



USER GUIDE

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Ascendix Search

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What is Ascendix Search?

Ascendix Search was created with the end user in mind. The ability to Search/Report data within CRM is often a complicated and time-consuming process. For a busy professional, this is simply unacceptable. Time is valuable after all.



We have developed a tool that flattens out the database making a complex multifaceted search easy. Allowing users to quickly create a "What If Analysis" (The process of changing the values in cells to see how those changes will affect the outcome). Combined with the ability to add/remove columns in searches to give the user a greater ability not only see what's relevant to them but also update/edit records through the handy Preview Panel feature. Eliminating the back and forth currently required to update records from reports in CRM.

Who needs Ascendix Search?

For those looking to really utilize their data we have options such as Cross Object Query Builder (Allows users to build searches based on attributes not related to the core record type such as building a list of Accounts where Opportunities probabilities are 70%+) and Expanded Search Operators (Search parameters such as Next X day and Between X and Y value) Plus an additional Map Interface that allows you to quickly search by geographic location.

Now that we have all these detailed searches what can we do with them? Export it to Excel, Save your search for a later date, or even Share your search template with other users in the organization.

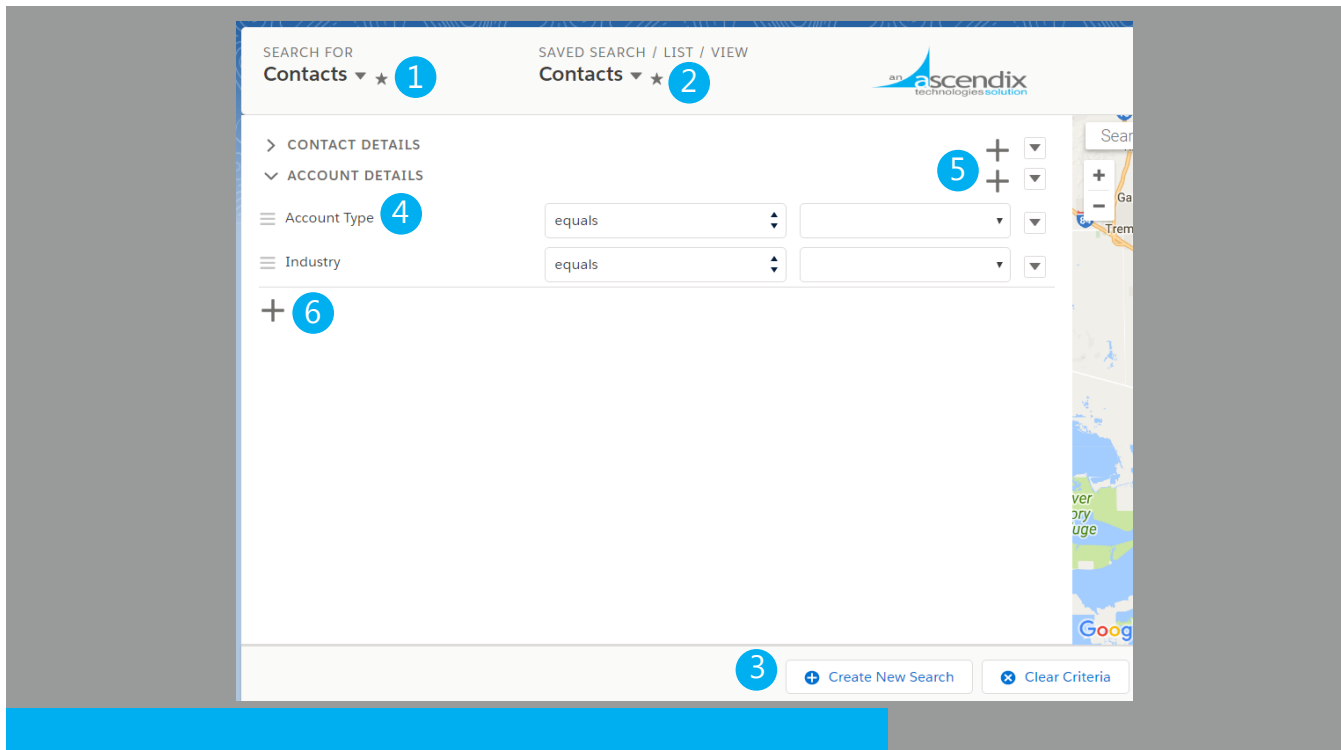
Not Enough?

Ascendix Search also allows for the creation of Ad-Hoc Lists (Lists created for a particular purpose) Giving you the end user the ability to quickly and easily access tailored information Now Not Later.



The Interface

Let's quickly go over navigation before getting started



1. SEARCH FOR: Select the type of object you want to see in your search results. By default, the tool is configured to search only accounts and contacts, but it can be configured to search against most types of objects in your organizations including custom objects and objects installed by other packages. Please refer to the Admin Guide for additional details.

2. Saved Search/ List/ View: System Views allows you to see all views created in Salesforce from Ascendix Search. Ad-Hoc Lists are static lists created by you for specific purpose.

Saved search allows you to see search templates that have been shared with or saved by you.

3. CREATE A NEW SEARCH: This allows you to create a new search template from scratch

4. SEARCH FIELDS: Once you have selected an object in SEARCH FOR you may notice some fields are prepopulated. These can be removed via the dropdown on the right of the field if they are not needed.

5. + SEARCH FIELD: This allows you to add fields to expand your search criteria.

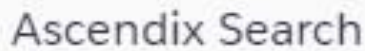
6. + RELATED CRITERIA: This option allows you to add related objects. Such as Opportunities to an Account based search.



Getting Started with Ascendix Search

Creating Your First Search

For this example, we will be creating a basic search using the preset Account search template provided by Ascendix Search.



Ascendix Search

Start by opening Ascendix Search which is located via the App Launcher or in the ribbon bar if your admin has made it available

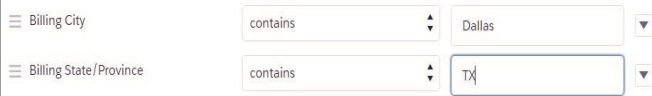


SEARCH FOR
Accounts ▼ ★

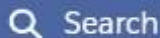


Account Name
Industry
Billing Street

Select Account in Search For. You should notice some search fields have been prepopulated such as Account Name, Industry, and Billing Street



Billing City contains Dallas
Billing State/Province contains TX



Search

Fill out some relevant search criteria such as Billing City or Billing State. Then click on Search in the bottom right of the interface



☐	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY	BILLING STATE/PROVINCE
☐	15125 SATICOY ASSOCIATES LLC	3953 MAPLE AVE #300	DALLAS	TX
☐	Alsbridge Inc.		Dallas	TX

If you have Accounts that match your search criteria they should show up now



Performing A What If Analysis

Great! Now that we've performed a basic search, let's perform a "What IF Analysis" to really see what your data can do for you. By changing values in the search criteria, you will be able to quickly test scenarios and update searches.



Select the Back button from the bottom right

Billing City	contains	Plano
Billing State/Province	contains	TX

Change a previously filled search criteria such as Billing City then select Search

☐	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY	BILLING STATE
☐	1st Global, Inc.		Plano	TX
☐	Bedrock Logistics Llc	1818 Coit Road	Plano	TX
☐	Classic Chevrolet Inc.		Plano	TX

If you have Accounts that match your search criteria they should show up in the updated search

Adding Additional Search Criteria

Now that we've performed our first What IF Analysis let's see how we can start using some advance search functionality. Such as adding additional search criteria to help you find locate information that matters to you.



ACCOUNT DETAILS

- Select field -

Select the Back button from the bottom right and open the + next to Account Details. This will allow you to add a new search criteria



Annual Revenue greater or equals 26,000,000.00

For our example, we will use Annual Revenue that is greater than \$26,000,000 and select Search

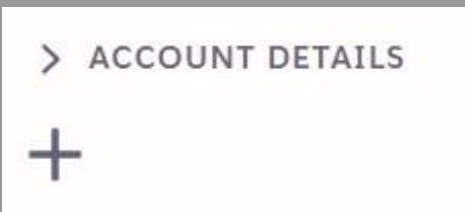
***To find a comprehensive list of Advanced Filtering Options please refer to Expanded Search Operators**

☐	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY
☐	Bedrock Logistics Llc	1818 Coit Road	Plano
☐	Classic Chevrolet Inc.		Plano

You'll notice that 1st Global Inc. is gone from the list because it doesn't meet the minimum revenue requirement

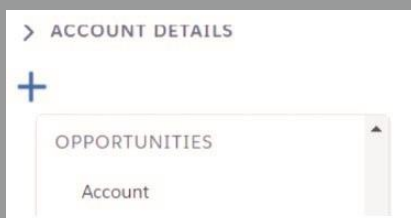
Performing a Cross Object Query

Up until this point we've only done single object searches, but for many business professionals a single object does not provide the necessary depth of information. With the Cross Object Query Builder you are able to generate a report tailored specifically to your needs.



Select the Back button from the bottom right and open the + below the Account Details section. This will let you add a new object

Select your search criteria(s). In our example, we are looking for Accounts from Plano TX with an Annual Revenue greater than 26 million, that have Opportunities in the 2017 Fiscal Year with a Probability greater than 50%.



For our example, we will use Opportunities.



By introducing a second object we can show accounts with active opportunities that have met certain requirements.

Annual Revenue	greater or equals	26,000,000.00	▼
Billing City	contains	Plano	▼
Billing State/Province	contains	TX	▼
Billing Zip/Postal Code	contains		▼
Billing Country	contains		▼
▼ OPPORTUNITIES ✓ + ▼			
Probability (%)	greater than	50	▼
Fiscal Year	equals	2,017	▼

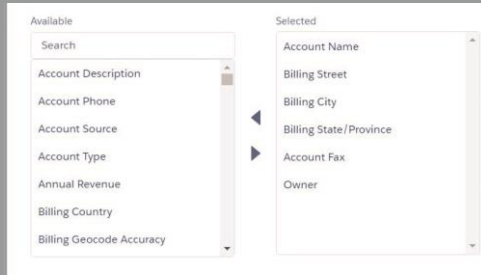
In our example Bedrock Logistics Llc was the only Account that met those requirements. This allows you to quickly pinpoint Accounts that are relevant to your current needs without the hassle of checking back and forth between objects.

☐	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY	BILLING STATE/
☐	Bedrock Logistics Llc	1818 Coit Road	Plano	TX

Adding/Removing Columns



To modify columns, click on Select Columns in the bottom right hand corner



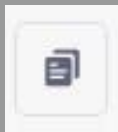
First select a value you want to add/remove/move. Then use the arrows in the interface to navigate the value to the desired location. Hit OK when done

***Only values in the Selected area will be displayed as columns**

Save, Share & Export to Excel

Saving a Search

Now that we have a fully customized search tailored to your needs. We need a quick and easy way to access it. In comes the Save Search button



Select Save Search from the bottom right of the screen

You will be prompted to fill out a Name & Description for your search. Click Save when done



SAVED SEARCH / LIST / VIEW
Plano Open Opps ▼ ★



Your saved searches will appear in the Saved Search drop down at the top. To create new searches, use the + Create New Search

***All saved searches are private by default unless expressly shared with others in the organization. Read the next section to learn how to share**

Sharing a Search

Sometimes you want to quickly share information with your team or coworker. Ascendix Search has got you covered.



Select Save Search from the bottom right of the screen

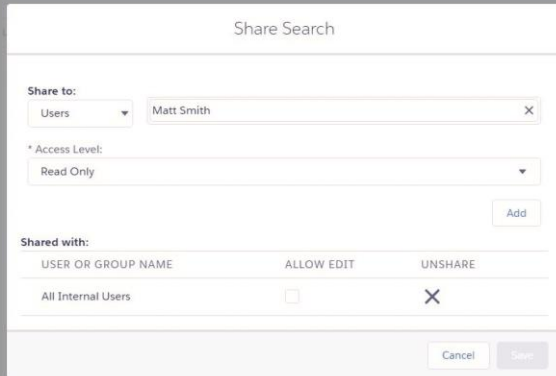
***The Share Search button will only appear for saved searches. Be sure to save before sharing**

Share to:

Users ▼



Use the magnifying glass to find users or groups to share your search with



The 'Share Search' dialog box has a title bar 'Share Search'. It contains a 'Share to:' section with a dropdown menu set to 'Users' and a text input field containing 'Matt Smith'. Below this is an '* Access Level:' dropdown menu set to 'Read Only'. An 'Add' button is to the right of the access level dropdown. At the bottom is a 'Shared with:' table.

USER OR GROUP NAME	ALLOW EDIT	UNSHARE
All Internal Users	☐	X

At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Check the checkbox on the user and check Allow Edit if you wish to grant them edit permissions

***Allow Edit allows the selected user(s) to edit your search and those changes will be reflected in your saved searches.**

Deleting a Saved Search

Have a Saved Search that you no longer need? Let's quickly go through and delete them.

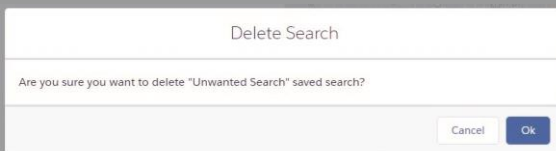


SAVED SEARCH / LIST / VIEW
Unwanted Search ▼ ★

From Saved Search select the search you would like to delete



Now click Delete Search



The 'Delete Search' dialog box has a title bar 'Delete Search'. It contains the text 'Are you sure you want to delete "Unwanted Search" saved search?'. At the bottom are 'Cancel' and 'OK' buttons.

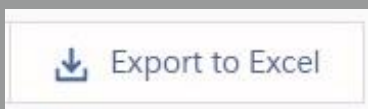
You will be prompted to confirm your deletion. Click OK if you are ready to delete



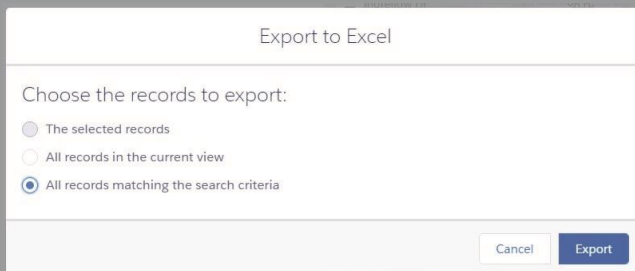
Export to Excel

Have a search result that you want to print off, share with the team, or manipulate outside of Salesforce? Ascendix Search lets you quickly export your results so you can have your data on the go.

***This option is only available for those with the export permission enabled. Speak with your admin to enable or consult the Admin Guide for your version of Salesforce**



From the search results page select Export to Excel from the top right.



From here you can choose what kind of data will be exported. Export when done



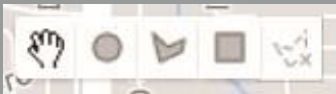
A results.xls file will be downloaded with the exact data presented in search results



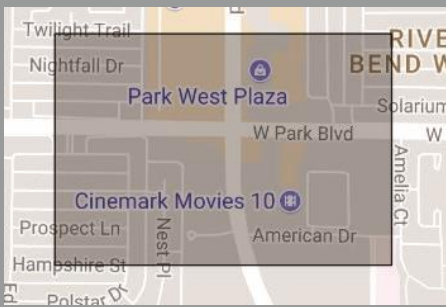
Map Interface, Preview Panel, Notes & More

Map Interface

Now that we've had some practice with Ascendix Search. Let's look at the map interface and how it can help you with searching and visualizing information.

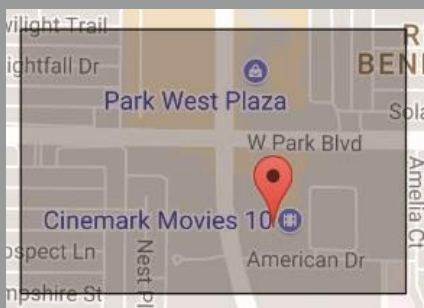


At the top, you will see various shapes will allow you to highlight areas within the map



By selecting a shape and highlighting a geographical area you can further refine criteria based searches

***The mapping feature will only work on valid addresses, partially filled address will not be recognized by the map component**



Once you've completed a search you will be brought to the search results page. From here click the record row you would like to update



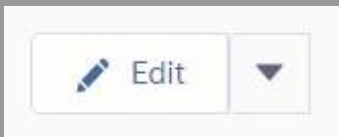
Preview Panel

Wouldn't it be great if we could edit search results without going back and forth between different objects? Ascendix Search has a solution to save you time and frustration.

☒	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY	BILLING ST
☒	Bedrock Logistics Llc	1818 Coit Road	Plano	TX

Once you've completed a search you will be brought to the search results page. From here click the record row you would like to update

***Click only on the record row to access the preview panel.
Clicking on the hyperlink will open the record in a new window**



From here select Edit from the top right

Edit Bedrock Logistics Llc

Parent Account
Search Accounts

Account Owner
Phillip Teng

*Account Name
Bedrock Logistics Llc

Phone

Fax

Website
www.bedrocklogistics.com

Additional Information

Type
--None--

Industry
--None--

Employees

Annual Revenue
\$29,900,000

Cancel Save

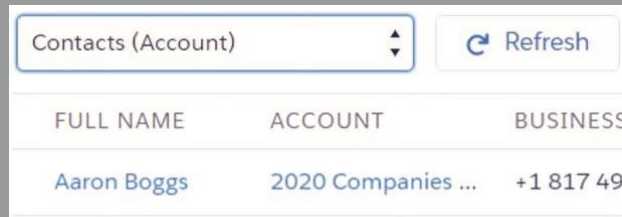
Now you can edit your record and Save after you have finished updating



View Records from Related Records



Start by selecting an account / contact and go to **Relate**



Select the type of record you want to drill down on such as **Contacts**

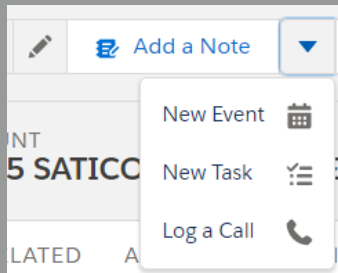
Bulk edit records

Bulk editing allows you to quickly edit records in bulk from the search results window.

A screenshot of a search results table. The first column contains checkboxes, all of which are checked. The table has columns for ACCOUNT NAME, BILLING STREET, BILLING CITY, and BILLING STATE. The first few rows are:

	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY	BILLING STATE
☒	15125 SATICOY ASSOCIATES LLC	3953 MAPLE AVE #300	DALLAS	TX
☒	1st Global, Inc.		Plano	TX
☒	702 EAST PALM AVENUE LLC	4808 MILL BROOK DR	COLLEYVILLE	TX
☒	AIMCO BUENA VISTA APARTMENTS	PO BOX 111397	CARROLLTON	TX
☒	Alsbridge Inc.		Dallas	TX
☒	ARNETT FAMILY TRUST	787 INDIAN SPRINGS RD	GEORGETOWN	TX
☒	BANK OF AMERICA NATIONAL PALACIOS TRUST	3903 BELLAIRE BLVD	HOUSTON	TX

After you've completed a search start by checking the records you wish to bulk edit

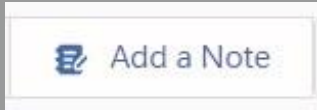


Now select the pencil to bulk edit your records or use the drop down to bulk create notes, events, task, or calls



Notes

Ascendix Search gives the ability to add notes to multiple companies / contacts without leaving your Search Results.



Start by selecting the record(s) you wish to add a note to then select Add a Note

From this window fill in your notes and select save

Activity Timeline

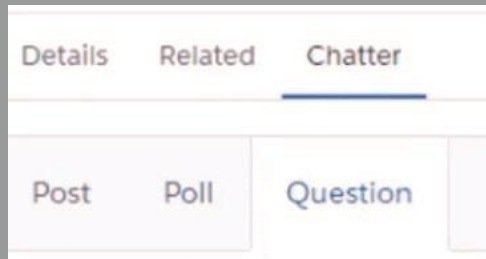
This tab allows you to quickly locate and see Activities Associated with the account / contact



Chatter Feed



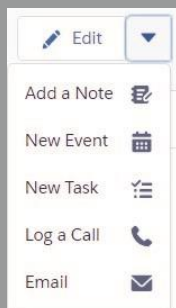
Start by selecting an account / contact and go to Chatter



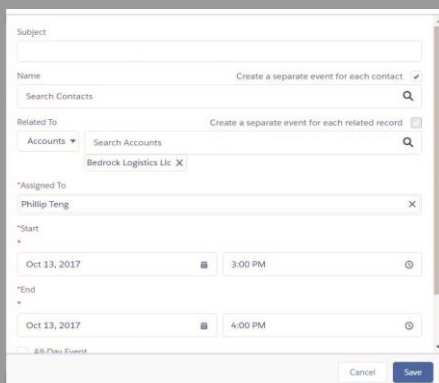
From here you can add or make changes in your chatter feed

Schedule an Event

Don't want to leave your search results to create an event? No problem, Ascendix Search allows you to just that!



Open an account / contact in the search results, then select New Event from the Edit dropdown

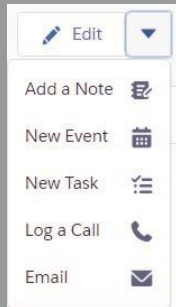


From here schedule the event and click Save after you are done



Add a Task

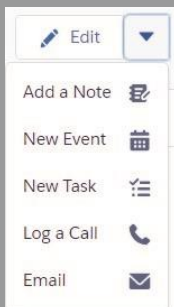
Adding a Task has never been easier!



Open an account / contact in the search results, then select New Task from the Edit dropdown

Log a Call

Using your search results as a call list or simply need to log a call?



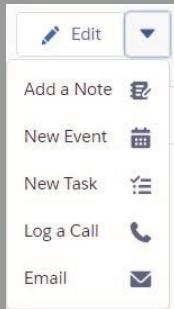
Open an account / contact in the search results, then select Log a Call from the Edit dropdown

From here log a Call and click Save after you are done



Email

Emailing contacts & prospects has never been easier!



Open an account / contact in the search results, then select Email from the Edit dropdown

From here select your contacts (10 records max per email), compose your email, or use a template and send when complete

Insights Panel

The Insights Pannel gives you the ability to visualize your Salesforce data giving you more control in how your data is consumed.



From your search results select the pie chart icon at the top left of your search results.

+ Add a chart

Now click on + Add a chart



New Chart

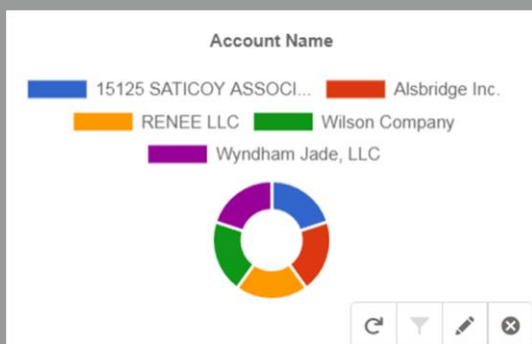
Type
Doughnut

Group by
Account Fax

Function
Count

Cancel Add

Now select your chart type, what criteria you would like to group by and the function type.



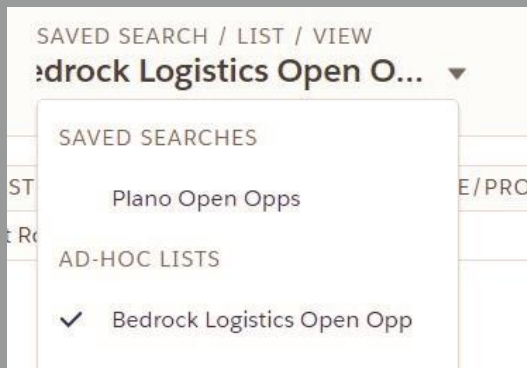
Congratulations now you have your chart set up! Now you can edit, refresh or drill into the chart by either clicking on the chart segment or the buttons provided.

Ad-Hoc Lists

What are Ad-Hoc Lists?

Ad-Hoc lists are static lists created for a specific purpose such as events, open engagements, hot opportunities, or records you want to keep track of. These lists allow you to quickly access records and make changes to them on the fly.

***To access Ad-Hoc lists pertaining to certain objects such as Account and Contact. Be sure to select the parent object in Search For first**



To find your Ad-Hoc lists use the drop down under Ad-Hoc Lists/System Views

***All Ad-Hoc Lists are private by default unless expressly shared with others in the organization. Read the [Sharing an Ad-Hoc List](#) to learn more**

How to Create Ad-Hoc Lists and Add Records

Creating Ad-Hoc Lists from Searches

☒	ACCOUNT NAME ↑	BILLING STREET	BILLING CITY
☒	Bedrock Logistics Llc	1818 Coit Road	Plano

Select the checkbox on records you wish to add to an Ad-Hoc List



From the top right select + Add to Ad-Hoc List

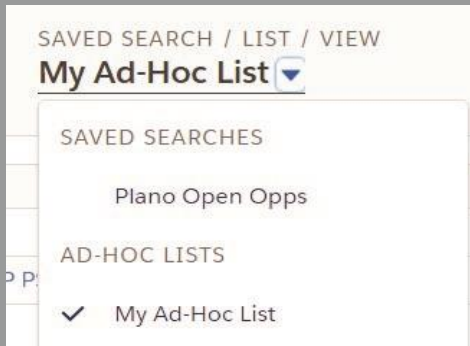
You will be prompted to select an existing Ad-Hoc list or create a new list. Click Save when done



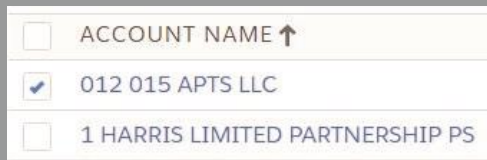
Creating Ad-Hoc Lists from Records

***This Function is not supported in Salesforce Classic**

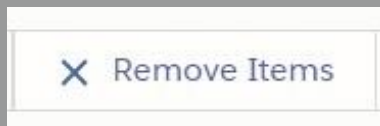
Adding/Removing Columns



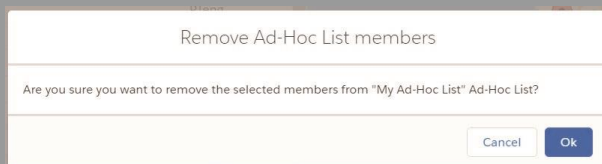
Start by selecting your Ad-Hoc List from the Ad-Hoc Lists/System Views drop down



Select the checkbox on records you wish to remove to an Ad-Hoc List



From the top right select Remove from <Blank>



You will be prompted to select an existing Ad-Hoc list or create a new list. Click Save when done

Sharing an Ad-Hoc List



Select Share Ad-Hoc List from the bottom center of the screen



***All saved searches are private by default unless expressly shared with others in the organization. Read the next section to learn how to share**

Share to:
Users ▾ Search User 🔍
* Access Level:
Read Only ▾
Add

Use the magnifying glass to find users to share your Ad-Hoc Lists with

Share Ad-Hoc List

Share to:
Users ▾ Search User 🔍
* Access Level:
Read/Write ▾
Add

Shared with:

USER OR GROUP NAME	ALLOW EDIT	UNSHARE
Matt Smith	☒	✕

Cancel Save

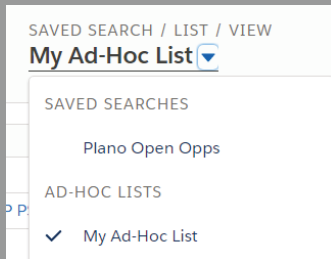
Check the checkbox on the user and check Allow Edit if you wish to grant them edit permissions.

***Allow Edit, allows the selected user(s) to edit your Ad-Hoc list and those changes will be reflected in your list searches.**



Deleting an Ad-Hoc List

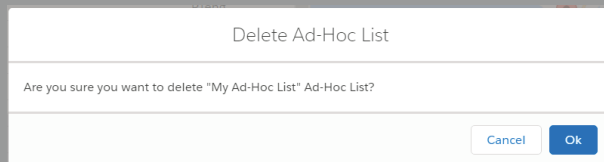
Have an Ad-Hoc List that you no longer need? Lets quickly go through and delete them.



Start by selecting the Ad-Hoc List you want to delete from the Ad-Hoc Lists/System Views drop down.



Now click Delete Ad-Hoc List



You will be prompted to confirm your deletion. Click OK if you are ready to delete.



Expanded Search Operators

Expanded Search Operators provided by Ascendix Search allows user(s) to customize search results beyond the basic out of the box solution provided by Salesforce. Giving you the end user full control of your data your way. Included below is a list of Search Operators and when to use them when performing searches.

Equals: Used to pinpoint records with specific criteria

Ex: City equals New York

@today: Shows records that were created today

Does Not Equal: Excludes records with specific criteria

Greater Than: Values above the stated value

Great Than or Equals: Values above or equaling the stated value

Less Than: Values below the stated value

Less Than or Equals: Values below or equaling the stated value

Between: Values that fall between to specific points.

Ex: Between 20 and 30 employees

Is Blank: Filters records with no data in the field

Is Not Blank: Filters records that have the field filled

Contains: Filters records based on matching/similar string of information

Does Not Contain: Filters records excluding matching/similar string of information

In: Used to filter specific value based on a picklist

Ex: Industry in Manufacturing

Various Date Filters: These filters allow quickly segment your data based on time.

The image shows three dropdown menus for search operators. The first menu on the left is open, showing options: 'is blank', 'in the last seven days', 'in the last X days', 'in the last month', 'in the last X months', 'in the last week', 'in the last X weeks', and 'in the next seven days'. The second menu in the middle is open, showing options: 'in the next X days', 'in the next month', 'in the next X months', 'in the next week', 'in the next X weeks', 'on or after', 'on or before', and 'this month'. The third menu on the right is open, showing options: 'this week', 'this year', 'tomorrow', 'yesterday', and 'between'.

Tips & Tricks

Congratulations you've reached the end of the guide! Here are a few tips and tricks that will allow you to be an Ascendix Search Pro.

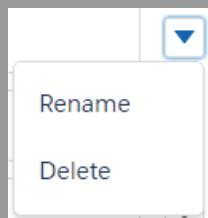
Drag and Drop Search Criteria



Hover over the hamburger button next to your search criteria and drag and drop to the location of your choice

Editing Search Criteria Labels

Billing State/Province 



By hovering over the Search Criteria, you can select the pen tool to edit the field or use the drop down to rename the field

***This option allows you to change Search Criteria into something you are more familiar with. Such as changing Billing Street to just Street.**

Show/ Hide the Map



By selecting this icon from the top left you can quickly show/hide your map to give you some extra viewing room



Support

If you encounter any issues during installation or usage, please reach out to support@ascendix.com.