



mscrm-addons.com
Your company for MS-CRM ADD-ONS!

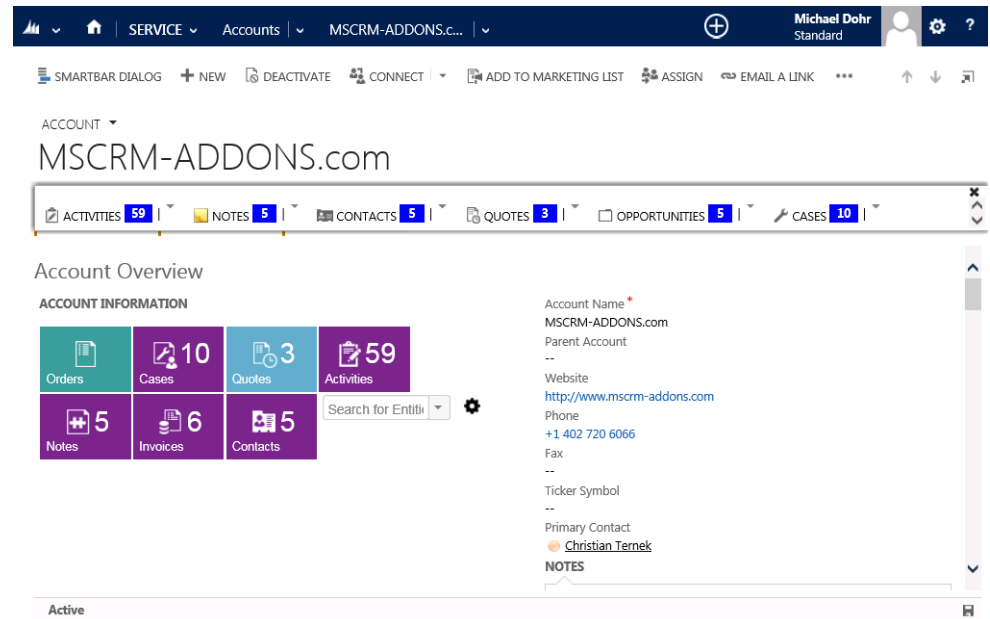
SmartBar
for
Microsoft Dynamics CRM

Navigation – QuickAccess – Related Records – „One-Click“ - Actions

Why would I use it?

“Save time by adding navigational or functional buttons”

- Simplify Navigation
 - between related records
 - personalized menus
- Count & Quick-Access of related records
 - Access related records/activities,...
 - See count of related entries (e.g. quotes...)
- „One-Click“-Actions
 - Fire workflows/javascript
 - Open Links
 - Access CRM sitemap entries (e.g. security roles, processes, users, templates...)
 - ...



Design and Features

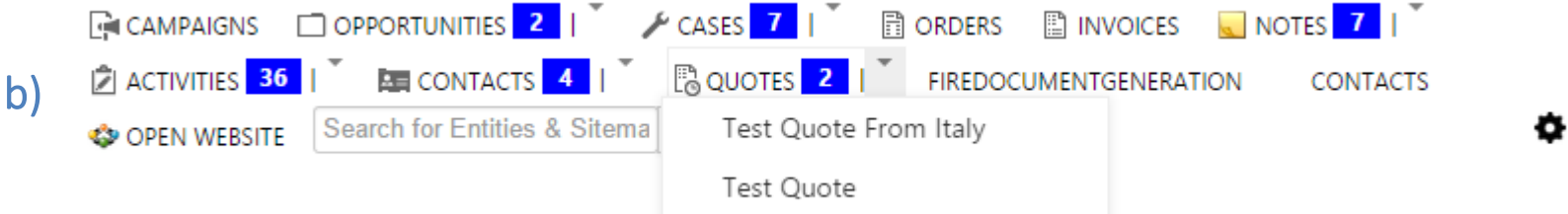
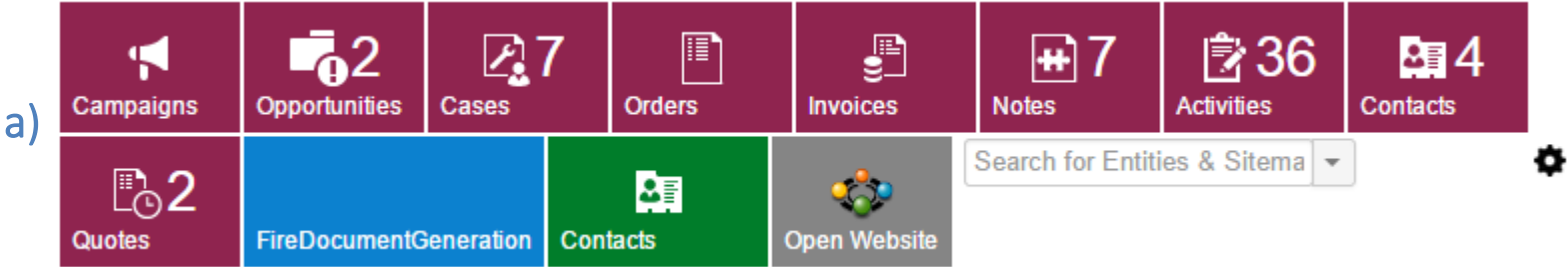
Views and Features

Views

- a) Tile-view
 - customizable color
 - Customizable size
- b) List view
 - Dropdown to open related records directly

Features

- Count related records
- Fire Javascript
- Open SitemapEntry
- Open Links (e.g. Advanced Finds)
- Entity-search



Integrating SmartBar

There are three different ways to integrate SmartBar into a CRM environment

- 1) Embed into Entity Forms
Custom menu on CRM form
 - see count of related records
 - navigate to related records

- 2) The SmartBar-dialog
CommandBar – menu showing related records
 - persists when navigating
 - accessible from everywhere

- 3) Embed into DashBoards
 - or quick access bar
 - personalized menu

The screenshot shows a CRM interface for 'MSCRM-ADDONS.com'. At the top, there is a navigation bar with 'SERVICE' and 'Accounts' menus. Below it, a 'SMARTBAR DIALOG' is visible, which is a horizontal bar containing icons and counts for various entities: ACTIVITIES (59), NOTES (5), CONTACTS (5), QUOTES (3), OPPORTUNITIES (5), and CASES (10). This dialog is highlighted with a blue box and the number '2'. Below the dialog, the 'Account Overview' section is shown, featuring a grid of entity counts: Orders, Cases (10), Quotes (3), Activities (59), Notes (5), Invoices (6), and Contacts (5). This grid is highlighted with a blue box and the number '1'. At the bottom of the screenshot, a 'Activity Overview' section is visible, which is a horizontal bar containing icons and counts for various entities: Accounts, Contacts, Leads, Quotes, Invoices, Opportunities, Security Roles, and Processes. This bar is highlighted with a blue box and the number '3'. The right side of the interface shows account details for 'MSCRM-ADDONS.com', including website, phone, and primary contact 'Christian Ternek'.

Retail – Pricing

Perpetual License

Component	Price / license	Support & Maintenance*
Per Site license (must cover all active users)	\$ 25	\$ 17

* Support & Maintenance is included for the first year

* Prices do not include reseller discount

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Support & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Do not forget we have an awesome blog at <http://blogs.mscrm-addons.com!>



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