



Global Search + Ascendix Search

Extending Search Capabilities of Salesforce



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Introduction

Using the 22 years of experience Ascendix has in the world of CRM, we've taken the best ideas and designs we've come across in using over 10 market leading CRM platforms and come up with a unique and end user enabling search facility for the Salesforce.com platform.

Ascendix Search was designed to provide an expanded set of options beyond what the Global Search Salesforce provides in the core platform.

This white paper will outline the various use cases and differences between the two search options which, when combined, provide an extensive set of search options for the user.

As you read this, you will see where Ascendix Search crosses over into adding flexibility and value to the process of building list views as well.

While the scope of this document is a comparative analysis between Global Search and Ascendix Search, we appreciate that some of the functionality in Ascendix Search can be accommodated for using the Salesforce report writer or dashboard facility.

In our assessment, searching for data and reporting on it are similar but distinctly separate tasks often performed by different user groups. It should be noted that while some aspects of Ascendix Search lend themselves to "light" report writing and dashboard creation, the tool was not designed as a report writer and should not be considered as a replacement for more full featured report writing tools such as the Salesforce report facility.



Record Searching

Are you searching for a specific record or conducting some data mining in search of a collection of records that fit a specific criteria? If the objective is to locate a specific record, the Global Search facility is a great resource. However, if your objective is to find a collection of records that match a specific criteria, Ascendix Search may prove to be a better fit.

Global Search provides a great facility to perform a "Google like" search where you type in keywords or phrases that return a variety of records across multiple record types.

Ascendix Search provides more precision in the results by returning records that conform to a specific criteria entered.

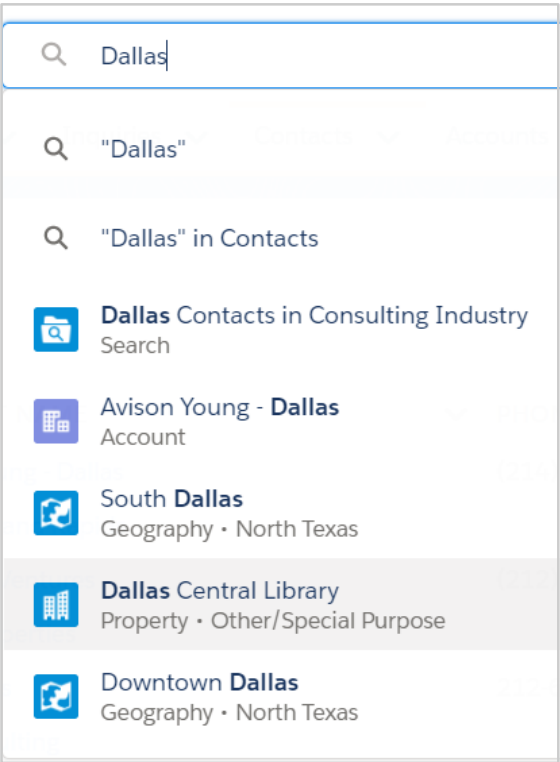


Image 1.1. Salesforce Global Search

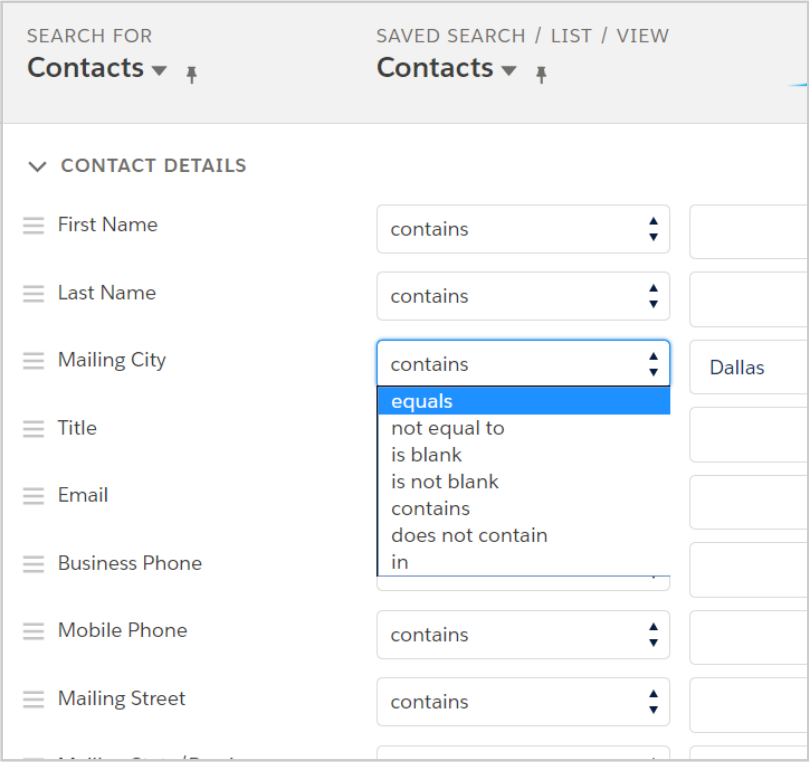


Image 1.2. Ascendix Search

As Global Search uses indexing technology, certain terms or keywords may bring back unexpected or unwanted results. Depending on the search objective, this behavior may be acceptable while in other situations there is a need for more precision with the records returned.

One time vs. repeatable/reusable Search

If there is a need to preserve the results from a particular search, there is no current method to "save" that search with the Global Search facility (you'd have to build a list view). With Ascendix Search, the search conditions can be saved making it available for reference in the future.

The screenshot displays the Ascendix Search interface. On the left, there are three expandable sections: CONTACT DETAILS, ACCOUNT DETAILS, and PREFERENCE DETAILS. Each section contains various filters with dropdown menus for operators and values. For example, in CONTACT DETAILS, 'Mailing City' is set to 'equals' and 'Mailing State/Province' is set to 'in Texas; TX'. In ACCOUNT DETAILS, 'Industry' is set to 'equals Finance' and 'Annual Revenue' is set to 'greater or equals 1,000,000.00'. In PREFERENCE DETAILS, 'Sale or Lease' is set to 'equals'. On the right, there is a map of Texas and surrounding areas, with a search box at the top. At the bottom, there is a row of buttons: 'Create New Search', 'Clear Criteria', 'Save Search' (highlighted with a blue box), 'Share Search', 'Delete Search', 'Select Columns', and a 'Search' button with a magnifying glass icon.

Image 2. Ascendix Search: Save your Search Results in one Click

Using Maps vs. City/State/ZIP fields

Global Search allows for searching of records based on address fields (for instance, typing in Dallas will get you records in Dallas but may also give you records that have Dallas in the record name) but when geographic searches don't conform well to address fields, Ascendix Search provides a map on which the user can draw shapes that dictate the geographic boundaries.

Typing in 'Dallas' in Global Search will get you records in Dallas but may also give you records that have Dallas in the record name:

The screenshot shows the Ascendix Search interface with a search bar containing 'Dallas'. The left sidebar lists various categories like Dashboards, Inquiries, Contacts, Accounts, Deals, Properties, Availabilities, Leases, Sales, and Listings. The main content area displays search results for 'Contacts' and 'Properties'.

Contacts Results:

NAME	ACCOUNT NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
Dan Spika	Henry S. Miller	+1 972 419 4000		Wes
Camille Thompson	Thompson Investments	(972) 852-4512	cm@thompson.com	Wes
Andrew Doster	Henry S. Miller	(972) 386-1466	andrew.doster@henrysmiller.com	Wes
John Schumacher	CBRE	310-363-4960	john.schumacher@cbre.com	Wes
Dillon Cook	Henry S. Miller	(972) 386-1462	dcook@henrysmiller.com	Wes

Properties Results:

PROPERTY NAME	RECORD TYPE	STREET	CITY	ST...	YEAR...	P...	...	REGION
3001 Dallas Parkway	Office	3001 Dallas Parkway	Frisco	TX		A		North Texas
Dallas Central Library	Other/Special Purpose	1954 Commerce Street	Dallas	TX	1955			

Draw shapes on a map to select geographic areas to define the search results in Ascendix Search:

The screenshot shows the Ascendix Search interface with a search bar containing 'Dallas'. The left sidebar lists various categories like Dashboards, Inquiries, Contacts, Accounts, Deals, Properties, Availabilities, Leases, Sales, and Listings. The main content area displays search results for 'Contacts' and 'Properties'.

Contacts Results:

FULL NAME	ACCOUNT NAME	MAILING STREET
Aaron Banion		13140 Coit Rd Ste 310
Alex Cox	Ascendix Technologies, Inc.	3920 Edgestone Drive
Alex Cox	Easton Recruiting	3920 Edgestone Drive
Alex Cross	Real Foundations	14135 Midway Road Suite 300
Alfredo Bala	Mannatech, Inc.	600 S Royal Ln Ste 200
Alfredo Ollivierre III	Hasco Medical	16800 Dallas Pkwy Ste 200
Alison Prigmore	Gas Monkey Garage	2330 Merrell Rd
Allan Pickering	Bartlett & West	3017 Lou Menk Drive Suite 11C
Amanda Cumberland		2501 South State Hwy 121 Suit
Amy Linn	Arlin Services	14900 Landmark Blvd. 100
Andrew Doster	Henry S. Miller	14001 N. Dallas Parkway
Andrew Kanter	etalk Corporation	2200 Ross Ave Suite 3500
Andrew Keith	Multiview, Inc.	7701 Las Colinas Ridge Suite 8C
Andy Jordan	Gainsco Inc.	3333 Lee Pkwy # 1200
Angela Burress		2501 South State Hwy 121 Suit

The right side of the interface shows a map of the Dallas area with a circular selection drawn around the city center. The map includes labels for various cities and highways.

3. Ascendix Search Map Search: The results of the map search are shown in the grid as well as on the map

Searching using criteria that involves more than one object

The Global Salesforce Search is great at searching for specific values **across** objects but doesn't really allow for you to search for records using criteria **from** multiple objects.

Salesforce Global Search	Ascendix Search
Is great at searching for specific values across objects.	Search for contacts using criteria from multiple objects.
You can't use criteria from multiple objects.	User-friendly interface. No formulas.

For example, type in Dallas and you'll get accounts, contacts and other records that contain the word Dallas. However, if you wanted to search for contacts in Dallas that are related to accounts in the Financial Services industry, Global Search is not your tool.

Ascendix Search provides a user friendly interface to allow the user to input criteria from multiple objects to drive the result set as described in the example above.

The screenshot displays the Ascendix Search interface. At the top, there's a search bar with 'Contacts' selected. Below it, the 'CONTACT DETAILS' section is expanded, showing criteria for 'First Name', 'Last Name', 'Mailing City', 'Title', and 'Mailing Country'. The 'ACCOUNT DETAILS' section is also expanded, showing criteria for 'Annual Revenue', 'Account Name', and 'Industry'. The 'PREFERENCE DETAILS' section is partially visible. On the right, a map of the United States is shown with a search box and a 'Filter by Map' button. The bottom of the interface features a navigation bar with buttons for 'Create New Search', 'Clear Criteria', 'Save Search', 'Share Search', 'Delete Search', 'Select Columns', and a 'Search' button.

Image 4. Ascendix Search supports related objects searching

End user configurable vs admin configurable Search

For certain fields to be searchable, the admin has to enable them by creating a tab for Global Search to pick them up.

With Ascendix Search, the end user can choose from any of the fields available in the org to search from without administrator intervention.

Ascendix Search provides a user-friendly interface to allow the user to input criteria from multiple objects to drive the result set as described in the example above.

The screenshot displays the Ascendix Search interface. On the left, a sidebar shows a tree view of search categories, with 'CONTACT DETAILS' expanded. A dropdown menu is open, listing various fields such as 'Select field -', 'Account', 'Assistant's Name', 'Business Fax', 'Business Phone', 'Created By', 'Created Date', 'Data.com Key', 'Deleted', 'Department', 'Email', 'Email Bounced Date', 'Email Bounced Reason', 'First Name', 'Full Name', 'Home Phone', 'Informal Name', 'Is Email Bounced', and 'Property Class'. The 'Created Date' field is highlighted. The main search form contains several criteria rows, each with a dropdown for the field, a comparison operator (e.g., 'equals', 'greater or equals'), and a value (e.g., 'Texas, TX', 'Finance', '1,000,000.00', 'Prospect'). A plus sign (+) is visible next to the criteria rows, indicating the option to add new fields. On the right, a map view shows the geographical distribution of search results, with labels for various cities and states. At the bottom, a navigation bar includes buttons for 'Create New Search', 'Clear Criteria', 'Save Search', 'Share Search', 'Delete Search', 'Select Columns', and a 'Search' button.

Image 5. Ascendix Search form customizing. Click on the plus sign to add new fields from any related objects.

Adjusting Columns To Result Sets

Global Search results are returned by page layouts determined and defined in advance by the administrator to suit the majority of needs.

With Ascendix Search, the end user can adjust the columns displayed for each individual search and the columns from multiple objects can be displayed in a single view.

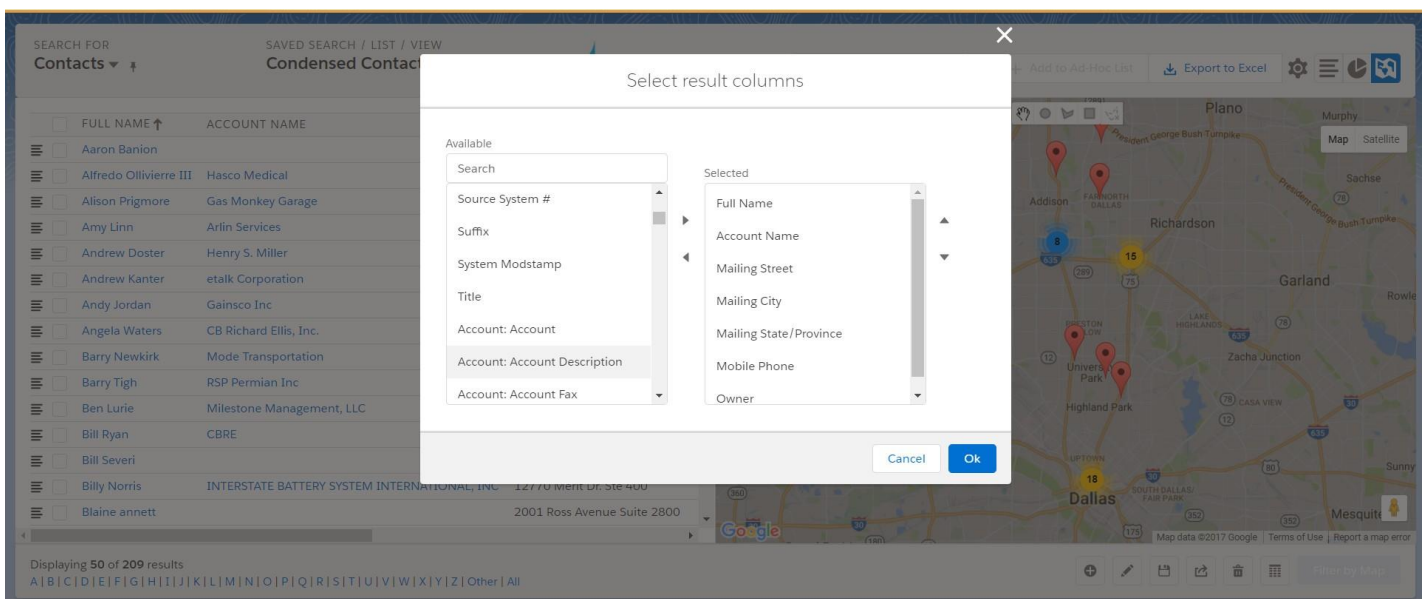


Image 6. Ascendix Search Results View. The "Select result columns" facility allows the end user to select which columns are displayed in the result set.

Displaying Search Results

In addition to the end user being able to adjust columns that are displayed for search results, they can choose those columns from multiple objects.

For instance, if the end user conducted a search on contacts, they could include attributes from the account object in that result set.

Let's take a marketing use case as an example where you wanted to do some market segmentation based on contacts associated with accounts that have revenue greater than \$15MM.

Ascendix Search excels at this type of searching. Simply type \$15M in the field 'Annual Revenue' and click the button 'Search':

The screenshot shows the Ascendix Search interface. On the left, under 'CONTACT DETAILS', the 'Annual Revenue' filter is set to 'greater or equals' with a value of '15,000,000.00'. Other filters include 'Account Name', 'Account Type', 'Industry', 'Sale or Lease', 'Property Type', 'Property Class', 'Area Minimum (SF)', and 'Area Maximum (SF)'. On the right, there is a map of the United States and Mexico. At the bottom, there are buttons for 'Create New Search', 'Clear Criteria', 'Save Search', 'Share Search', 'Delete Search', 'Select Columns', and a 'Search' button.

Image 7.1. Ascendix Search: The annual revenue filter was added to the search template

Once clicking on the 'Save' button the user will see their search results:

The screenshot shows the search results in a list view. The table has columns for 'Full Name', 'Account Name', 'Account: Annual Revenue', and 'Account: Industry'. The results show four contacts, all with an annual revenue of \$200,000,000.00.

Full Name	Account Name	Account: Annual Revenue	Account: Industry
Alex Smith	Aarden Equity	\$200,000,000.00	Finance
Anna Deharo	Aarden Equity	\$200,000,000.00	Finance
Arthur Martinez	Abercrombie & Fitch Co.	\$200,000,000.00	Retail - Apparel and Acces
Bob Iameron	Aarden Equity	\$200,000,000.00	Finance

Image 7.2 Ascendix Search Results - Account Revenue has been included in a list view of contact records

Flexibility in searching on date fields

Global Search is not optimized for searching for records driven by dates. If you were to look at the list of searchable fields, you would not find date fields on the list.

Salesforce Global Search	Ascendix Search
Global Search is not optimized for searching for records driven by dates. Users can create a list view instead.	User can filter by dates using a variety of operators (Next X Days, Last X Weeks, yesterday, tomorrow and more).

Salesforce users can create a list view instead, but there are some limitations. First, there is a limited set of operators to use. Second, users are not able to use a date picker to select a date, but need to enter it manually.

Ascendix Search allows the end user to choose from a variety of operators such as Next X Days, Next X Weeks and Months to allow for the casual end user to drive into some meaningful sets of data.

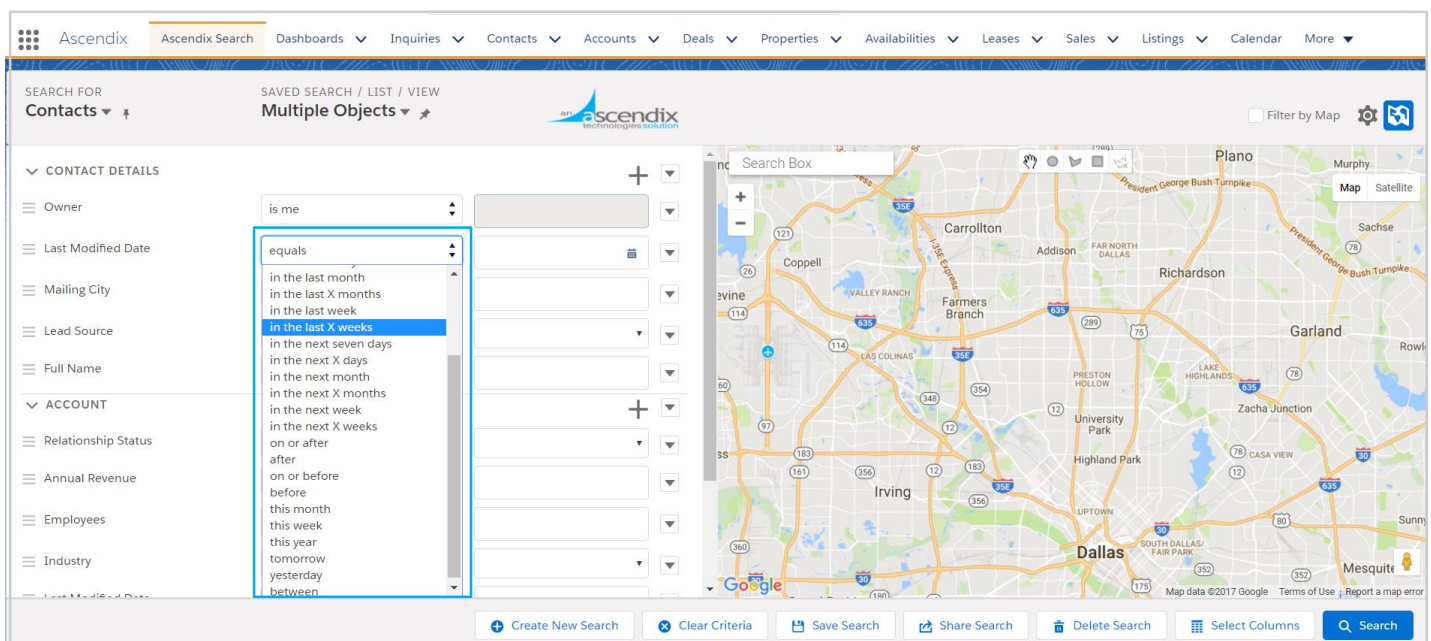


Image 8. Extended search operators for dates in Ascendix Search.

About the Author

Wes Snow is a co-founder and President of Ascendix Technologies based in Dallas, Texas with international offices located in Eastern Europe. Along with products like Ascendix Search available on the AppExchange, Ascendix is the author of AscendixRE CRM which have been brought to market for the commercial real estate industry. In addition, Ascendix also provides an offshoring/outsourcing offering which leverage the investments and experience obtained over the 10-year history of working with offshoring partners.

About Ascendix Search

Ascendix Search simplifies complex Salesforce searches turning any user into an advanced search specialist. Perform single/multi-criteria searches without building list views, save your searches, bulk edit records, export lists to Excel, filter and refine searches by maps & charts, and more.

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