SmartBar
for
Microsoft Dynamics CRM

SmartBar

<u>Why would I use it?</u>

"Save time by adding navigational or functional buttons"

- <u>Simplify Navigation</u>
    - between related records
    - personalized menus

- <u>Count & Quick-Access of related records</u>
    - Access related records/activities,…
    - See count of related entries (e.g. quotes…)

- <u>„One-Click"-Actions</u>
    - Fire workflows/javascript
    - Open Links
    - Access CRM sitemap entries (e.g. security roles, processes, users, templates…)
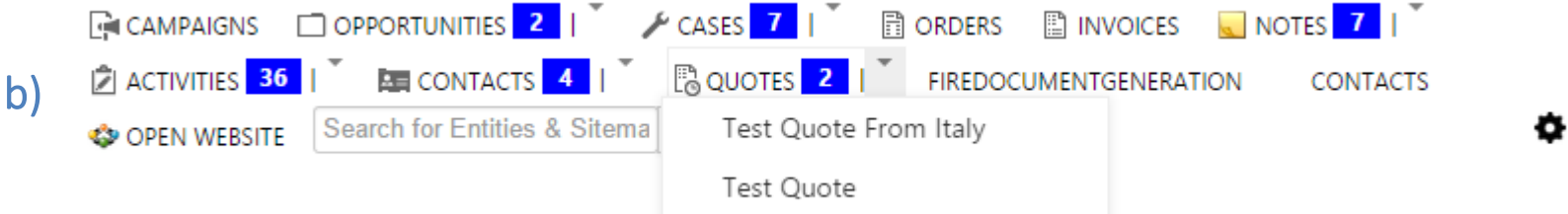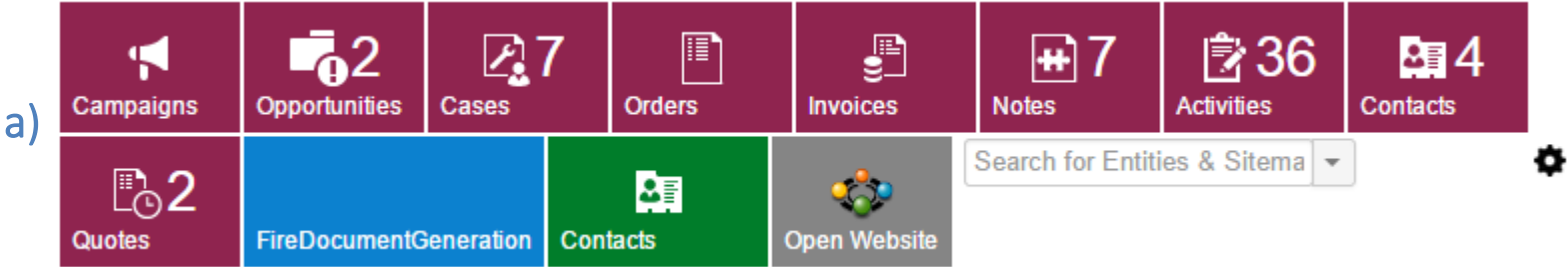   - …
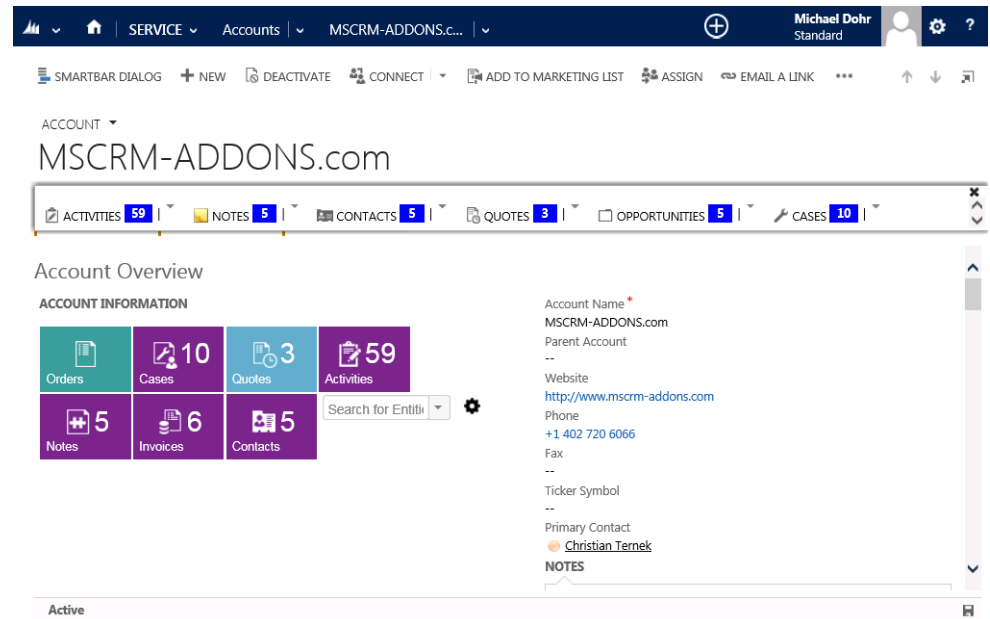
Design and Features

Views

a) Tile-view
- customizeable color
- Customizeable 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

a)

b)

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Integrating SmartBar

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

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

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

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

Retail – Pricing

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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☎ US: +1 404 720 6066   ✉ support@mscrm-addons.com

☎ Europe: +43 (316) 680 880   ✉ office@mscrm-addons.com

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