



# SmartBar

## Getting Started from AppSource

Hello!

Thank you for your interest in SmartBar. This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our [guides](#) or [blogs](#).

There are basically two ways to install SmartBar from AppSource:

### 1. Get solution from Marketplace in Dynamics 365

It is possible to open AppSource directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the **[Get Solutions from Marketplace]**-button, highlighted in yellow in the figure below.

The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. A yellow box highlights the 'More Actions' button in the top toolbar. Below the toolbar is a table of solutions.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdyn_PowerAppsCh...	PowerApps Checker	1.0.0.103	5/11/2019	Managed	Microsoft Dynamics 365	PowerApps Checker promotes higher-quality mo...
AutoMergeGlobalButt...	AutoMergeGlobalButt...	2017.1	5/9/2019	Managed	PTM EDV Systeme GmbH	
AutoMergeServerCore	DocumentsCorePack b...	2017.5	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains basic settings for Docume...
DocumentsCorePackS...	MSCRM-ADDONS.co...	2017.2	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains the data for DocumentsCo...
MSCRMADDONScom...	MSCRM-ADDONS.co...	2017.39	5/9/2019	Managed	PTM EDV Systeme GmbH	General MSCRM-ADDONS.com Solution.
msdynce_CRMHub	Crm Hub	1.0.20170...	5/4/2019	Managed	Microsoft Dynamics 365	
Crb330e	Common Data Service...	1.0.0.0	5/3/2019	Unmanag...	CDS Default Publisher	

Figure 1: Get solutions from Marketplace

This leads you to the AppSource website where you can search for SmartBar and is described below.

## 2. Get solution from AppSource

The second option is to go to the AppSource website and search for SmartBar. Use this [link](#) to find all add-ons provided by mscrm-addons.com (figure below).

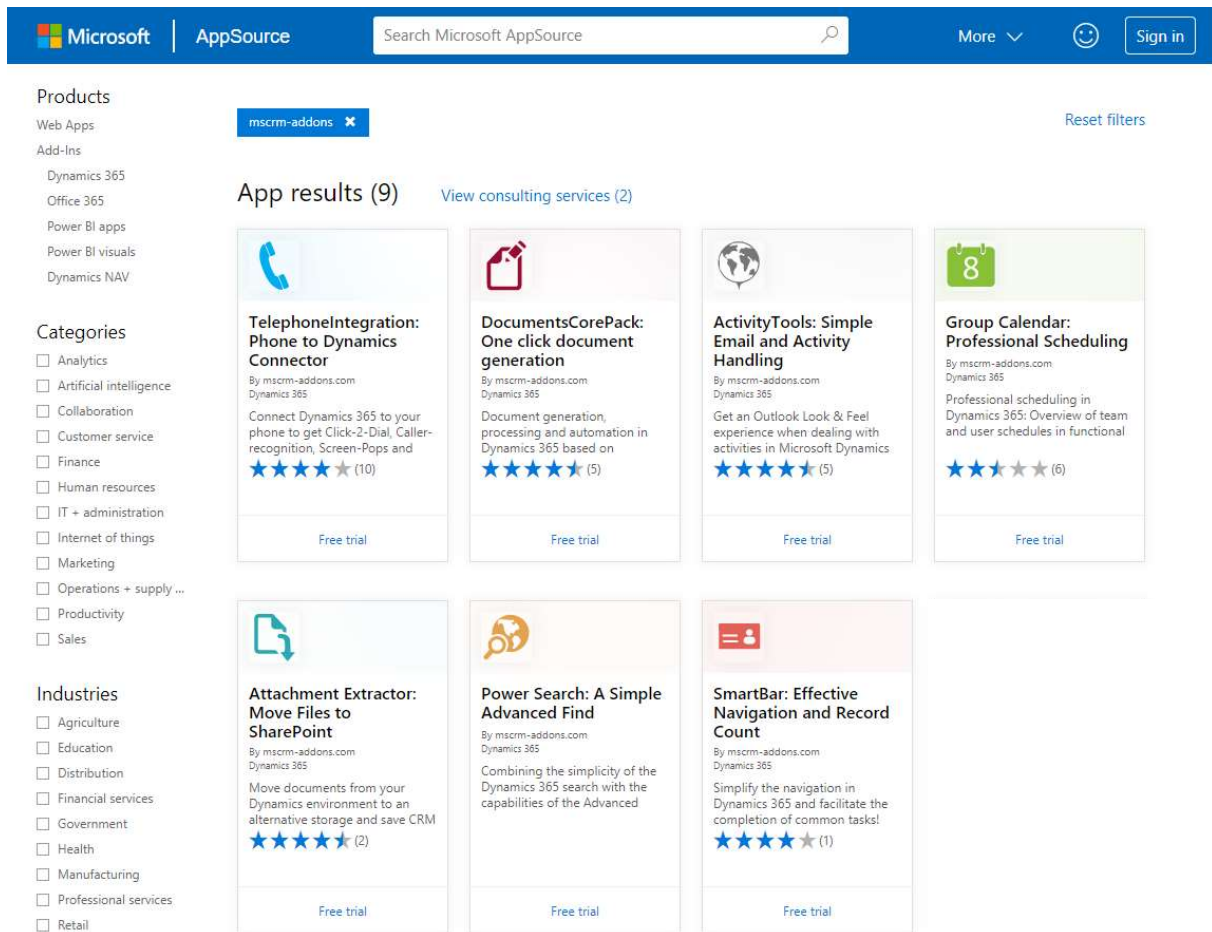


Figure 2: AppSource – solutions by mscrm-addons.com

Next, please select SmartBar. The so opened window provides you with information regarding SB. Here, please click on the **[FREE TRIAL]**-button on the left side.

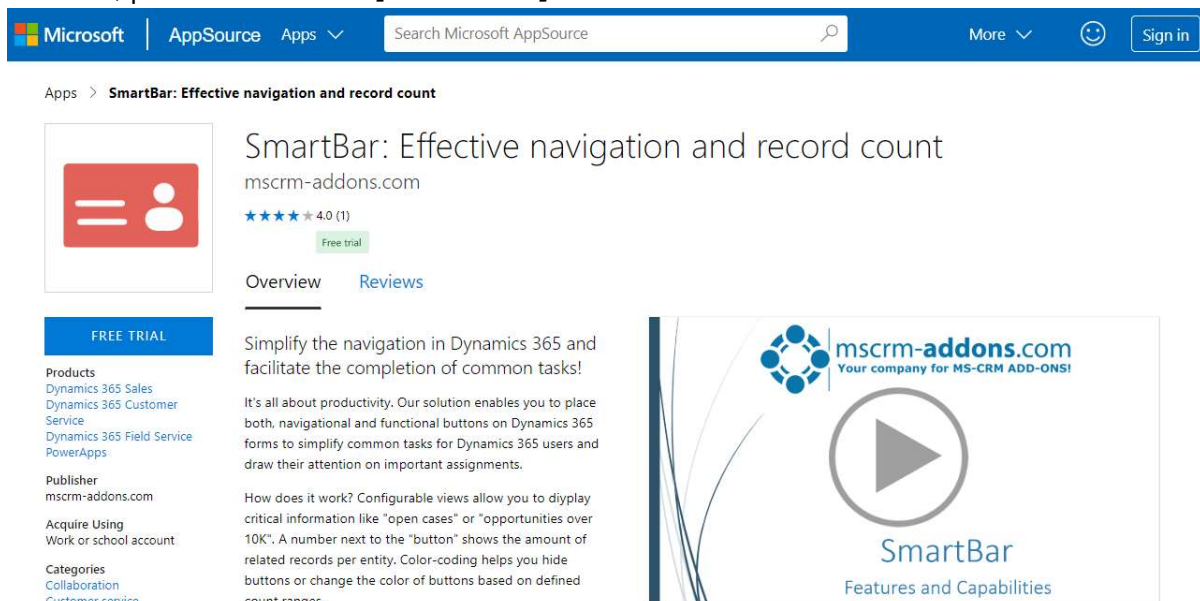


Figure 3: AppSource – SmartBar

Next, please sign in to Microsoft AppSource. Enter your e-mail address and hit the **[Sign in]**-button as you can see in the figure below.


A screenshot of a 'Sign in to Microsoft AppSource' dialog box. It has a title bar with a close button. The main text says 'Sign in to Microsoft AppSource'. Below it, a message says 'Enter the email address of the account you want to use when acquiring apps on AppSource.' There is an information icon and a note: 'The app you have selected (SmartBar: Effective navigation and record count) requires a work or school account to continue. Microsoft accounts are not supported for this app.' Below this, it says 'Work or school account' and shows a text input field containing 'admin@CRM410084.onmicrosoft.com'. A blue 'Sign in' button is below the field. At the bottom, it says 'Don't have an account? [Sign up for a free account](#)'.

Figure 4: Sign in to Microsoft AppSource

In the window below please check the Microsoft permission checkbox at the bottom. Click on the **[Continue]**-button to proceed.

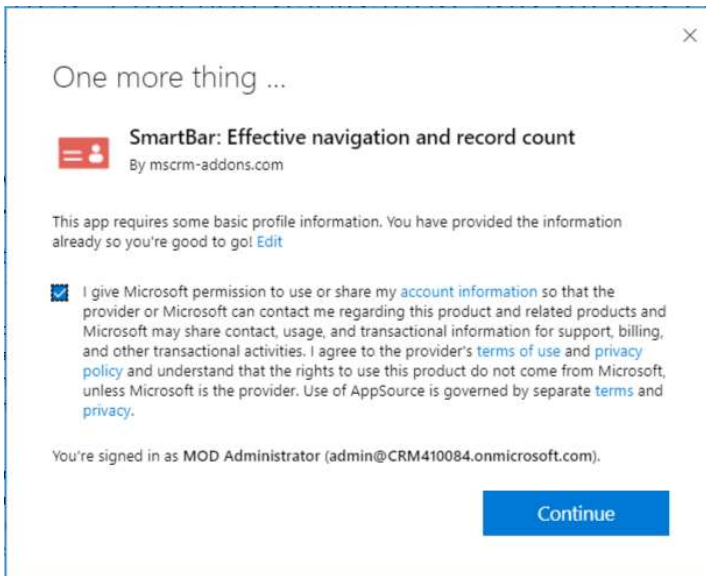
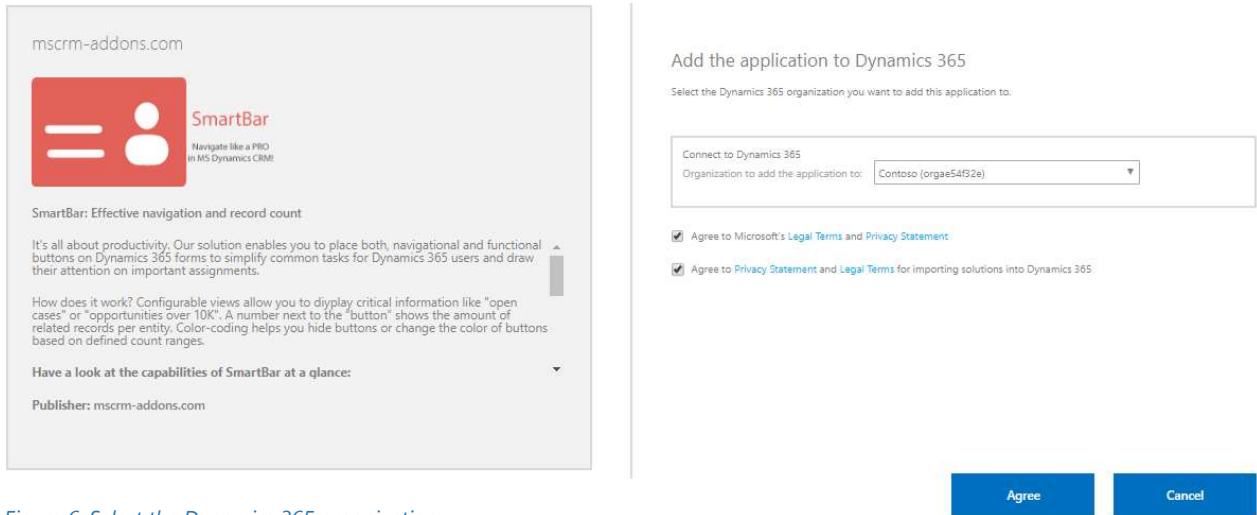
A screenshot of a 'One more thing ...' dialog box. It has a title bar with a close button. The main text says 'One more thing ...'. Below it, there is a red icon and the text 'SmartBar: Effective navigation and record count' followed by 'By mscrm-addons.com'. A message says 'This app requires some basic profile information. You have provided the information already so you're good to go! [Edit](#)'. Below this, there is a checked checkbox and a long paragraph of text: 'I give Microsoft permission to use or share my account information so that the provider or Microsoft can contact me regarding this product and related products and Microsoft may share contact, usage, and transactional information for support, billing, and other transactional activities. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).' At the bottom, it says 'You're signed in as MOD Administrator (admin@CRM410084.onmicrosoft.com)'. A blue 'Continue' button is at the bottom right.

Figure 5: Check the Microsoft permission checkbox

Next, please select the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the **[Agree]**-button.



mscrm-addons.com

**SmartBar**  
Navigate like a PRO in MS Dynamics CRM!

SmartBar: Effective navigation and record count

It's all about productivity. Our solution enables you to place both, navigational and functional buttons on Dynamics 365 forms to simplify common tasks for Dynamics 365 users and draw their attention on important assignments.

How does it work? Configurable views allow you to display critical information like "open cases" or "opportunities over 10K". A number next to the "button" shows the amount of related records per entity. Color-coding helps you hide buttons or change the color of buttons based on defined count ranges.

Have a look at the capabilities of SmartBar at a glance:

Publisher: mscrm-addons.com

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to:

Connect to Dynamics 365  
Organization to add the application to: Contoso (orgae54f32e)

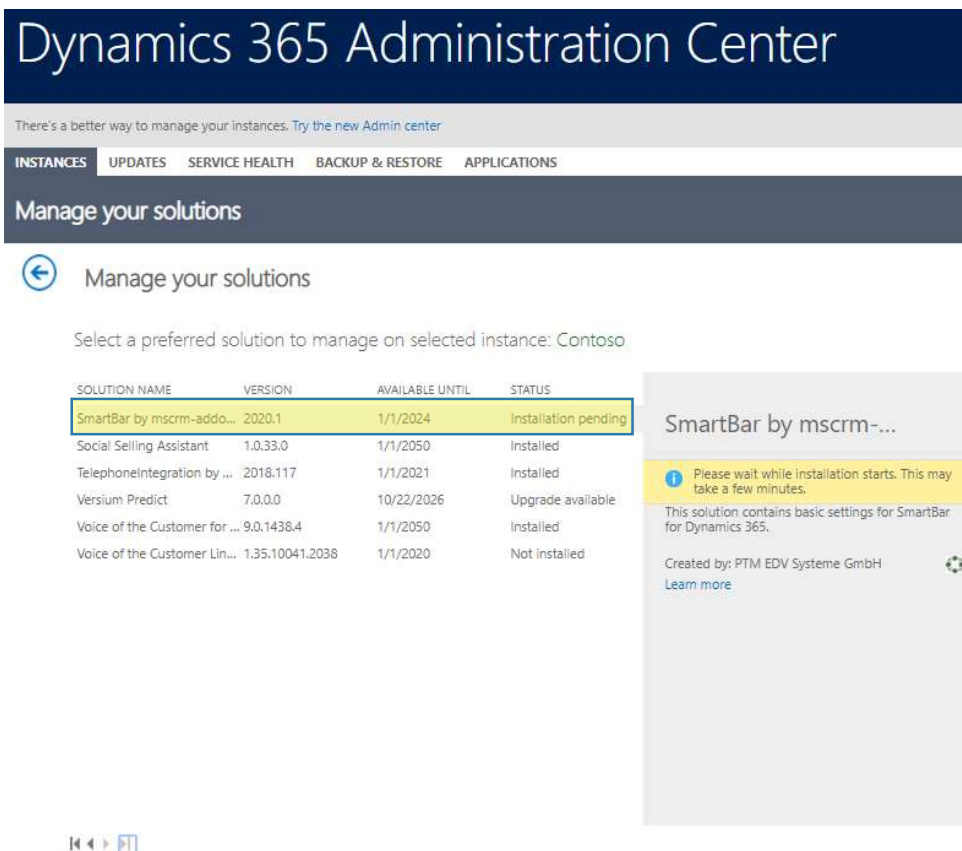
☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

**Agree** **Cancel**

Figure 6: Select the Dynamics 365 organization

This leads you to your organization overview. The installation takes a while – as you can see SmartBar has the Status "Installation pending" until the installation is completed (highlighted in yellow).



## Dynamics 365 Administration Center

There's a better way to manage your instances. [Try the new Admin center](#)

**INSTANCES** | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

### Manage your solutions

Manage your solutions


Select a preferred solution to manage on selected instance: Contoso

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
SmartBar by mscrm-addons.com	2020.1	1/1/2024	Installation pending
Social Selling Assistant	1.0.33.0	1/1/2050	Installed
TelephonyIntegration by ...	2018.117	1/1/2021	Installed
Versium Predict	7.0.0.0	10/22/2026	Upgrade available
Voice of the Customer for ...	9.0.1438.4	1/1/2050	Installed
Voice of the Customer Lin...	1.35.10041.2038	1/1/2020	Not installed

**SmartBar by mscrm-...**

Please wait while installation starts. This may take a few minutes.

This solution contains basic settings for SmartBar for Dynamics 365.

Created by: PTM EDV Systeme GmbH 

[Learn more](#)

Figure 7: Organization overview – SB installation pending

Meanwhile, you will receive an e-mail with more information about SB and its usage.

To see when the installation is finished, please refresh the page in between. Only when the status is on "Installed" you can continue with the process (highlighted in yellow below).

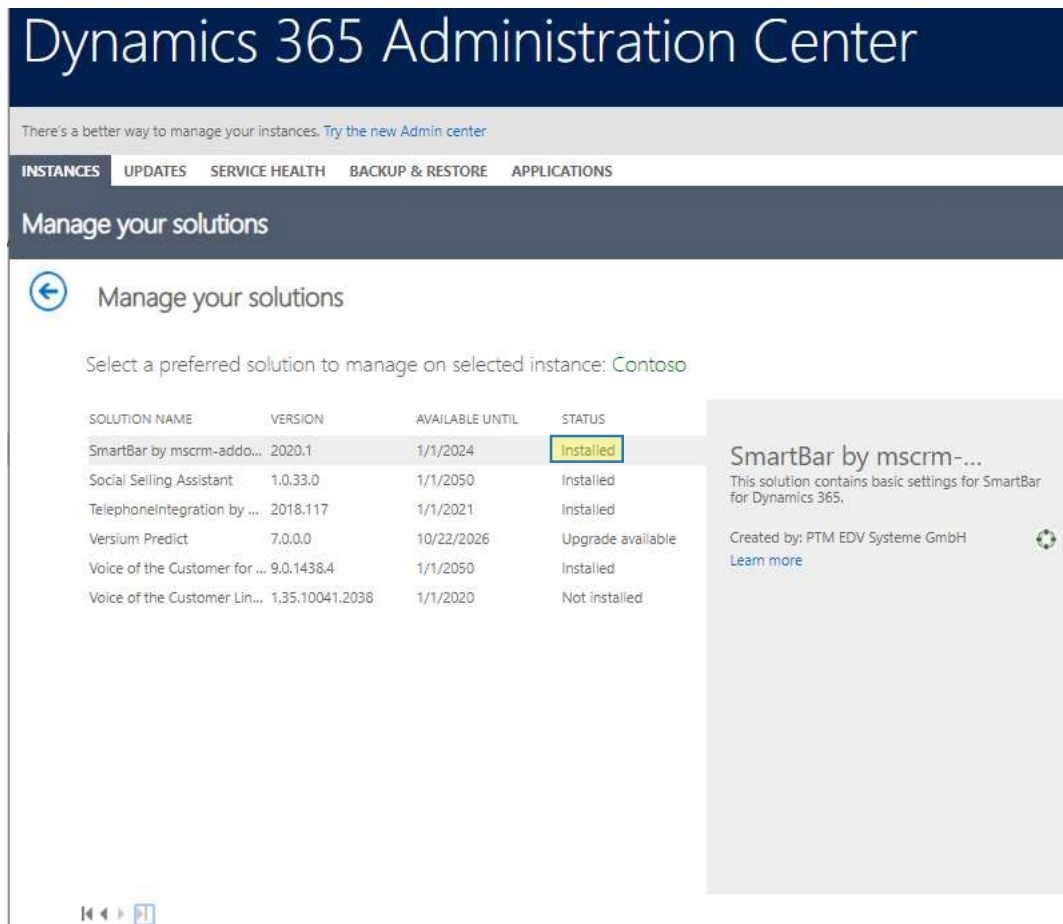


Figure 8: Organization overview – SB installation finished

Congratulations! You have successfully completed the installation of SmartBar from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – SmartBar (highlighted in yellow).

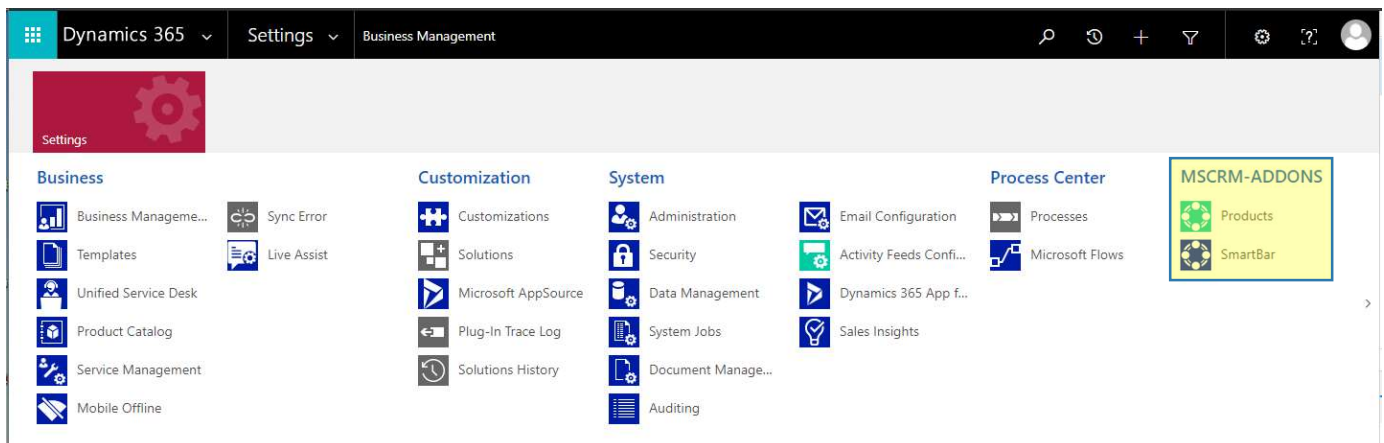


Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: SmartBar



A click on SmartBar leads you to the *SB Getting Started* page. This provides you with information about the next steps to finalize the setup.

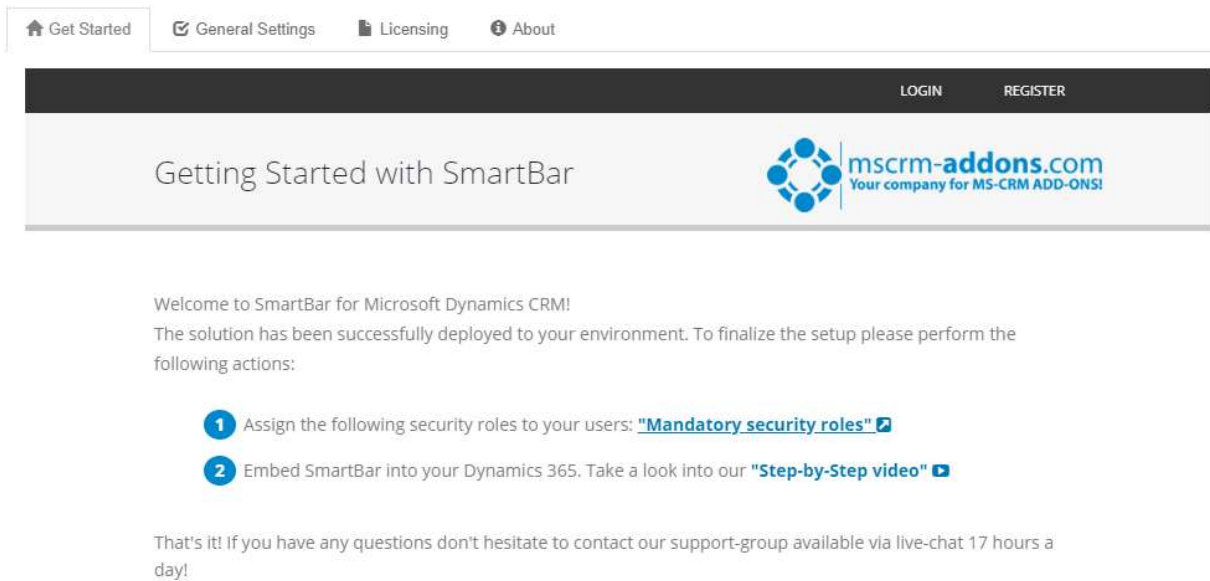


Figure 10: SmartBar Getting Started page

## 1 ASSIGN SECURITY ROLES

First, you have to assign security roles for the users who should be able to use SB. Therefore, go to **Settings > Security** and select **Users**. Please open a user account and click on the '**Manage roles**'-option as you can see it highlighted in yellow below.

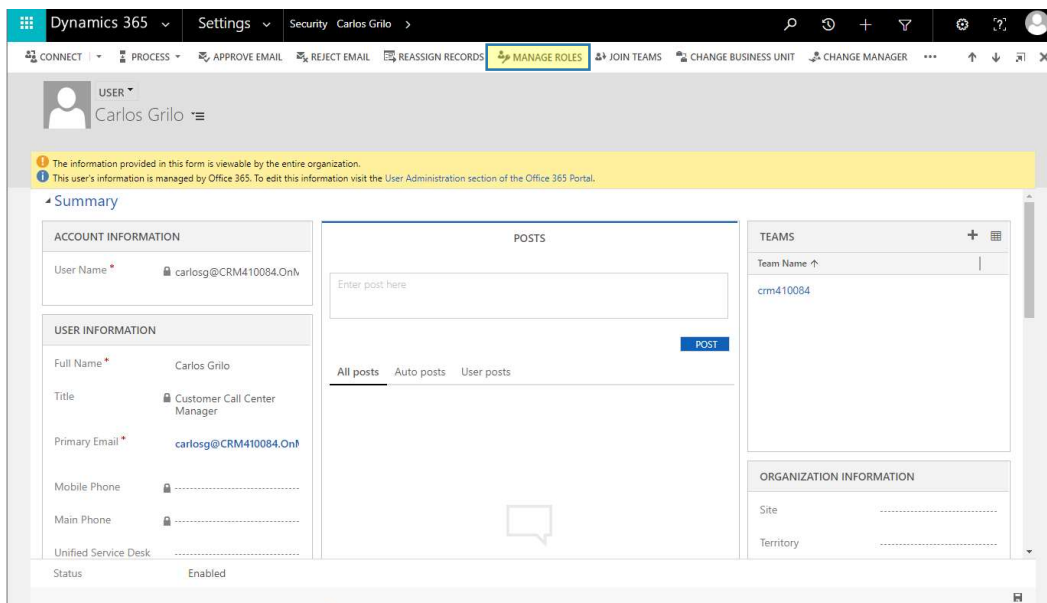


Figure 11: Manage roles

In the so opened window please enable the two security roles you can see in the figure below by checking the checkbox.

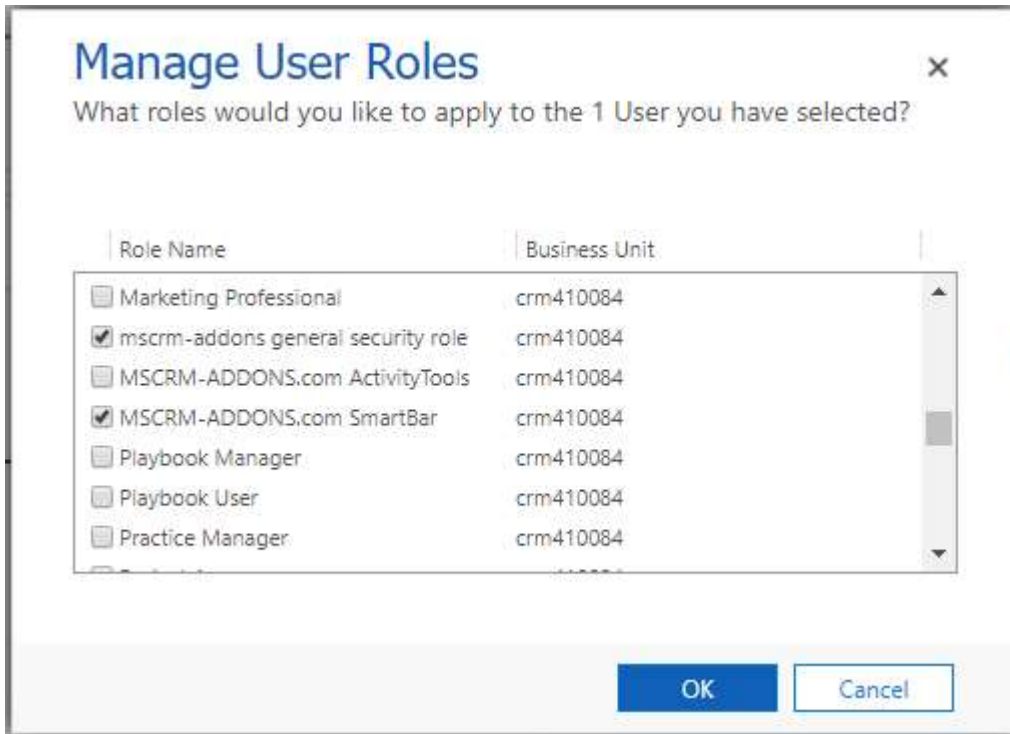


Figure 12: Manage user roles

## 2 EMBED SMARTBAR

Next, you have to embed SmartBar into your Dynamics 365. You can embed SB on your preferred entity. In this case we select the entity account to show you how it works.

Please navigate to **Settings > Customization** and select **Customize the System** as you can see in the figure below.

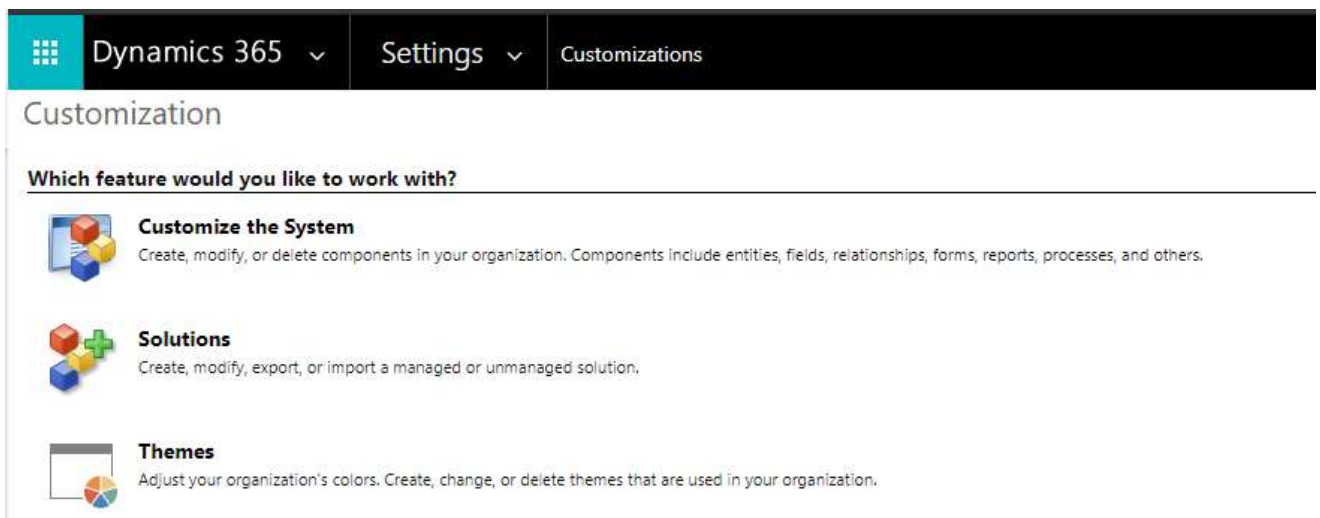


Figure 13: Settings - Customize the system

In the window below, please open the **Account** entity, go to **Forms** and select a form. In this case, we select and open the form '**Account**'.

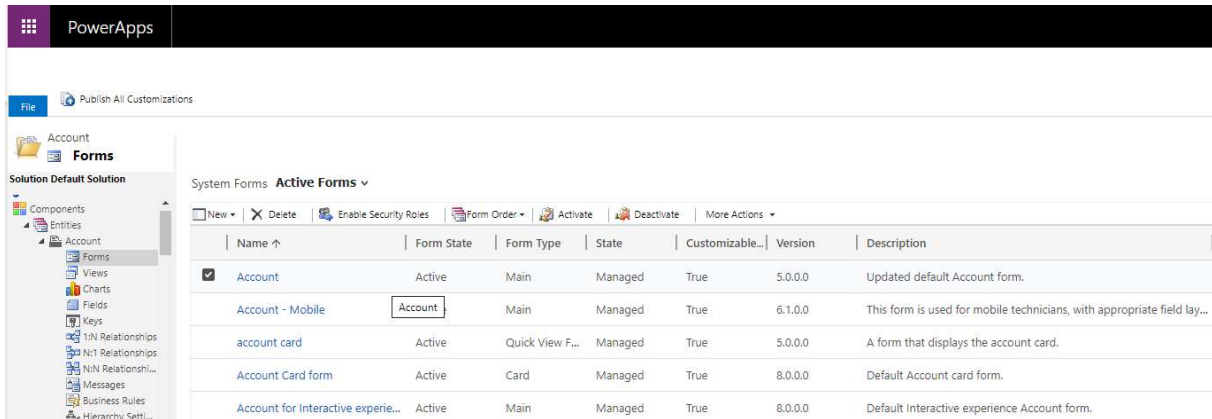


Figure 14: Select a form for the entity account

In this example, please navigate to the ① *Insert*-tab, select ② One Column and click on ③ Web Resource. Please fill in the ④ requested fields below.

**IMPORTANT:** Please select as Web resource always '**ptm\_SmartBar/MainPage.html**', which is the container for SmartBar.

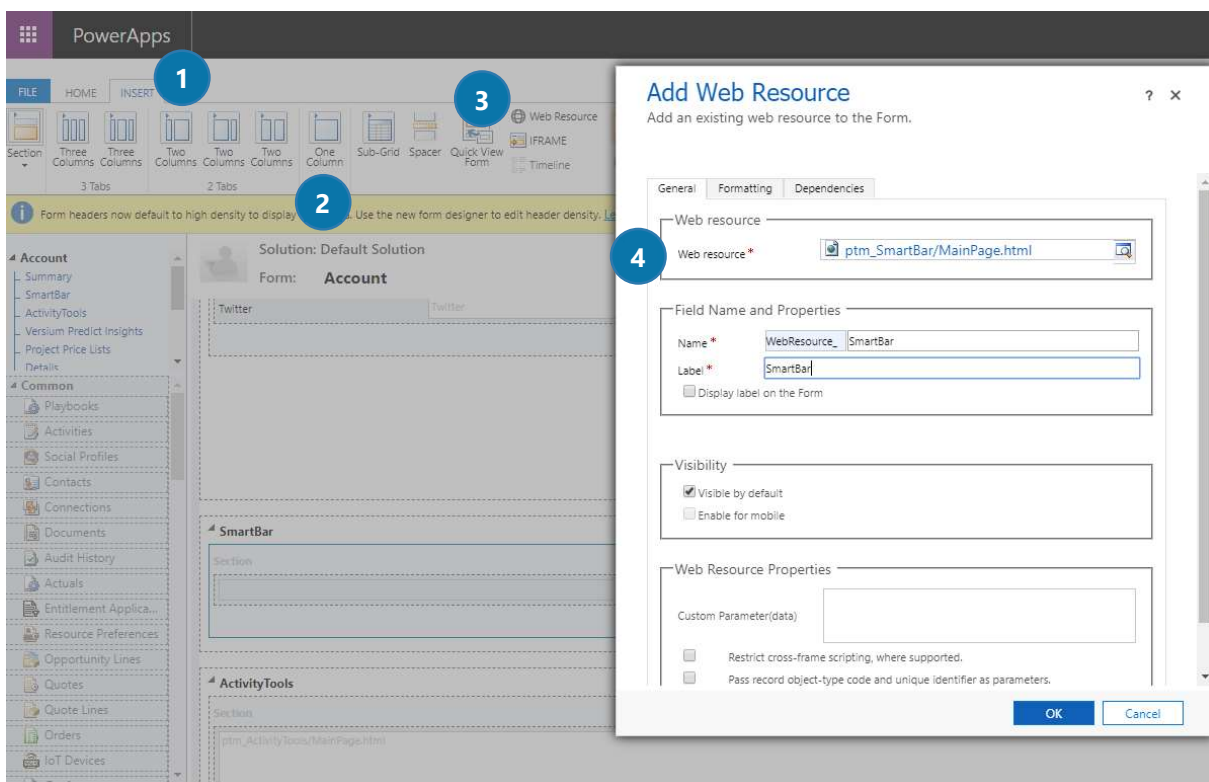


Figure 15: Define your form

After defining your form, please navigate to the *Home*-tab and hit **Save** and **Publish** in order to see the changes.

Congratulation! You have finished the setup of SmartBar. More information can be found in the corresponding [SmartBar Installation & User Guide](#).



If you now open an account, SmartBar provides you with all the standard buttons of this account as you can see in the figure below. The number shown on the "Buttons" represents the number of related records per entity.

You can customize these buttons in order to meet your business needs. To do so, please on the **[Gear icon]**-button. Further information can be found in the user guide mentioned before.

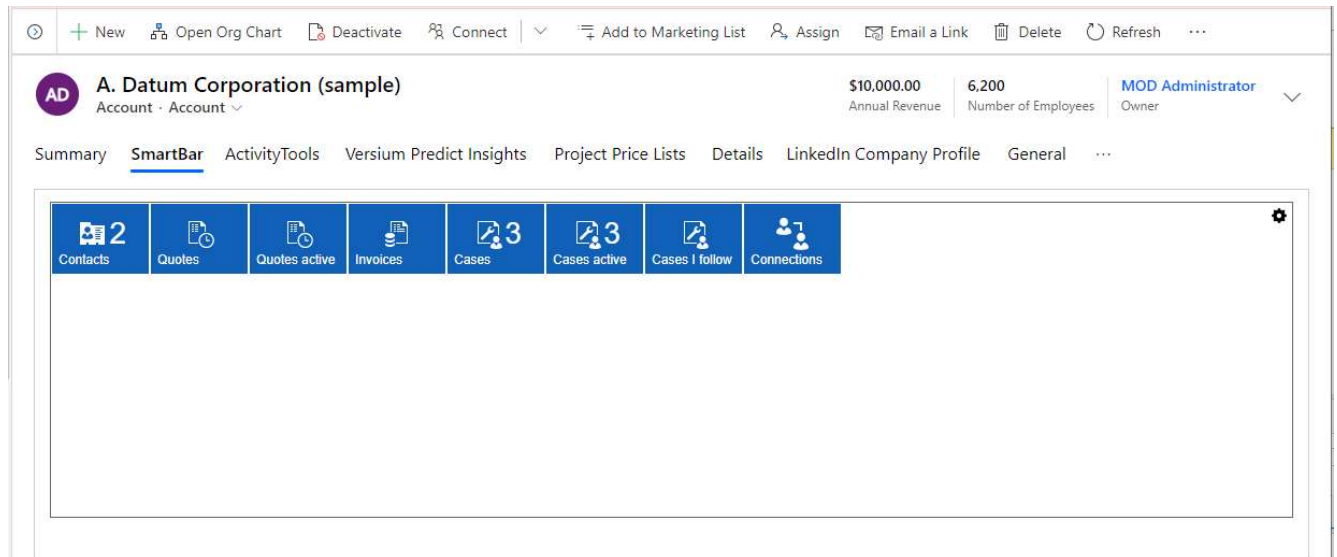


Figure 16: Standard buttons of SmartBar

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## Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact [support@mscrm-addons.com](mailto:support@mscrm-addons.com).

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