



Power Search





CONTENT

1. Objective	3
2. Power Search Application – Process Flow	4
3. Plausible Search Cases	14



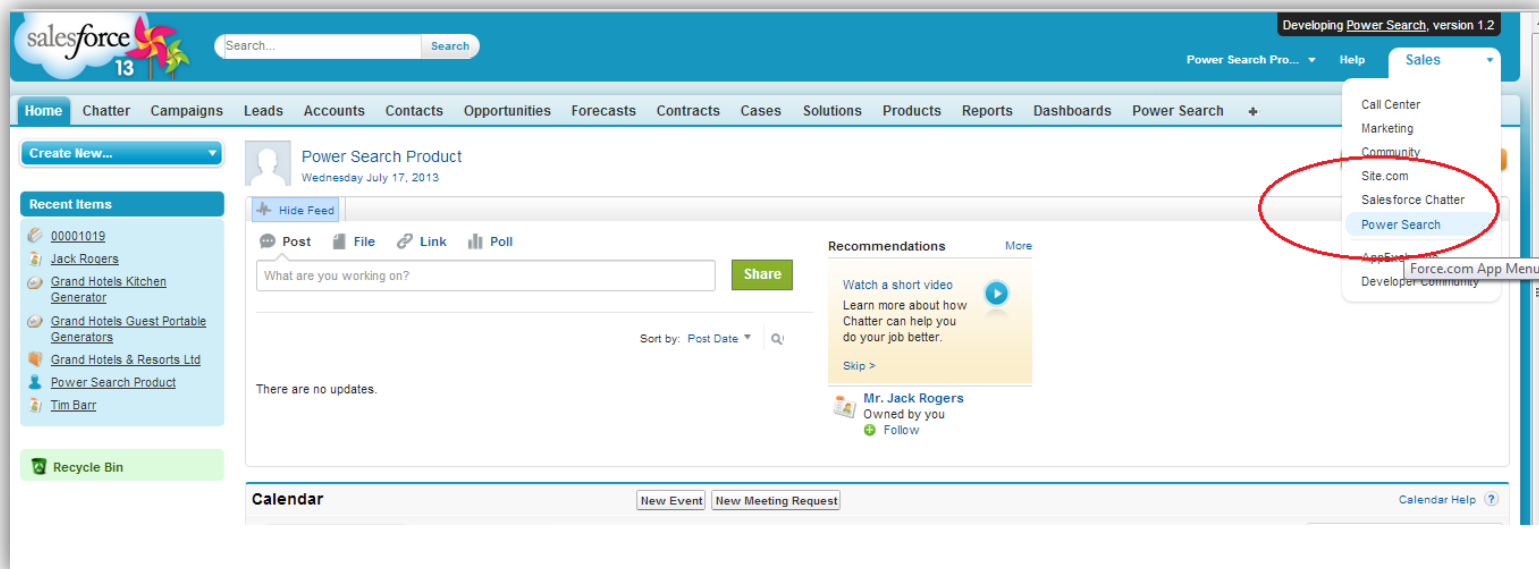
OBJECTIVE

Power Search is a powerful extension to Salesforce.com search. This allows users to do 2-level hierarchical searches that span standard CRM and custom objects, e.g., all 'Closed-Won' Opportunities that have products form a particular family.

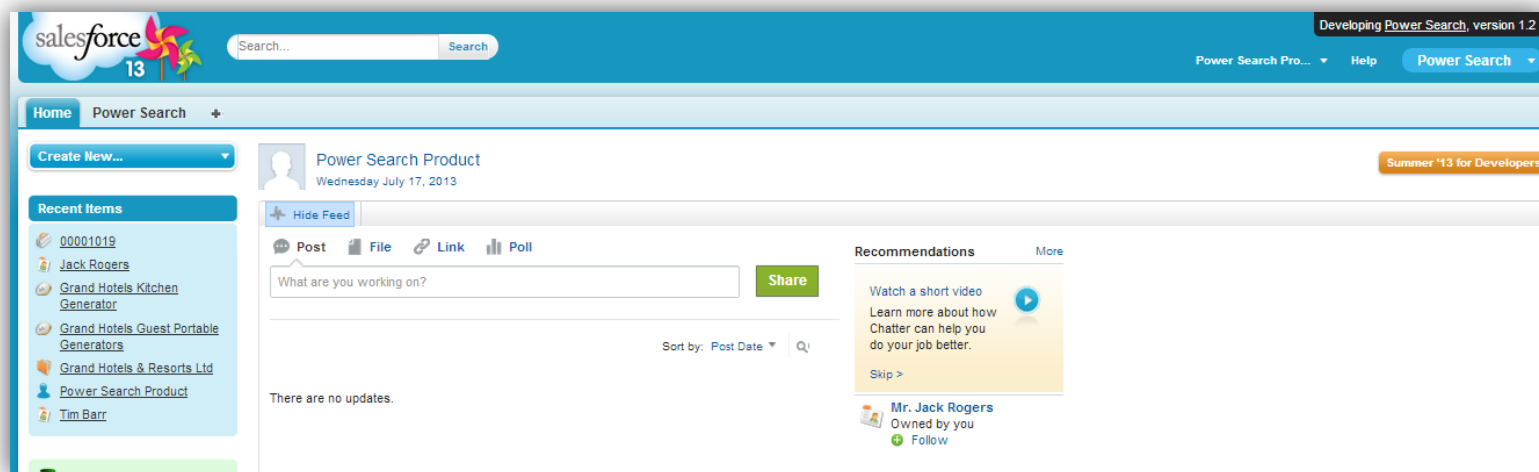


POWER SEARCH – PROCESS FLOW

After successful login, user must be navigated to the Home screen. Then the 'Power Search' App must be selected from the application dropdown on the page top right corner.



After selecting the Power Search option, the Power Search home page will be displayed.

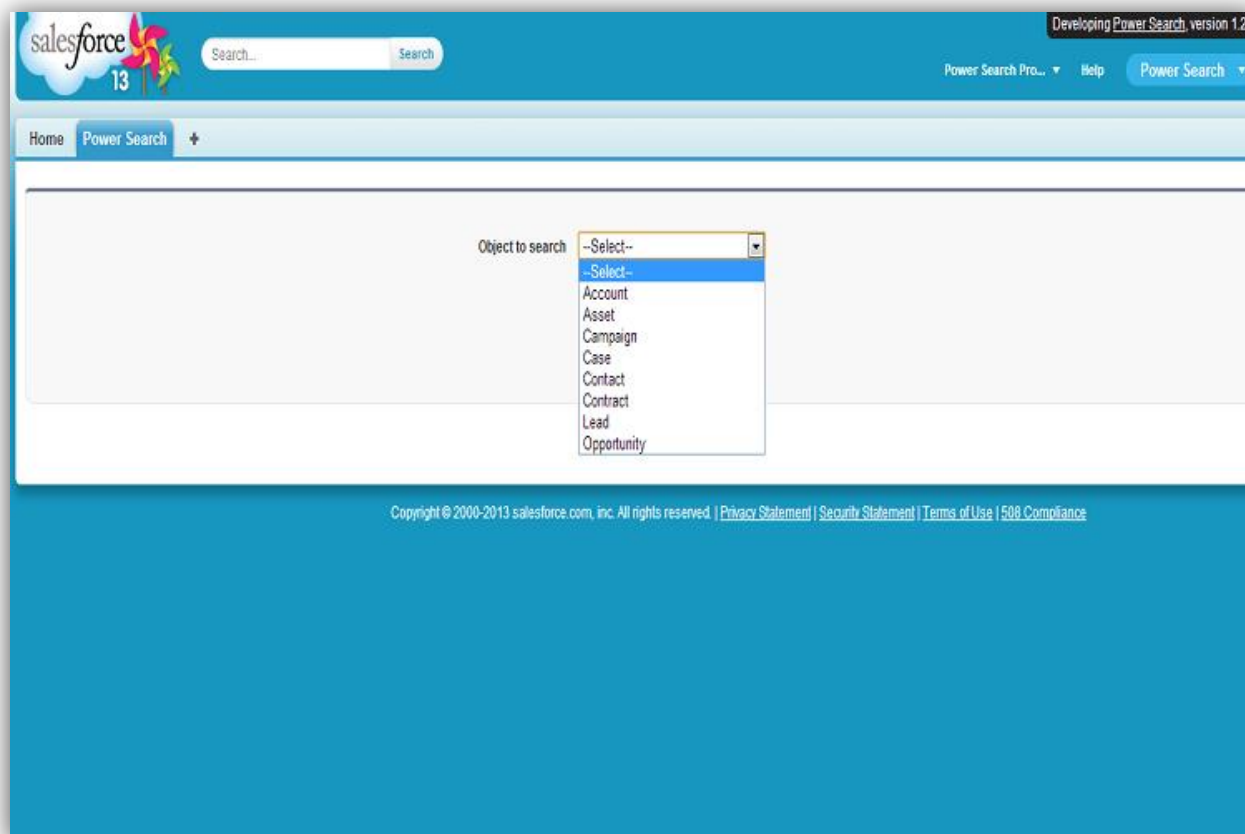


Now, Click on the 'Power Search' button on the top of the Home page.

User must be navigated to the Object search page.



Object Search page:



Select an object from the search dropdown and user must be navigated to the particular object's search page. Objects which are having atleast one child will be listed in the dropdown list.

Now, select the respective fields for which search needs to be conducted for the parent object.



Field selection for the parent object:

Selected Object to search: Account [Change Parent Object](#)

Select Fields to display in Search Result

Available fields: Account Rating, Account Site, Account Source, Account Type

Selected fields: Account Fax, Account Number, Account Phone

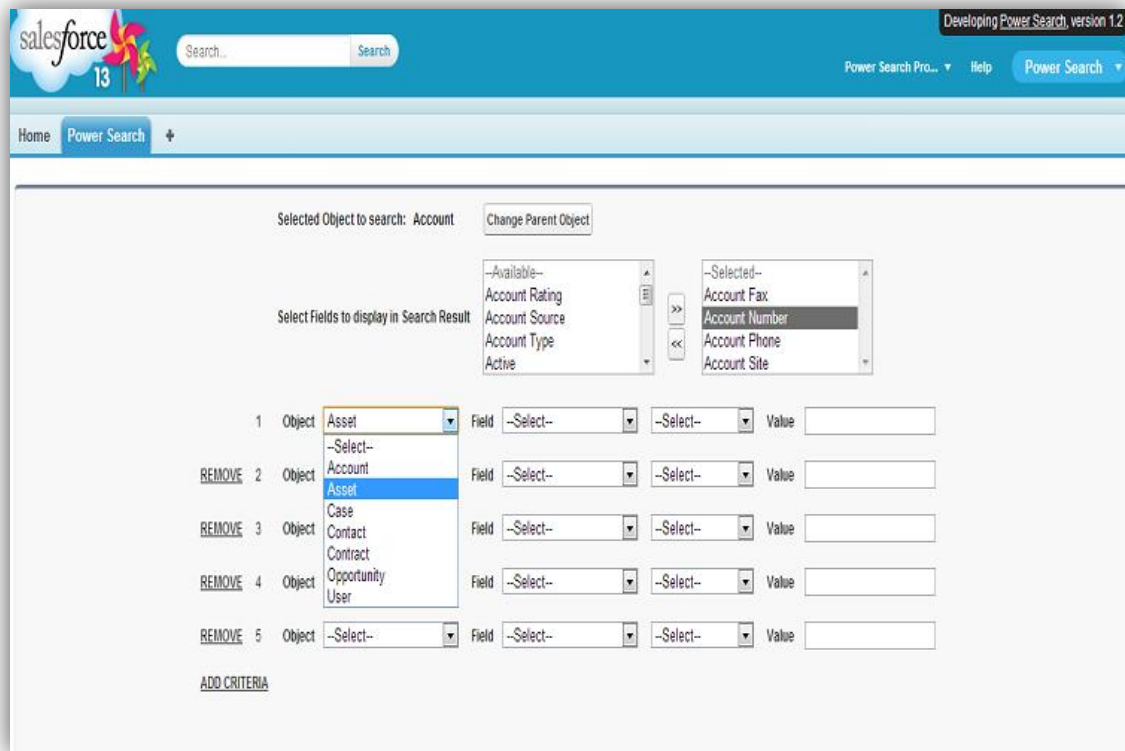
	Object	Field	Value
1	--Select--	--Select--	--Select--
REMOVE 2	--Select--	--Select--	--Select--
REMOVE 3	--Select--	--Select--	--Select--
REMOVE 4	--Select--	--Select--	--Select--
REMOVE 5	--Select--	--Select--	--Select--

[ADD CRITERIA](#)

Now, select the child objects of the parent.



Child objects selection:



Selected Object to search: Account [Change Parent Object](#)

Select Fields to display in Search Result

Available Fields: Account Rating, Account Source, Account Type, Active, Account Fax, Account Number, Account Phone, Account Site

	Object	Field	Value
1	Asset	--Select--	--Select--
2	Account	--Select--	--Select--
3	Case	--Select--	--Select--
4	Contract	--Select--	--Select--
5	Opportunity	--Select--	--Select--

[ADD CRITERIA](#)

Also, select the field and respective field value condition along with value, for the child objects. The search result will be displayed as per the fields being selected.



Child Object filed selection:

salesforce 13 Developing Power Search version 1.2

Power Search Pro... Help

Home **Power Search** +

Selected Object to search: Account

Select Fields to display in Search Result

--Available--
Account Rating
Account Source
Account Type
Active

--Selected--
Account Fax
Account Number
Account Phone
Account Site

1 Object Field Value

REMOVE 2 Object Field Value

REMOVE 3 Object Field Value

REMOVE 4 Object Field Value

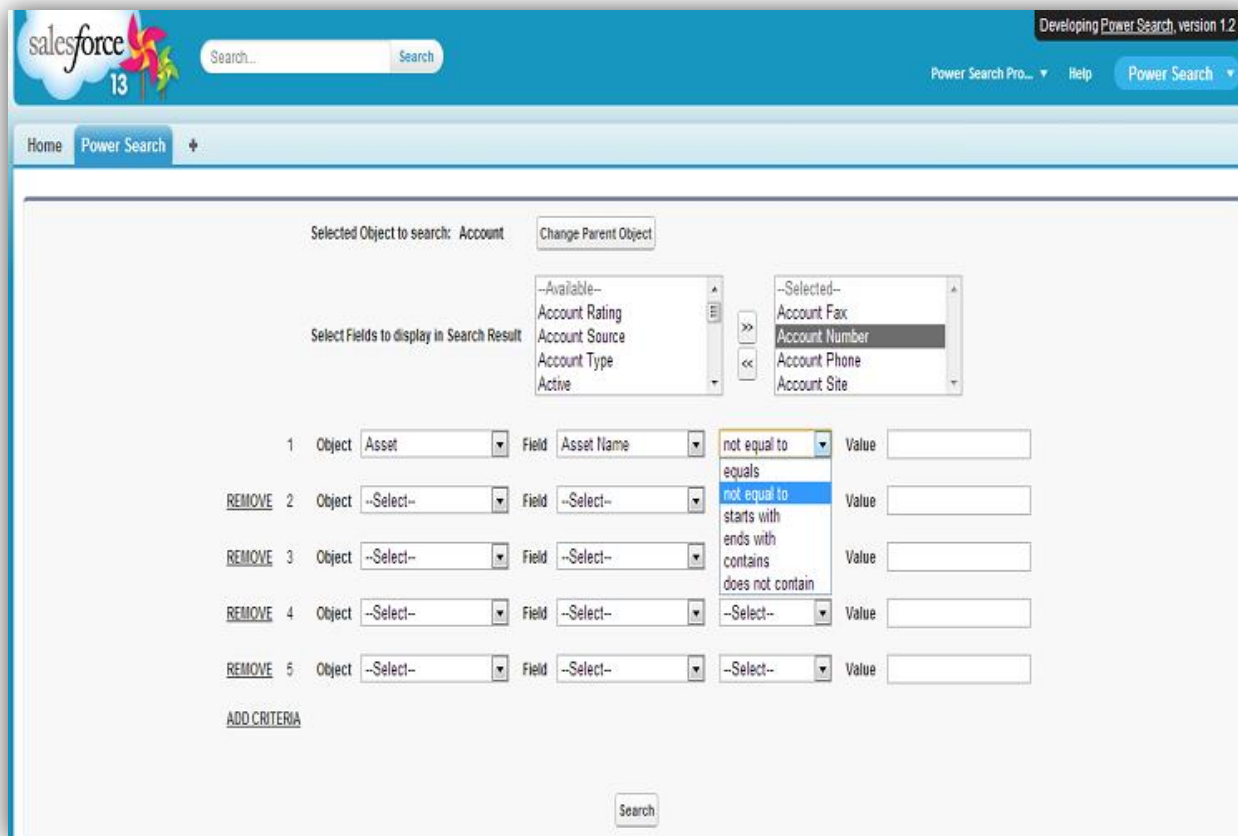
REMOVE 5 Object Field Value

ADD CRITERIA

--Select--
--Select--
Asset Name
Competitor Asset
Created Date
Install Date
Last Modified Date
Price
Purchase Date
Quantity
Serial Number
Status
Usage End Date



Field condition selection:



The screenshot shows the Salesforce 13 Power Search interface. At the top, there's a search bar and a 'Power Search' button. Below the search bar, the 'Selected Object to search' is set to 'Account'. A 'Change Parent Object' button is next to it. Below this, there's a section for 'Select Fields to display in Search Result' with two lists: 'Available' and 'Selected'. The 'Available' list includes 'Account Rating', 'Account Source', 'Account Type', and 'Active'. The 'Selected' list includes 'Account Fax', 'Account Number', 'Account Phone', and 'Account Site'. Below these lists, there's a table for adding search criteria. The table has five rows, each with a 'REMOVE' button, an 'Object' dropdown, a 'Field' dropdown, a condition dropdown, and a 'Value' input field. The first row is pre-filled with 'Asset' for the object and 'Asset Name' for the field. The condition dropdown for the first row is open, showing options: 'not equal to', 'equals', 'not equal to', 'starts with', 'ends with', 'contains', and 'does not contain'. The 'not equal to' option is selected. Below the table, there's an 'ADD CRITERIA' button and a 'Search' button.

Here, the parent object can also be selected in the place of child object. For the parent object, the respective field and conditions can be selected as well.

If an object is having relation with any other object then the relationship dropdown must be popped up after the condition option and user can select a proper relationship to be filtered here.

If more than one child object is being selected as row items, then the Field Logic option will be enabled. This logic can be performed by only 2 operators i.e. 'AND' and 'OR' logical operators.

Filter logic:



Selected Object to search: Account [Change Parent Object](#)

Select Fields to display in Search Result

Available Fields	Selected Fields
--Available-- Account Rating Account Source Account Type Active	--Selected-- Account Fax Account Number Account Phone Account Site

1 Object: Asset Field: Asset Name not equal to Value: test

[REMOVE](#) 2 Object: Case Field: Case Number equals Value: 0

[REMOVE](#) 3 Object: --Select-- Field: --Select-- --Select-- Value:

[REMOVE](#) 4 Object: --Select-- Field: --Select-- --Select-- Value:

[REMOVE](#) 5 Object: --Select-- Field: --Select-- --Select-- Value:

[ADD CRITERIA](#)

Filter Logic: 1 AND 2

eg: (1 OR 2) AND 3. Please provide space between Operator and Row Number.

[Search](#)

As per the selected object, fields and field logic, the search result will be displayed after clicking the 'Search' button.



Search result example:

Search Results

[Click here to see search results in more detail](#)

Name &	Account Number	Account Fax	Account Phone
Burlington Textiles Corp of America	CD466092	(336) 222-8000	(336) 222-7000
Dickenson plc	CC834267	(785) 241-6201	(785) 241-6200
Edge Communications	CD451796	(512) 757-8000	(512) 757-6000
Express Logistics and Transport	CC847211	(503) 421-7801	(503) 421-7800
GenePoint	CC878213	(550) 867-8895	(550) 867-3450
Grand Hotels & Resorts Ltd	CD438877	(312) 596-1500	(312) 596-1000
Pinnacle Construction Inc.	CC213425	(614) 427-4428	(614) 427-4427
sForce		(415) 901-7002	(415) 901-7000
United Oil & Gas Corp.	CD055118	(212) 842-5501	(212) 842-5500
United Oil & Gas, Singapore	CD055120-B	(650) 450-8820	(650) 450-8818
United Oil & Gas, UK	CD055119-A	+44 191 495620	+44 191 4956203
University of Arizona	CD736025	(520) 773-8000	(520) 773-8050

Search result after clicking on 'more detail' link:

salesforce 13 Developing Power Search, version 1.2

Power Search Pro... Help

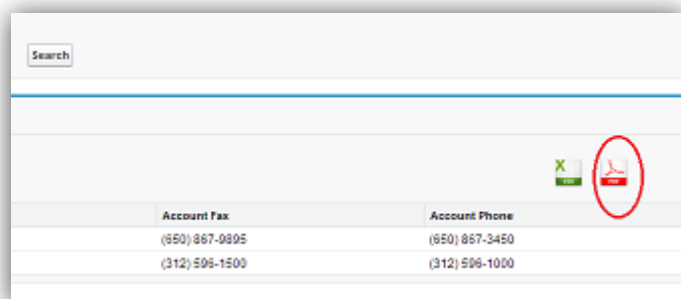
Home Power Search +

Expand All Collapse All

Account Burlington Textiles Corp of America	Contact	Last Name	to text	Jack Rogers
Account Dickenson plc	Contact	Last Name	to text	Andy Young
Account Edge Communications	Contact	Last Name	to text	Rose Gonzalez Sean Forbes
Account Express Logistics and Transport	Contact	Last Name	to text	Barbara Lee Josh Davis
Account GenePoint	Contact	Last Name	to text	Edna Frank

The search result can be exported as PDF and EXCEL formats.

Account Fax	Account Phone
(550) 867-9895	(550) 867-3450
(312) 596-1500	(312) 596-1000

[illegible]

To get the PDF export file for the search result, click on the 'PDF' icon on top right corner on the search result page.



Sample Excel export is as below:

Power Search Results			
Filtered By:			
Filter Logic :			
1. Account. Account Name startswith G			
Account	Account Number	Account Fax	Account Phone
GenePoint	CC978213	(650) 867-9895	(650) 867-3450
Grand Hotels & Resorts Ltd	CD439877	(312) 596-1500	(312) 596-1000

Validations / Restrictions applicable for the Search filter page:

1. At the time of selecting parent fields to be displayed in search results, the maximum allowed field selection is 5.
2. Objects must be listed to select field for those child objects including parent object and field records can be extracted as per relationship dropdown if implacable.
3. The records must be displayed as per the filtered values given in search criteria. The default search result column is Parent object's Name field. But for Case object, case number is the default search result column and for Contract object, contract number is the default search result column.
4. In field criteria validation, if 2 rows are having same object, field, condition and value then error message must be popped up and user will not be able to proceed further.
5. Maximum 10 rows are allowed in object selection criteria.
6. Field conditions list will be populated as per the selected field for the child / parent object.
7. The field criteria will be listed as per the field data type. For example – 'String' cannot be listed for a numeric field data type.
8. At the time of child object filed selection in a row, user must select the all three options i.e. Field, value and condition, unless error must be popped up.
9. Maximum 1000 records are allowed in search result.
10. Search result can be exported only as PDF or EXCEL document format.



Plausible SEARCH CASES

Case 1:

Search filters can be selected as below –

Parent object – Account

Respective object row selections as – Account (parent), Contact (Child, having a relationship with school object)

Field Logic – 1 OR 2

Selected Object to search: Account [Change Parent Object](#)

Case 1 : Filter criteria

Select Fields to display in Search Result

--Available--
Account Site
Account Source
Account Type
Active

--Selected--
Account Fax
Account Number
Account Phone
Account Rating

1 Object Account Field Account Name not equal to Value test

[REMOVE](#) 2 Object Contact Field First Name contains Value a School

[REMOVE](#) 3 Object --Select-- Field --Select-- --Select-- Value

[REMOVE](#) 4 Object --Select-- Field --Select-- --Select-- Value

[REMOVE](#) 5 Object --Select-- Field --Select-- --Select-- Value

[ADD CRITERIA](#)

Filter Logic 1 OR 2
eg: (1 OR 2) AND 3. Please provide space between Operator and Row Number.

Search Results

[Click here to see search results in more detail](#)

Name ▲	Account Number	Account Fax	Account Phone	Account Rating
Burlington Textiles Corp of America	CD656092	(336) 222-8000	(336) 222-7000	Warm
Dickenson plc	CC634267	(785) 241-6201	(785) 241-6200	
Edge Communications	CD451796	(512) 757-9000	(512) 757-6000	Hot
Express Logistics and Transport	CC947211	(503) 421-7801	(503) 421-7800	Cold
GenePoint	CC978213	(650) 867-9895	(650) 867-3450	Cold
Grand Hotels & Resorts Ltd	CD439877	(312) 596-1500	(312) 596-1000	Warm
Pyramid Construction Inc.	CC213425	(014) 427-4428	(014) 427-4427	
sForce		(415) 901-7002	(415) 901-7000	
United Oil & Gas Corp.	CD355118	(212) 842-5501	(212) 842-5500	Hot
United Oil & Gas, Singapore	CD355120-B	(650) 450-8820	(650) 450-8810	
United Oil & Gas, UK	CD355119-A	+44 191 4956620	+44 191 4956203	
University of Arizona	CD736025	(520) 773-9060	(520) 773-9050	Warm



Case 2:

Search filters can be selected as below –

Parent object – Account

Respective object row selections as – Asset, Contract

Field Logic – 1 OR 2

Selected Object to search: **Account**

Change Parent Object

Case 2: Filter Criteria

Select Fields to display in Search Result

--Available--
Account Number
Account Site
Account Source
Account Type

--Selected--
Account Fax
Account Phone
Account Rating

1	Object	Asset	Field	Asset Name	not equal to	Value	test
REMOVE	2	Object	Contract	Field	Contract Number	contains	Value 0
REMOVE	3	Object	--Select--	Field	--Select--	--Select--	Value
REMOVE	4	Object	--Select--	Field	--Select--	--Select--	Value
REMOVE	5	Object	--Select--	Field	--Select--	--Select--	Value

[ADD CRITERIA](#)

Filter Logic

1 OR 2

eg: (1 OR 2) AND 3. Please provide space between Operator and Row Number.

Search

Search Results

There are no matching Account records. Please refine the search criteria.

No records were found for the search criteria.



Case 3:

Search filters can be selected as below –

Parent object – Account

Respective object row selections as [5 child objects] – Asset, Contract, Case, Opportunity, User

Field Logic – 1 OR 2 OR 3 OR 4 OR 5

Selected Object to search: Account [Change Parent Object](#)

Case 3: Filter Criteria

Select Fields to display in Search Result

--Available--
Account Number
Account Site
Account Source
Account Type

--Selected--
Account Fax
Account Phone
Account Rating

1	Object	Asset	Field	Asset Name	not equal to	Value	test
REMOVE	2	Object	Contract	Field	Contract Number	contains	Value 0
REMOVE	3	Object	Case	Field	Case Number	equals	Value
REMOVE	4	Object	Opportunity	Field	Amount	greater than	Value 0
REMOVE	5	Object	User	Field	Country	does not contain	Value t
REMOVE	6	Object	--Select--	Field	--Select--	--Select--	Value

[ADD CRITERIA](#)

Filter Logic
eg: (1 OR 2) AND 3. Please provide space between Operator and Row Number.

Search Results

[Click here to see search results in more detail](#)

Name ▲	Account Fax	Account Phone	Account Rating
Burlington Textiles Corp of America	(336) 222-8000	(336) 222-7000	Warm
Dickenson plc	(785) 241-6201	(785) 241-6200	
Edge Communications	(512) 757-9000	(512) 757-6000	Hot
Express Logistics and Transport	(503) 421-7801	(503) 421-7800	Cold
GenePoint	(650) 867-9895	(650) 867-3450	Cold
Grand Hotels & Resorts Ltd	(312) 596-1500	(312) 596-1000	Warm
Pyramid Construction Inc.	(014) 427-4428	(014) 427-4427	
United Oil & Gas Corp.	(212) 842-5501	(212) 842-5500	Hot
University of Arizona	(520) 773-9060	(520) 773-9050	Warm



Case 4:

Search for the Opportunities for the Account 'Grand Hotels & Resort Ltd.'.

Search filters can be selected as below –

Parent object – Account where name equals to 'Grand Hotels & Resorts Ltd'

Respective object row selections as – Account, Opportunity

Field Logic – 1 AND 2

Selected Object to search: Account

Change Parent Object

Select Fields to display in Search Result

--Available--
Account Fax
Account Rating
Account Site
Account Type

--Selected--
Account Number
Account Phone
Account Source
Billing City

1

Object

Account

Field

Account Name

equals

Value

Grand Hotels & Resorts L

REMOVE

2

Object

Opportunity

Field

Name

starts with

Value

Grand

REMOVE

3

Object

--Select--

Field

--Select--

--Select--

Value

REMOVE

4

Object

--Select--

Field

--Select--

--Select--

Value

REMOVE

5

Object

--Select--

Field

--Select--

--Select--

Value

ADD CRITERIA

Filter Logic

1 AND 2

eg: (1 OR 2) AND 3. Please provide space between Operator and Row Number.

Search

Search Results

[Click here to see search results in more detail](#)

Name ▲

Account Number

Account Source

Billing City

Billing Country

Account Phone

Grand Hotels & Resorts Ltd

CD439877

Chicago

(312) 596-1000

CSV

PDF



Case 5:

Search for the Case details of a particular case number i.e. "00001019".

Search filters can be selected as below –

Parent object – Case

Respective object row selection as – Case for the specific case number

Field Logic – No field logic [Since only one row]

Selected Object to search: Case

Change Parent Object

Select Fields to display in Search Result

--Available--
Case Origin
Closed
Company
Created Date

--Selected--
Case Reason
Case Type
Closed Date

1 Object Case Field Case Number equals Value 00001019
REMOVE 2 Object --Select-- Field --Select-- --Select-- Value
REMOVE 3 Object --Select-- Field --Select-- --Select-- Value
REMOVE 4 Object --Select-- Field --Select-- --Select-- Value
REMOVE 5 Object --Select-- Field --Select-- --Select-- Value
ADD CRITERIA

Search

Search Results

[Click here to see search results in more detail](#)



CaseNumber ▲	Closed Date	Case Reason	Case Type
00001019	Wed May 25 18:59:51 GMT 2011	Equipment Design	Structural