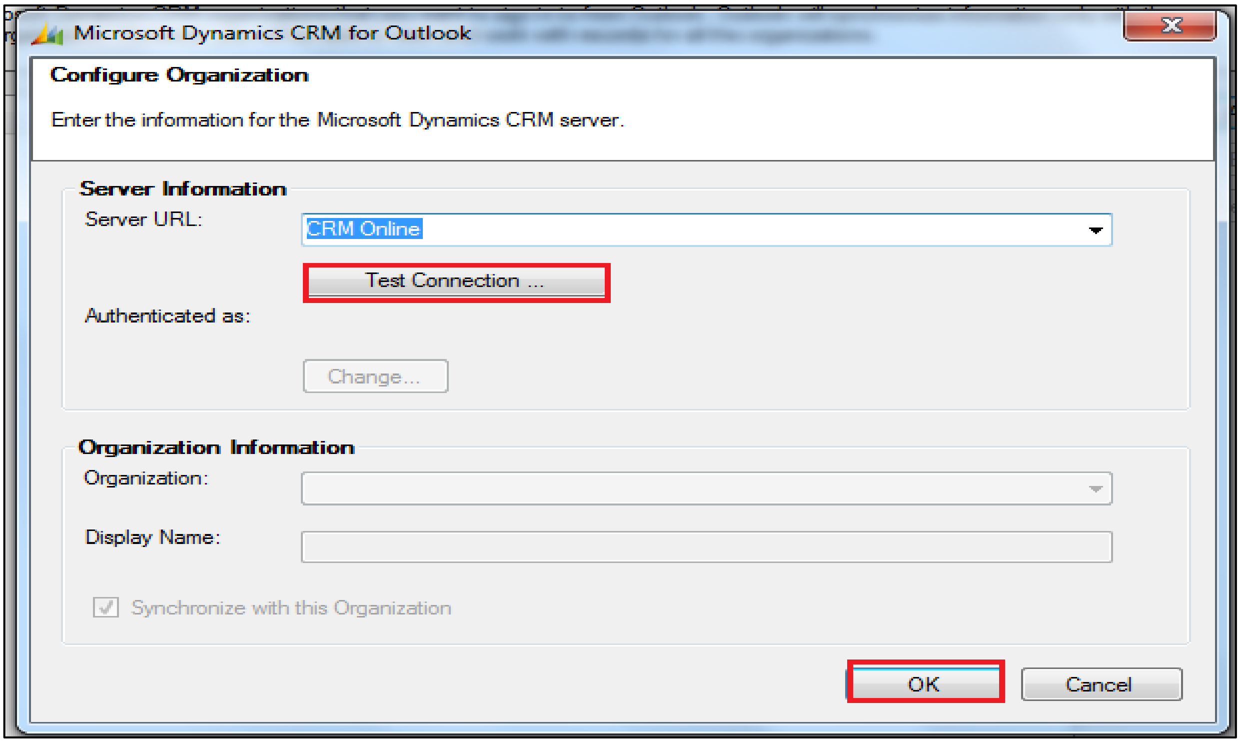




Figure 73: Configure Organization

- Select CRM Online from the Drop down list against Server URL
- Click on Test Connection and wait for few minutes

**Note:**

If the URL details provided are of On Premise CRM, then Dynamics CRM window pops up and you have to give your Username and Password to create CRM in outlook

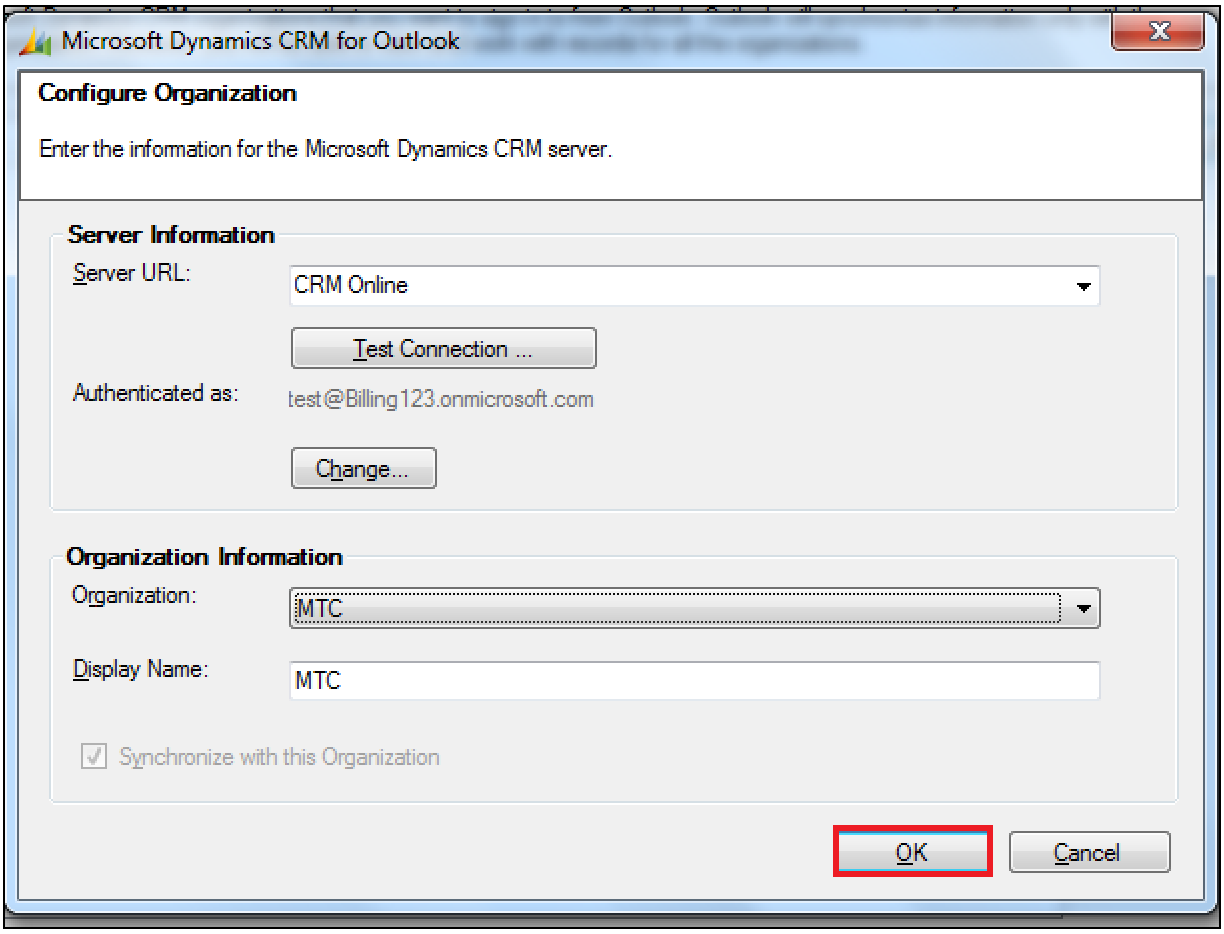
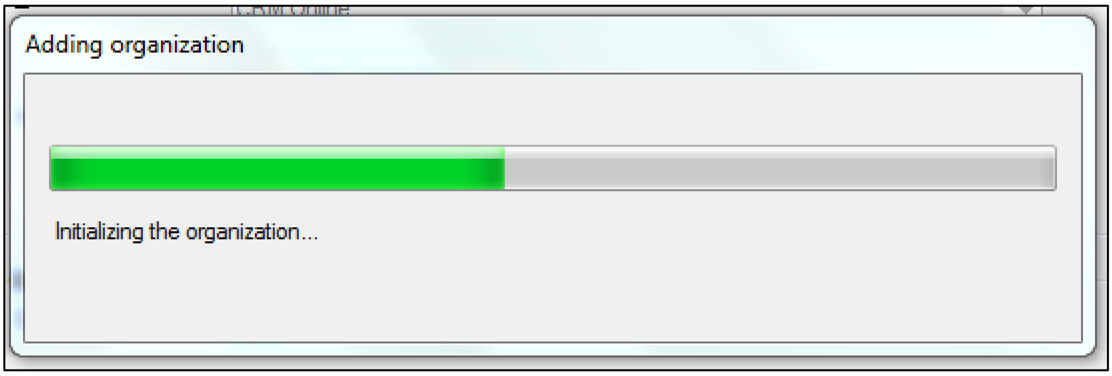
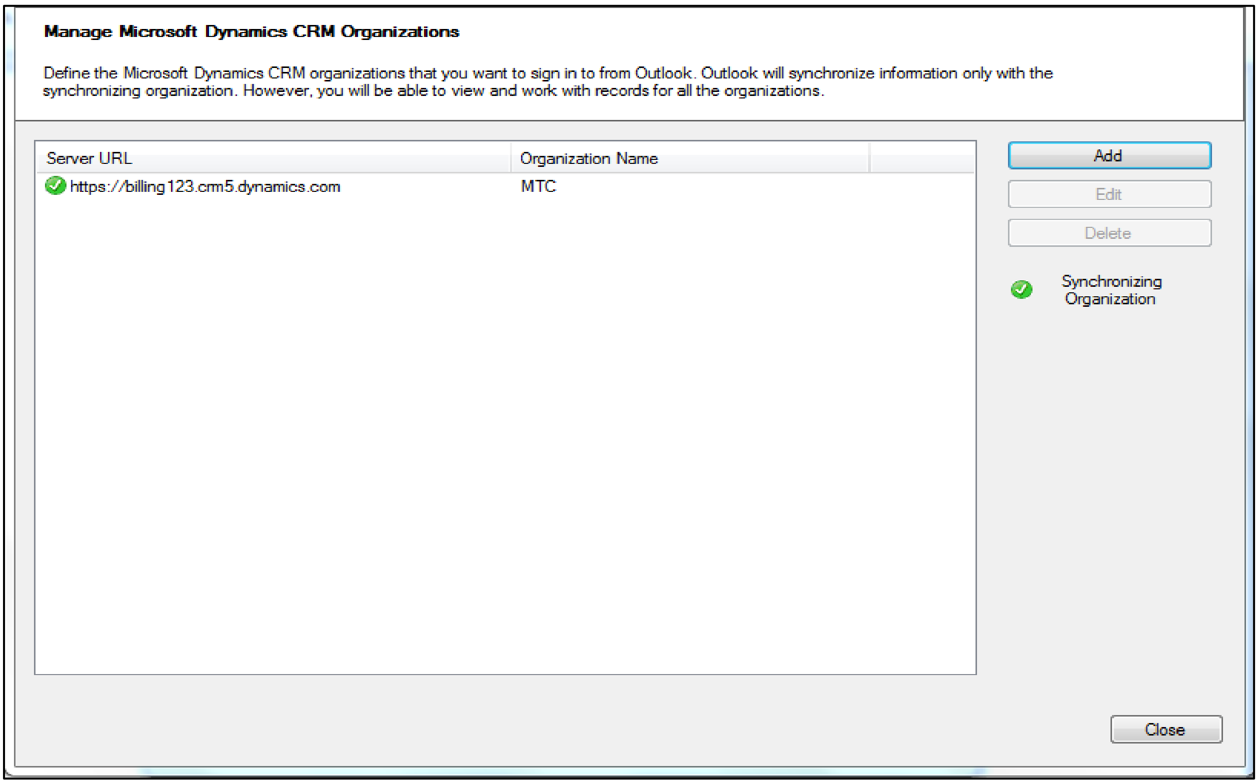



Figure 74: Configure Organization

- Check the Organization name and Display name, if it's correct click on OK.
- Initializing process will take few minutes... Please wait till the process is finished






- Click Close Tab to close the wizard.
- Open Microsoft Outlook
- Would able to see the CRM tab on the main Ribbon
- Click on Display Name (MTC) as shown in red color box
- Click on Workplace->Click on Customer -> Accounts as shown below

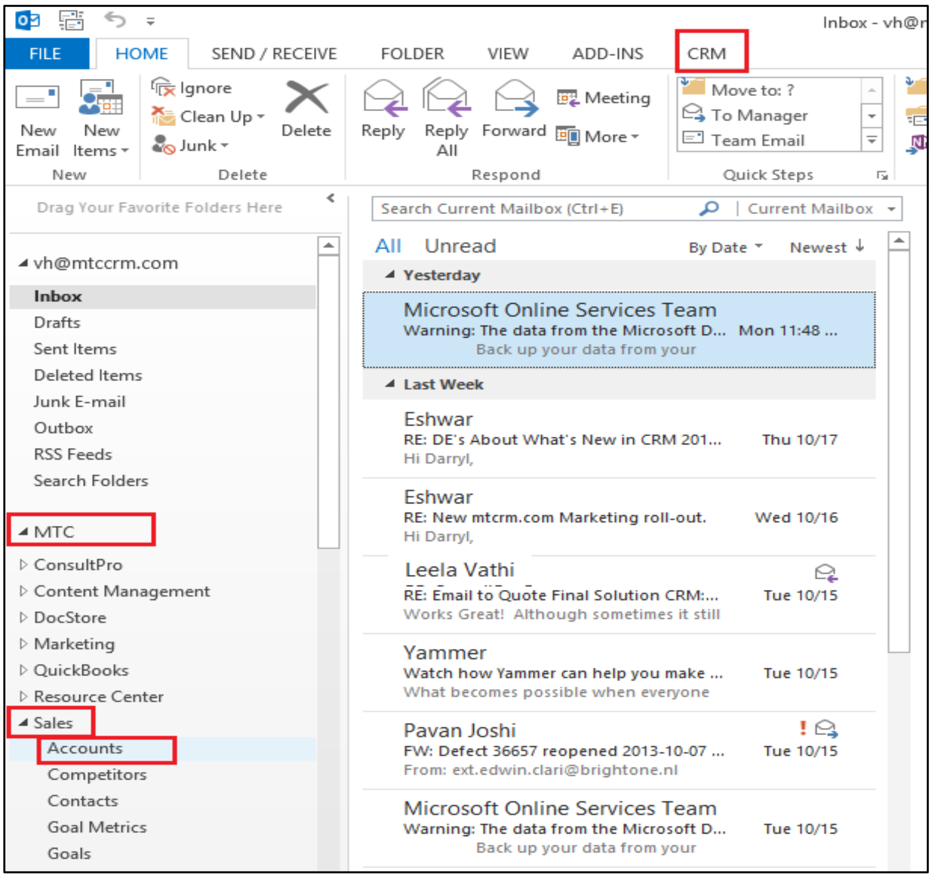


Figure 75: Outlook Screen

- The CRM screen is shown below in Outlook with Active accounts in the top Half of the screen and the details of the selected accounts in the bottom half of the screen. Now click on Sup gird Icon on the top of the screen as show below

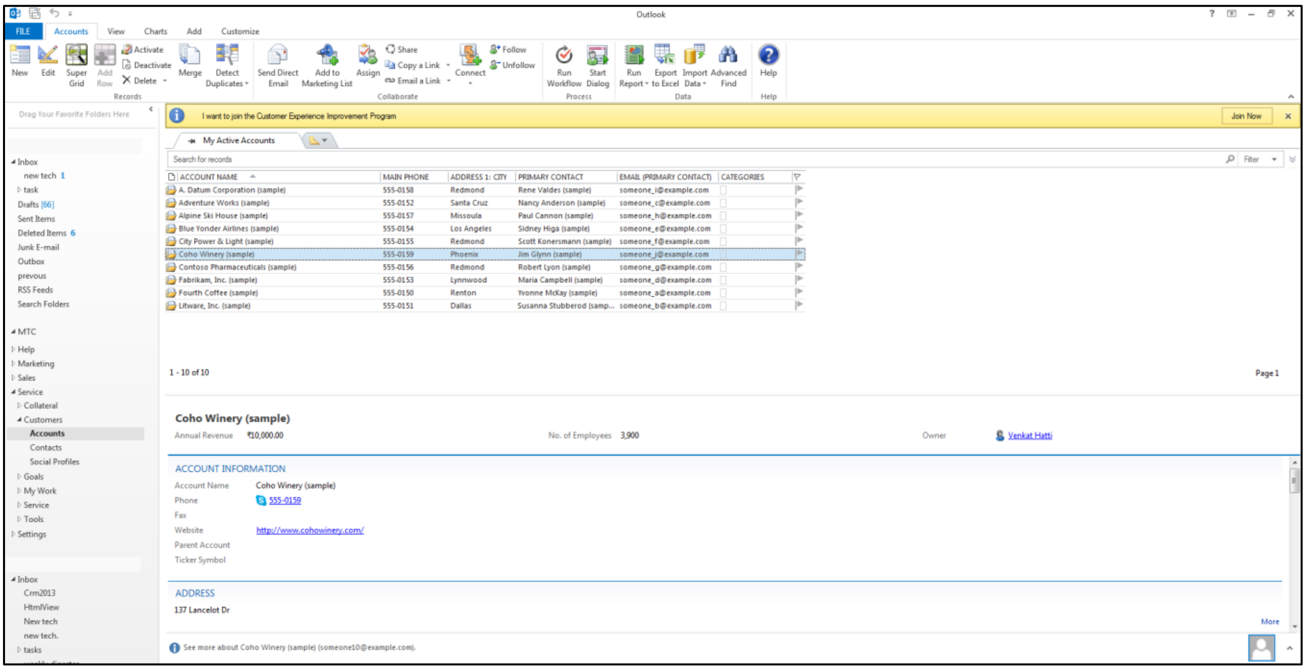


Figure 76: CRM in Outlook

- A new Screen pops up showing all the Accounts (in this case My Active Accounts) are displayed.
- All the functions are of same as in Super Grid product, you will be able to add a Row, Delete a Record, Edit a record like in Excel sheet and finally once done, click on Save Icon to save the record.
- To exit Super Grid functionality click on Super Grid Icon and close the pop up screen to go back to Outlook screen.

## Super Grid on Dashboards

- Select **Settings -> Customizations** (one-time activity)

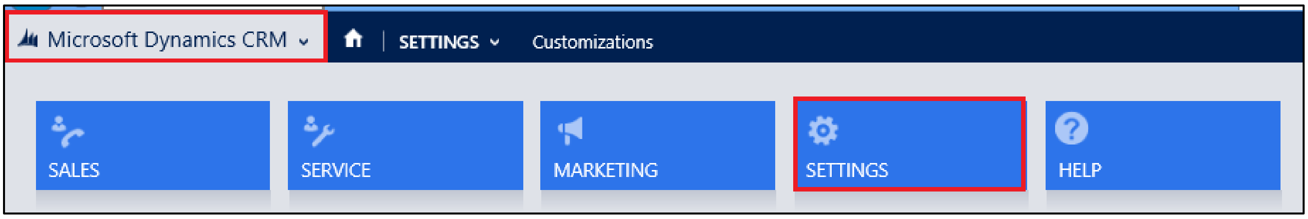



Figure 77: CRM Customizations

- Click on **Customize the System.**

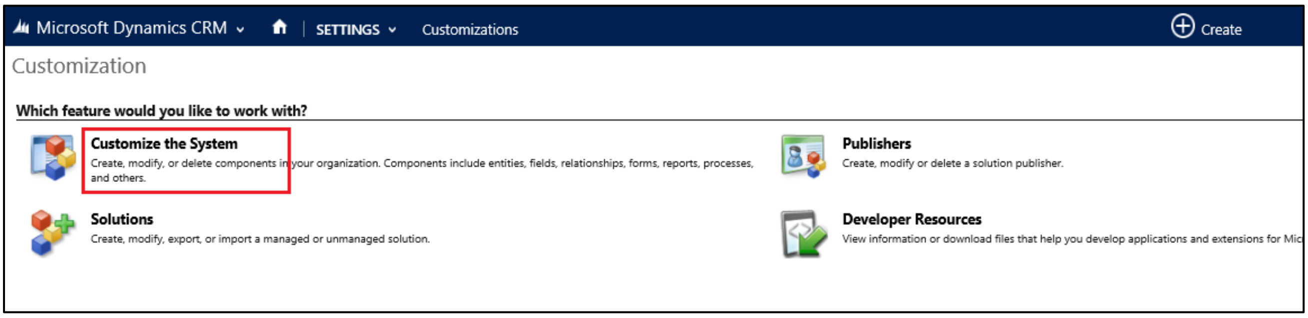



Figure 78: CRM Customizations

- Select Dashboards

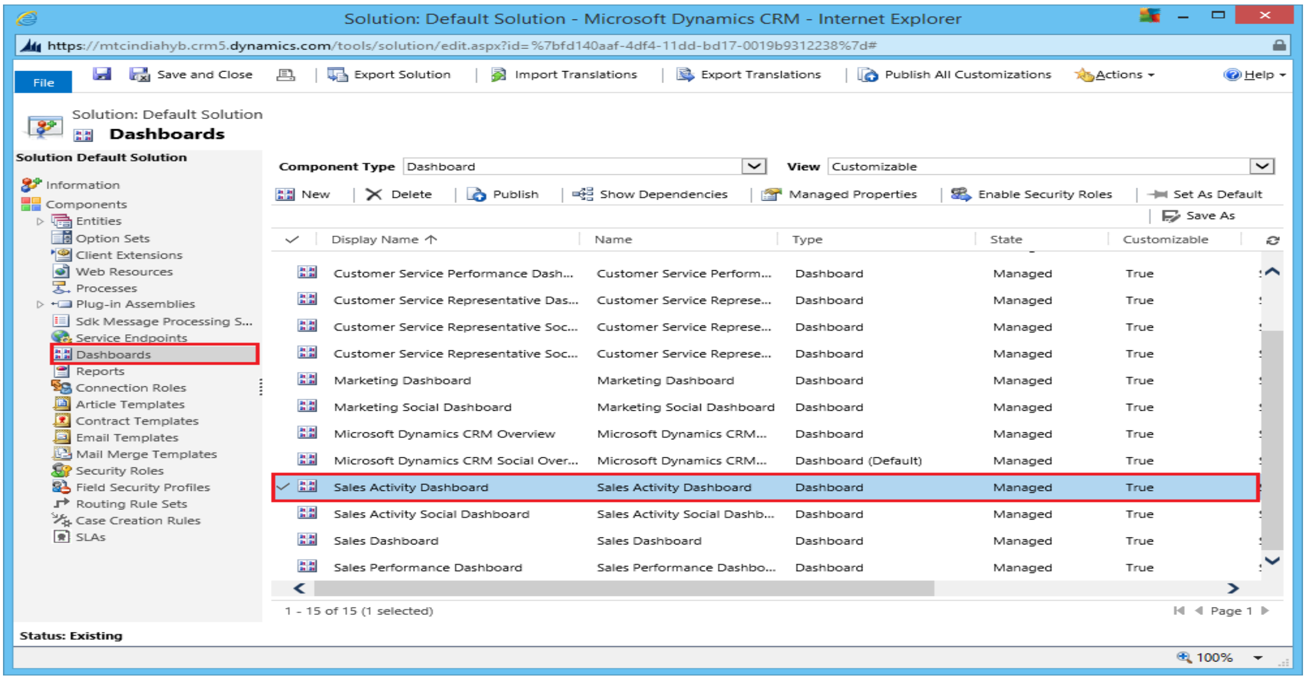



Figure 79: Solution Default settings

- For example if the User needs to set up Super grid on dashboard "Sales Activity Dashboard" , he needs to double click on the required dashboard
- Now Click on Web Resource as shown below
- A pop Window Add Web Resource is opened
- Select '**mtc_/EditGrid/CustomGridPage.html**' with the help of lookup icon

- Enter Web Resource Name
- Select OK to continue

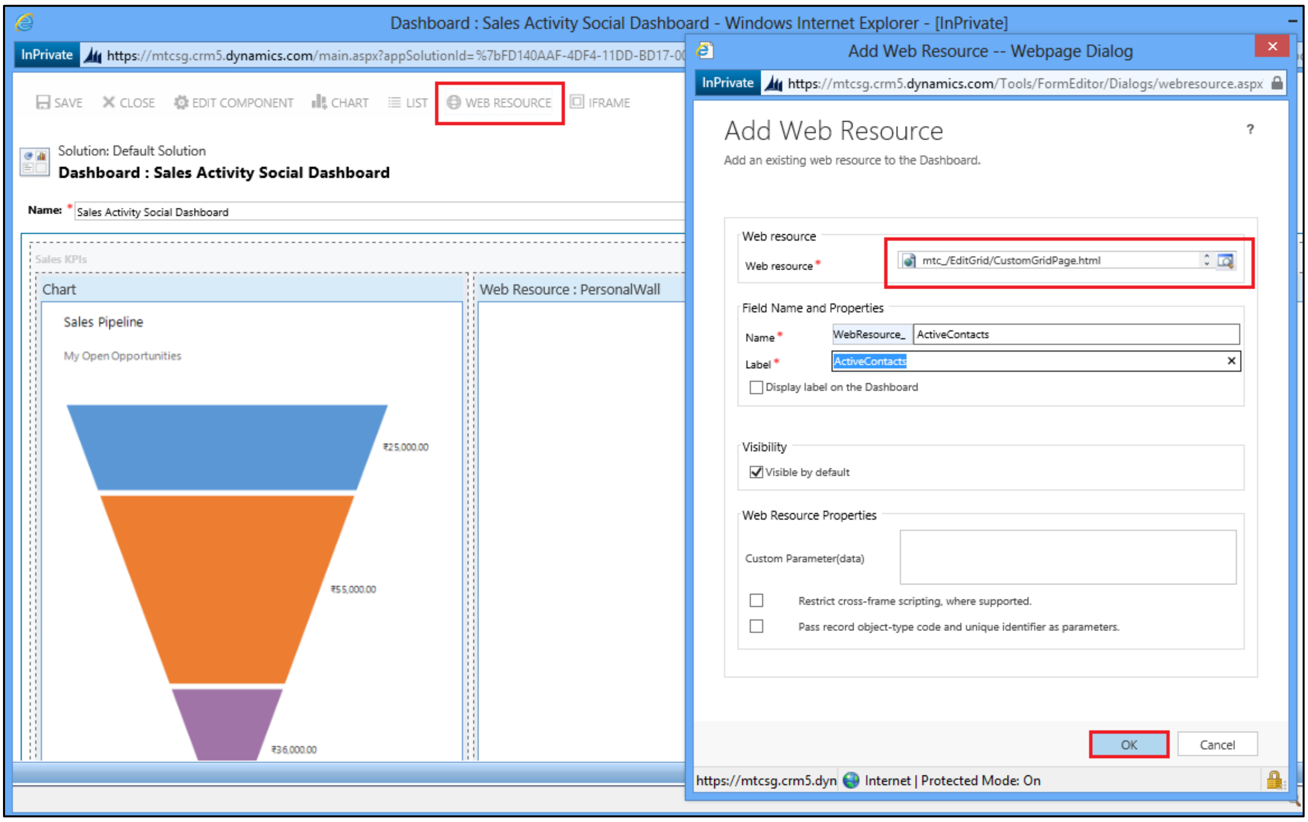



Figure 80: Adding Web Resource in form

- Save and Publish the Dashboard
- Control is directly moved to the Dashboard and the user can adjust the size of display to choice.

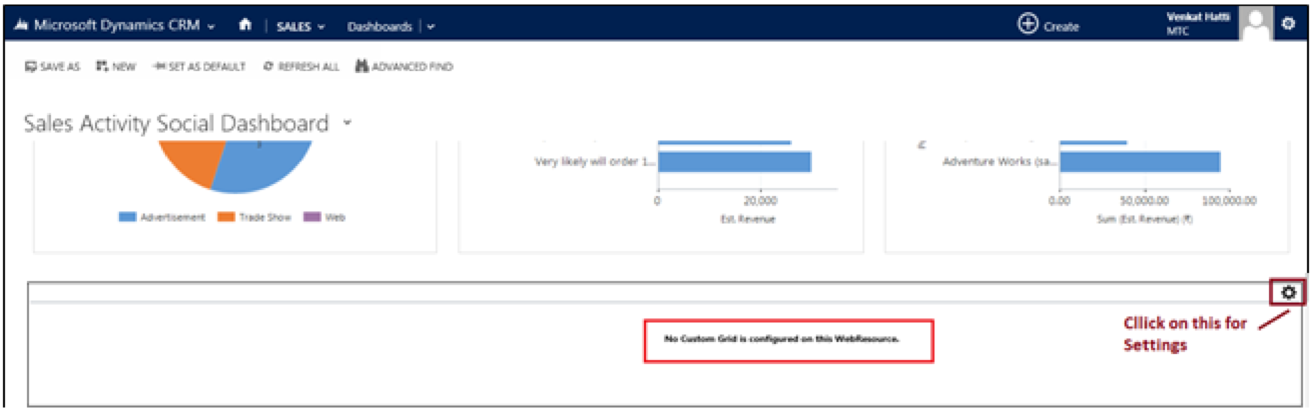



Figure 81: Super Grid Functionality on Dashboard

## Settings Area for Super Grid on Dashboards

Initially all Dashboards are not configured. This Super Grid functionality is available only if the necessary settings and changes are made. As shown below.

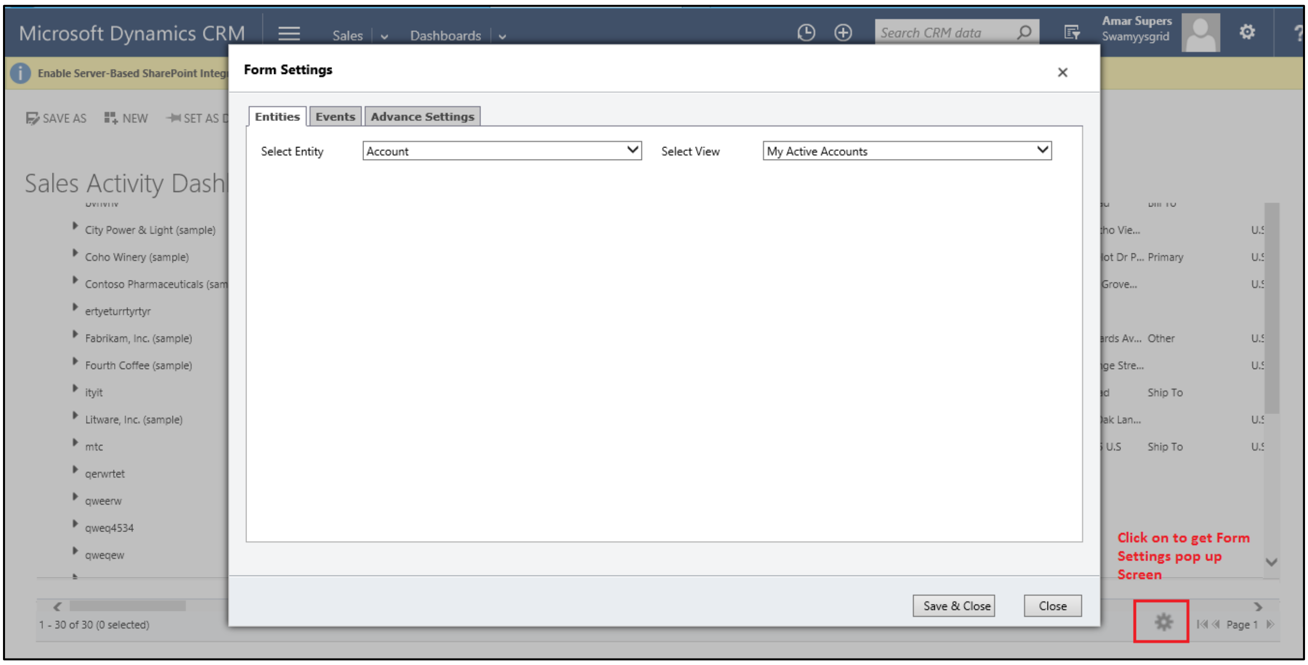



Figure 82: Form Settings for Dashboards

- Click on the icon as shown above to open Form Settings screen
- Click on the icon as shown above for Settings
- It Pops up Form Settings
- **Select Entities** – Select Entity as Account (example) and Select View as ACTIVE CCOUNTS (example) both from drop down list provided

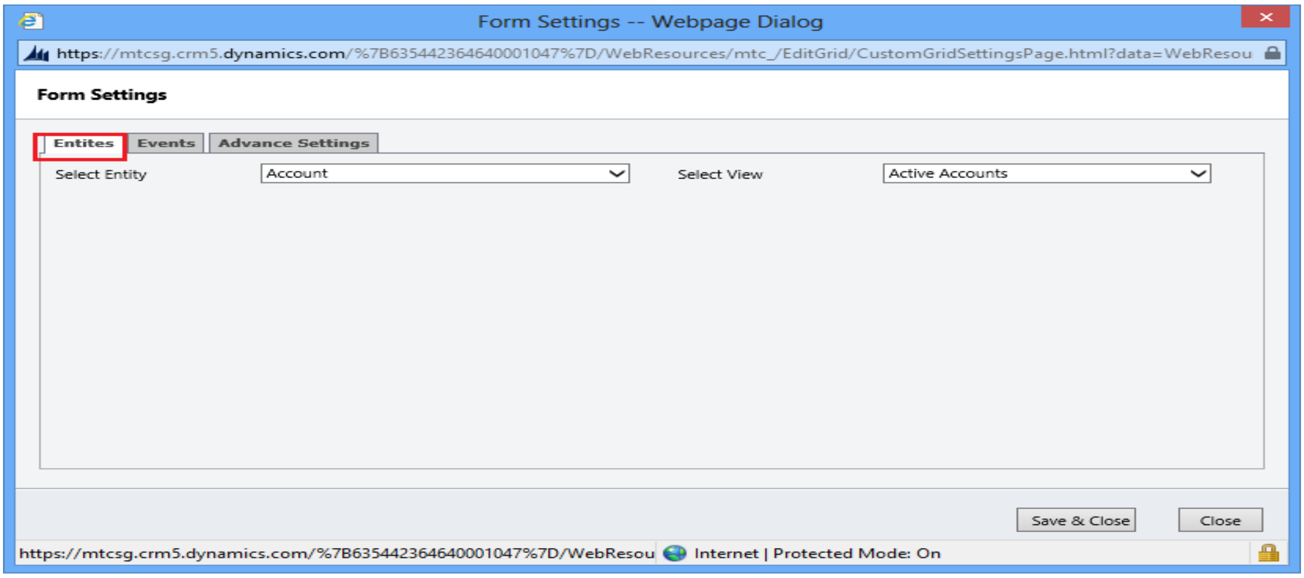



Figure 83: Form Settings for Dashboards -Entities

- **Select Events**
- Under Events add Web Resource and Select Event from the Drop down list provided

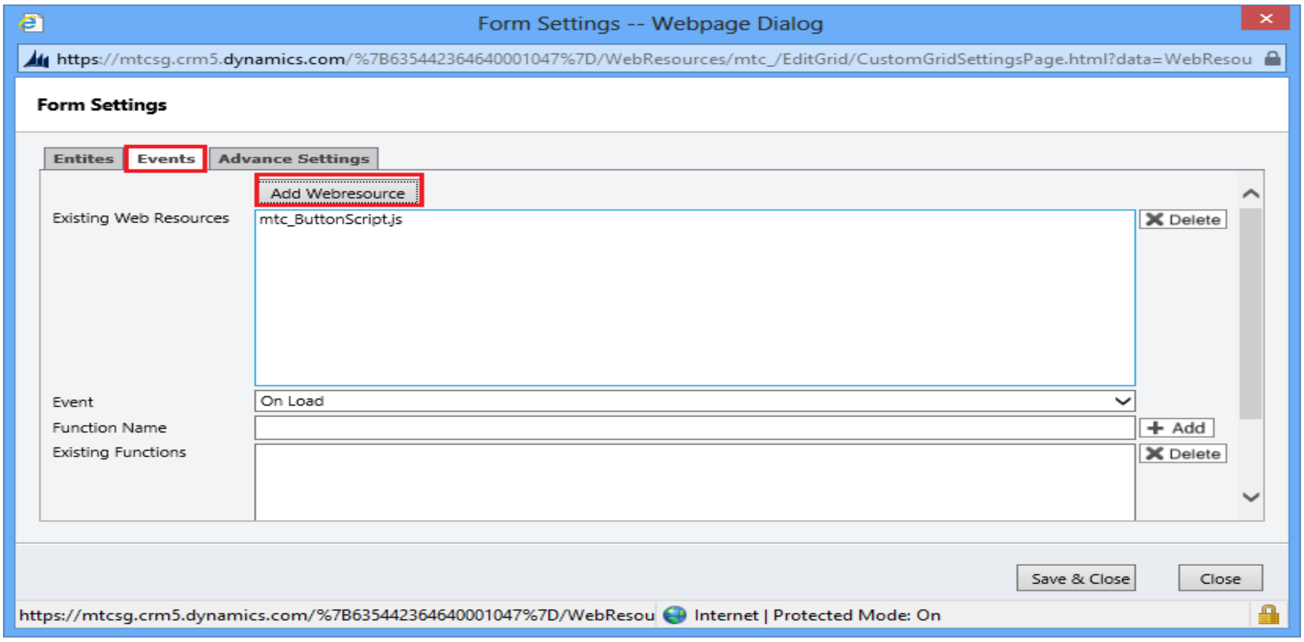
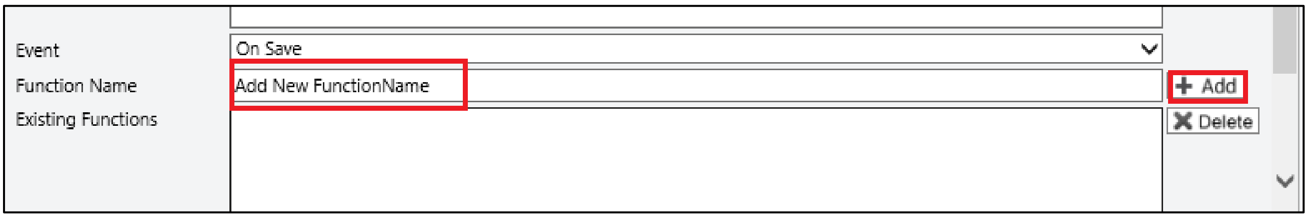


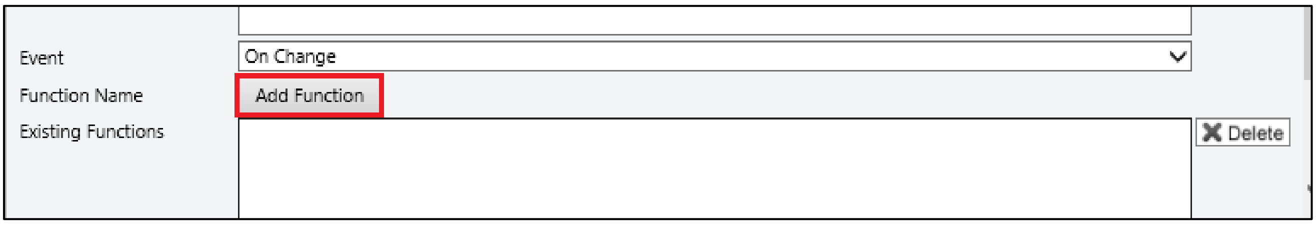

Figure 84: Form Settings for Dashboards – Events

**Note: There are five types of Event available from the Drop Down list. Like On Load, On Save, On Add Row, On Change and On Save Complete.**

- Except for On Change for all the other four events, you can directly give the Function name and Click Add button as shown below

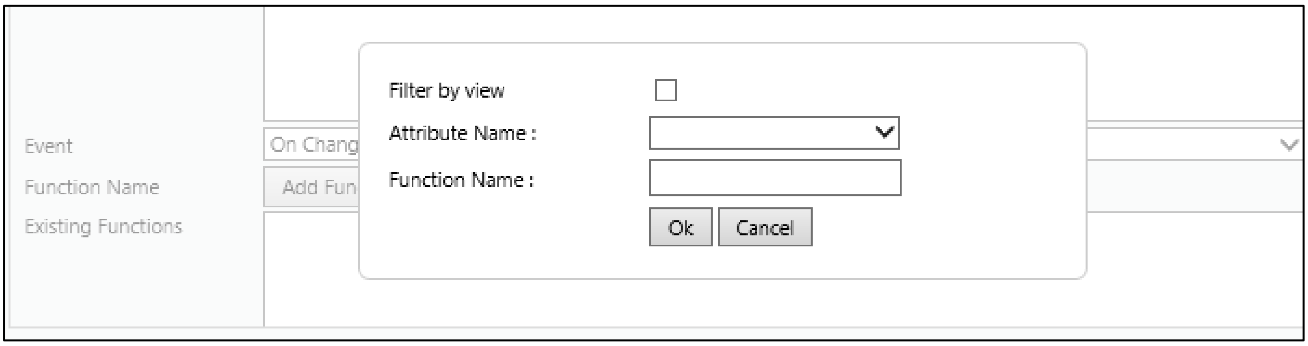



- On click of Add, the Name is moved to existing Functions. This can be deleted if needed by selecting the function and click on Delete Button.
- **For On Change Function**: On Selecting on Change from the drop down list




- Add Function Button is shown the place of Function Name, Click on Add Function button
- A new Pop up window is displayed as shown below




**Note:** If Filter by View is checked, only the Attributes pertaining to Select Views under Entities are displayed for Attribute Names. If not selected then all the Attributes of the entities are displayed for Attribute Names.

- Here you have to select the Attribute Name and Function Name. These can also be filtered by View if needed.
- Click OK to continue
- **Select Advance Settings**
- Under this select like Auto Save, CRM Required fields, Filter Attributes etc. as shown below

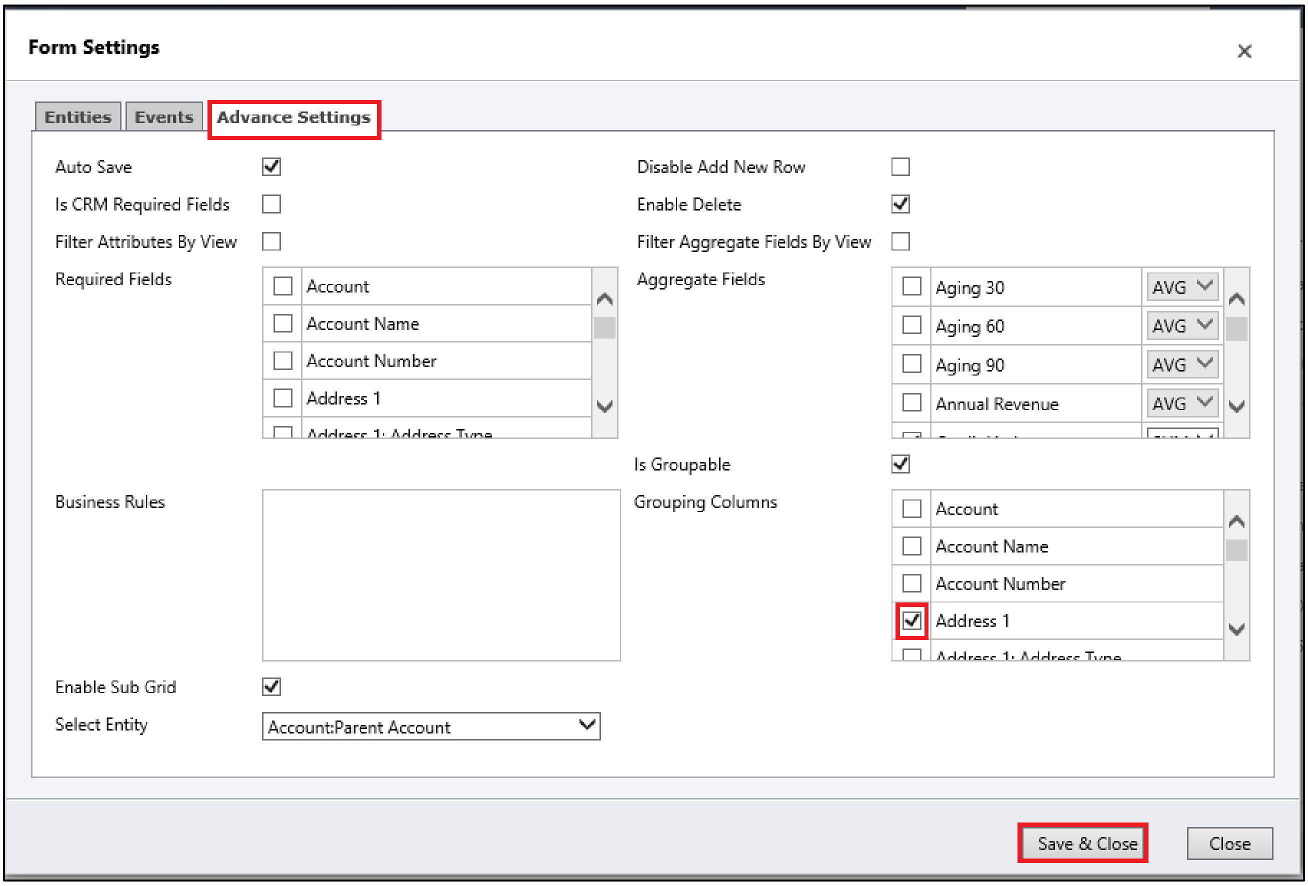



Figure 85: Form Settings for Dashboards - Advance Settings

**Note:** If Filter by Attributes are checked, only the Attributes pertaining to Select Views under Entities are displayed for Required Fields. If not selected then all the Attributes of the entities are displayed for Required Fields.

- For grouping columns to add select Is Groupable
- Select Enable Subgrid to Parent-child relation Entity
- Finally click on Save and Close

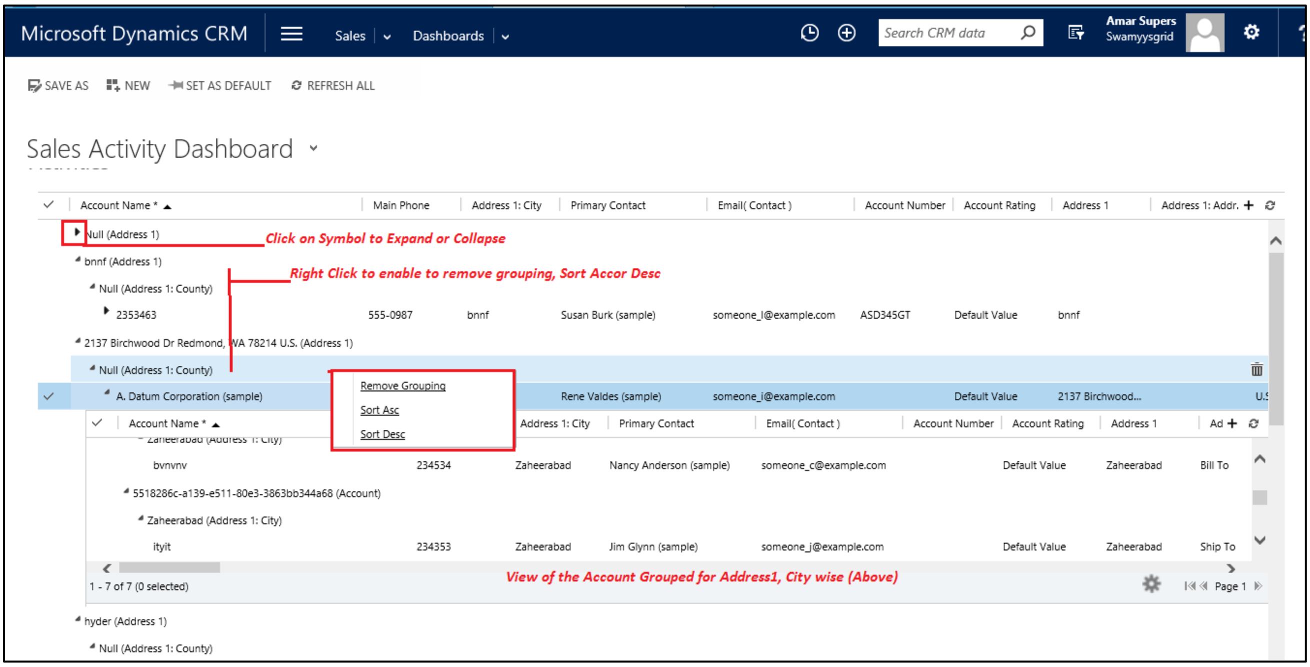



Figure 86: Dash Board with Super grid

- Super Grid on required dashboard is shown above
- Click on the Symbol to expand grouping details. (as shown above) On a single click user can modify or change or edit data using Super Grid function.
- User can Add or Delete records accordingly using Super Grid
- Once this done, user can directly go to dashboards and use this functionality in future
- On Right Click user can create a Group or Remove a Group.
- Use also has facility to Sort Ascending or Descending on the Right click
- Click on the Symbol on the Left of the data record enables to show the Grouping details in full

## Grouping Columns for Super Grid on Dashboards

Go **to CRM→Sales→Dashboard** as shown below.

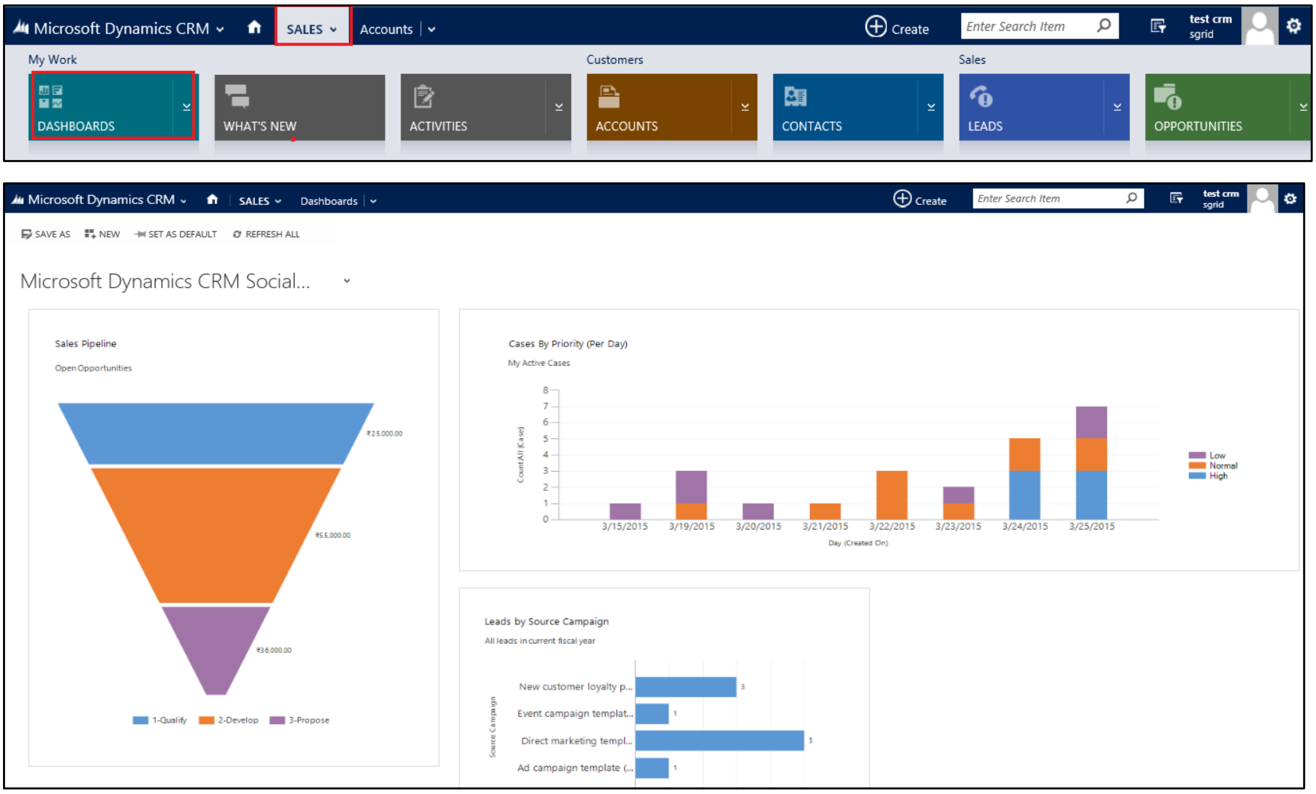



Figure 87: Dashboard showing Grouping Columns

- Scroll down the Dashboard

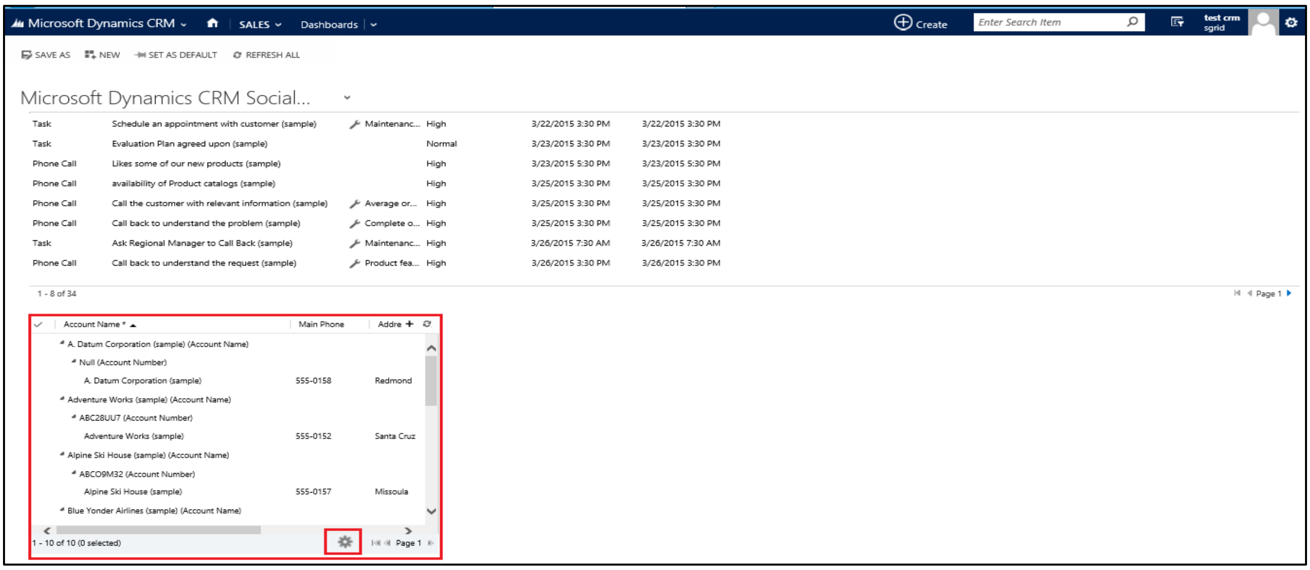



Figure 88: Dashboard showing Grouping Columns

- The Grouping columns are shown on the Dashboard also.
- Functionality of this grouping is similar and as discussed above in Settings area
- If the Grouping is not enabled on custom grid on Dashboard or on the custom grid on form then Click on Settings icon

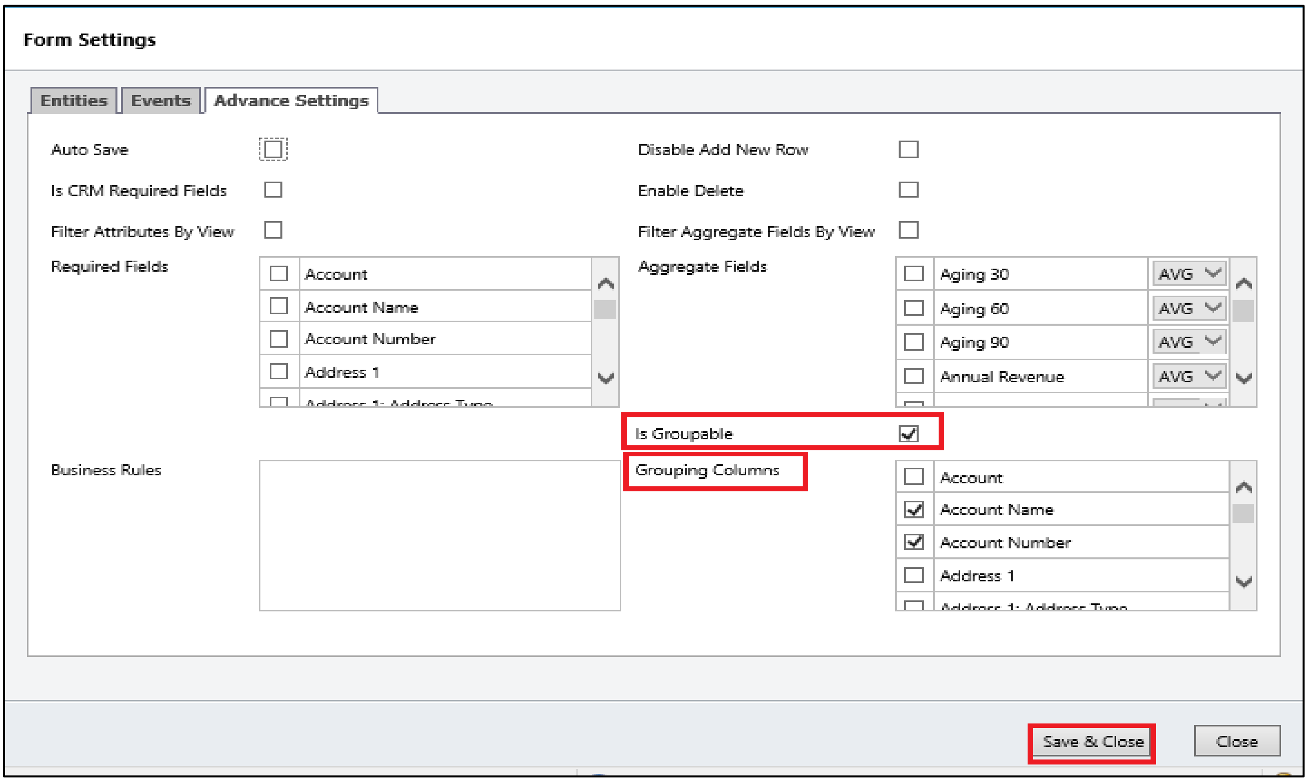



Figure 89: Form Settings - Webpage Dialog

- Make Sure that Is Groupable is selected
- Select the Fields for the Grouping Columns
- Finally Click Save and Close to record changes

## Super Grid on Form

The Super Grid on any Entity forms.

- **CRM→Sales→Leads** (example)
- Select any Lead record to open

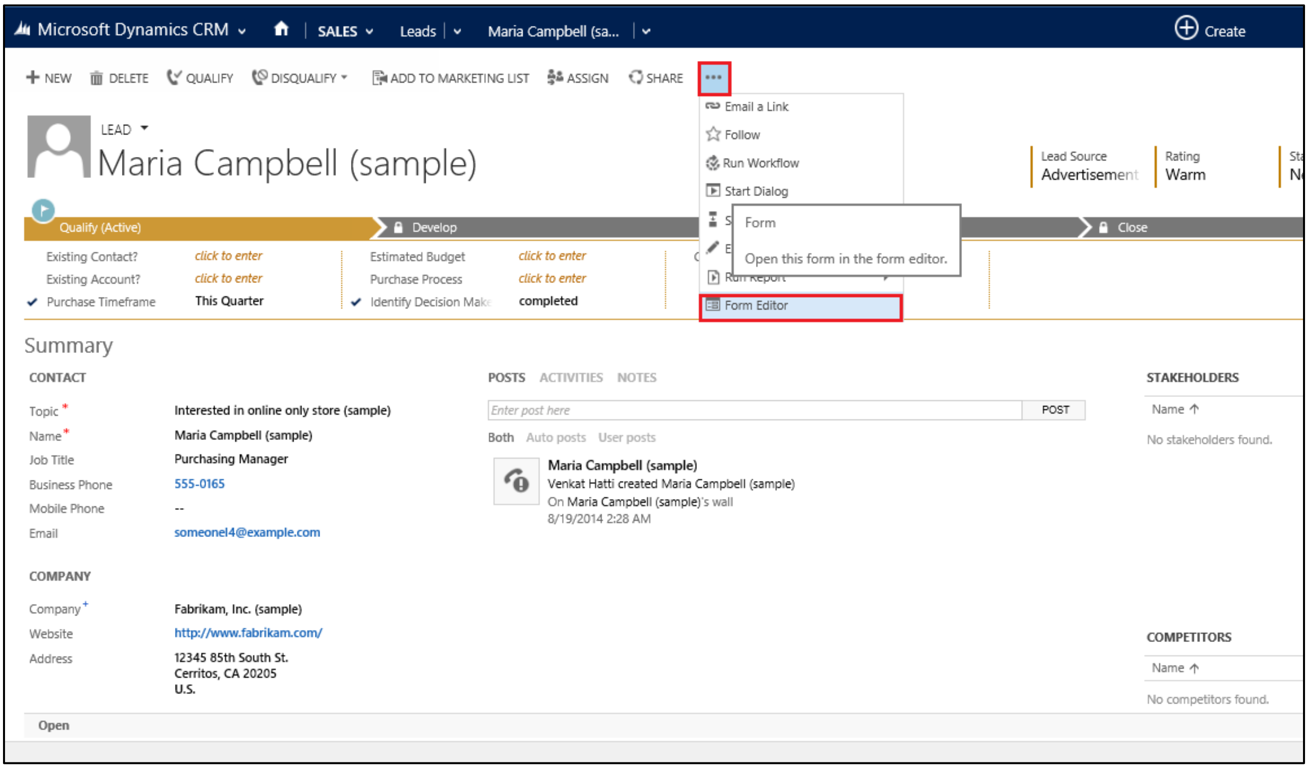


Figure 90: CRM Forms - Leads

- Click on More (...) and select Form Editor
- Insert column
- Select Web Recourse
- Now Click on Web Resource as shown below
- A pop Window Add Web Resource is opened
- Select ‘ **mtc_/EditGrid/CustomGridPage.html**’ with the help of lookup icon
- Enter Web Resource Name
- Enter Field Name and Properties
- Select OK to continue
- Finally Save and Publish

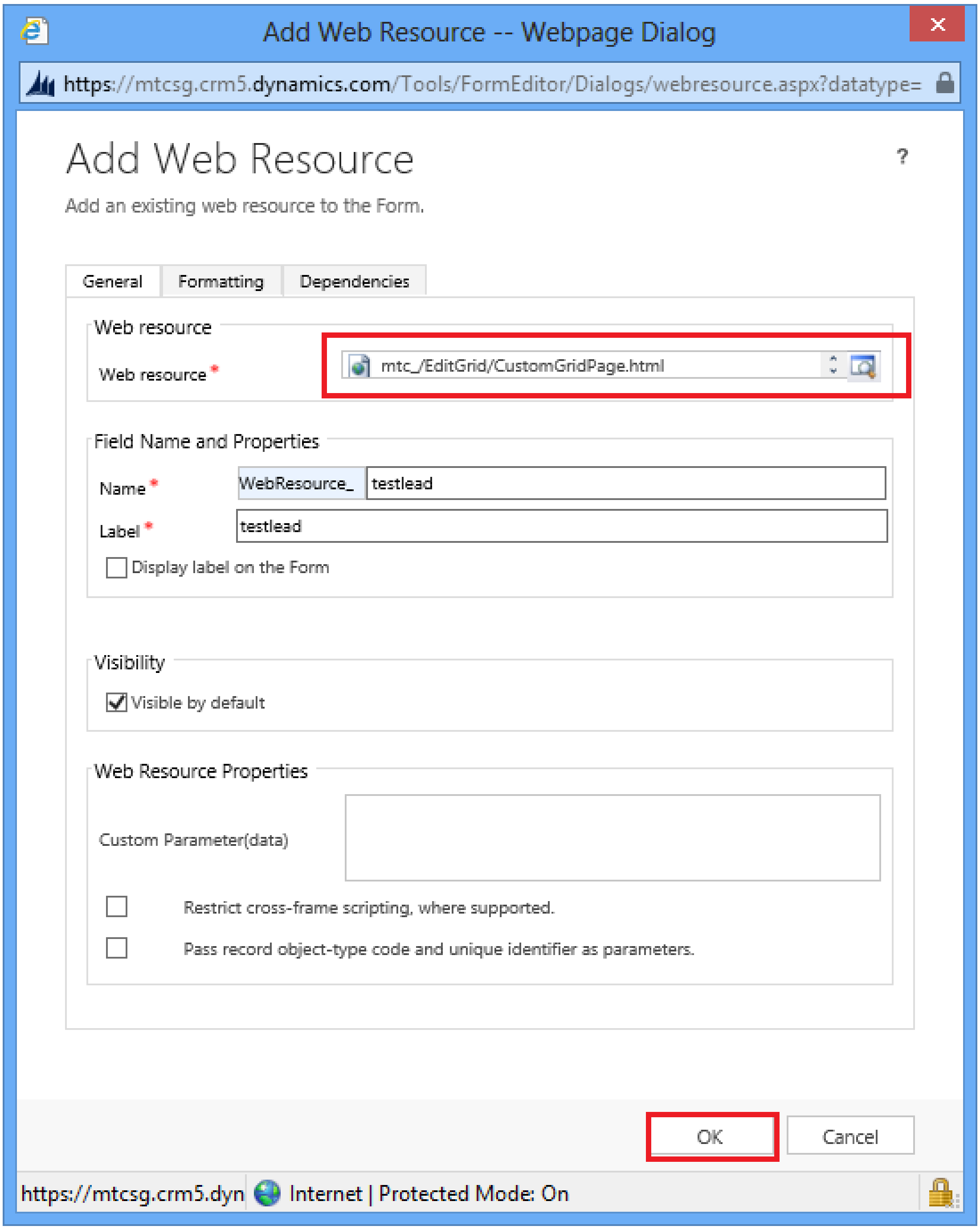



Figure 91: Add Web resource

- Initially when you go back to Leads form and refresh you see the form as shown below for the first time
- It displays a message that '**No Custom Grid is configured on this Web Resource'**

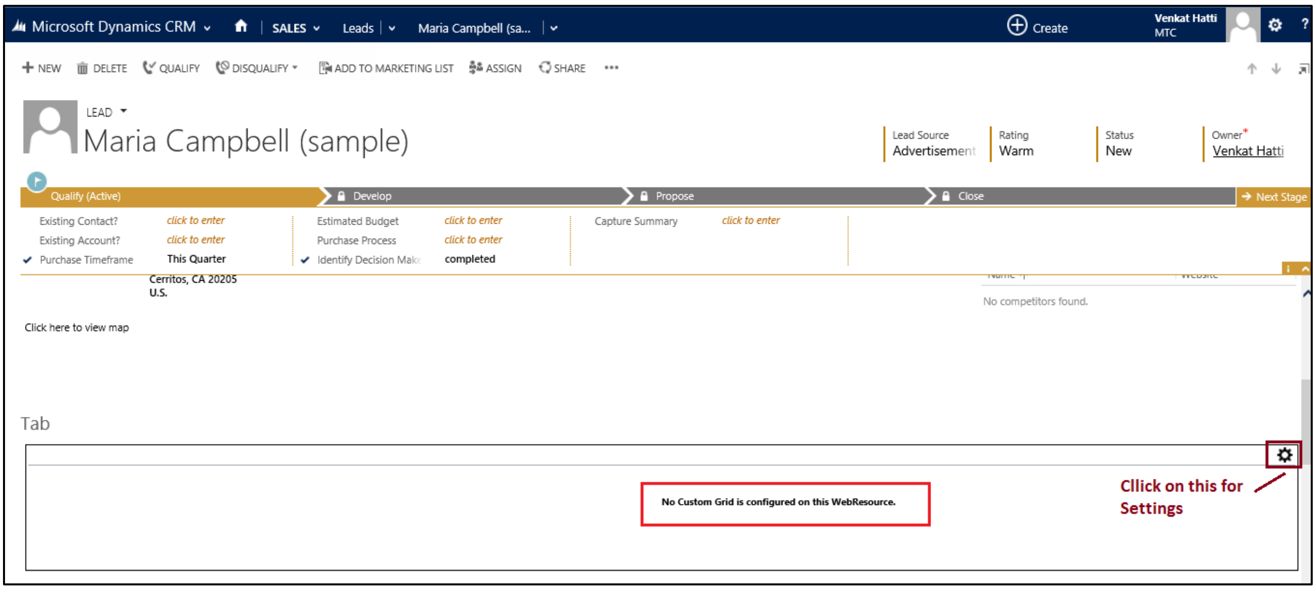



Figure 92: CRM Lead form after Web resource selection

## Settings Area for Super Grid on Forms

- Click on the icon as shown above for Settings
- It Pops up Form Settings
- **Select Entities** – Select Entity as CASE (example) and Select View as ALL CASES (example)
- Only related entities will be displayed in the entity list

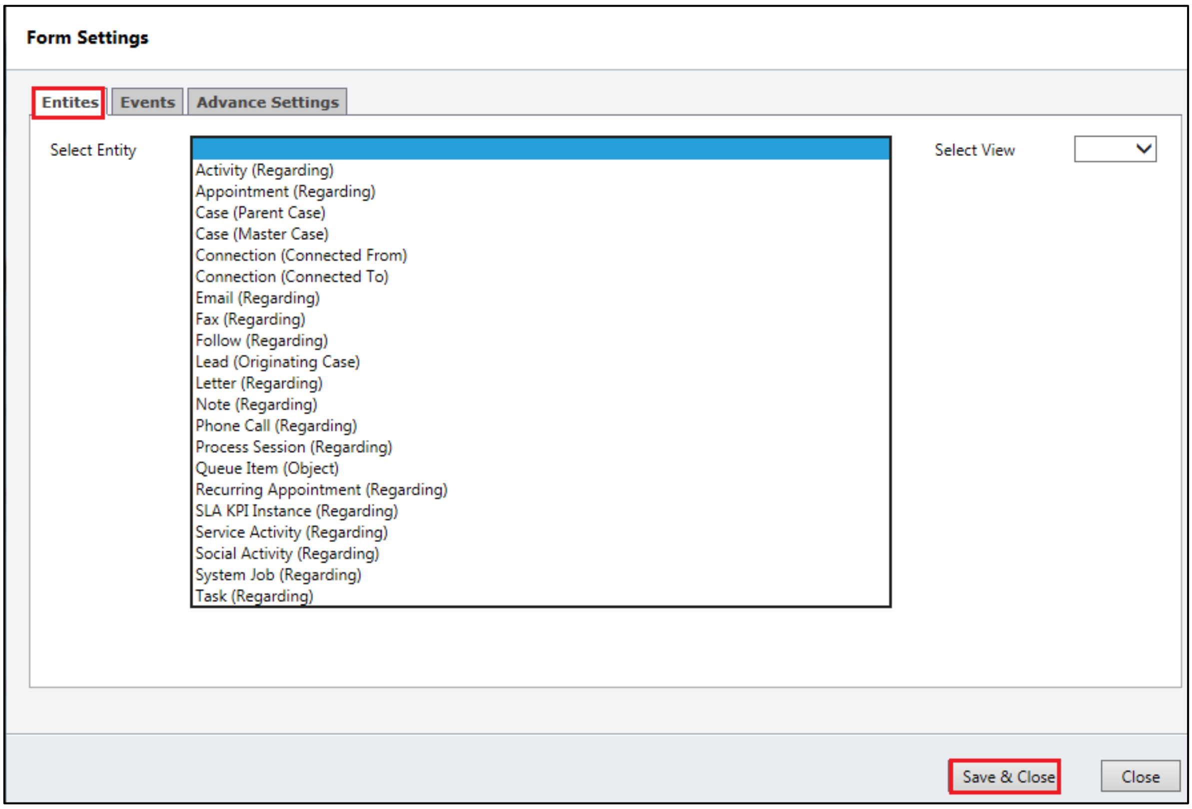



Figure 93: Form Setting on Forms - Entities

- **Select Events**
- Under Events add Web Resource and Select Event from the Drop down list provided

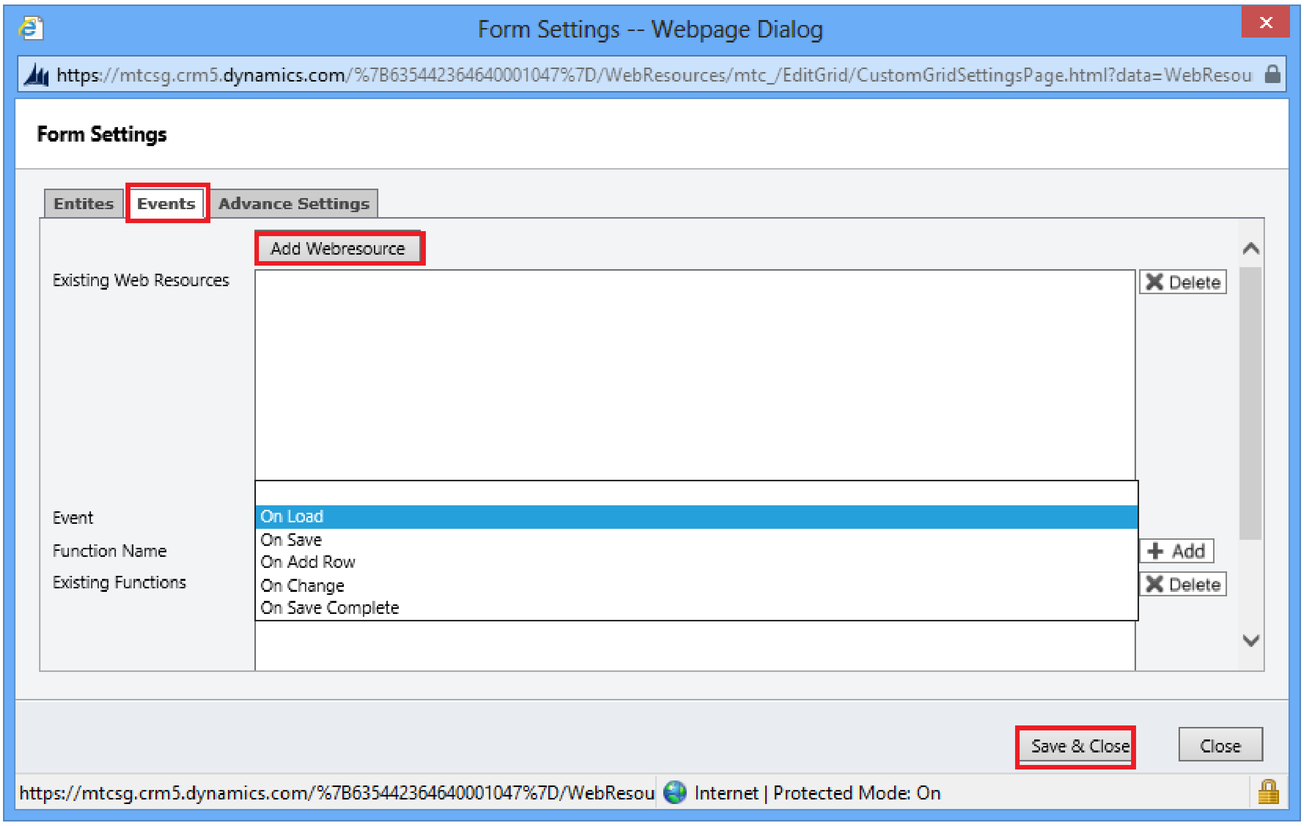
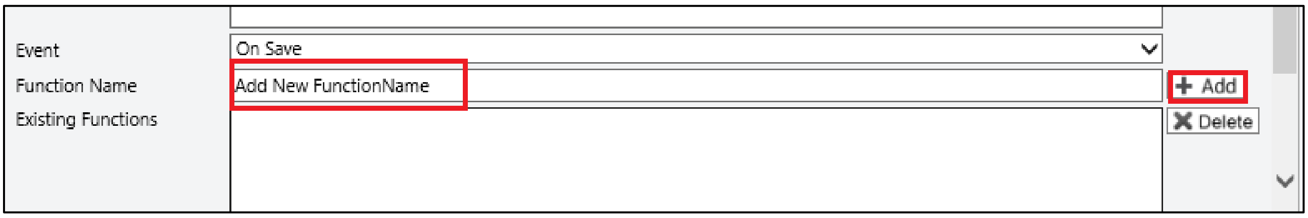


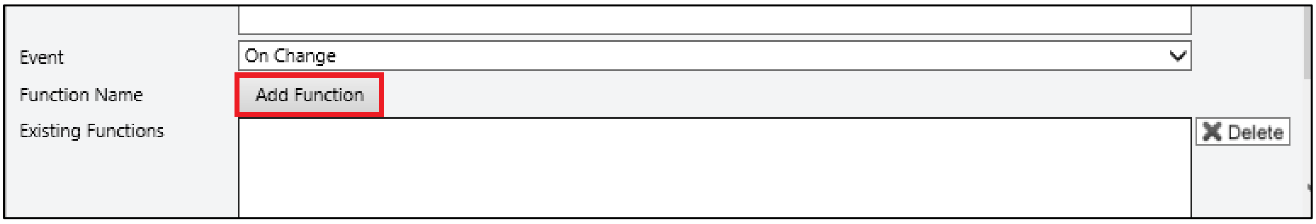

Figure 94: Form Setting on Forms – Events

**Note: There are five types of Event available from the Drop Down list. Like On Load, On Save, On Add Row, On Change and On Save Complete.**

- Except for On Change for all the other four events, you can directly give the Function name and Click Add button as shown below

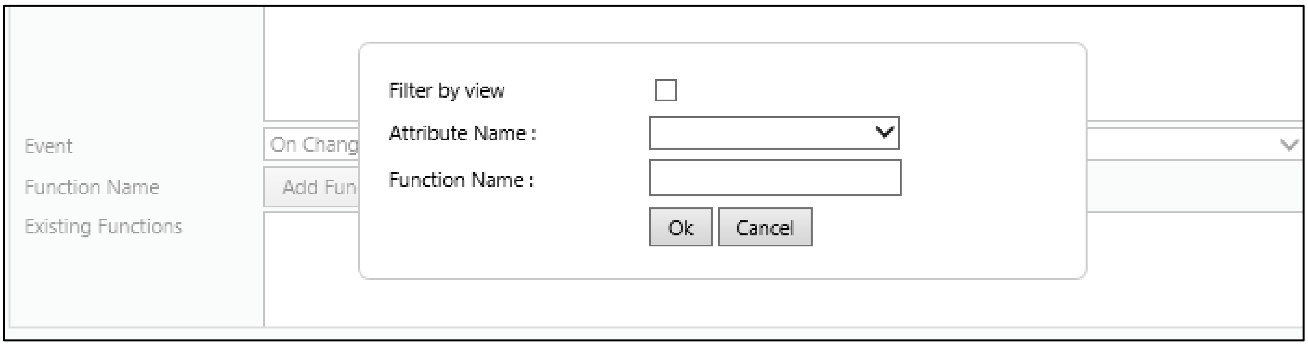



- On click of Add, the Name is moved to existing Functions. This can be deleted if needed by selecting the function and click on Delete Button.
- **For On Change Function**: On Selecting on Change from the drop down list




- Add Function Button is shown the place of Function Name, Click on Add Function button
- A new Pop up window is displayed as shown below




**Note:** If Filter by View is checked, only the Attributes pertaining to Select Views under Entities are displayed for Attribute Names. If not selected then all the Attributes of the entities are displayed for Attribute Names.

- Here you have to select the Attribute Name and Function Name. These can also be filtered by View if needed.
- Click OK to continue

- **Select Advance Settings**
- Under this select like Auto Save, CRM Required fields, Filter Attributes etc. as shown below

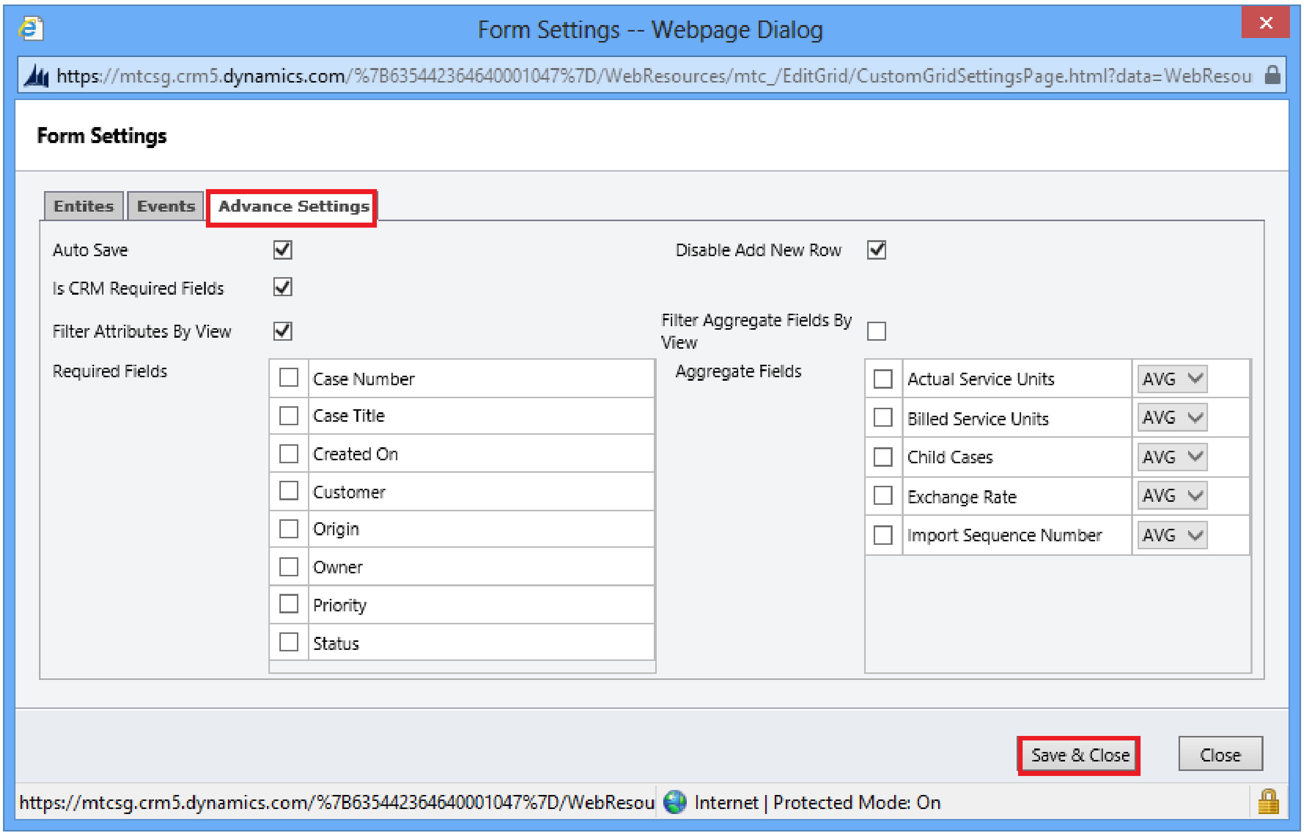


Figure 95: Form Setting on Forms - Advance Settings

**Note:** If Filter by Attributes are checked, only the Attributes pertaining to Select Views under Entities are displayed for Required Fields. If not selected then all the Attributes of the entities are displayed for Required Fields.

- Finally click on Save and Close
- Now in Leads form you can view the Super Grid Functionality on Forms

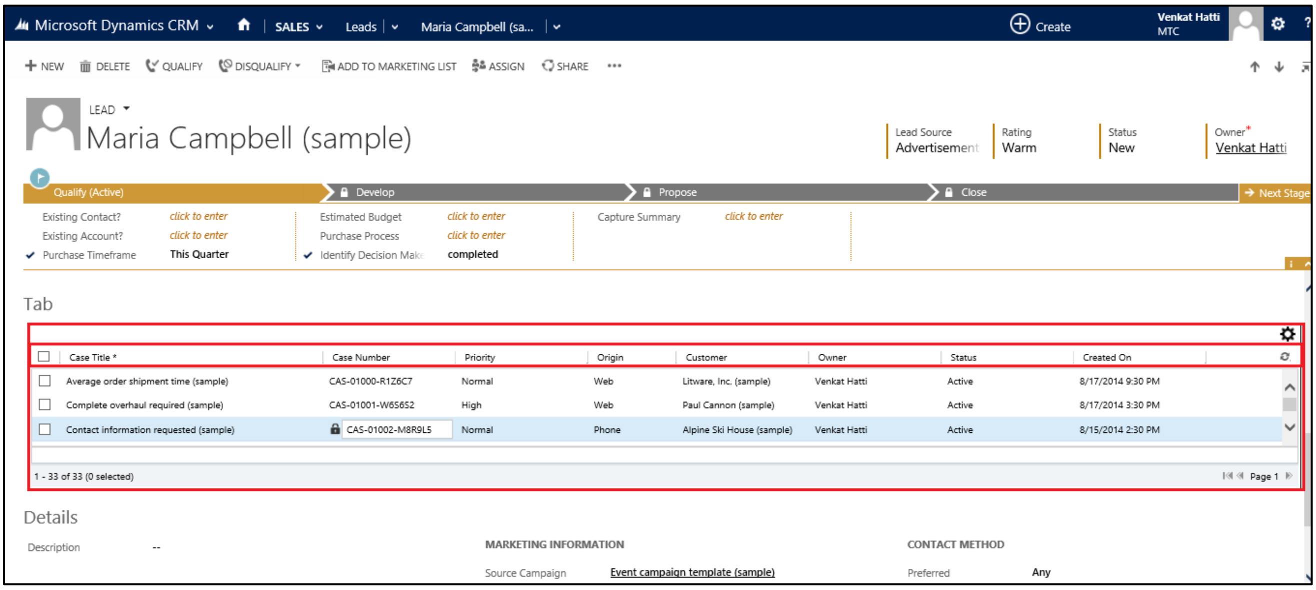



Figure 96: Final CRM Lead form with Super Grid

## Uninstallation Process

If you are trying to delete the solution through **settings→Solution**→click on check box of **Super Grid Solution→Delete**. Then you will get a web page dialog Uninstall Solution

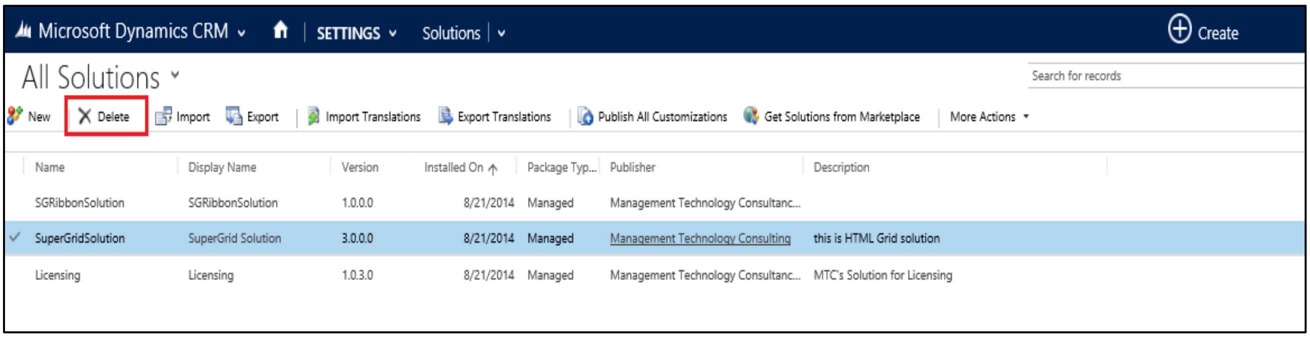



Figure 97 : Uninstall Solution

- The web dialog contains the message you are deleting a managed solution. The solution and of its components. Including data in the components will be deleted. The solution might take several minutes to uninstall. Click on ok.
- After clicking ok a web page dialog will be opened it displays the error message that cannot delete component (cannot delete the solution because one or more components require it. Details.).To close this dialog click ok.

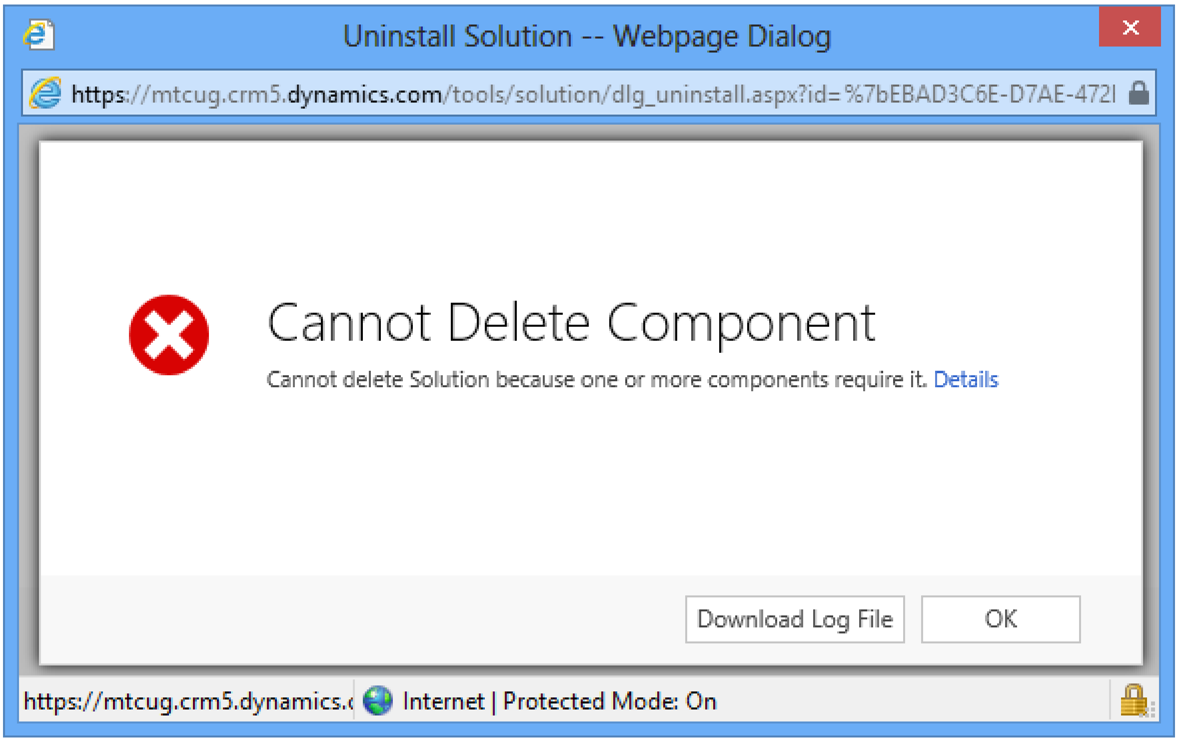



Figure 98 : Error message while deleting the Solution

# Delete the Solution process from Entities

Actual deletion process of solution follows the below steps:

**STEP 1:**

- To delete the solution first we need to delete the entities which are in super grid settings.

**STEP 2:**

- Navigation of deleting entities **solution→configuration→super grid settings→**Select the **Entity name** which you want to delete click on update ribbon.

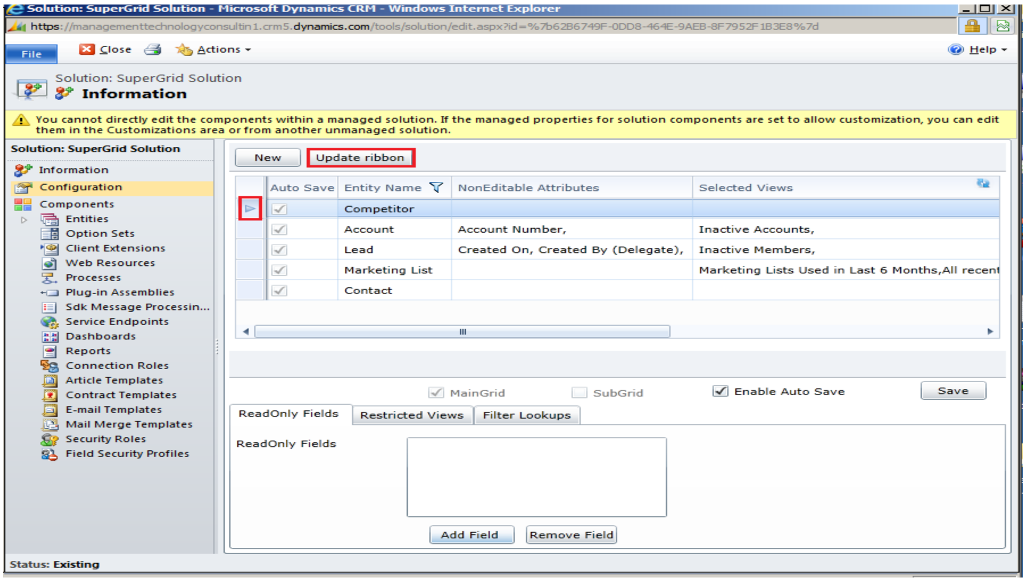



Figure 99 : Deleting the Entities

**STEP 3**:

- Disable the check box of Main Grid and click on Update button

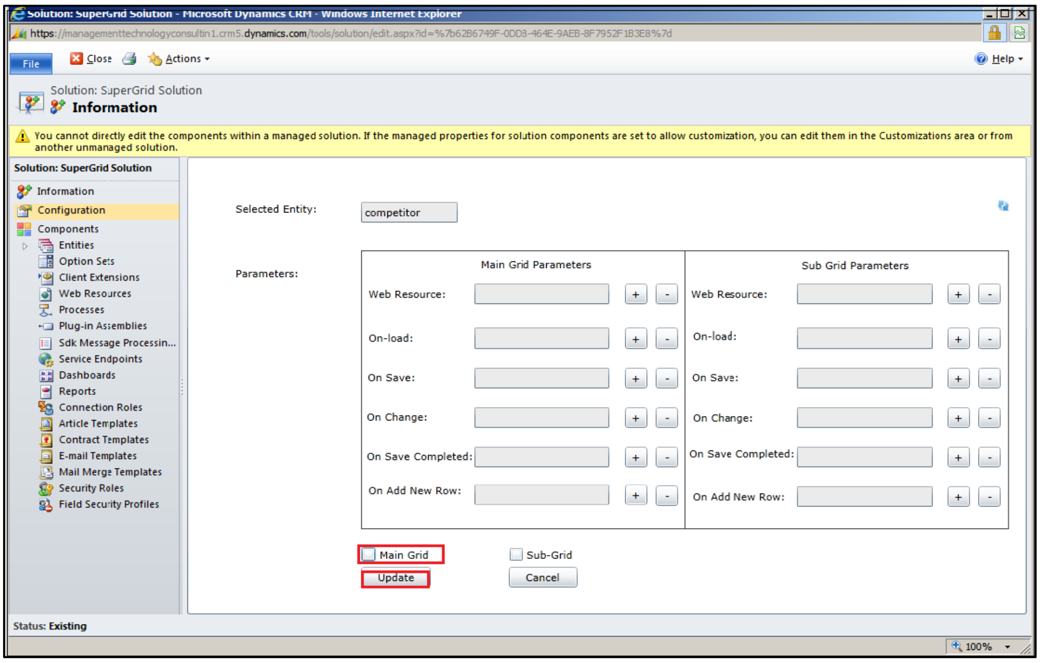



Figure 100 : Selected Entity deleted

**STEP 4:**

After updating it will display the below messages

- Exporting the solution, please wait this may take few minutes
- Retrieving existing solution creating a solution
- Importing solution please wait this may take few minutes.
- Publishing all customizations, please wait this may take few minutes.
- Updating records
- Then it will delete the entity which you are selected
- You need to delete the entire entities one by one to delete them follow the step2 and step 3.
- Now we can able to delete solution by clicking on check box of super grid solution and click on Delete button.

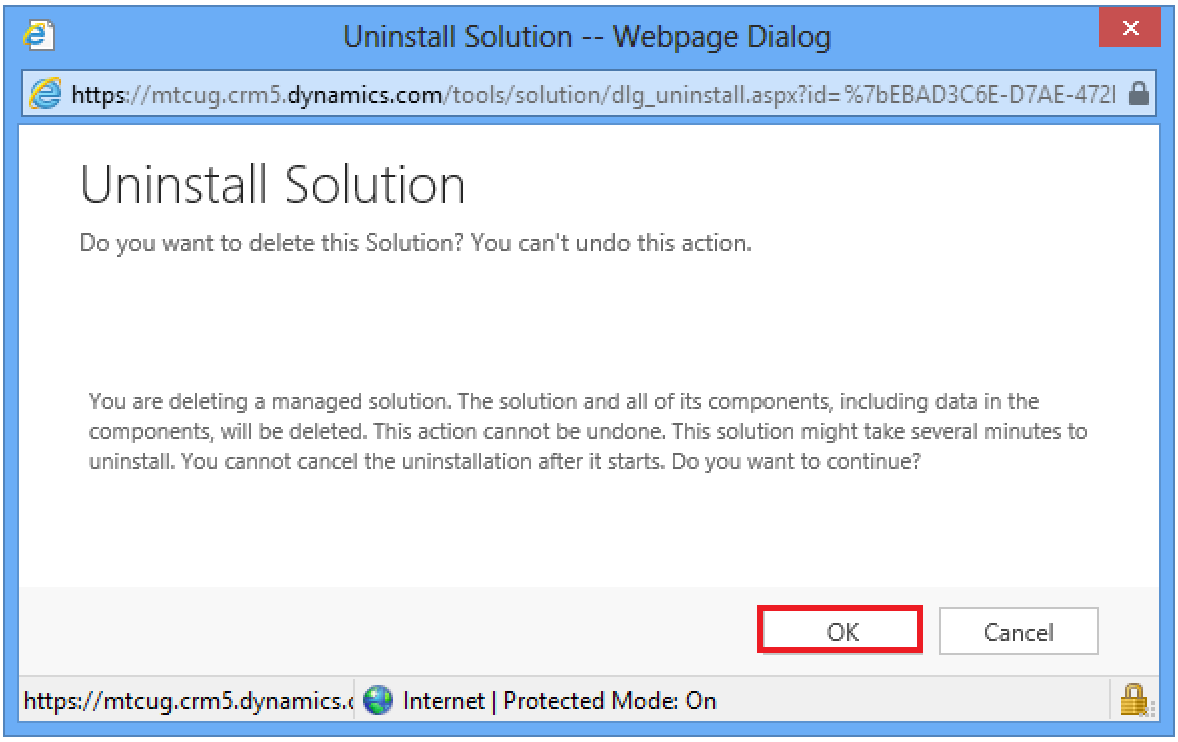



Figure 101 : Solution deleted from CRM

## MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example

SMB Custom Enterprise Componentized Solutions on Dynamics xRM Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

**SMB Custom Enterprise** is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.

Management Technology Consulting LLC (MTC) is dedicated exclusively to the Microsoft Dynamics CRM platform and CRM web portal technologies in the business of delivering add-on products and services.

MTC Management Technology Consulting LLC

MTC is a Microsoft Independent Solution Vender working on Microsoft CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as complete vertical-market Enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.

Microsoft Partner

Microsoft Dynamics CRM

MTC's services are built on a global 24/7 rapid-response and low-cost and fixed-rate ease of engagement. MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

### The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Microsoft Dynamics CRM platform Community at www.DynamicsExchange.com. Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Microsoft Dynamics CRM platform with unique and innovative social networking and knowledge resource allocation processes.

Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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13. MTC may cancel this license at any time if End-User fails to comply with the terms and conditions of this Agreement; and MTC may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights.

14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.

15. No term or provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute consent to, waiver of, or excuse for any other different or subsequent breach.

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## A. Limitation of Liability

IN NO EVENT WILL MTC OR ITS OEM PARTNER(S) BE LIABLE FOR ANY DAMAGES, INCLUDING LOSS OF DATA, LOST PROFITS, COST OF COVER, OR OTHER SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR INDIRECT DAMAGES ARISING FROM THE USE OF THE PROGRAM OR ACCOMPANYING DOCUMENTATION, HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY. THIS LIMITATION WILL APPLY EVEN IF MTC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. YOU ACKNOWLEDGE THAT THE LICENSE FEE REFLECTS THIS ALLOCATION OF RISK.

## B. General

The laws of the State of California shall govern this Agreement. This Agreement is the entire agreement between MTC and End-User concerning the Product and supersedes any other communications or advertising with respect to the program and accompanying documentation. If any provision of the Agreement is held invalid, the remainder of the Agreement shall continue in full force and effect. If you have any questions, please contact in writing: Management Technology Consulting LLC, 7738 Sky hill Drive, Los Angeles, CA 90068, and Tel: (323) 851-5008.

## C. Warranty Disclaimer

Management Technology Consulting LLC, Inc. disclaims any warranty regarding the product or and content or examples contained in this documentation and the Managed Solution code, including the warranties of merchantability and fitness for a particular purpose.

## D. Limitation of Liability

## E. Annual Maintenance and Support

Software products offered by Management Technology Consulting LLC, (MTC) include 1 year of Annual Maintenance and support. Annual maintenance includes your right to the latest versions and any updates to this product at no charge during the 1st year of ownership. Future years of Annual Maintenance must be purchased at a fee equal to 25% of the original purchase price of the product. MTC will notify owners of record by email of the Annual Maintenance renewal time and facilitate collection of fees and simultaneously assure the latest versions and updates are in use.

## F. Customer Care details

MTC is always open to global community of Microsoft Dynamics CRM platform Software Users

**Availability and hours of operation: Monday to Friday**
**USA PST 323-851-5008 - 8:00 AM to 6:00 PM**
**India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST**

**USA Headquarters:**
**Management Technologies Consulting, LLC**
**7738 Sky hill Drive, Los Angeles, CA 90068**

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