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SmartBar – Installation and User Guide for Microsoft Dynamics 365

July 2023

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Preamble

This documentation is intended to guide you through the installation process of our tool. SmartBar for Microsoft Dynamics 365 facilitates – among other things – the navigation between related forms in MS Dynamics 365. Before installing SmartBar for Microsoft Dynamics 365, please read this document and follow the steps carefully.

Target Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring Microsoft Dynamics 365
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft Dynamics 365 Server

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 9 and higher
- Firefox
- Chrome
- Edge

One of the following editions of Microsoft Dynamics 365 must be available:

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Server 2015/2016

Please note: If you use SmartBar 2015.200 or a higher version, you can upgrade from Microsoft Dynamics CRM 2015 to 2016 or Dynamics 365 without extra work.

If you use an older version, please find a short step-by-step instruction regarding to the upgrade of our Add-ons to the latest version of Microsoft Dynamics CRM 2016 or Dynamics 365 [here](#).

Any of the following operating systems is required:

- Windows 11
- Windows 10
- Windows 8.1 (64-bit and 32-bit versions)
- Windows 8 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Vista SP2 (6-bit and 32-bit versions)
- Windows Server 2012 and higher

Purpose of SmartBar

SmartBar facilitates – among other – navigation in Dynamics 365. SmartBar allows its users to navigate smartly and fast between related records in Microsoft Dynamics 365.

The tool consists of many valuable features that allow, for example, simple back-and-forth navigation. Several “buttons” represent the related records per entity. Besides its easy to handle “buttons”, SmartBar shows up with a few additional settings to provide high-quality usability and individualization.

1. How to install SmartBar to Dynamics 365

The installation of SmartBar for MS Dynamics 365 is quite easy.

1.1. How to install SmartBar via AppSource

By leveraging Microsoft AppSource, businesses can find, and implement our applications like [SmartBar](#) that align with their requirements and help them streamline processes.

After accessing the app on AppSource, check the compatibility and requirements of your Microsoft software, sign into your Microsoft account, and install the app by clicking Free Trial. Make sure you select the environment you want to install SmartBar in case you have different environments.

Follow any on-screen instructions or prompts to complete the installation process. You may be asked to grant certain permissions or provide additional information during the installation.

Once the app is successfully installed, you should receive a confirmation message or notification. The app should now be accessible within the chosen Microsoft environment.

Follow [this article](#) for post AppSource installation.

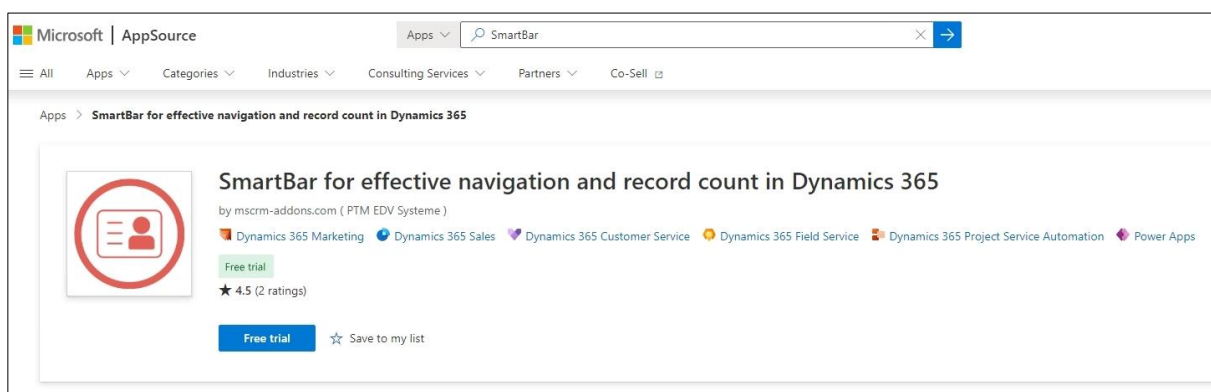


Figure 1: SmartBar in AppSource

1.2. How to install SmartBar via .exe-file

Get the SmartBar Setup file from our [homepage](#).

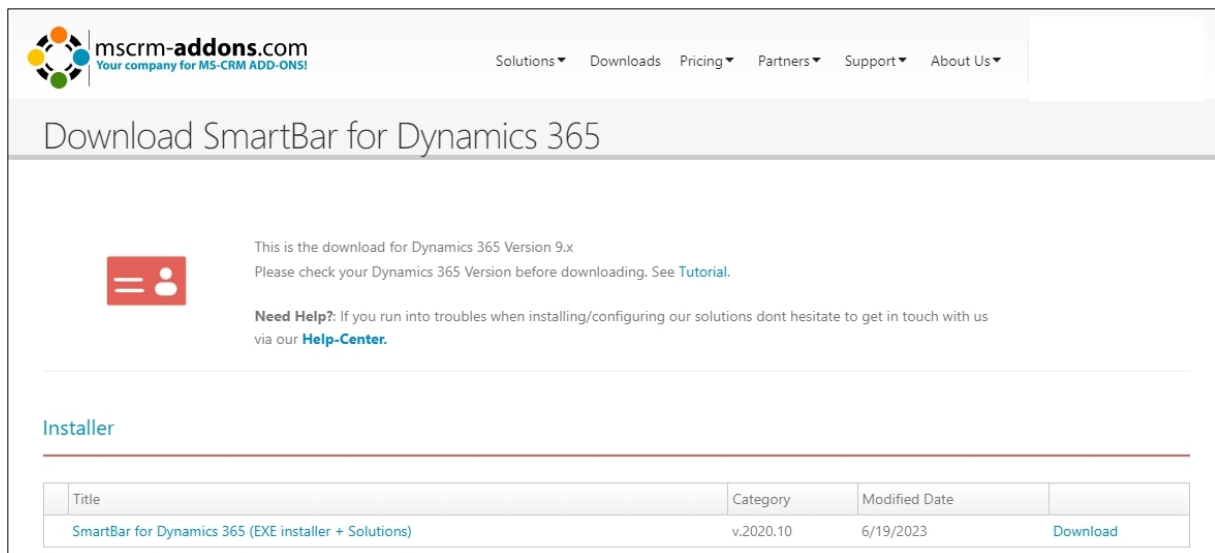


Figure 2: Download setup file from our homepage

Open your Download folder, extract and run the .exe file by clicking on it.

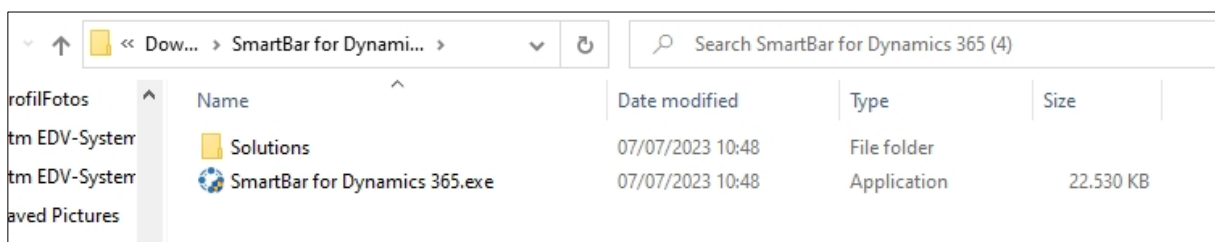


Figure 3: Run the setup file in the Download folder

After allowing the app to make changes to your device the Installer for SmartBar opens. Click **Next** to proceed.

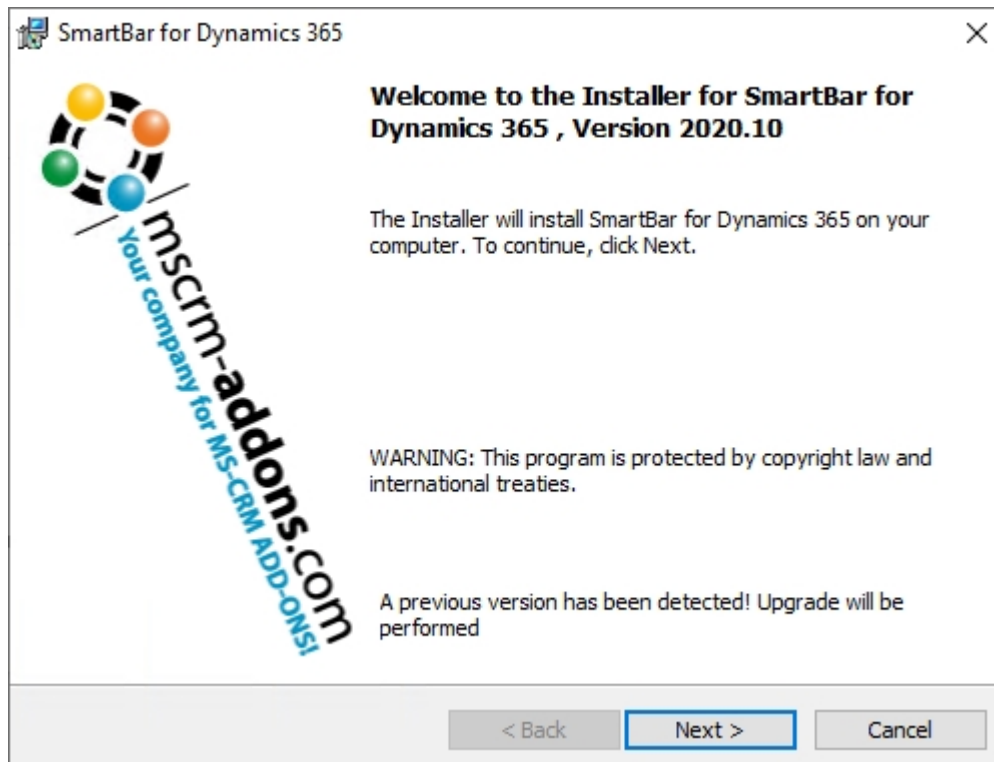


Figure 4: Installer opens

Please agree to the **Form of End User License Agreement**. Click **Next** to proceed.



Figure 5: EULA

Now click **Install** to begin installation.

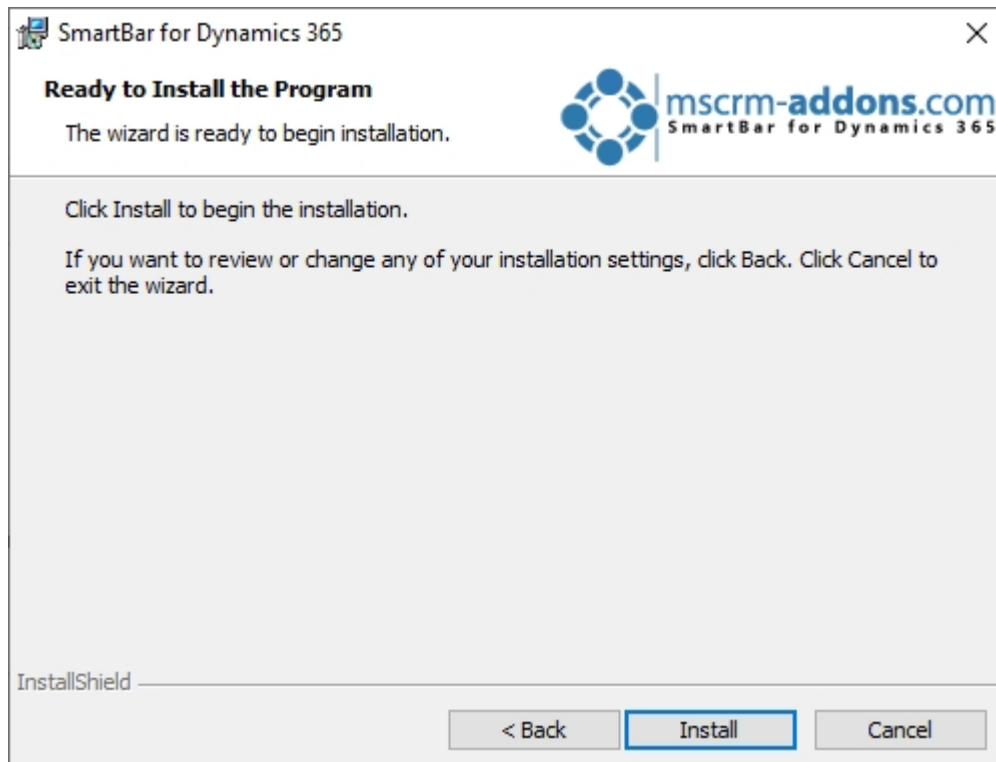


Figure 6: Begin installation

SmartBar is installing. This may take a few minutes.

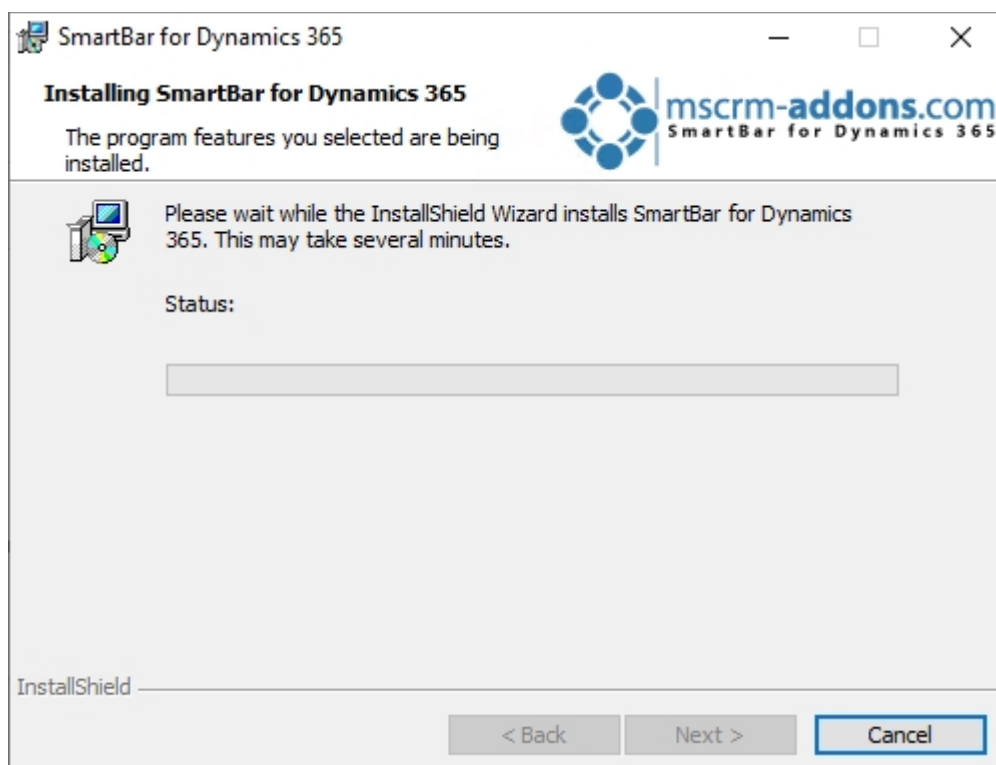


Figure 7: Installing



The **Dynamics 365 Connection setup** window opens. Now configure your Dynamics 365 server.

- 1 **Existing Profiles:** If you can see your profile in the drop-down select it.
- 2 **Select your Dynamics 365 Type:** Online
- 3 **Dynamics 365 Server-Url:** Enter your Dynamics 365 Server URL.
- 4 **Authenticated as:** Prefer Server2Server authentication.
- 5 **Retrieve all Organizations:** Click the button to retrieve the organization.
- 6 **Organization information:** Your organization will be displayed there.

Logon information - SmartBar (2020.10)

Welcome to your Dynamics 365 Connection setup.

Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

1 **Existing Profiles** [HKLM] https://org...b.crm4.dynamics.com - CRM51947 Manage New

2 Select your Dynamics 365 Type

☐ OnPremise ☐ IFD/Hosted ☒ Online ☐ AppAccess

3 Dynamics 365 Server-Url:

https://org...4.dynamics.com ✓

4 Authenticated as:

☒ Prefer Server2Server authentication (admin@CRM168820.onmicrosoft.com)

Server to server authentication enabled! Click on <Retrieve all Organization> to continue.
Note, that a separate authentication window from Microsoft Dynamics appears.
You must complete the logon and consent process to continue.

5 Retrieve all Organizations

6 Organization information:

Friendly name	Unique name	ServiceURL
CRM 0	unc 3...	org 8

OK Cancel

Figure 8: Dynamics 365 connection setup

A **Save Profile** window might pop up. Just **Save** the Profile.

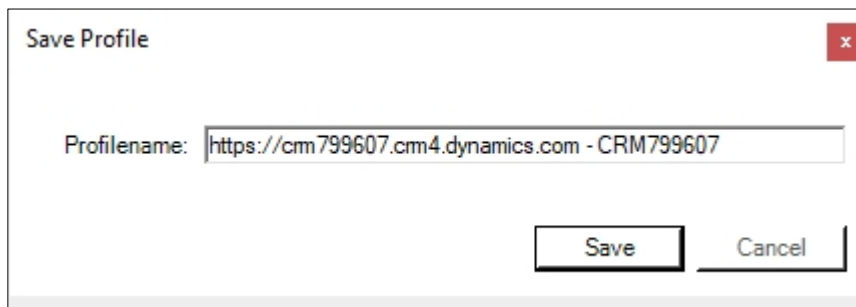


Figure 9: Save Profile

During the installation, you will be asked if you want to apply the **Security Roles** for all users. Click **Yes** to continue or **No** if you want to apply the roles manually to all users.

Please note: In general, security roles contain the basic requirements for using our products and for being able to perform the license checks.

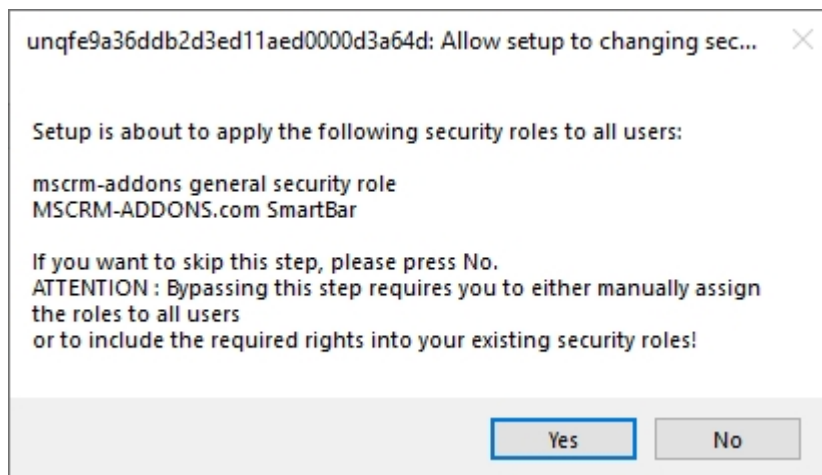


Figure 10: Apply Security roles

Click **Finish** to complete the installation and to exit the installer.

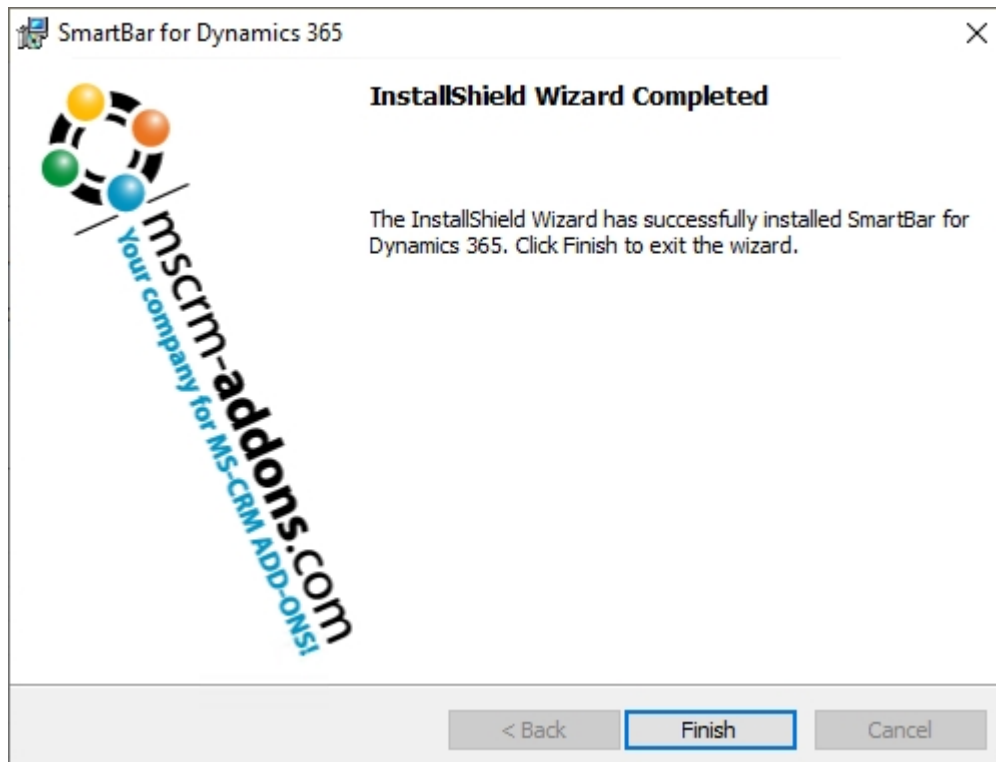


Figure 11: Finish the installation

1.2.1. SmartBar Organization Overview

The SmartBar for Microsoft Dynamics 365 Configuration allows you to specify your SmartBar Settings. To work with SmartBar Organization Overview, search for **Configuration - SmartBar for Dynamics 365** in the Windows Start Pane and press enter.

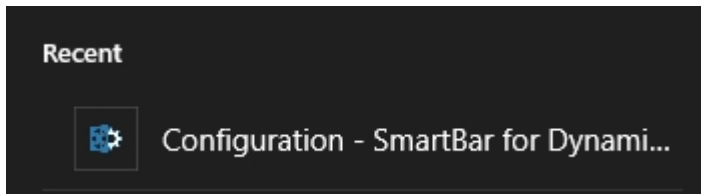


Figure 12: SmartBar Configuration

The Connection setup window opens.

Logon information - SmartBar (2020.10)

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

Existing Profiles [HKLM] https://crm799607.crm4.dynamics.com - CRM799607 Manage New

Select your Dynamics 365 Type

☐ OnPremise ☐ IFD/Hosted ☒ Online ☐ AppAccess

Dynamics 365 Server-Url:
https://crm799607.crm4.dynamics.com ✓

Authenticated as:
☒ Prefer Server2Server authentication (admin@CRM799607.onmicrosoft.com)
Server to server authentication enabled! Click on <Retrieve all Organization> to continue.
Note, that a separate authentication window from Microsoft Dynamics appears.
You must complete the logon and consent process to continue.

Retrieve all Organizations

Organization information:

Friendly name	Unique name	ServiceURL
CRM799607	unqf6f7d0bff119ee...	crm799607

OK Cancel

Figure 13: Connection setup window

Select the appropriate organization and click on the **OK** button to continue. Usually, you simply have to click on the **OK** button, because the appropriate organization has already been selected by the system. However, there is nothing wrong with double-checking the data.

The organization overview opens.

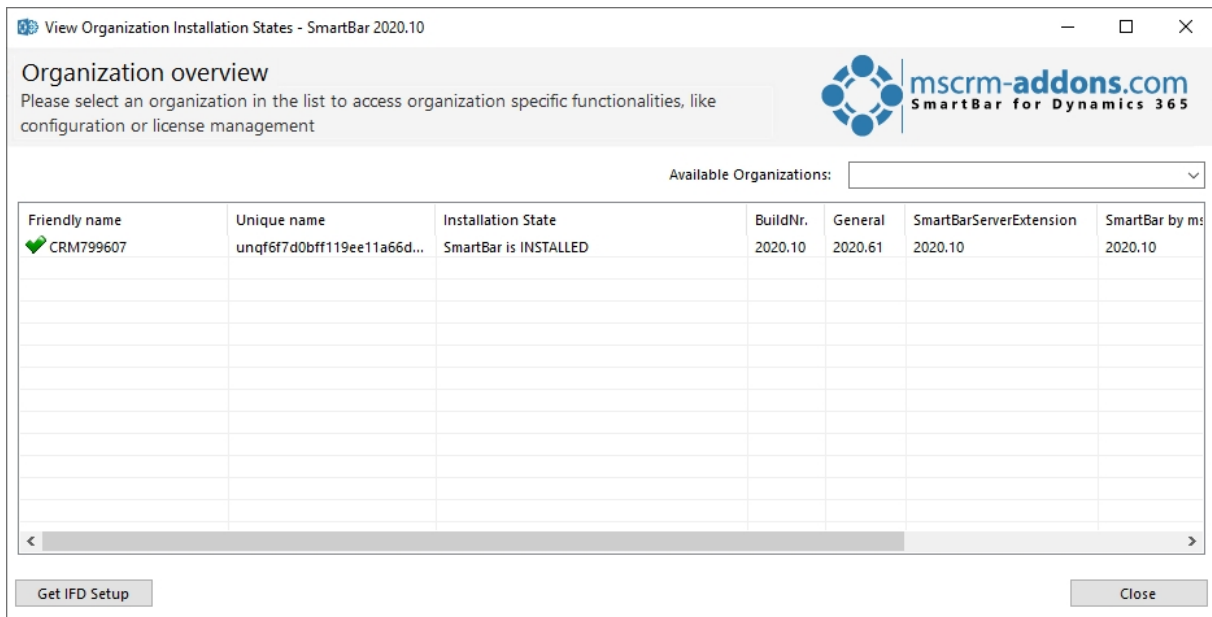


Figure 14: Organization overview

Select the organization in the list and you can see the function buttons.

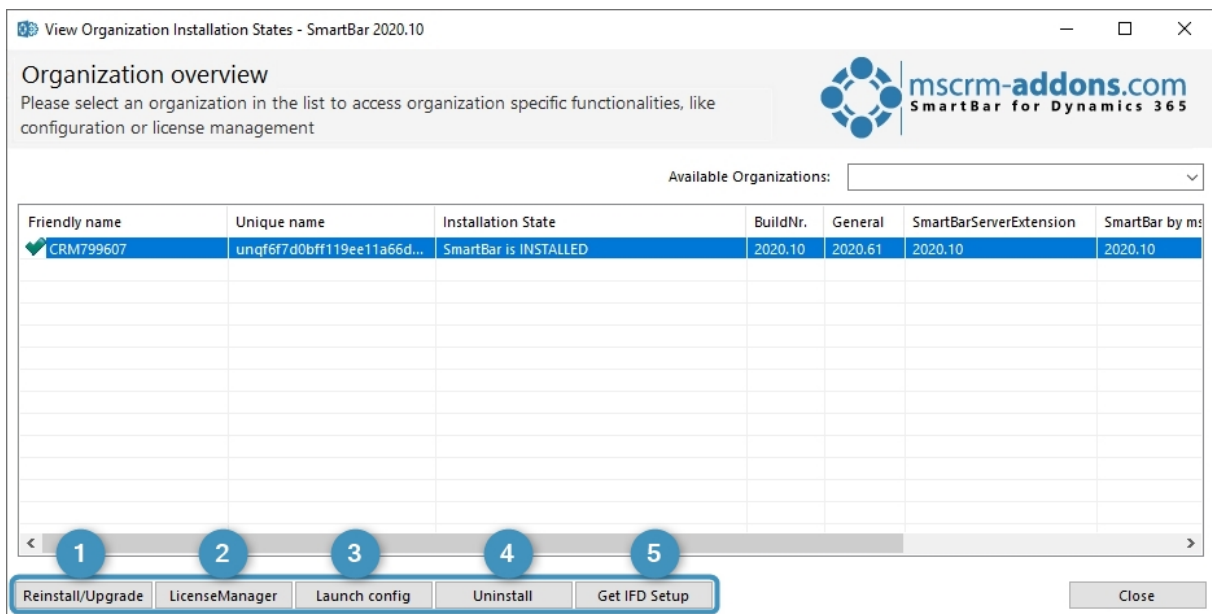


Figure 15: Select organization to see function buttons

1 Reinstall/Upgrade: Select the organization (in case there are more than one) in the list and click the **Reinstall/Upgrade** button.

2 LicenseManager: Select an organization and click the **LicenseManager** button to open the LicenseManager.

- 3 **Launch config:** This button opens the Configuration page in Dynamics 365.
- 4 **Uninstall:** Here, you can uninstall ActivityTools.
- 5 **get IFD Setup:** Learn [here](#) more.

1.2.2. SmartBar Server Configuration (deprecated)

Once the installation is complete, the SmartBar Server Configuration will be presented.

Please note: The purpose of this configuration is to activate and configure the counting of related records in the Dynamics 365 menu.

The SmartBar Server Configuration Surface

This overview provides you with the main functionalities of the SmartBar Server Configuration.

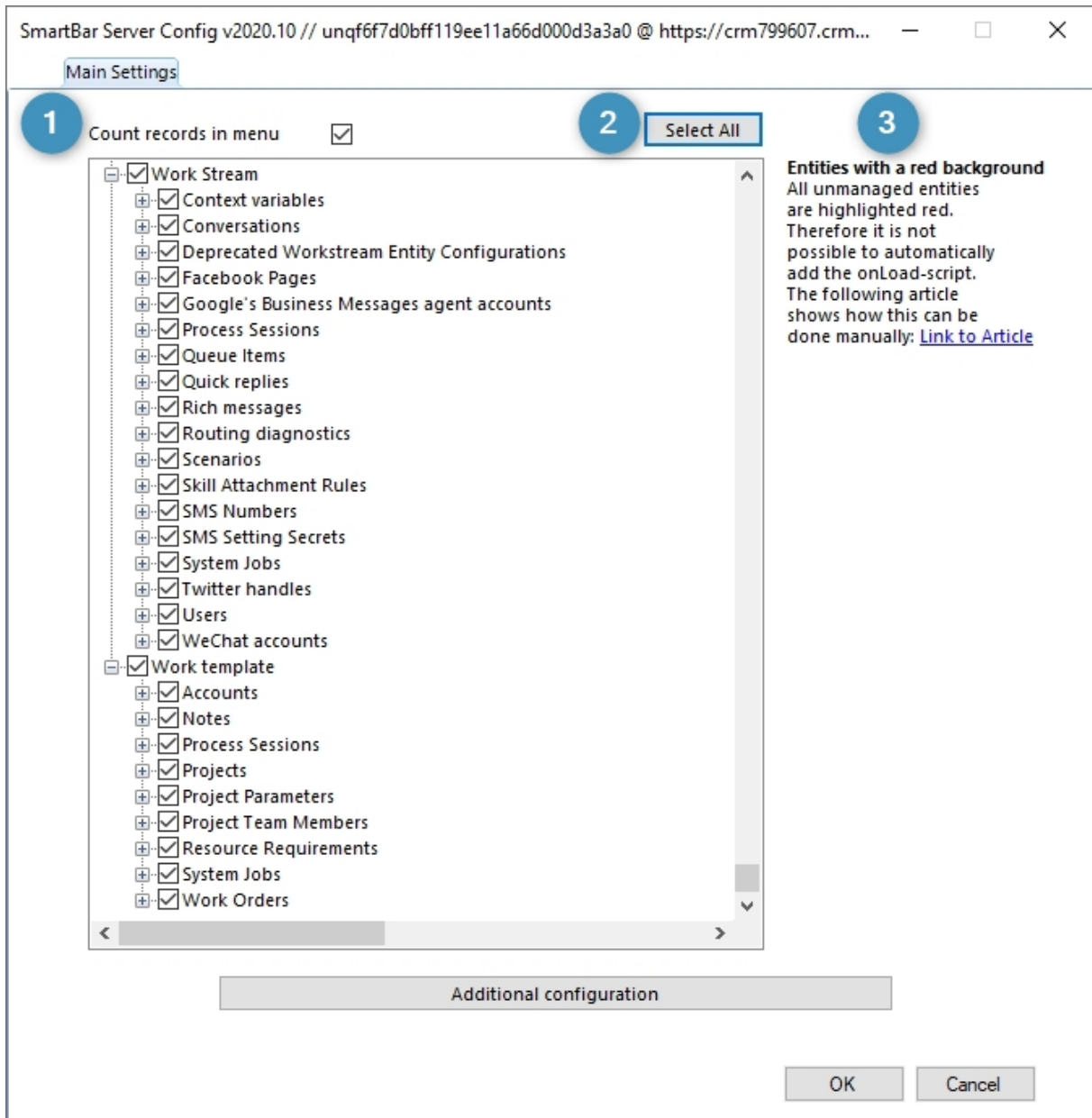


Figure 16: The SmartBar Server Configuration

- 1 **Count records in menu:** This window pops up if you check this option. The counting of related records in Dynamics 365 is activated.

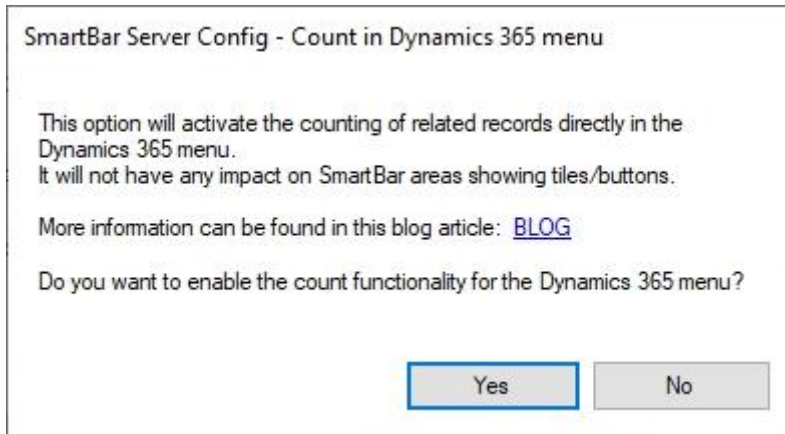


Figure 17: Enable Count records in menu option

- 2 **Select All:** Click this button to select all entities for the counting option.
- 3 **Entities with a red background:** All unmanaged entities are highlighted in red. This is why it is not possible to automatically add the onLoad-script. Please read the following article and find out how this can be done manually.

How to configure the SmartBar Configuration

To configure the SmartBar Server Configuration, simply check the records you want to be counted in the Main Settings. Then click on the **OK** button. This window is shown. Click **OK** to continue to save your settings.

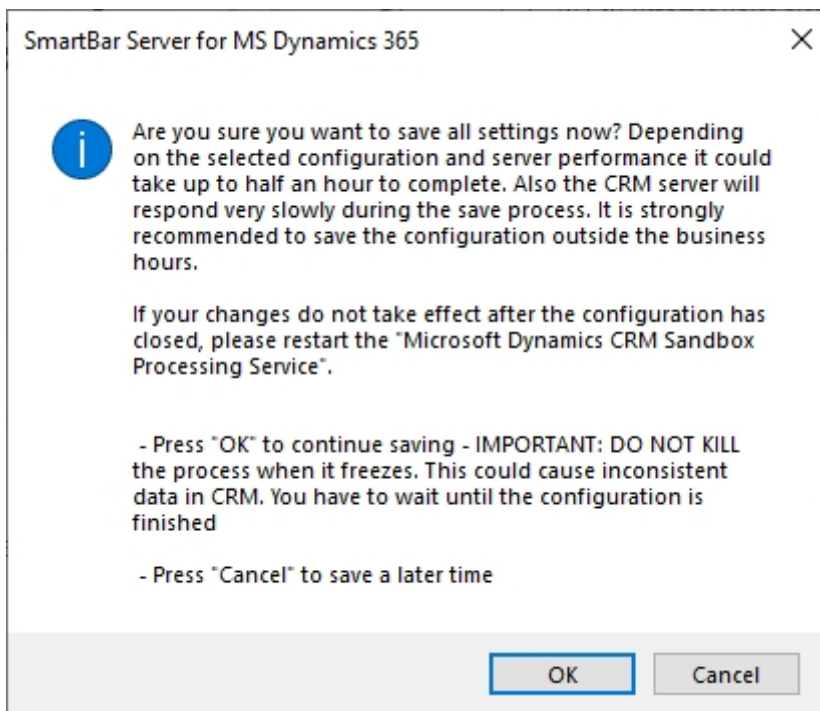
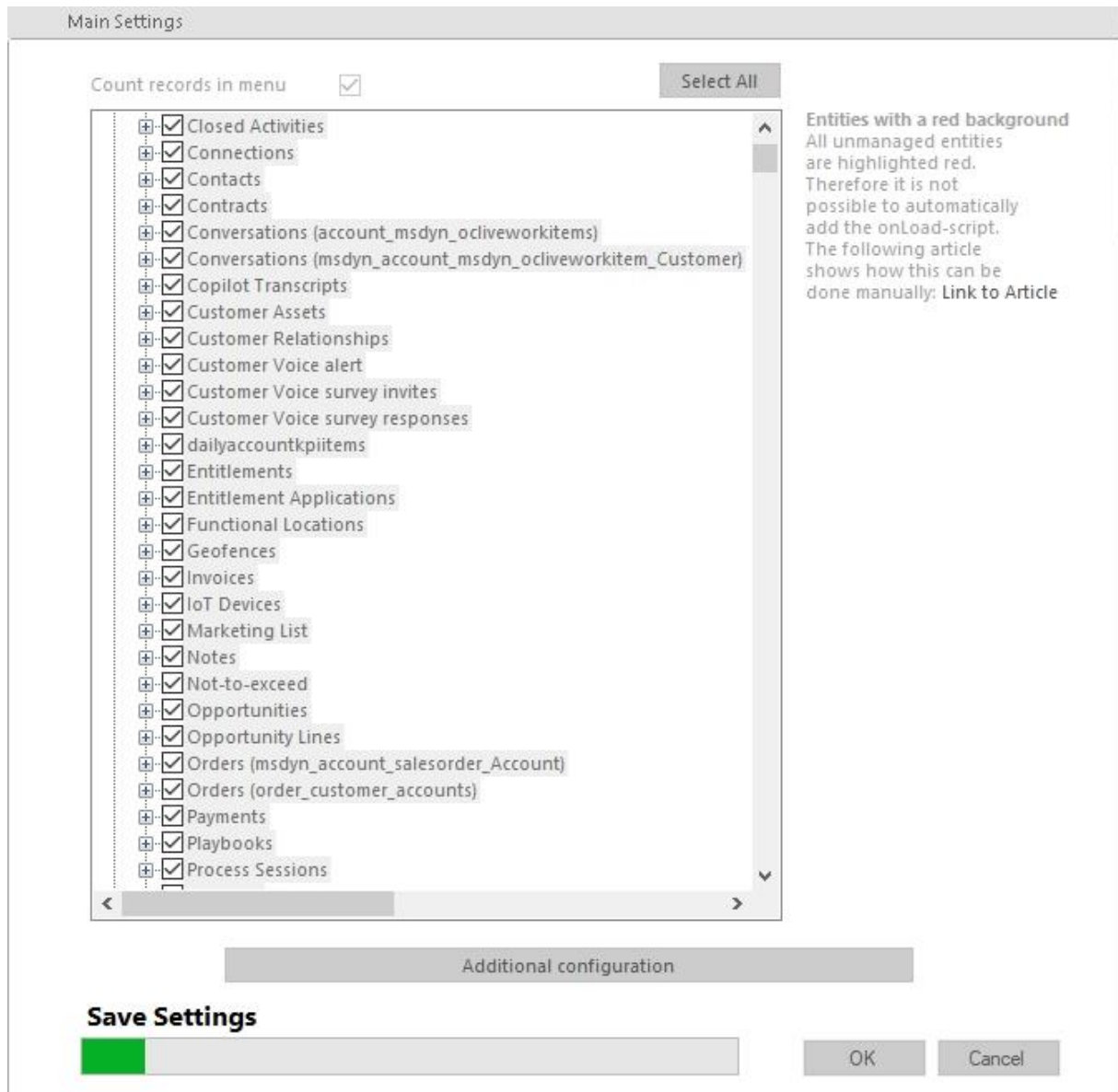


Figure 18: SmartBar Server Config - Save Settings

Please note: We recommend you not to save your settings during the business hours, because it could take up to half an hour to complete the savings.



Main Settings

Count records in menu ☒ Select All

- ☒ Closed Activities
- ☒ Connections
- ☒ Contacts
- ☒ Contracts
- ☒ Conversations (account_msdyn_oliveworkitems)
- ☒ Conversations (msdyn_account_msdyn_oliveworkitem_Customer)
- ☒ Copilot Transcripts
- ☒ Customer Assets
- ☒ Customer Relationships
- ☒ Customer Voice alert
- ☒ Customer Voice survey invites
- ☒ Customer Voice survey responses
- ☒ dailyaccountkpiitems
- ☒ Entitlements
- ☒ Entitlement Applications
- ☒ Functional Locations
- ☒ Geofences
- ☒ Invoices
- ☒ IoT Devices
- ☒ Marketing List
- ☒ Notes
- ☒ Not-to-exceed
- ☒ Opportunities
- ☒ Opportunity Lines
- ☒ Orders (msdyn_account_salesorder_Account)
- ☒ Orders (order_customer_accounts)
- ☒ Payments
- ☒ Playbooks
- ☒ Process Sessions

Additional configuration

Save Settings

OK Cancel

Entities with a red background
All unmanaged entities
are highlighted red.
Therefore it is not
possible to automatically
add the onLoad-script.
The following article
shows how this can be
done manually: [Link to Article](#)

Figure 19: Progress in Saving is shown

Additional Configuration

The additional configuration allows you to refine your SmartBar Configuration. To open the additional configuration, simply click on the **Additional Configuration** button in the SmartBar Server Configuration surface.

Please note: Before you use the tool for the first time, at least one entity has to be checked and the SmartBar Server Config has to be saved once.

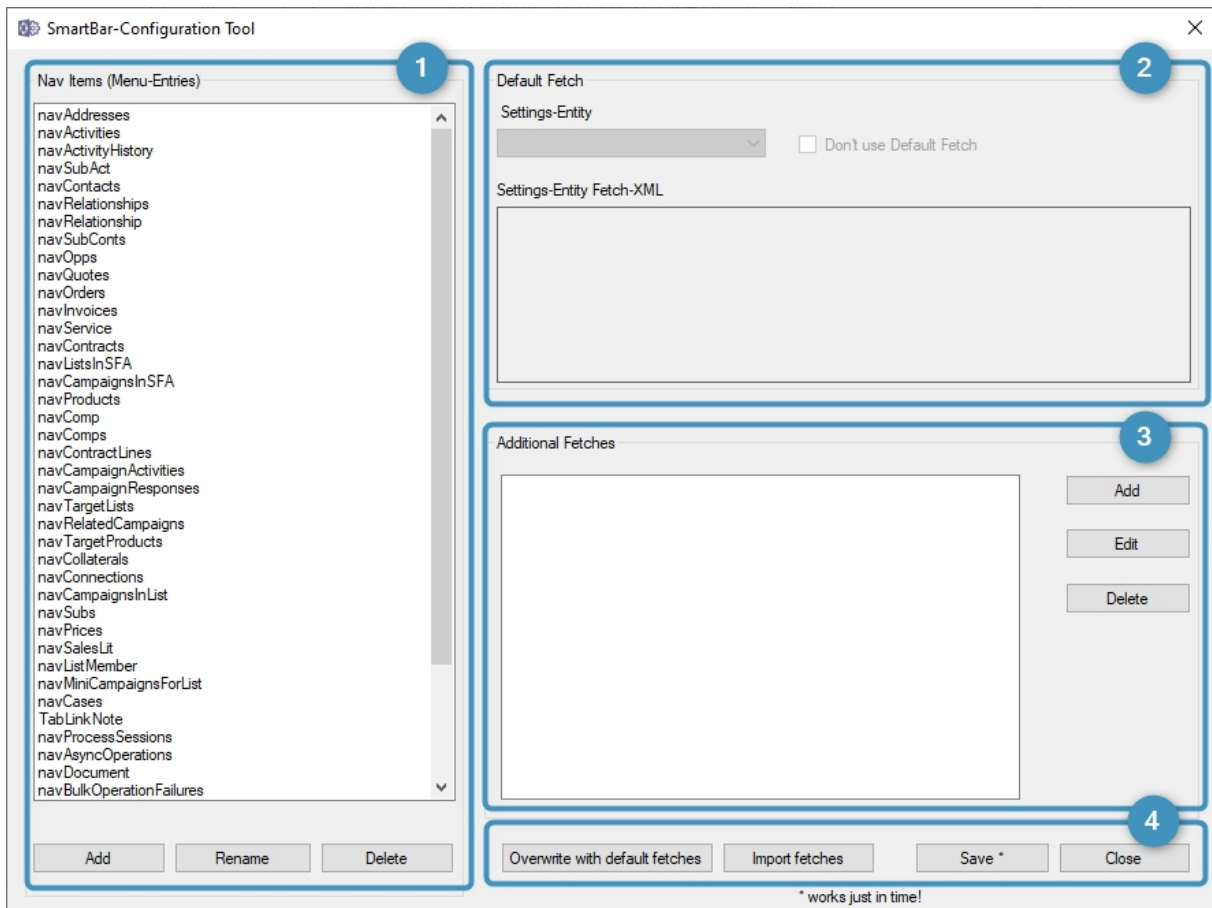


Figure 20: Additional Configuration window

1 Nav Items (Menu-Entries): This area manages the navigation items (menu items in Dynamics 365). The list includes the **html-IDs** of all menu items for which SmartBar is configured. For example, the list-entry **navQuotes** represents the entity quote. To add, modify or delete existing entries, use the buttons at the bottom of the section.

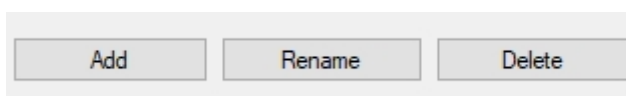


Figure 21: Nav Items section buttons

Please note: With one click on these buttons, the changes are performed without a warning window. However, they are not saved until the **Save** button in the General section is pressed.

2 Default Fetch: In this area, the default-fetch of the selected navigation-entry is shown. It counts all records which are directly related with the calling entity. It is not possible to delete or edit the default-fetch. But you can disable it by checking the Don't use Default Fetch-checkbox.

3 Additional Fetches: These fetches count all records which are not directly related to the entity. To add, edit or delete a particular fetch, use the buttons next to the additional fetches box. The **Add** button opens a blank screen that enables you to add a new fetch to the selected entry. Use the text area under Fetch-XML to place the new fetch.

In the text field below Fetch-Type, fill in the entitytypecodes (unique number of the entity) of the entities for which the fetch should be used. If you don't insert a number, the fetch will be executed for all possible entities. To add the fetch to the list, simply click on the **OK** button.

The **Edit** button opens a selected fetch in a new window in order to modify it.

Please note: Corrupt Fetches that are not executable will be ignored.

In the following example, the navigation-entry navQuotes (html-name for quotes) receives a new fetch. The fetch will count all quotes which are related to a contact and the calling account.

If the field Fetch-Type was blank, the fetch would be executed for all possible quote-menu items (quote is available in account, contact, opportunity, etc.). But because the text field includes 1 (entity-type code for account), the fetch will be executed only for the quote-navigation entry in the account menu.

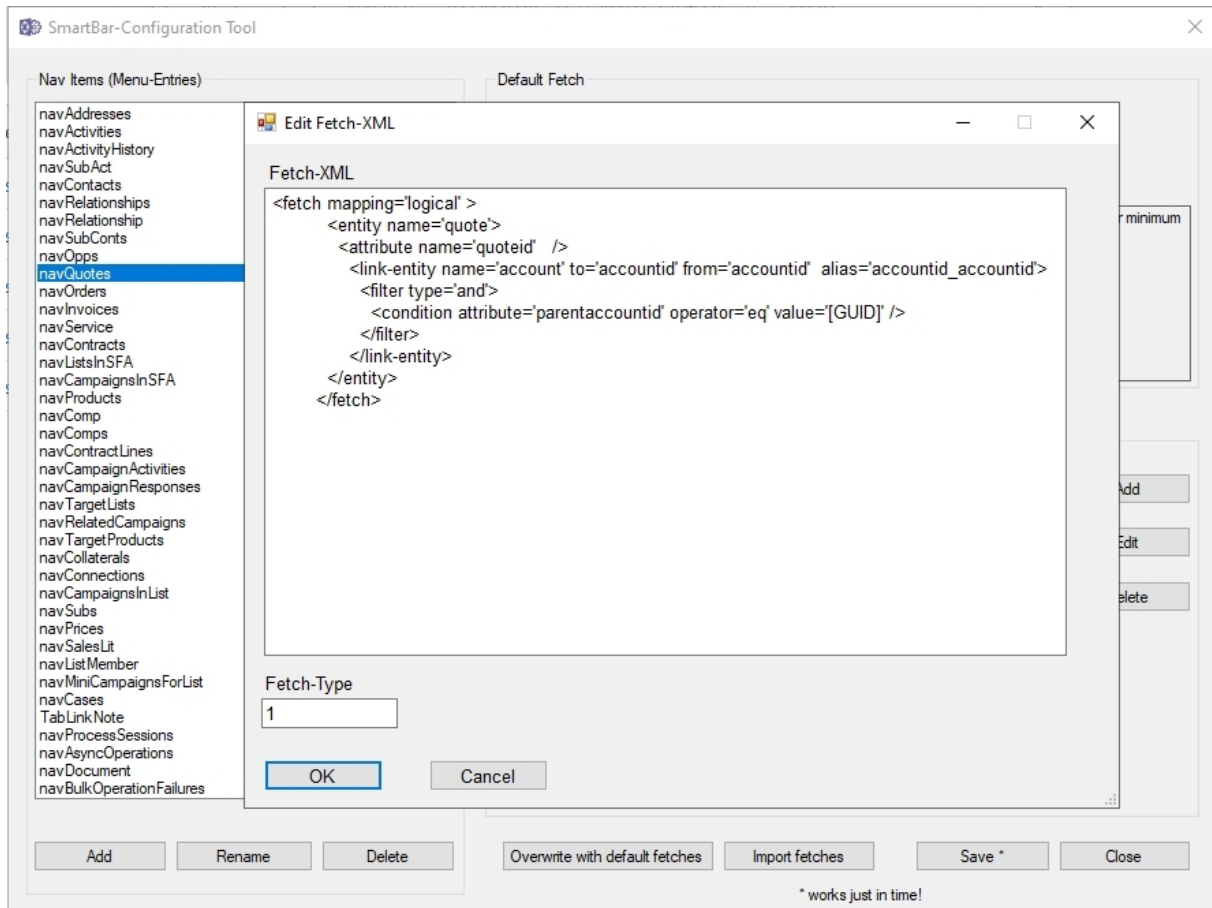


Figure 22: Edit fetch

Finally, the **Delete** button deletes selected fetches.

Please note: All buttons in this area affect the entire window.

A click on the **Overwrite with default fetches** button restores default values. Make sure that you save the current configuration before it is overwritten.

Click on the **Import fetches** button to optionally overwrite the current NavigationItems and/or XML-files (setting file).

A click on the **Close** button closes the Configuration Tool.

Click on the **Save** button to save all settings of the entire Configuration Tool. The below window appears. Click **OK** to confirm.

Please note: We recommend you not to save your settings during the business hours, because it could take up to half an hour to complete the savings.

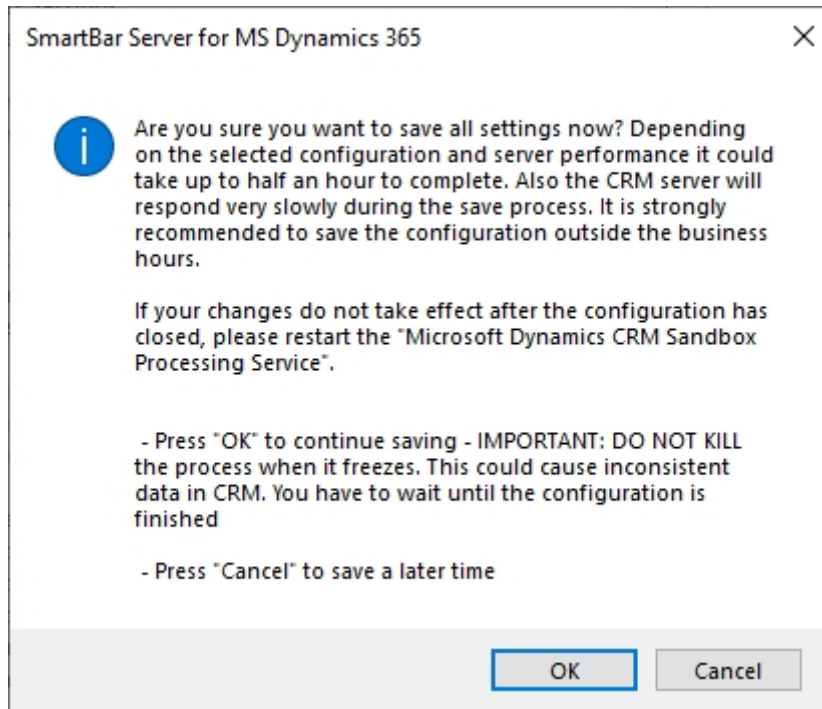


Figure 23: Save Configuration

1.3. How to install SmartBar via solution import (manually)

In some cases,, it is necessary to install our mscrm-addons.com solutions (you can access from the [Download](#) area) manually. Here is shown how this can be done in Dynamics 365.

Navigate in Dynamics 365 to **Settings** and to **Solutions**.

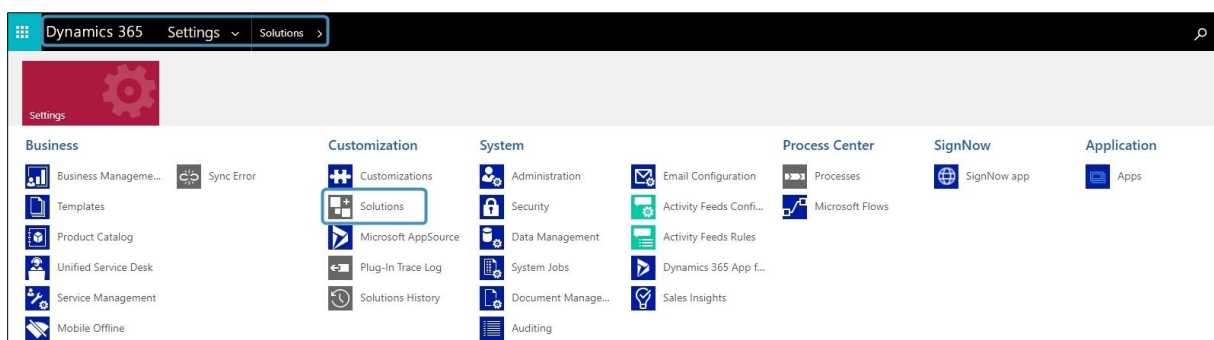


Figure 24: Dynamics 365 > Settings > Solutions

In the **All Solutions** overview select **Import**.

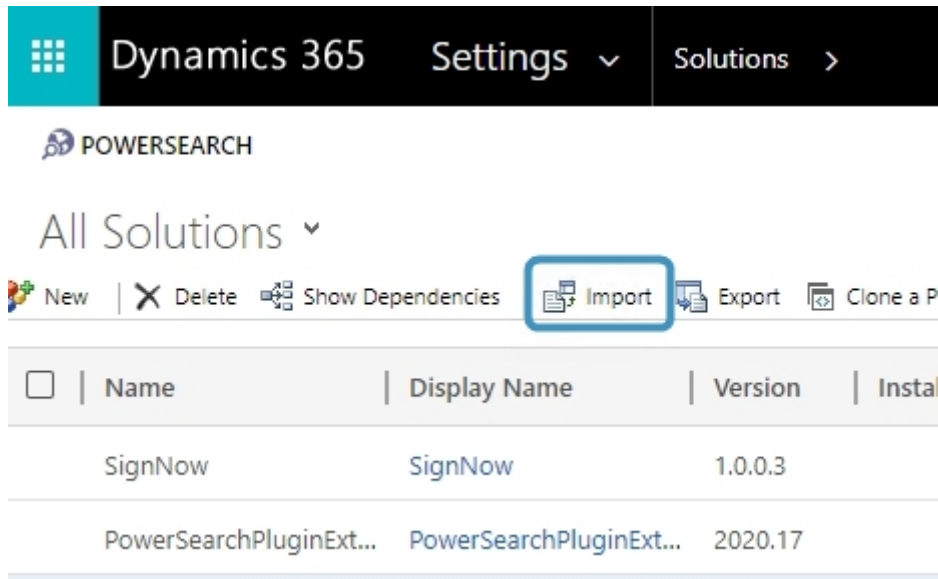


Figure 25: All Solutions overview

Select the Solution Package like in Figure 14 and continue with **Next**.

Please note: It is of utmost importance to upload the mandatory files in the following order!

- 1 **MSCRM-ADDONScomGeneral.zip**
- 2 **SmartBarServerCore.zip**
- 3 **SmartBarServerExtension.zip**
- 4 **SmartBarServerNavigationHelper.zip**

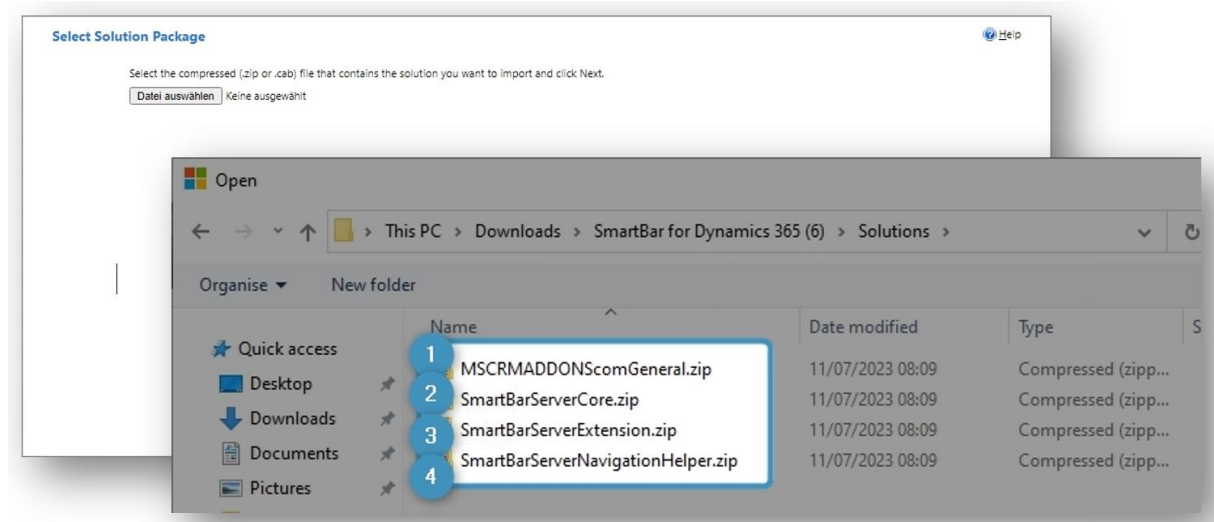
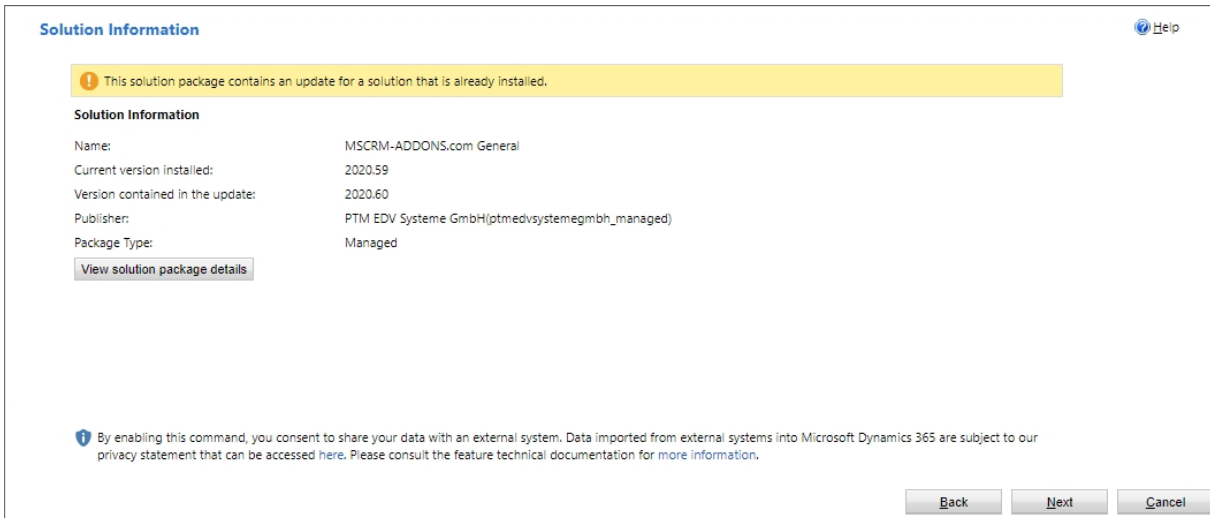


Figure 26: Select Solution Package

After a double-click on **MSCRM-ADDONScomGeneral.zip** this window is shown. Continue with **Next**.

The message says that this solution package contains an update for a solution that is already installed. Just click **Next**.



Solution Information Help

! This solution package contains an update for a solution that is already installed.

Solution Information

Name:	MSCRM-ADDONS.com General
Current version installed:	2020.59
Version contained in the update:	2020.60
Publisher:	PTM EDV Systeme GmbH(ptmedivsystemegmbh_managed)
Package Type:	Managed

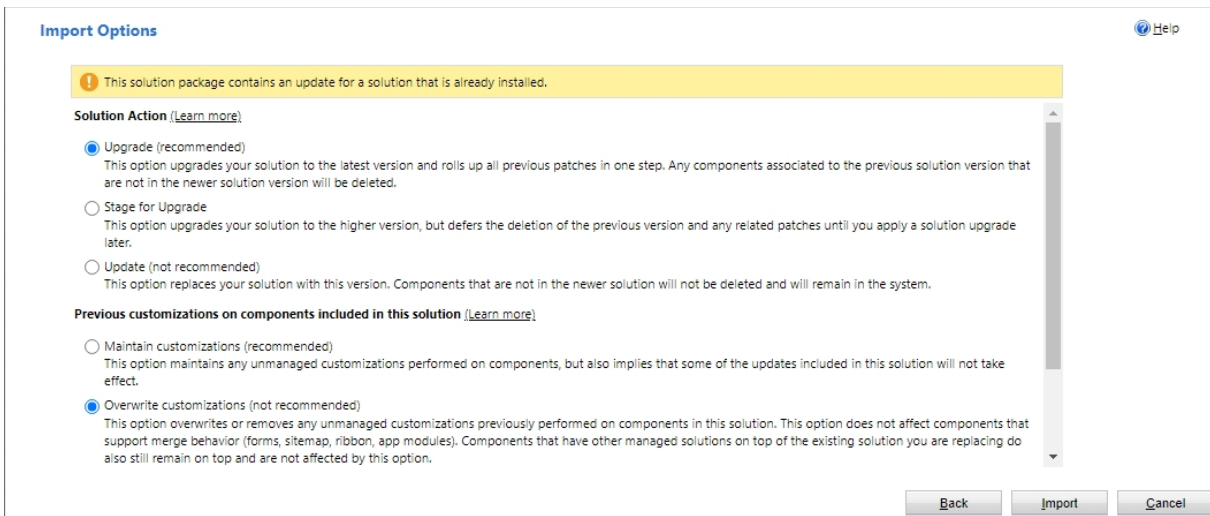
[View solution package details](#)

i By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

Back Next Cancel

Figure 27: Solution information

The following window opens. Please choose **Upgrade** and **Overwrite customizations** and click **Import**.



Import Options Help

! This solution package contains an update for a solution that is already installed.

Solution Action ([Learn more](#))

☒ **Upgrade (recommended)**
This option upgrades your solution to the latest version and rolls up all previous patches in one step. Any components associated to the previous solution version that are not in the newer solution version will be deleted.

☐ **Stage for Upgrade**
This option upgrades your solution to the higher version, but defers the deletion of the previous version and any related patches until you apply a solution upgrade later.

☐ **Update (not recommended)**
This option replaces your solution with this version. Components that are not in the newer solution will not be deleted and will remain in the system.

Previous customizations on components included in this solution ([Learn more](#))

☐ **Maintain customizations (recommended)**
This option maintains any unmanaged customizations performed on components, but also implies that some of the updates included in this solution will not take effect.

☒ **Overwrite customizations (not recommended)**
This option overwrites or removes any unmanaged customizations previously performed on components in this solution. This option does not affect components that support merge behavior (forms, sitemap, ribbon, app modules). Components that have other managed solutions on top of the existing solution you are replacing do also still remain on top and are not affected by this option.

Back Import Cancel

Figure 28: Choose import options

The solution gets imported. Please wait for the operation to complete.

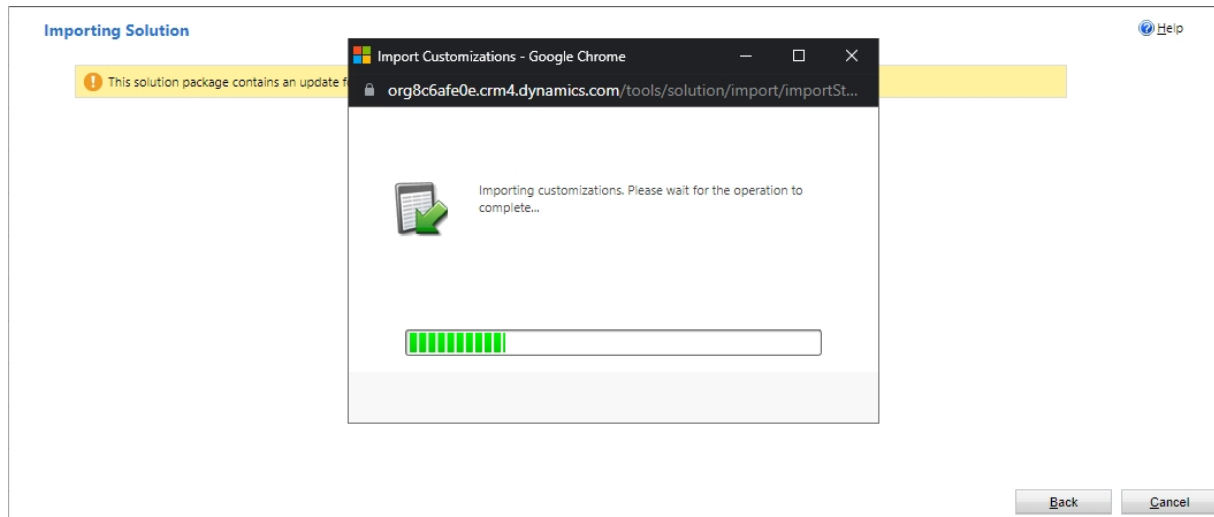


Figure 29: Importing solution

The import of the solution **MSCRM-ADDONS.com General** is completed successfully. The ribbon client metadata is being refreshed in the background.

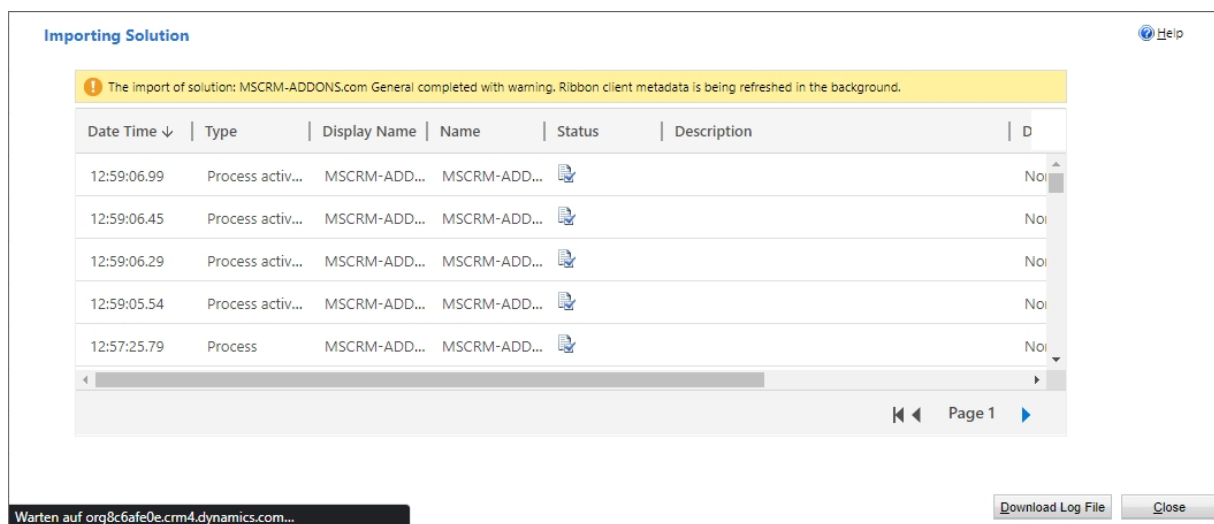


Figure 30: Imported solution

Now repeat the procedure for

- **SmartBarServerCore.zip**
- **SmartBarServerExtension.zip**
- **SmartBarServerNavigationHelper.zip**

2. How to embed SmartBar in Microsoft Dynamics 365

SmartBar for Microsoft Dynamics 365 can be embedded into the entity form in two different ways.

1. Use of web resources to embed SmartBar in any desired entity form.
2. Embed SmartBar in dashboards.

2.1 How to embed SmartBar as a webresource

Learn here in a step-by-step tutorial how to embed ActivityTools in your Dynamics 365 environment.

Step 1: First add **MSCRM-ADDONS.com SmartBar** security role to your users.

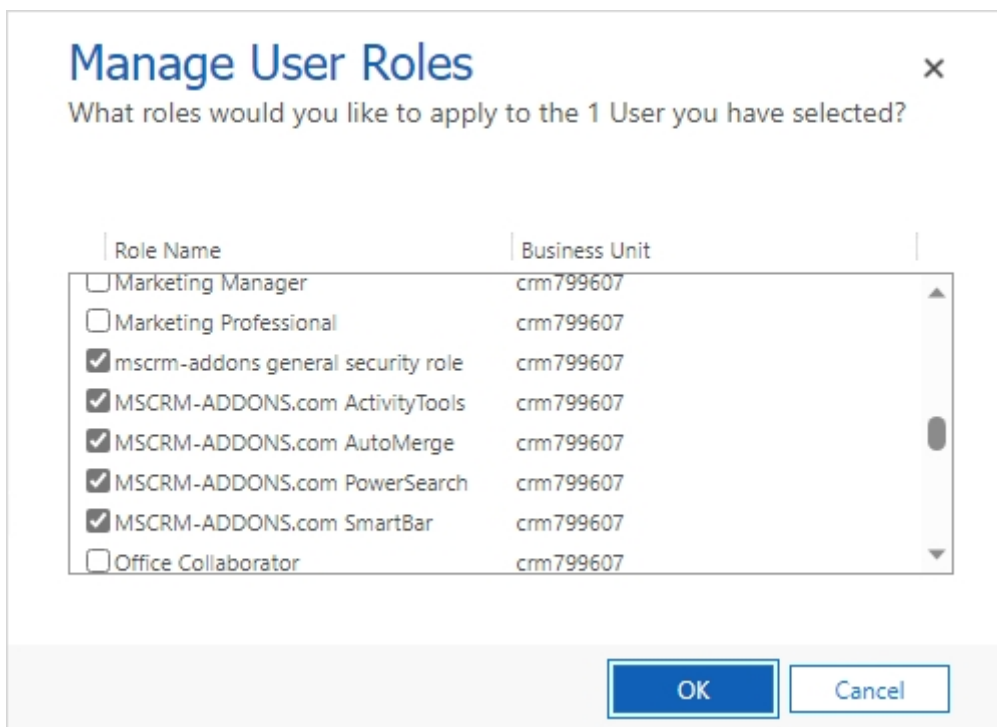


Figure 31: Assigning security role

Therefore, open in Dynamics 365 → Advanced Setting → Security → Users → Manage Roles.

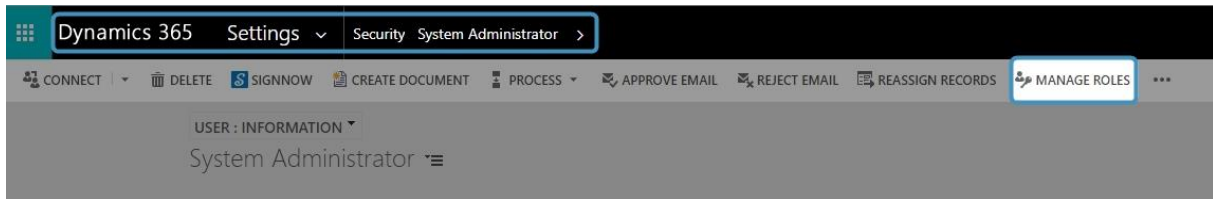


Figure 32: Access the Manage User Roles

To embed SmartBar into Dynamics 365 open [Power Apps](#) and navigate to Tables (entity) and select the one you want to customize.

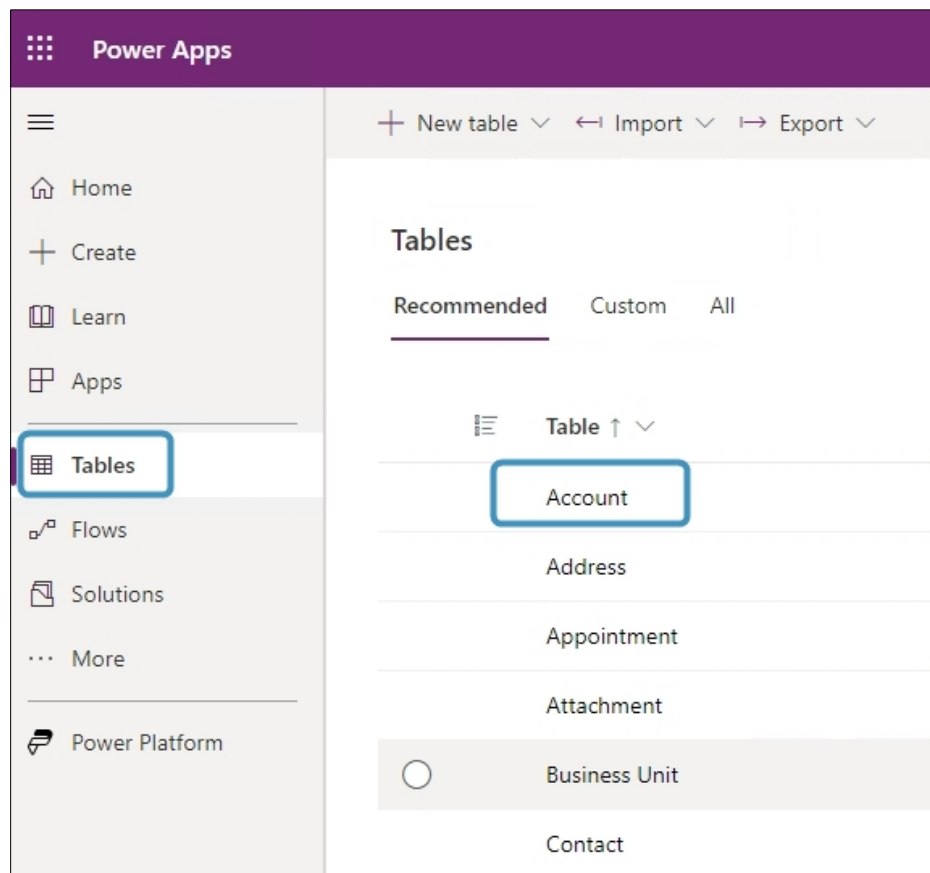


Figure 33: Power Apps - Tables Account

Step 3: In the Form editor select **Component** and click on **HTML web resource** under the component **Display**.

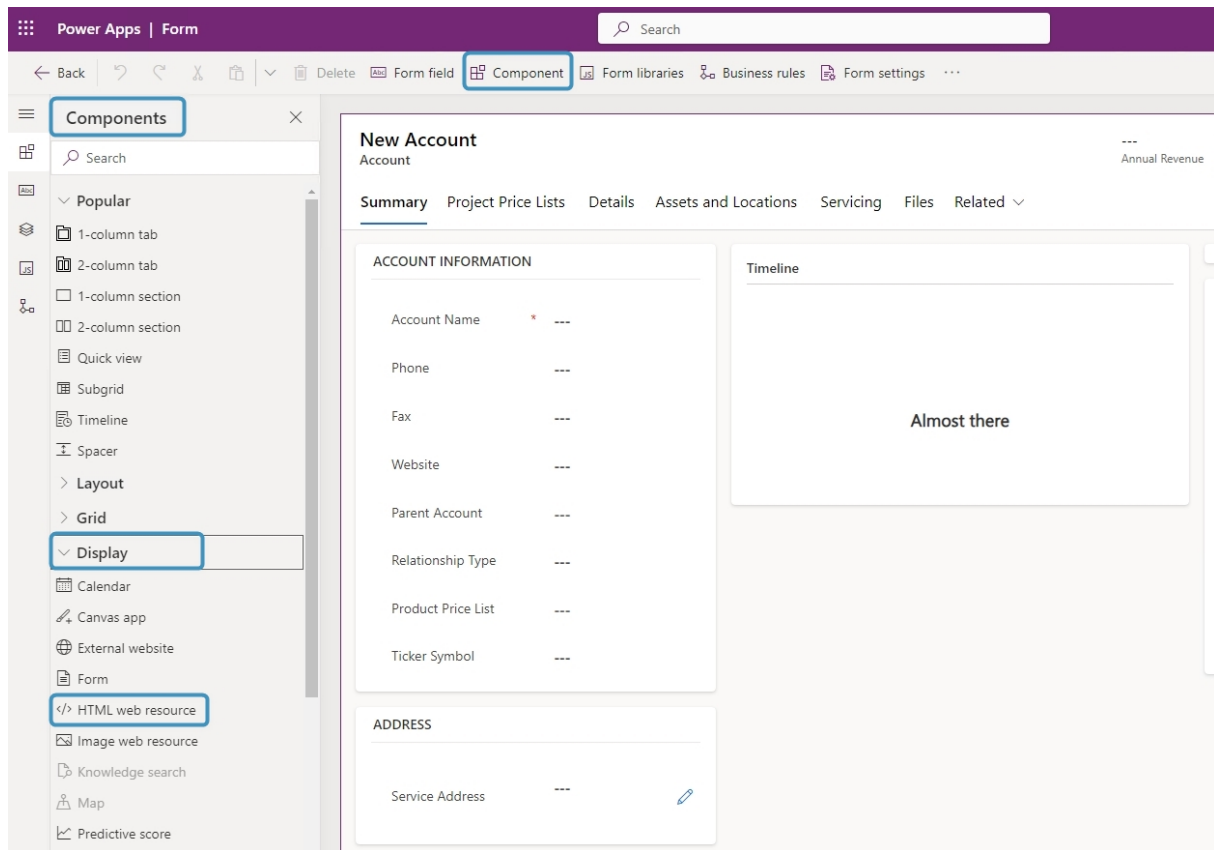


Figure 34: The Form editor

Step 4: In the HTML web resource window which opens, locate the web resource called **ptm_ActivityTools/MainPage.html** and **Add** it.

Please note: In Figure 30 The **Add** button is greyed out because the web resource is already added.

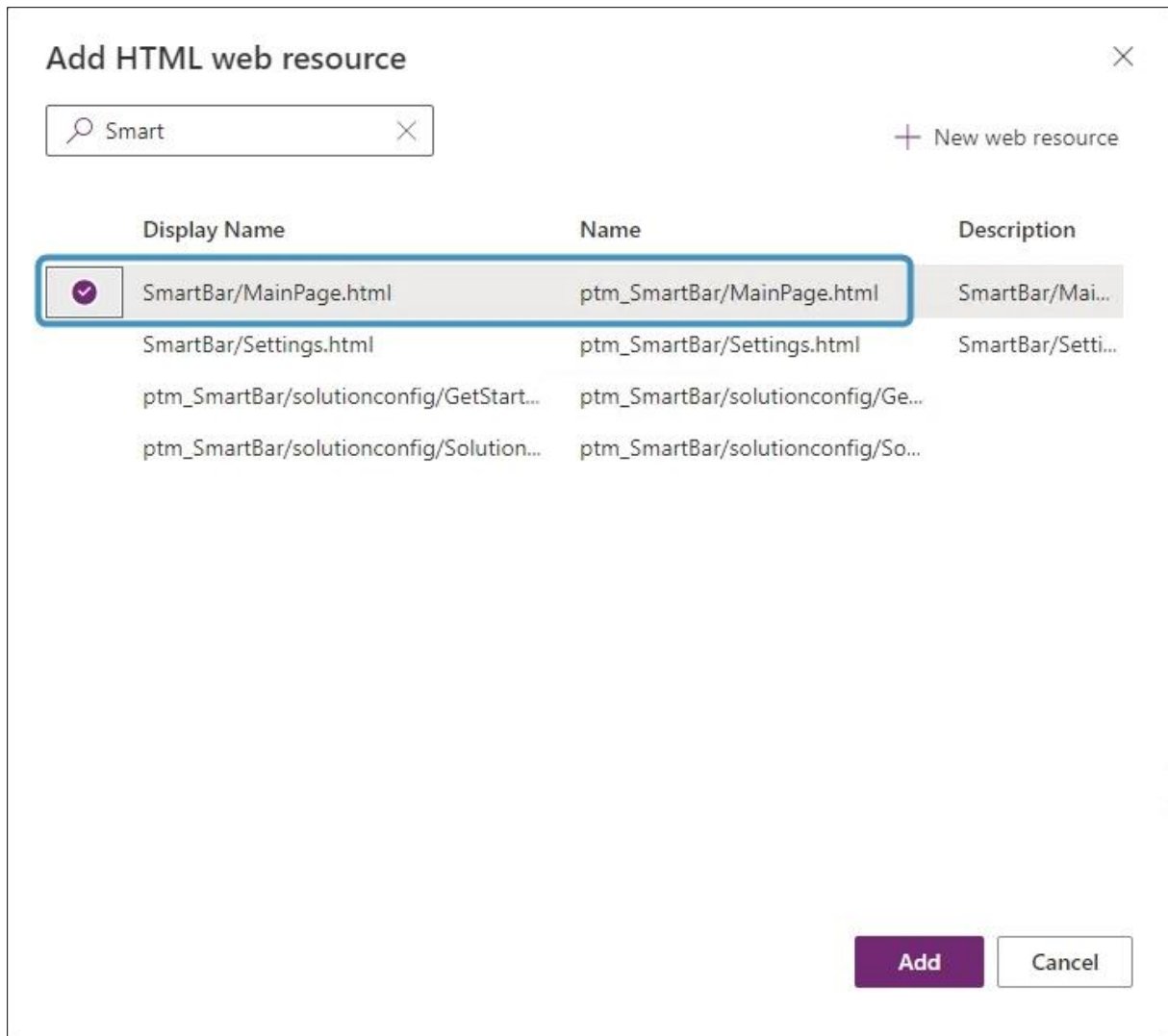


Figure 35: HTML web resource window

Step 5: Now **Save and publish** your customizations.

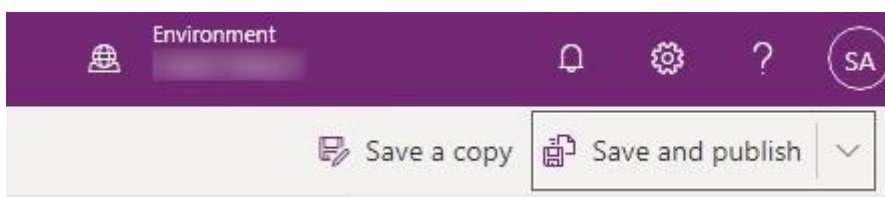


Figure 36: Save and publish your customizations

Step 6: Now when select the Account record, SmartBar will be displayed.

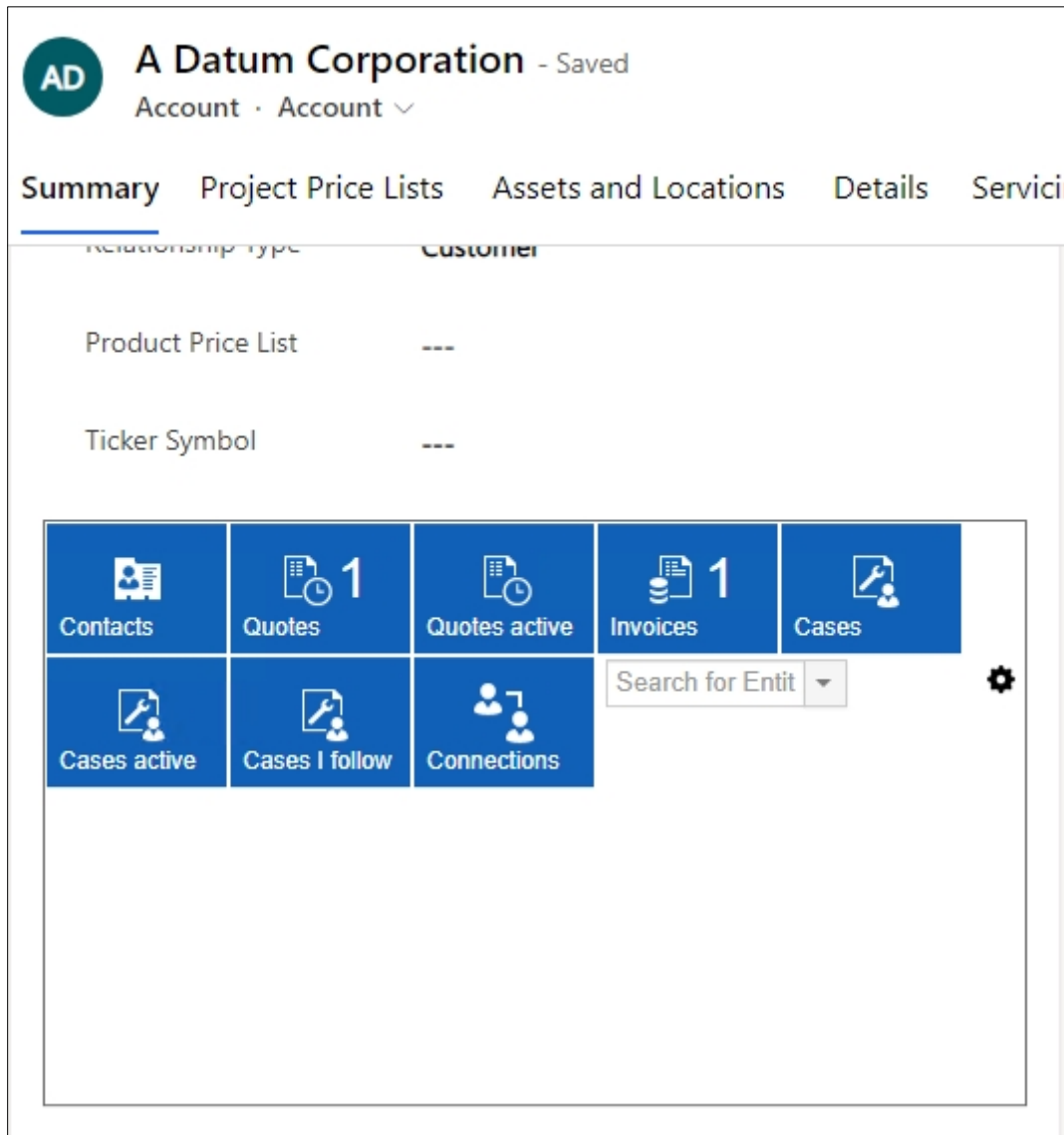


Figure 37: SmartBar embedded in Dynamics 365 - Account

2.2 Embed SmartBar in Dashboards

SmartBar for Dynamics 365 can also be integrated into any of your Dynamics 365 dashboards. To do this, follow the tutorial below:

1. To add SmartBar to a dashboard, access your Dynamics 365 and navigate to **1 Dashboard**. If you wish to create a new custom dashboard, click the **2 New** button in the command bar. Alternatively, if you want to edit an existing dashboard, simply select the one you wish to modify and click on the **Edit** button. For this example, we will demonstrate how to create a new dashboard.

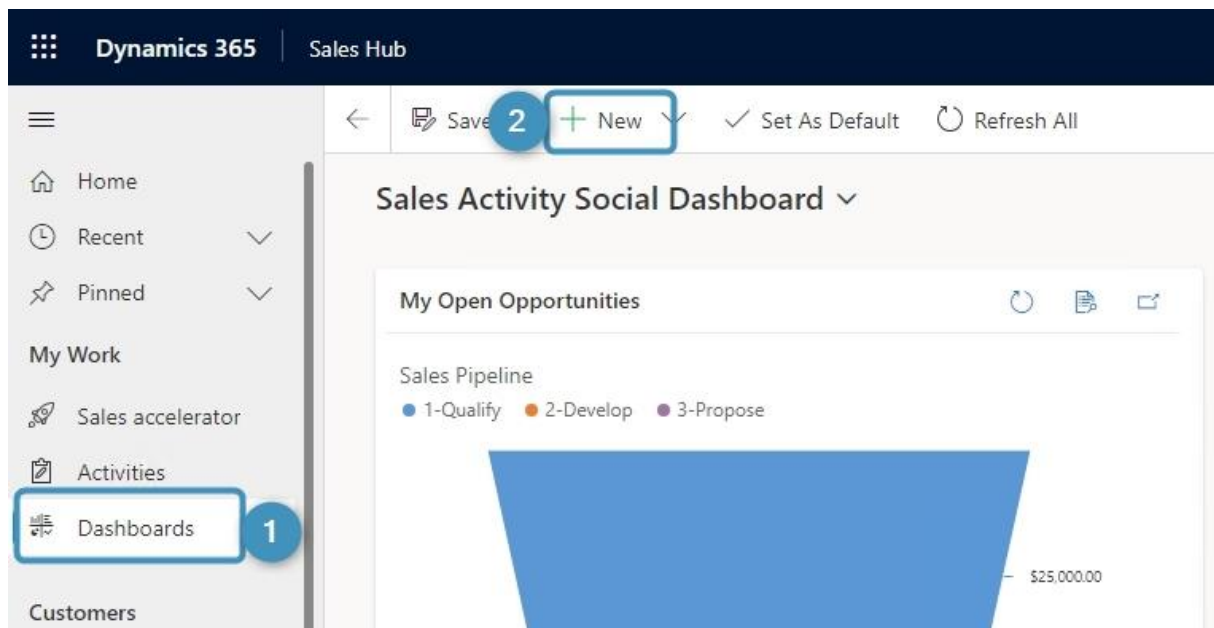


Figure 38: Create a new dashboard

Select an empty grid in the window that opens. Confirm with **Create**.

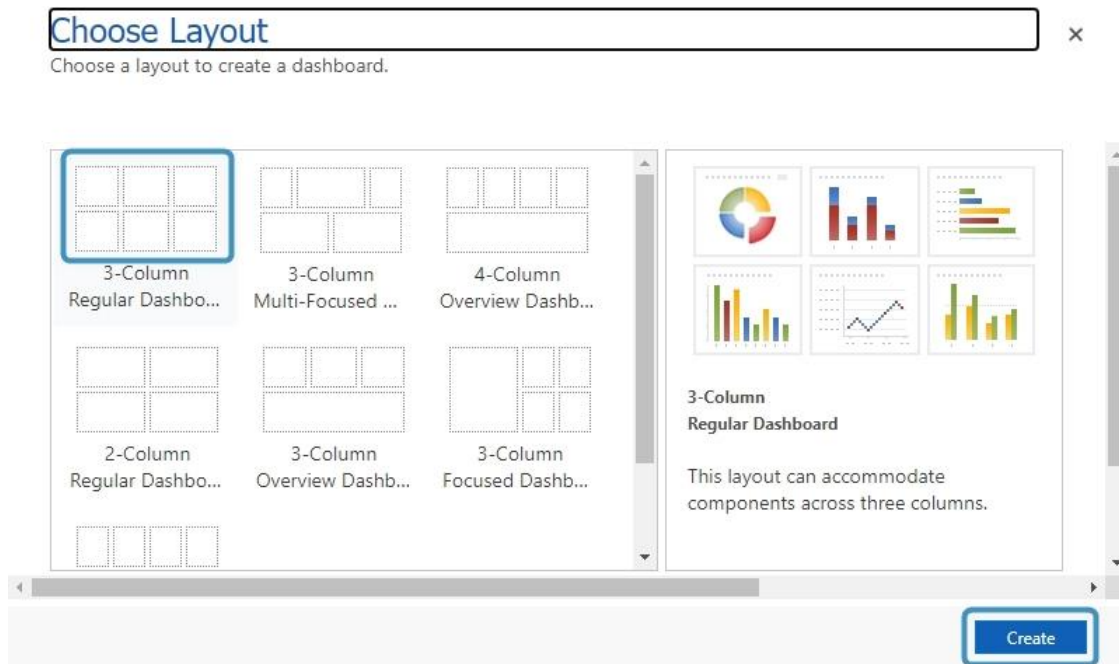


Figure 39: Select a layout

After selecting the Layout, make a double click. This Power Apps site is shown. Click the **1 Web Resource** button.

To modify the height and width, simply use the scaling buttons **2** in the command bar.

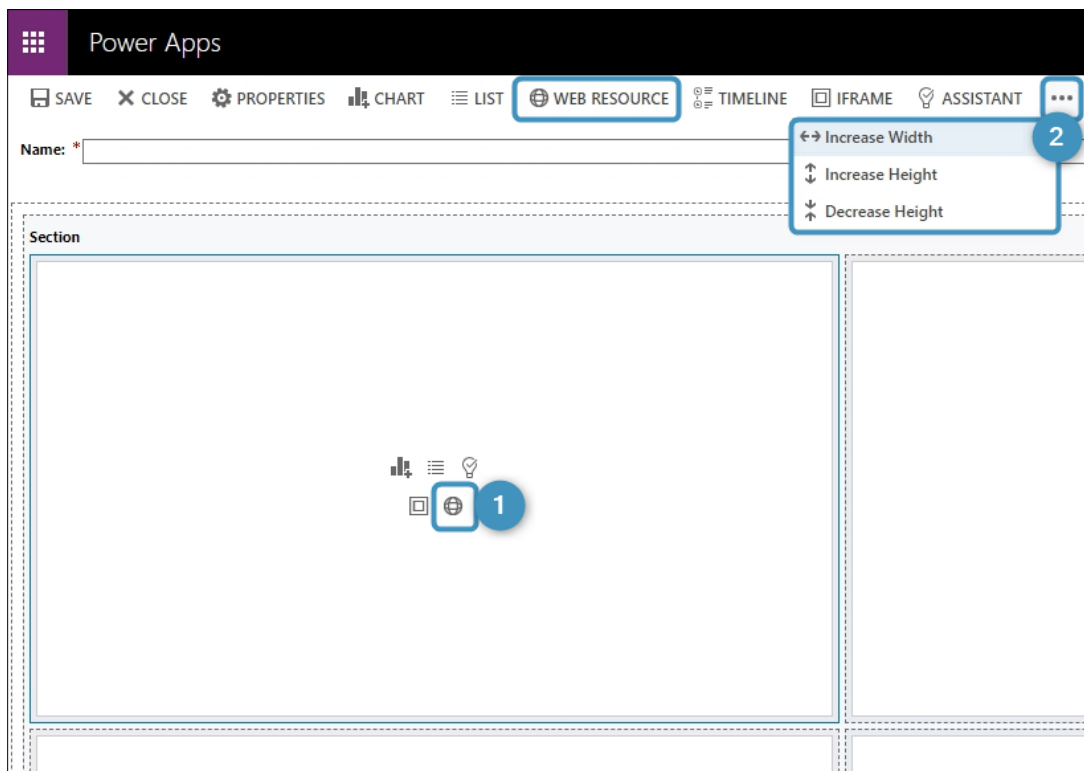


Figure 40: Open a Web Resource

A possible result could look like this:

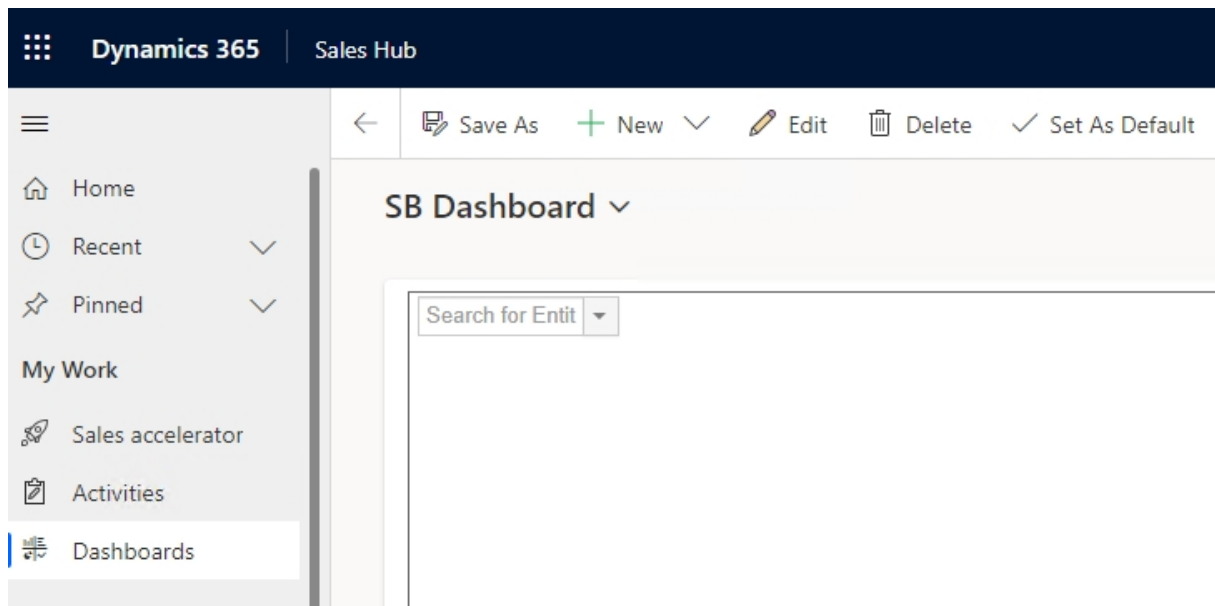


Figure 41: Possible result

3. The SmartBar settings

As soon as SmartBar is embedded in Dynamics 365, you can customize it. The tool allows administrators to configure different settings. To open the SmartBar settings, simply navigate to My SmartBar and click on the **Gear icon** button, which is displayed below.



Figure 42: Access SmartBar Settings

The first time you open the settings, you will be asked to set some Security Roles for your users. The Security Roles define which users should be able to access the Settings page. Only users owning at least one of the selected roles will be able to change the SmartBar settings when using the tool.

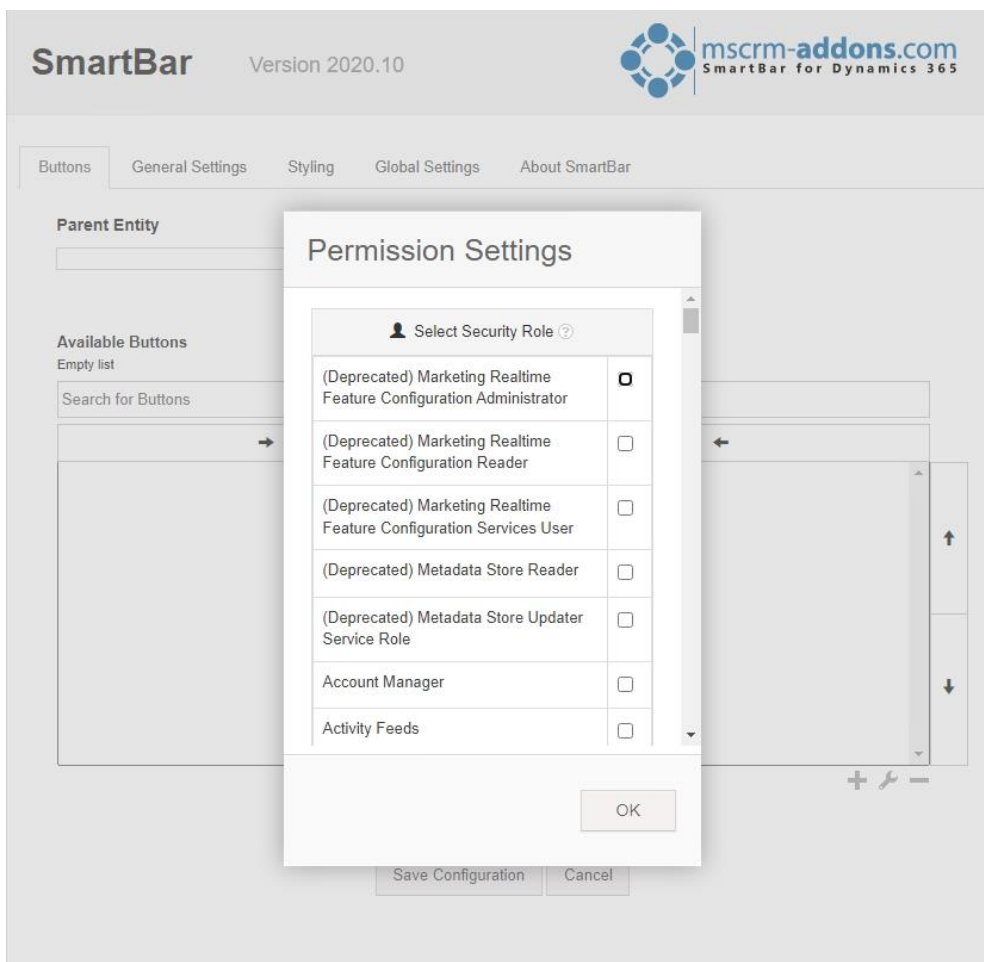


Figure 43: Permission settings

3.1 The SmartBar Settings Overview

The SmartBar Settings consists of various tabs. The different functionalities of the tabs will be explained in the course of the following chapters.

Figure 44: Settings overview

3.1.1 Buttons

SmartBar buttons are a crucial component of SmartBar. They allow a quick overview and represent the related records.

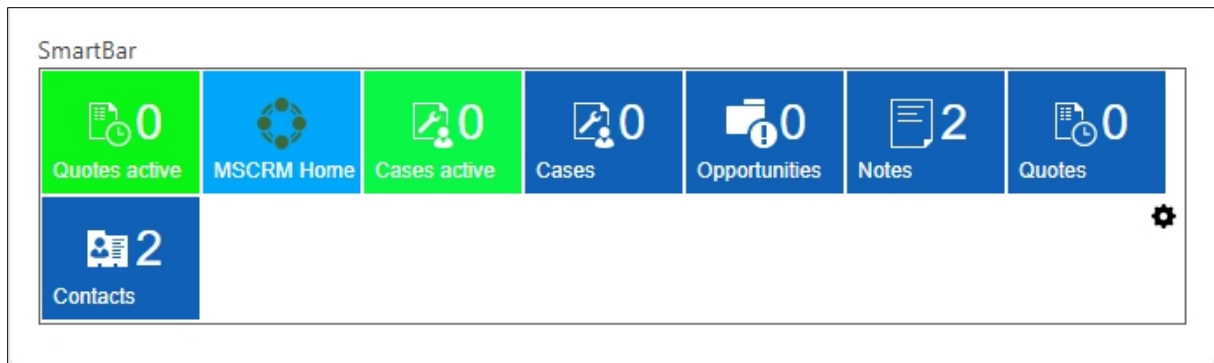


Figure 45: SmartBar buttons

Numbers next to the buttons display the number of related records per entity. The number also appears in the command bar. SmartBar buttons can also be added or removed from the bar. These and other functions need to be activated in the settings.

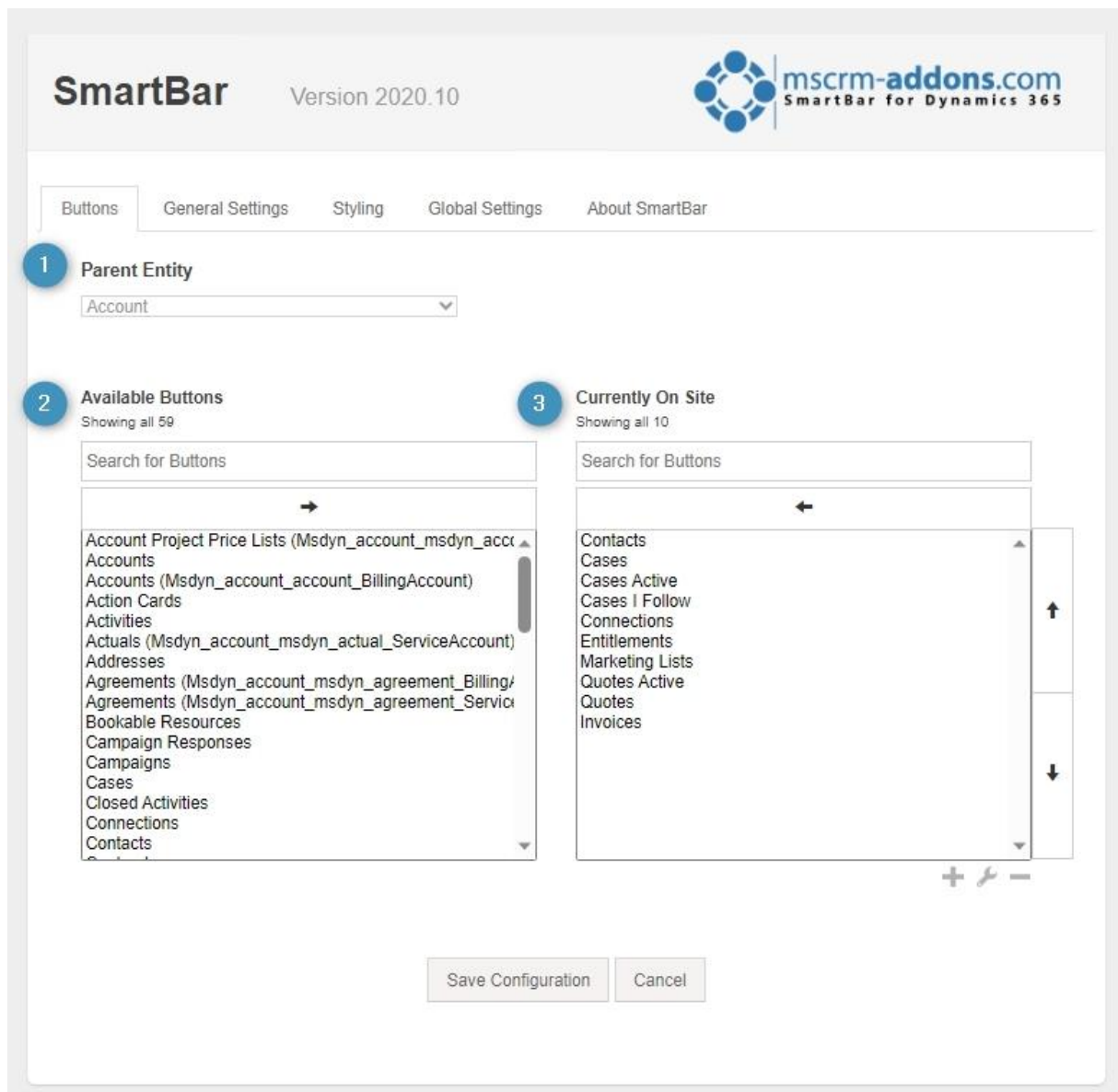


Figure 46: Buttons setting

1 Parent Entity: The entity from which you have started, is usually displayed. If you, for example, configure SmartBar for the Accounts entity, the entity would be displayed here. We started to configure SmartBar from Dashboards. This is why the field is blank in our example.

2 Available Entity: This section provides you with a list of all available buttons.

3 Currently On Site: This section provides you with a list of all buttons that are currently on site.

Please note: There two kinds of SmartBar buttons. Standard and Custom buttons. Learn how to customize them in the [Tutorials](#) chapter.

3.1.2 General Settings

This tab provides you with the possibility to customize the general SmartBar settings.



The image shows the SmartBar configuration interface. At the top, it says 'SmartBar Version 2020.10' and includes the mscrm-addons.com logo. Below this is a navigation bar with tabs: 'Buttons', 'General Settings' (selected), 'Styling', 'Global Settings', and 'About SmartBar'. The 'General Settings' section is divided into two parts. The first part, labeled '1', contains settings for the SmartBar itself, including 'Enable Drag Option' (Enabled), 'Open Entities in a new tab' (Enabled), 'Always show entity counter' (Disabled), 'Use filter "All" in subgrids' (Enabled), 'Enable Dropdown' (Enabled), 'Set max dropdown elements' (50), 'Maximum Dropdown Height' (300), 'Dropdown Width' (250), and 'Display Mode' (Horizontal). The second part, labeled '2', contains 'Entity Search Button Settings', including 'Entity Search Button' (Disabled), 'Button Width' (130), 'Maximal Dropdown Height' (300), and 'Dropdown Width' (250). At the bottom of the settings area are 'Save Configuration' and 'Cancel' buttons.

Figure 47: General Settings

1 General Settings

- **Enable Drag Option:** When enabled, you can drag the buttons.
- **OpenEntites in a new tab:** All entities will be opened in a new tab if this function is enabled.
- **Always show entity counter:** Enable this function to count entities from 0 (zero). If there are no related entities, the counter will show 0.
- **Use filter "All" in subgrids:** With this option enabled you filter **All** in subgrids.
- **Enable Dropdown:** the dropdown functionality for related entites can be enabled here.
- **Set max dropdown elements:** Define how many elements should be displayed in the dropdown menu.
- **Maximum Dropdown Height:** Set the maximum height of the dropdown elements in pixels.
- **Dropdown Width:** Set the width of the dropdown box in pixels.
- **Display Mode:** Select your preferred display mode.

Please note: If you change your display mode, you must also change the webresource-formatting in your form settings.

2 Entity Search buttons Settings

- **Entity Search Button:** Check this option in order to enable the entity search button.
- **Button Width:** Define the width of your entity search button.
- **Maximal Dropdown Height:** Define the maximum dropdown height of your Entity Search Button in pixels.
- **Dropdown Width:** Define the width your Entity Search Button dropdown box in pixels.

3.1.3 Styling

There are two Styles you can choose:

- Tile
- Menu

Depending on the style, also the SmartBar button functions vary.

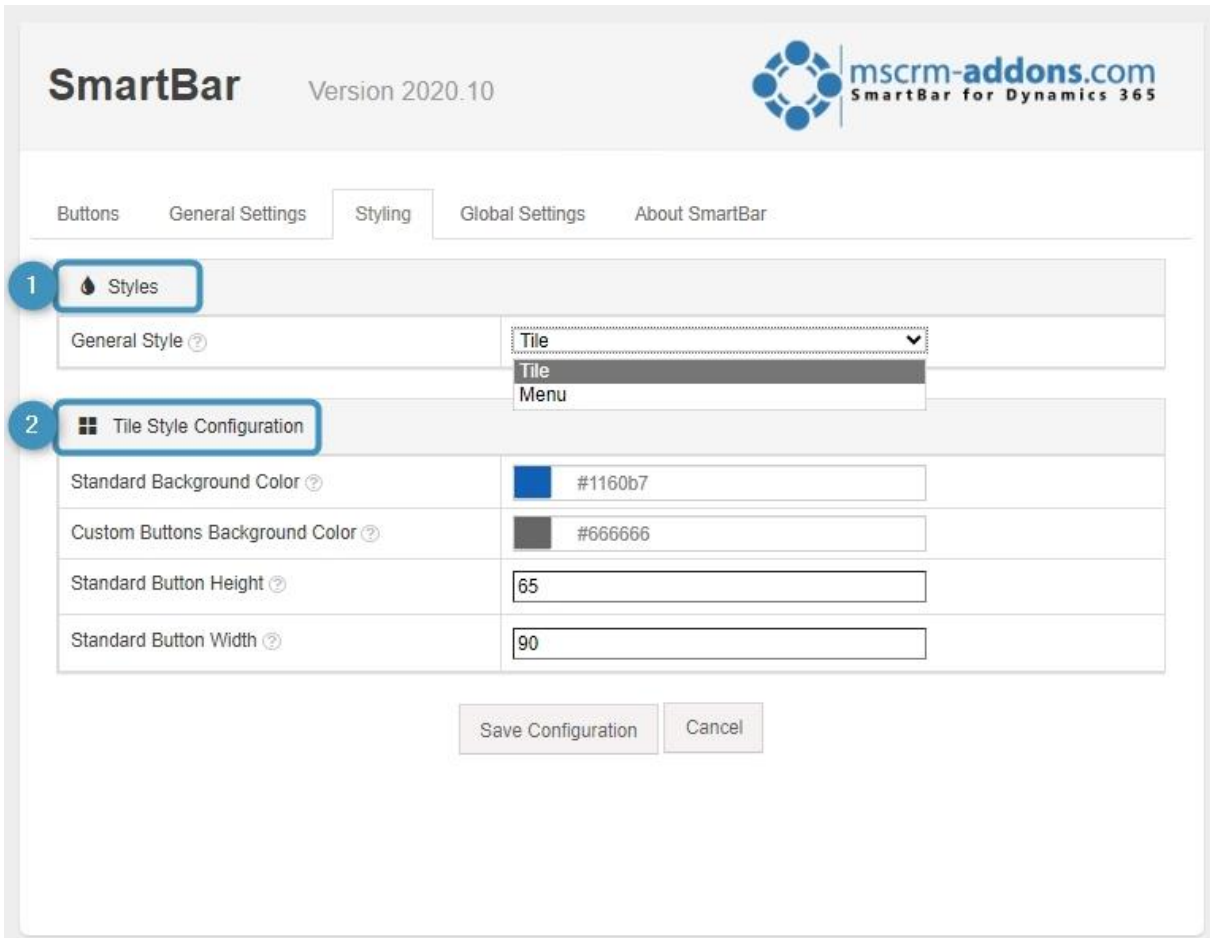


Figure 48: Styling – Tile Style Configuration

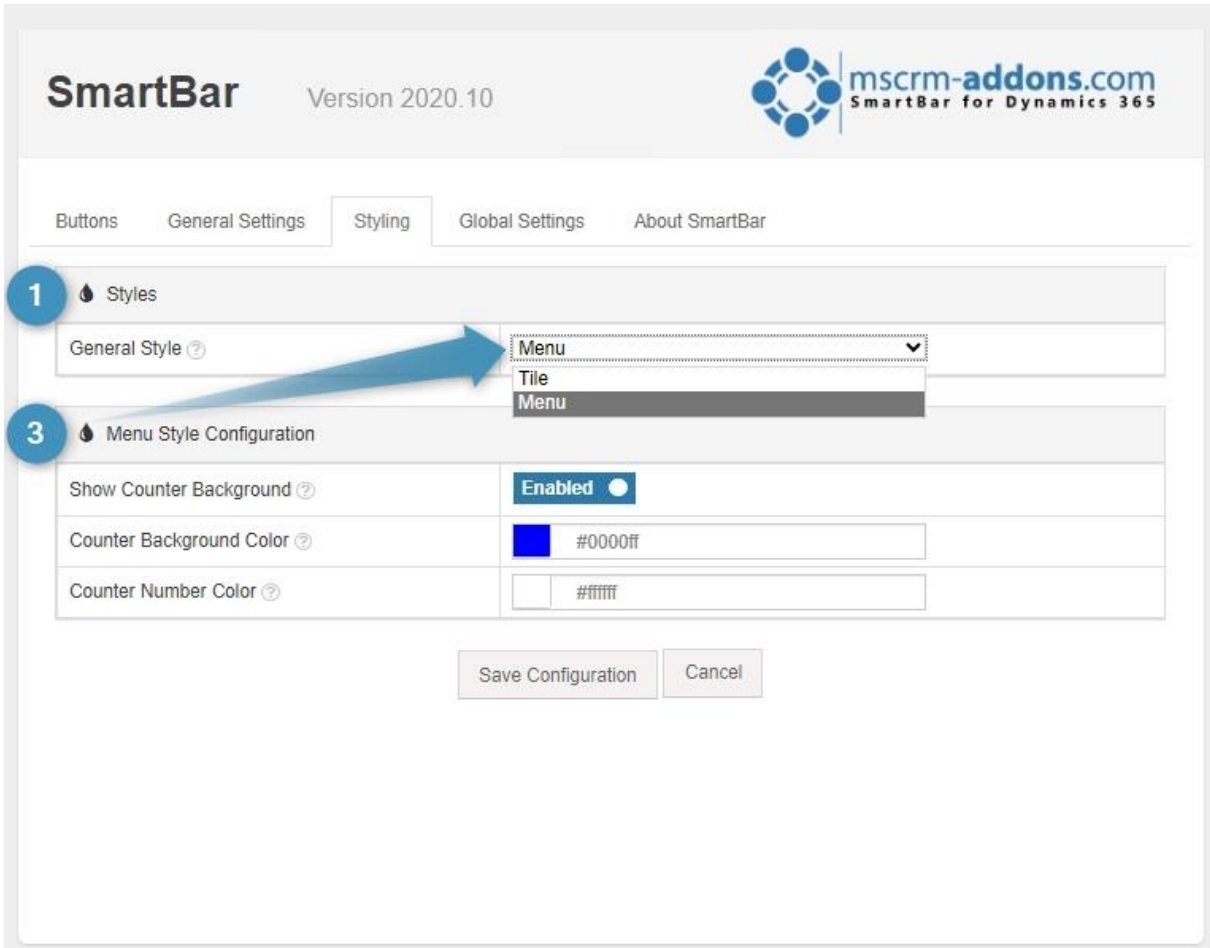
1 Styles

- **General Style:** Select here your preferred style. You can choose between Menu and Tile. If you change your style, you will also need to change the web resource formatting in your form settings

2 Tile Style Configuration

- **Standard Background Color:** Set here the standard background color of your tile buttons.
- **Custom Buttons Background Color:** Set here the background color of your custom tile buttons.

- **Standard Button Height:** Adjust here the height of the standard button (min. height is 32)
- **Standard Button Width:** Set the standard button width of your tile buttons (min. width is 32).



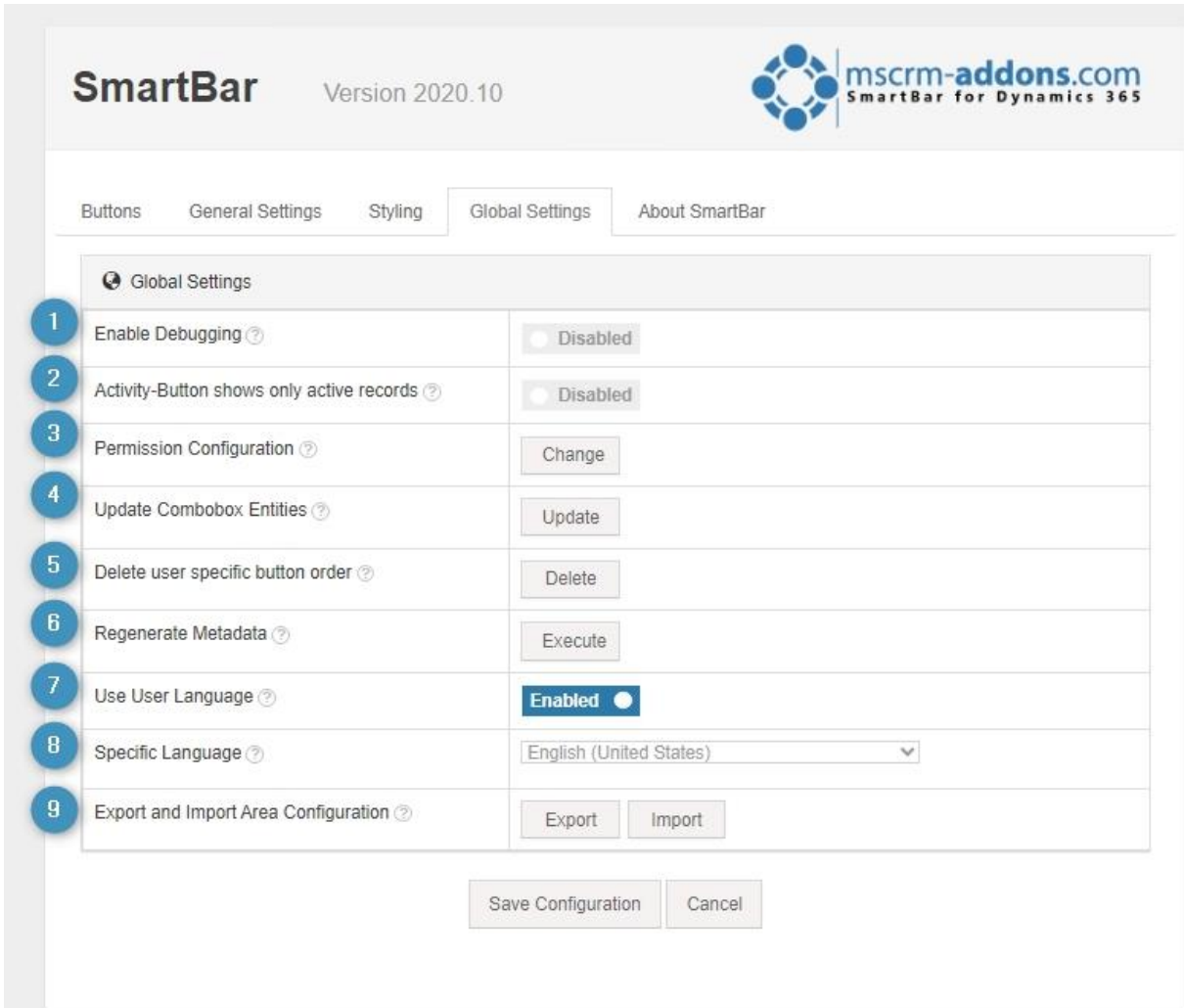
The screenshot shows the SmartBar configuration interface. At the top, it says "SmartBar Version 2020.10" and "mscrm-addons.com SmartBar for Dynamics 365". Below this are tabs for "Buttons", "General Settings", "Styling", "Global Settings", and "About SmartBar". The "Styling" tab is selected. Under "Styling", there are two sections: "1 Styles" and "3 Menu Style Configuration". In the "1 Styles" section, the "General Style" dropdown is set to "Menu". In the "3 Menu Style Configuration" section, the "Show Counter Background" is set to "Enabled". The "Counter Background Color" is set to "#0000ff" (blue), and the "Counter Number Color" is set to "#ffffff" (white). At the bottom, there are "Save Configuration" and "Cancel" buttons.

Figure 49: Styling – Menu Style Configuration

3 Menu Style Configuration

- **Show Counter Background:** this options shows a background for your entity counter, which will be displayed beside your button.
- **Counter Background Color:** Sets the background color of the entity counter.
- **Counter Number Color:** Set the color of your entity counter.

3.1.4 Global Settings



Global Settings	
1 Enable Debugging ?	<input type="radio"/> Disabled
2 Activity-Button shows only active records ?	<input type="radio"/> Disabled
3 Permission Configuration ?	<button>Change</button>
4 Update Combobox Entities ?	<button>Update</button>
5 Delete user specific button order ?	<button>Delete</button>
6 Regenerate Metadata ?	<button>Execute</button>
7 Use User Language ?	<input checked="" type="radio"/> Enabled
8 Specific Language ?	<input type="text" value="English (United States)"/>
9 Export and Import Area Configuration ?	<button>Export</button> <button>Import</button>

Save Configuration Cancel

Figure 50: Global Settings

- 1 **Enable Debugging:** Enable here debugging.
 - 2 **Activity-Button shows only active records:** Enable this option if you will show and count active records.
 - 3 **Permission Configuration:** Users with this selected Security Roles are allowed to configure SmartBar.
 - 4 **Update Combobox Entities:** Update the sitemap entries of the entity search button.
 - 5 **Delete user specific button order:** Force every user to use your global button order when deleting their Temp/User settings.
 - 6 **Regenerate Metadata:** With this function you are able to regenerate every fetch and title of the SmartBar buttons.
 - 7 **Use User Language:** Select here the language for the buttons.
 - 8 **Specific Language:** Define here a specific language for your SmartBar buttons.
 - 9 **Export and Import Area Configuration:** Here you can export and import the configuration of the current SmartBar area. Global Settings are not included!
- Please note:** Don't forget to **Save Configuration**.

4. Uninstall SmartBar from Dynamics 365

To uninstall SmartBar you have to go to the **Control Panel** and select **Programs**.

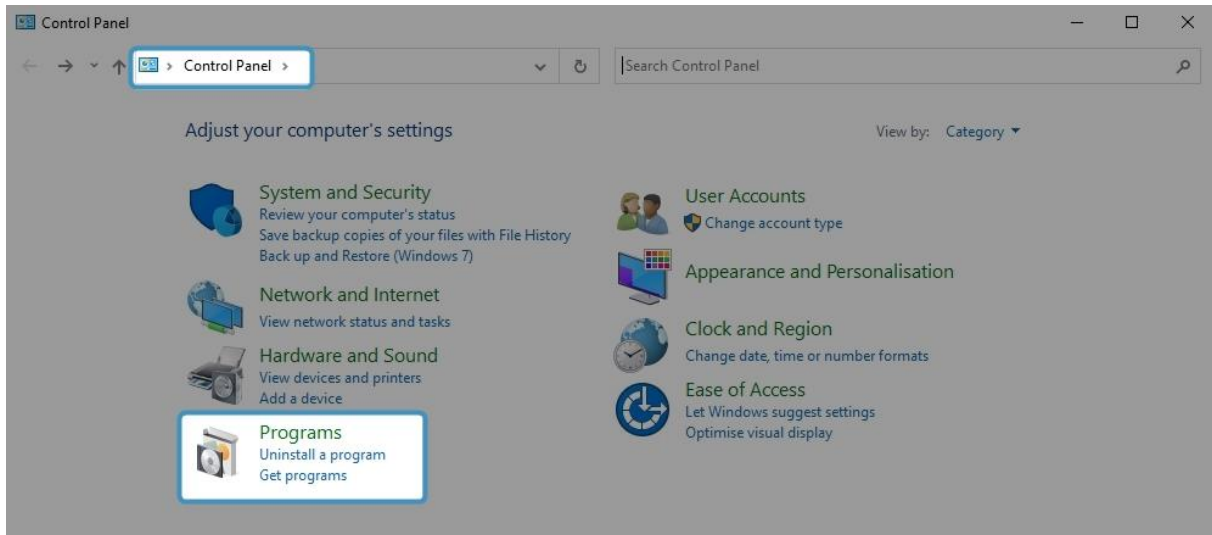


Figure 51: Open Programs in the Control Panel

Look for the **SmartBar for Dynamics 365** Application and click **Uninstall**.

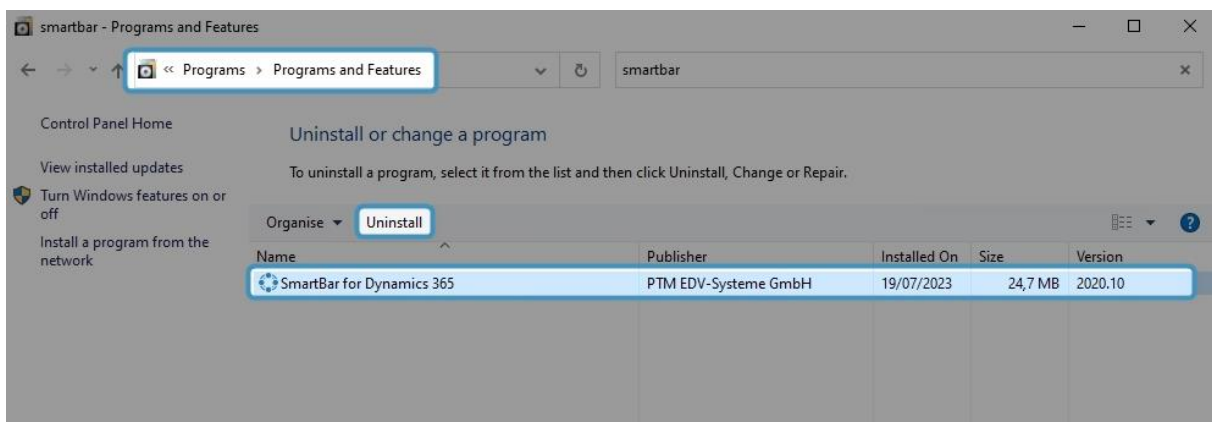


Figure 52: Uninstall SmartBar

Confirm here when you are sure about the uninstallation.

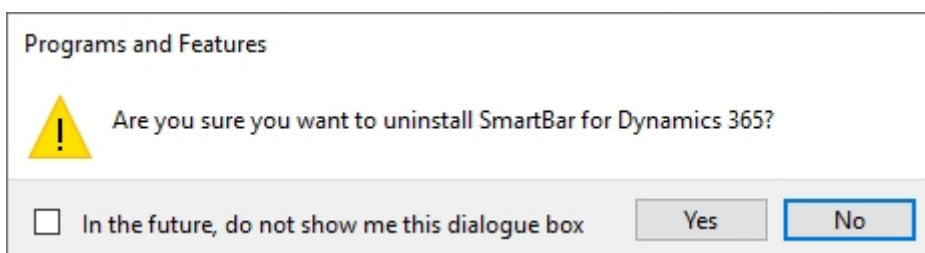


Figure 53: Confirm Uninstallation

5. Tutorials (How to's)

This chapter provides you with helpful tutorials that show you how to work with SmartBar efficiently.

5.1 How to navigate with SmartBar

Introducing SmartBar for Dynamics 365 - a seamless navigation tool that streamlines your experience between Dynamics 365 entities and related records. With just a simple click on the corresponding SmartBar button, you can effortlessly move back and forth between different entities.

SmartBar adds a touch of convenience to your workflow, allowing you to navigate from an entity where it's embedded or from the SmartBar dialog itself. This versatility ensures you can swiftly switch to related entities without losing your SmartBar.

Imagine clicking on one of the listed entities, such as "Activity," and instantly transitioning to the activities section. It's that easy and efficient!

Experience the power of SmartBar as it empowers you with smooth and efficient back-and-forth navigation within MS Dynamics 365, making your work more enjoyable and productive than ever before. Embrace the simplicity of SmartBar and revolutionize the way you interact with your data.

Please note: If you switch between several activities, you have to make sure to save your changes. They are not automatically saved. If you do not save them, they will be lost.

5.2 How to navigate from an entity where SmartBar is embedded

To navigate from an entity where SmartBar is embedded to a related record, simply click on the record you would like to open (here: Invoices) and you will be redirected to the related Invoices.

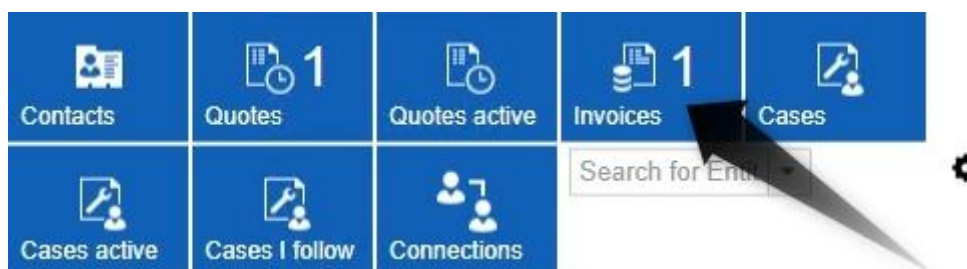


Figure 54: Navigate from entity to related record

The displayed invoice is now opening.

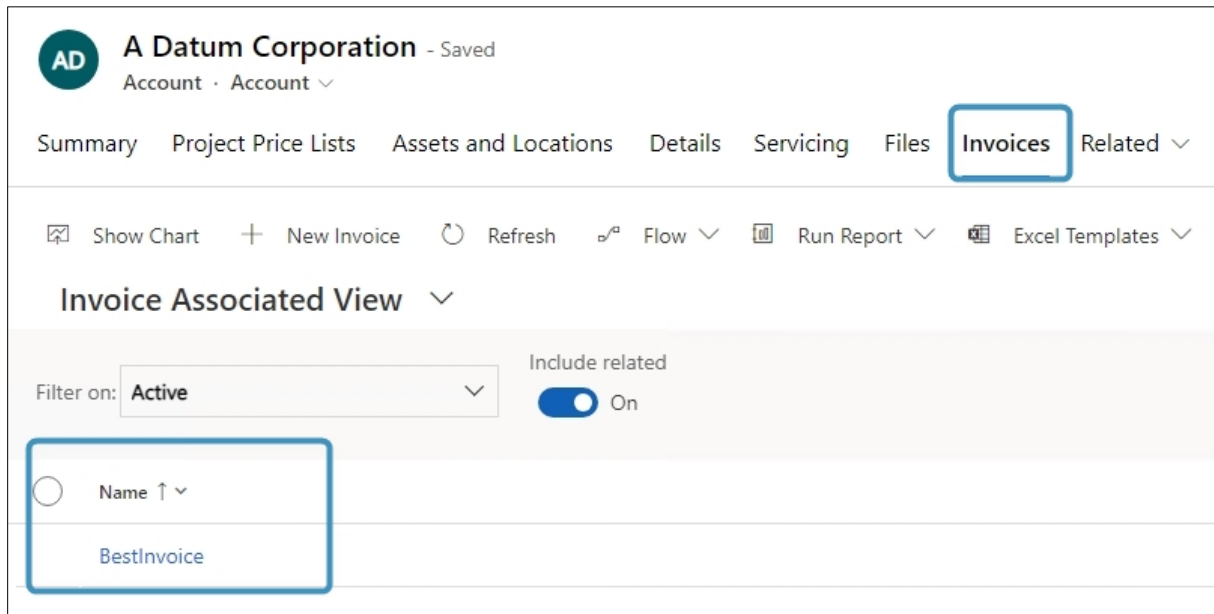


Figure 55: Related record opens

5.3 How to add or remove Standard SmartBar buttons

Customizing Standard SmartBar buttons with our addons is remarkably straightforward, making it one of the simplest tasks you can accomplish.

In the left column, you can see a list of all available buttons, while in the right column you see the buttons that are currently installed.

To add a **1** button (here: Account) to the SmartBar, simply click on it in the Available Buttons section. Next, click on the **2** arrow that points from left to right. The button will be visible on site as soon as you **3** save the configuration. To delete SmartBar buttons, simply highlight a button in the Currently On Site-section. Next, click on the arrow that points from right to left and the button will be deleted.

Please note: Standard buttons still exist in the list if you remove, they are removed from the current site. However, if you delete custom buttons, they will be deleted permanently.

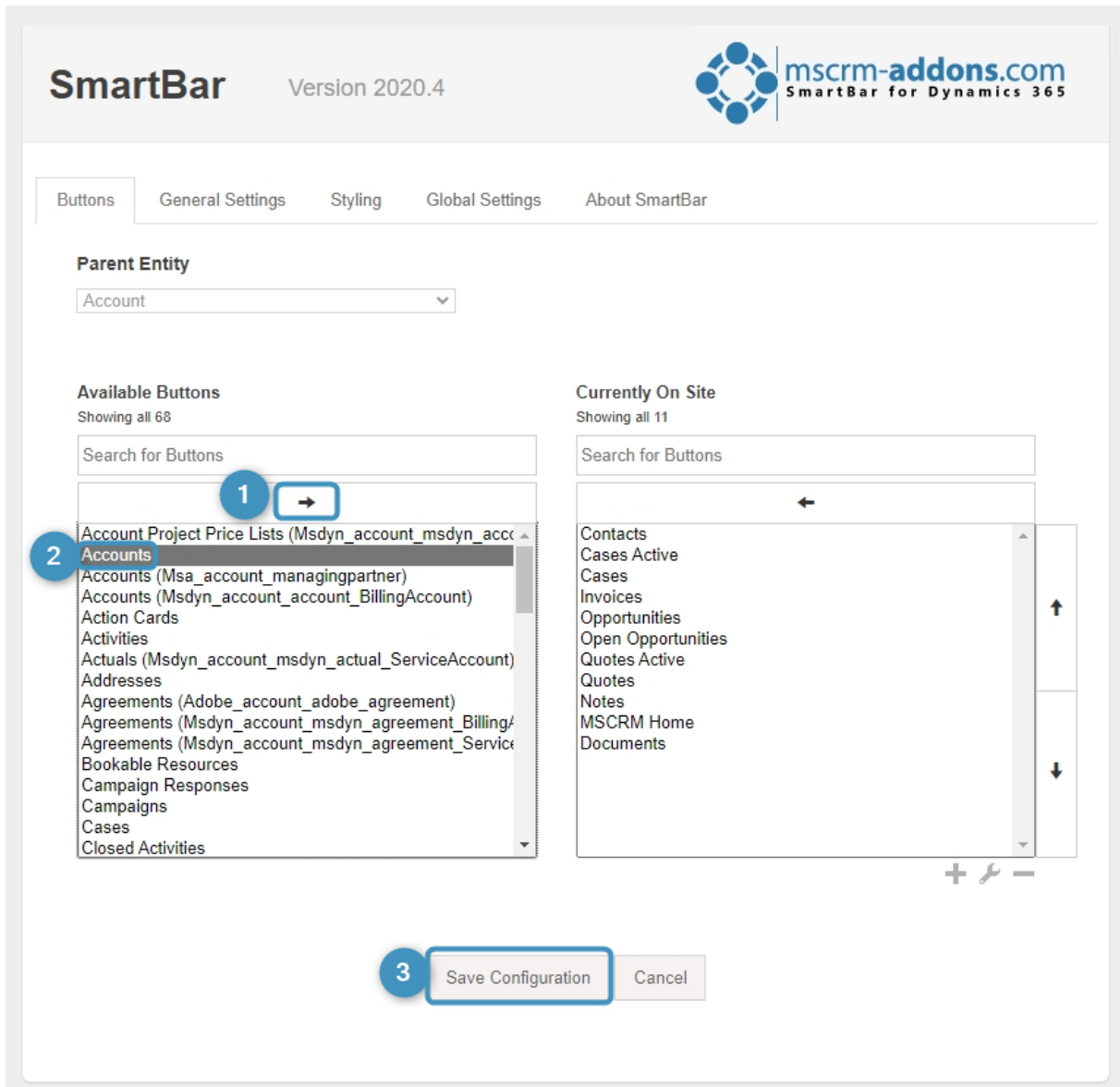


Figure 56: Add or remove a button

5.4 How to add Custom Buttons

SmartBar for Dynamics 365 also allows you create customized buttons. Click on the **1** **Add** button in the SmartBar settings in the right lower corner.

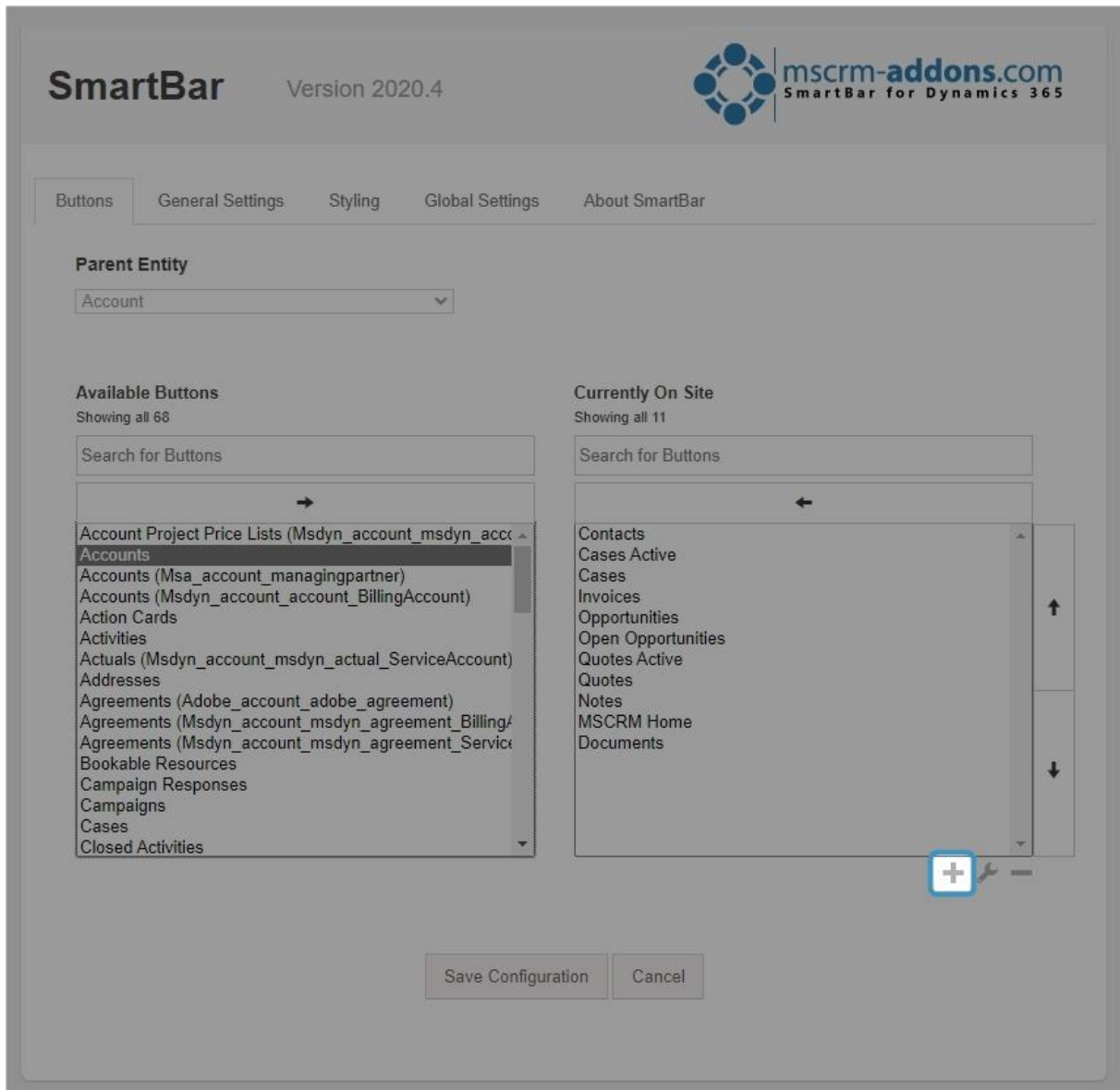


Figure 57: Add customized button

Once you have clicked on the **Add** button, you will be presented with the below window. It helps you to customize your button. As for example, in the Type-section, you can select between

- Javascript Function,
- Link
- Entity|Sitemap,
- Scroll to Section or

Custom Buttons

Type

Link

▼

Javascript Function

Link

Entity | Sitemap

Scroll to Section

Button Background Color

#666666

Button Icon

Button Width

90

Link*

Additional Settings

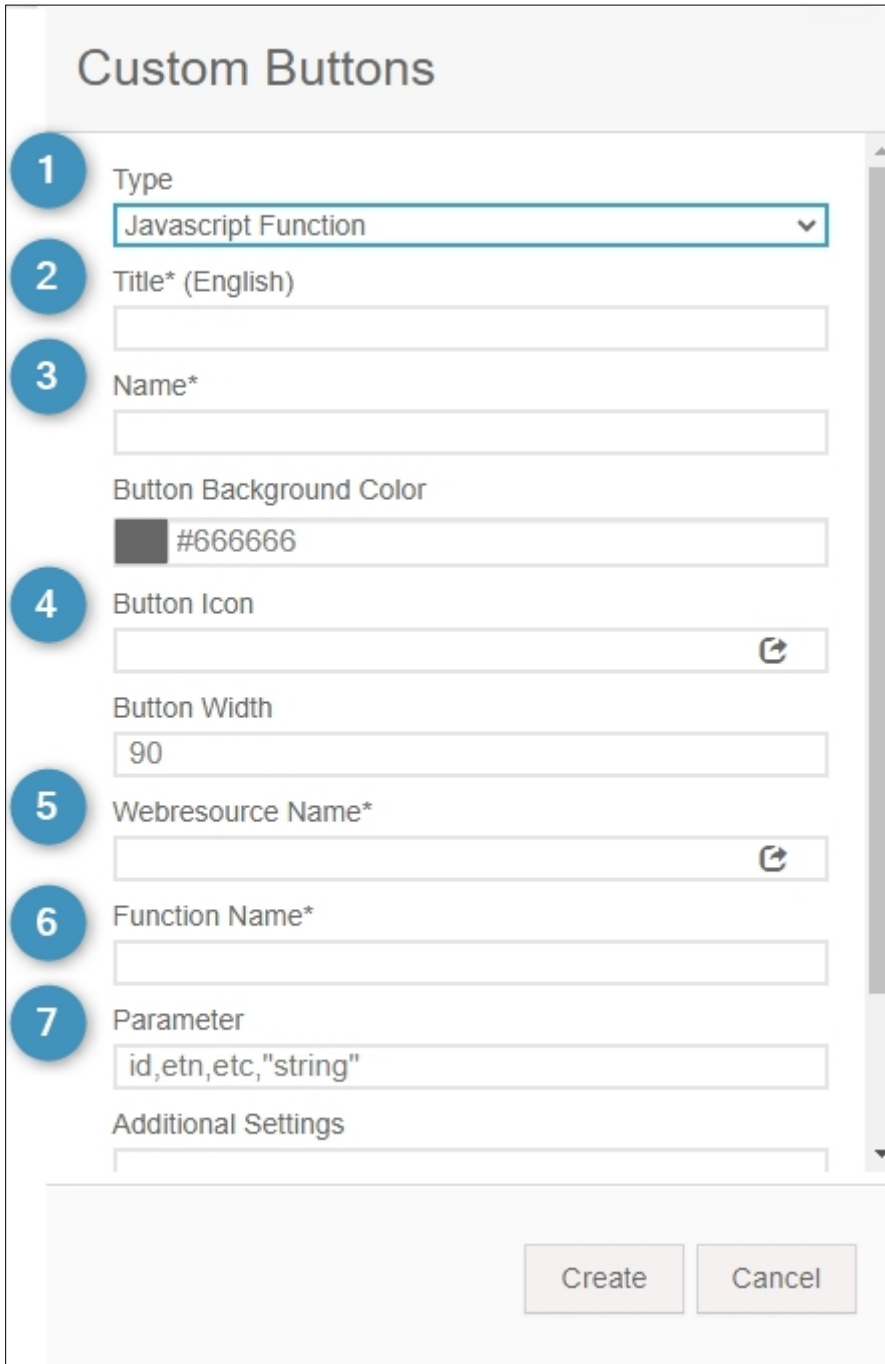
Create

Cancel

Figure 58: Custom buttons

5.5 How to add Javascript Function buttons

To add an **Javascript Function** button, simply select the below explained settings.



Custom Buttons

- 1** Type
Javascript Function
- 2** Title* (English)
- 3** Name*
- 4** Button Background Color
#666666
- 5** Button Icon
- 6** Button Width
90
- 7** Webresource Name*

Function Name*

Parameter
id,etn,etc,"string"

Additional Settings

Create Cancel

Figure 59: Custom buttons window

- 1 Type:** Javascript Function
- 2 Title:** This section enables you to customize the title of your buttons in different languages. To do so, click on the dropdown arrow next to Title and type in the corresponding terms.
- 3 Name:** Please define a unique name for your custom button. It is important, that the name is unique!

4 **Button Icon:** The purpose of this field is to configure the icon on the button. With a click on the icon, you will be transferred to the Web Resource Overview.

5 **Web Resource Name:** Please define the Web resource containing your JavaScript function. The search for the Web resource works like the search for the icon. Instead of looking for a matching icon, simply search for a matching web resource.

Please note: Fields with * are mandatory and must be completed!

6 **Function Name:** Type in the name of the function which should be executed

7 **Parameter:** Here, you can define parameters which should be passed to your function. Available parameters are:

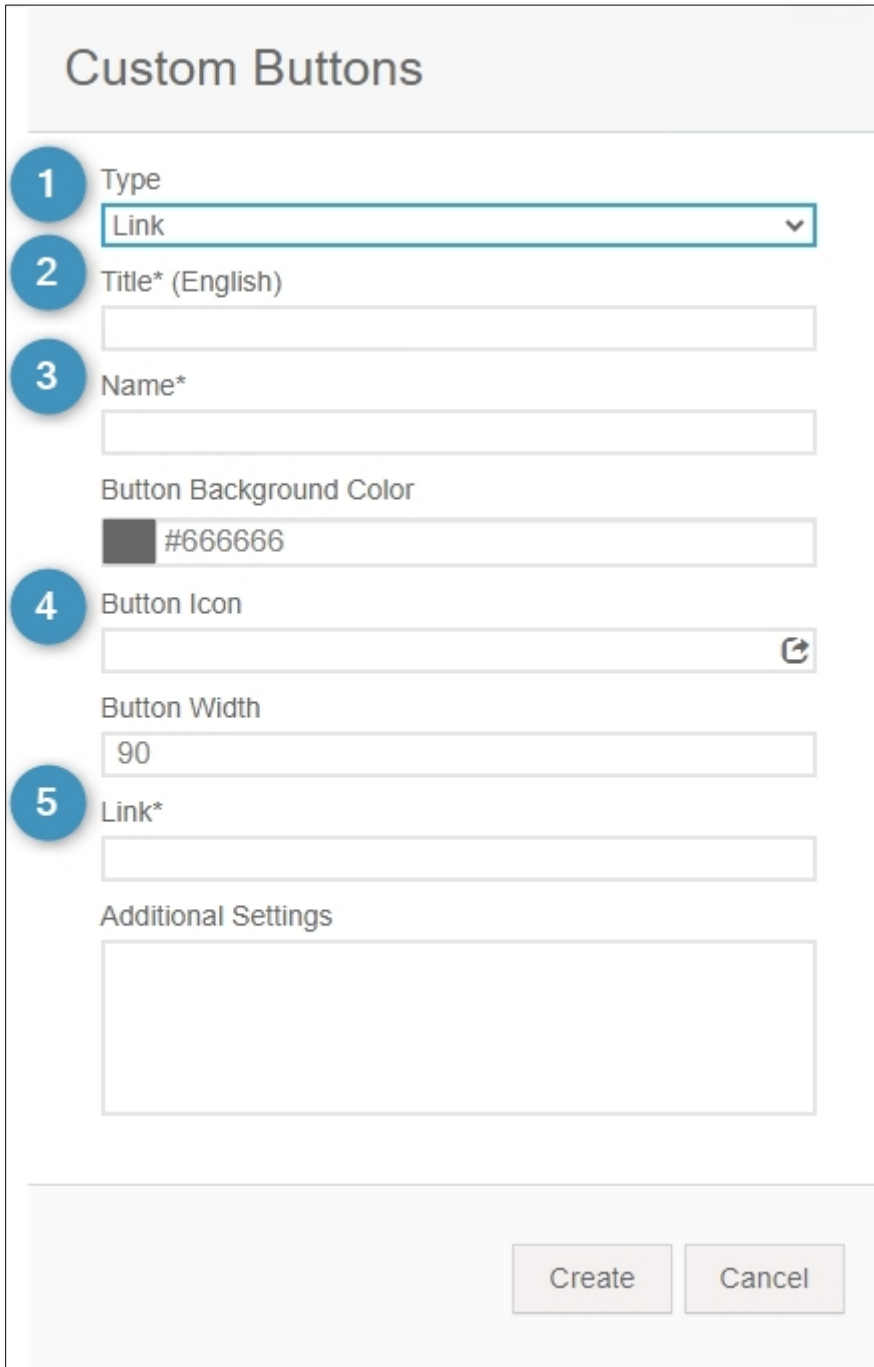
- **id** (unique id to the starting Dynamics 365 record),
- **etn** (entity type name of the Dynamics 365 record),
- **etc** (entity type code of the Dynamics 365 record) and
- **a custom string.**

Please note: You can select between up to four parameters. However, they must be separated by a comma!

To add the Custom Buttons to the SmartBar, confirm with **Create!**


5.6 How to add Link Buttons

To add a **Link** button, simply select the below explained setting.



Custom Buttons

- 1 Type**
Link
- 2 Title* (English)**
- 3 Name***

Button Background Color
#666666
- 4 Button Icon**
 
Button Width
90
- 5 Link***

Additional Settings

Create Cancel

Figure 60: Customize a Link button

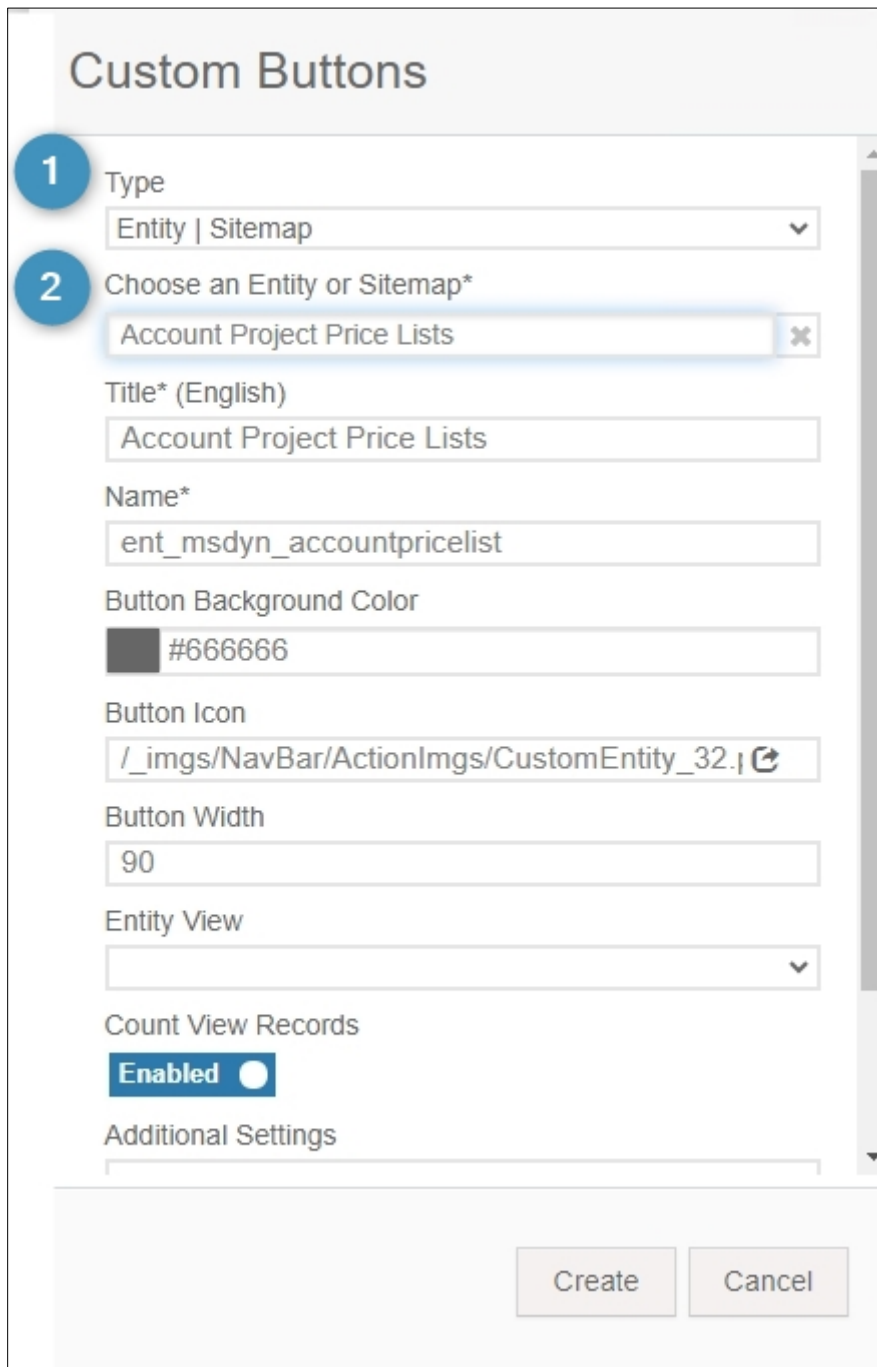
- 1 Type:** Link
- 2 Title:** Enables you to customize the title of your buttons in different languages. To do so, click on the drop-down arrow next to Title and type in the corresponding terms.
- 3 Name:** Here you can define a unique name for your custom button. It is important that the name is unique!

- 4 **Button Icon:** The purpose of this field is to configure the icon on the button. With a click on the icon, you will be transferred to the Web Resource Overview.
- 5 **Link:** Please type in the link here. As soon as you have applied all the necessary changes, please click on the **Create** button in order to add the link-button.

Please note: Fields with * are mandatory and must be completed! Confirm with **Create** to add the Custom Button to the SmartBar.

5.7 How to add Entity | Sitemap Buttons

To add an **Entity | Sitemap** button, simply select the below explained settings.



Custom Buttons

1 Type
Entity | Sitemap

2 Choose an Entity or Sitemap*
Account Project Price Lists

Title* (English)
Account Project Price Lists

Name*
ent_msdyn_accountpricelist

Button Background Color
#666666

Button Icon
/_imgs/NavBar/ActionImgs/CustomEntity_32.

Button Width
90

Entity View

Count View Records
Enabled

Additional Settings

Create Cancel

Figure 61: Customize Entity|Sitemap buttons

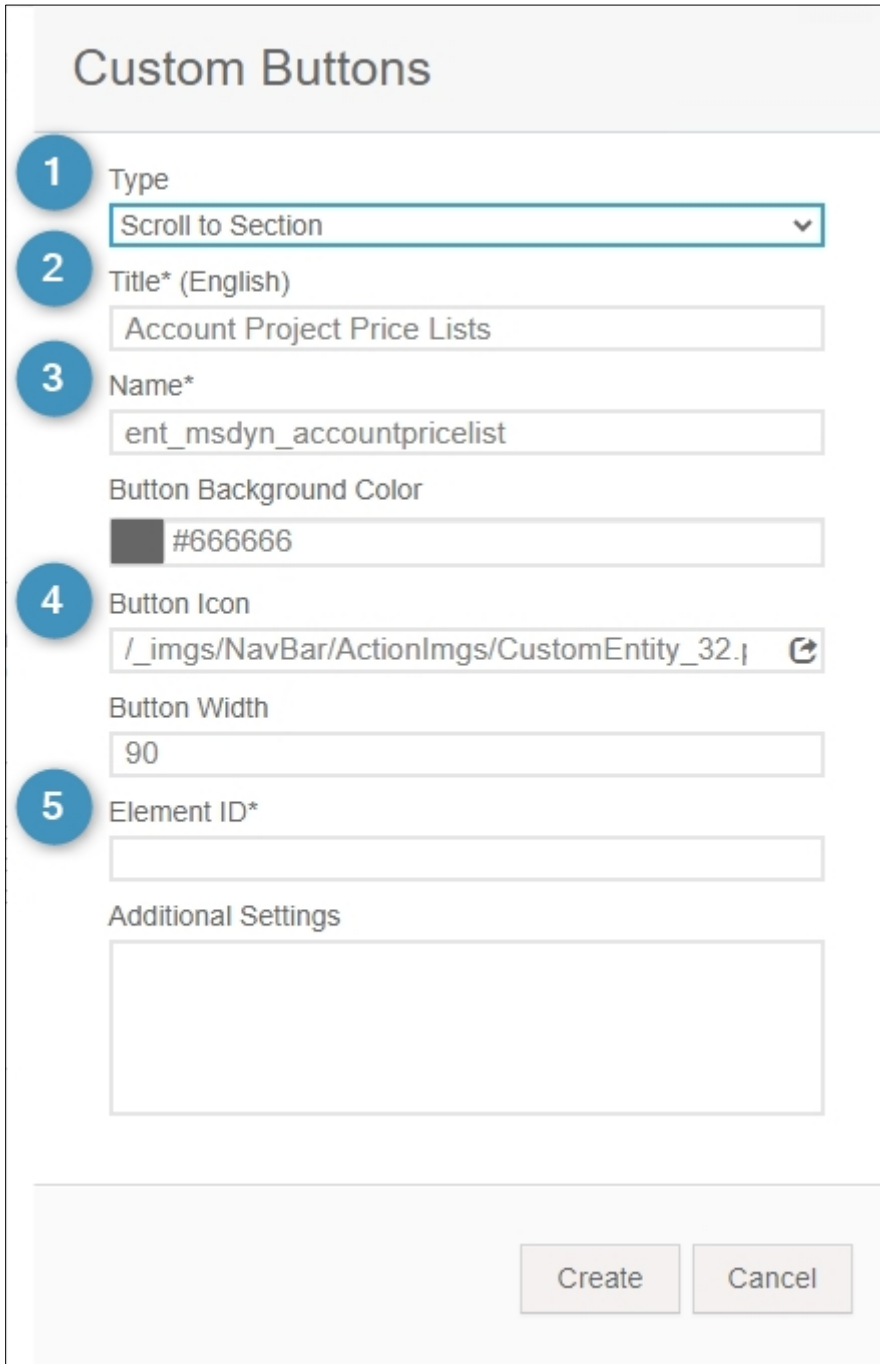
- 1 **Type:** Entity | Sitemap
- 2 **Choose an Entity or Sitemap:** With a click on the drop-down arrow the window displayed here opens.

Please define which Entity or Sitemap Entry should be opened when you click on the Custom Button. All the other fields will be filled automatically according to the selected entity or site map, but you can also insert your own terms.

Please note: The names must be unique! Fields with * are mandatory and must be completed! Confirm with **Create** to add the Custom Button to the SmartBar.

5.8 How to add Scroll to Section buttons

To add a **Scroll to Section** button, simply select the below explained settings.



Custom Buttons

- 1** Type
Scroll to Section
- 2** Title* (English)
Account Project Price Lists
- 3** Name*
ent_msdyn_accountpricelist
Button Background Color
#666666
- 4** Button Icon
/_imgs/NavBar/ActionImgs/CustomEntity_32.i
Button Width
90
- 5** Element ID*

Additional Settings

Create Cancel

Figure 62: Customize Scroll to Section button

- 1 Type:** Scroll to Section
- 2 Title:** Enables you to customize the title of your buttons in different languages. To do so, click on the drop-down arrow next to Title and type in the corresponding terms.
- 3 Name:** Here you can define a unique name for your custom button. It is important that the name is unique!

- 4 **Button Icon:** The purpose of this field is to configure the icon on the button. With a click on the icon, you will be transferred to the Web Resource Overview
- 5 **Element ID:** Please type in a html ID from the Dynamics 365 form.

Please note: Fields with * are mandatory and must be completed! Confirm with **Create** to add the Custom Button to the SmartBar.

5.9 How to edit Custom Buttons

Please select a custom button from the Currently on-Site row (here: Contacts). Then click on the **Wrench** button.

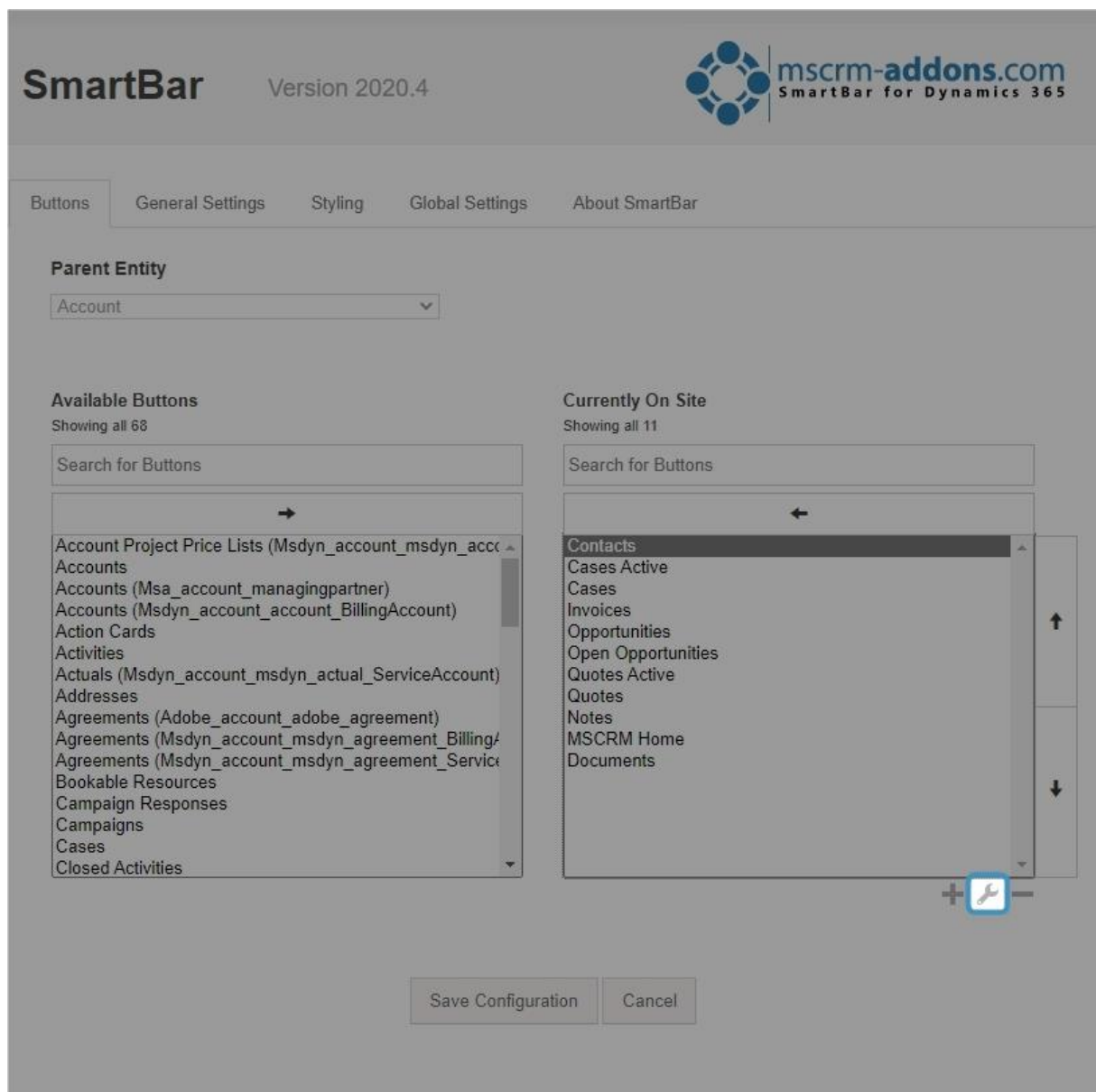


Figure 63: Edit Custom button

In the so opened window, the settings of the button can be customized.

Figure 64: Edit Custom button

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5.10 How to delete Custom Buttons

To delete a custom button, simply select a custom button from the Currently on-Site row. Next, click on the **Minus** button in order to remove the button from the list.

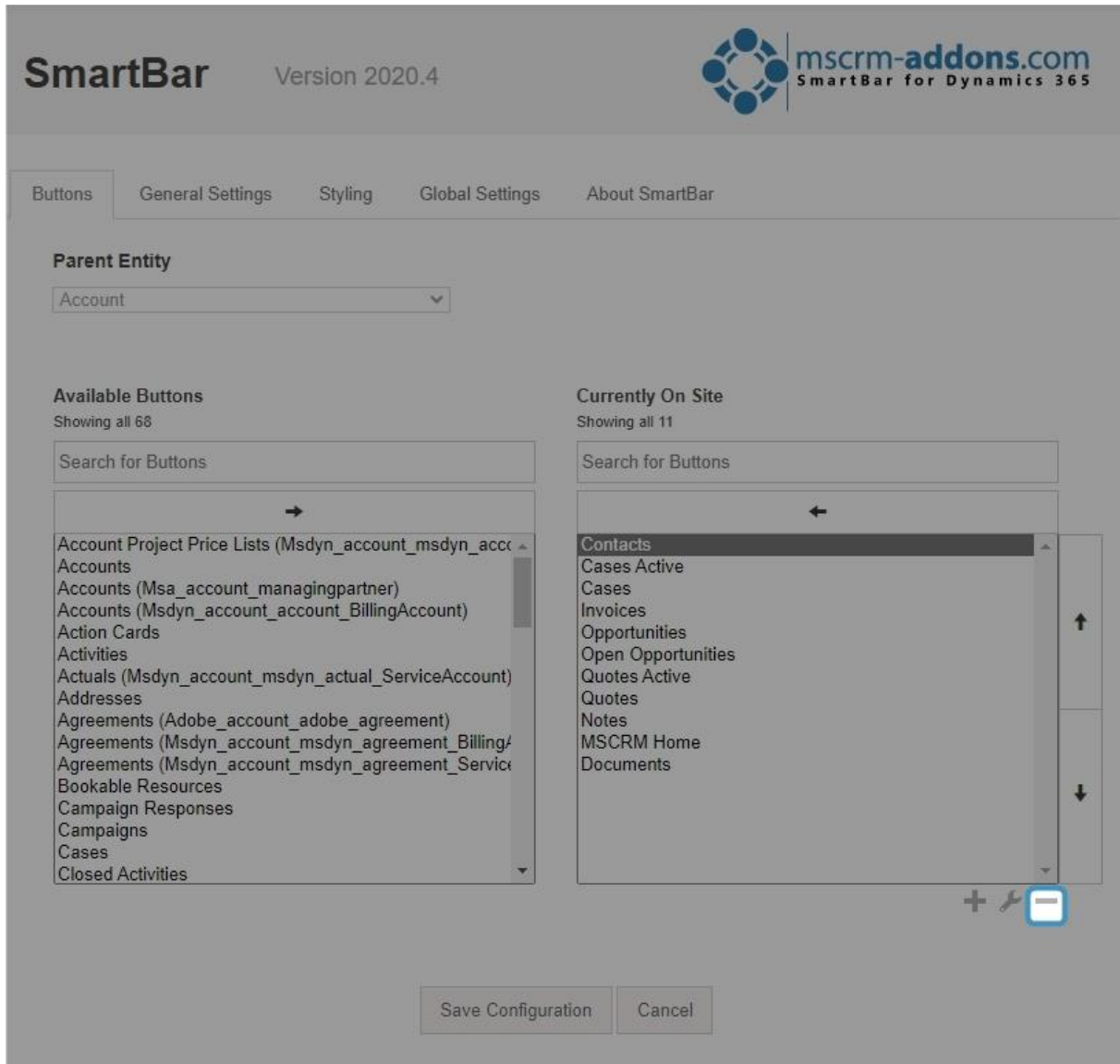


Figure 65: Delete Custom Button

Please note: Standard Entity-Buttons still exist in the list if you remove them from the SmartBar. If you delete custom buttons, they will be deleted permanently.

5.11 How to configure customized Icons

There are two possible options, if you want to configure an icon. This chapter explains how to configure a customized icon.

In Dynamics 365 navigate to Settings > Customizations > Customize the System

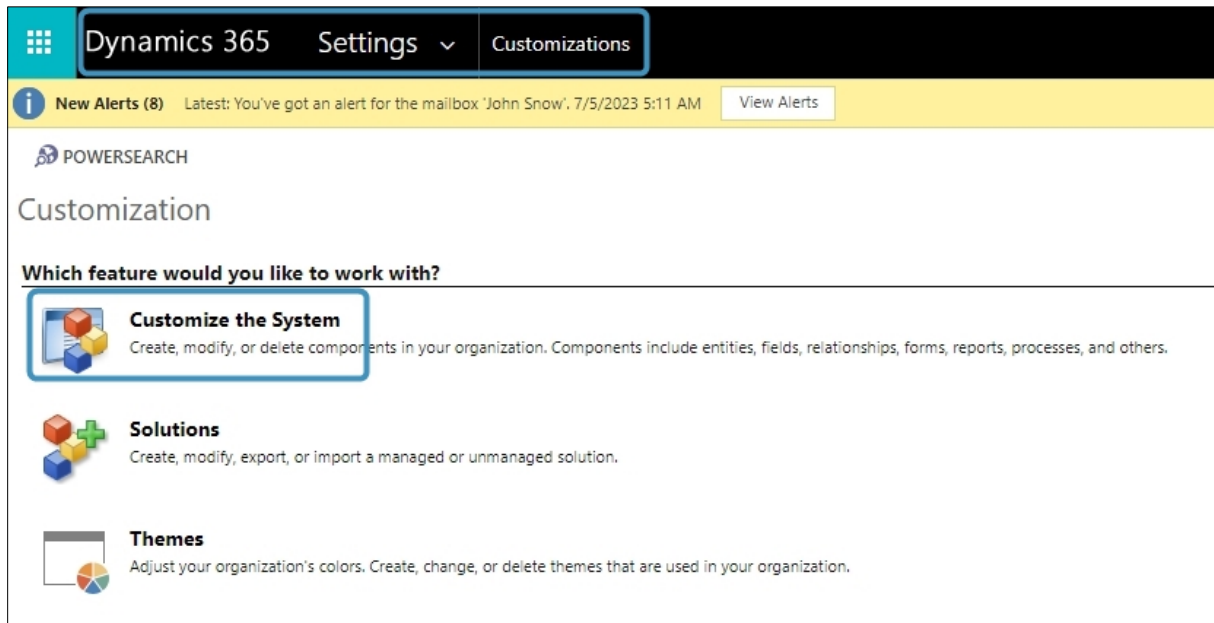


Figure 66: Dynamics 365 > Customize > Customize the System

Select **1 Web Resource** as Component Type and Click on **2 New**.

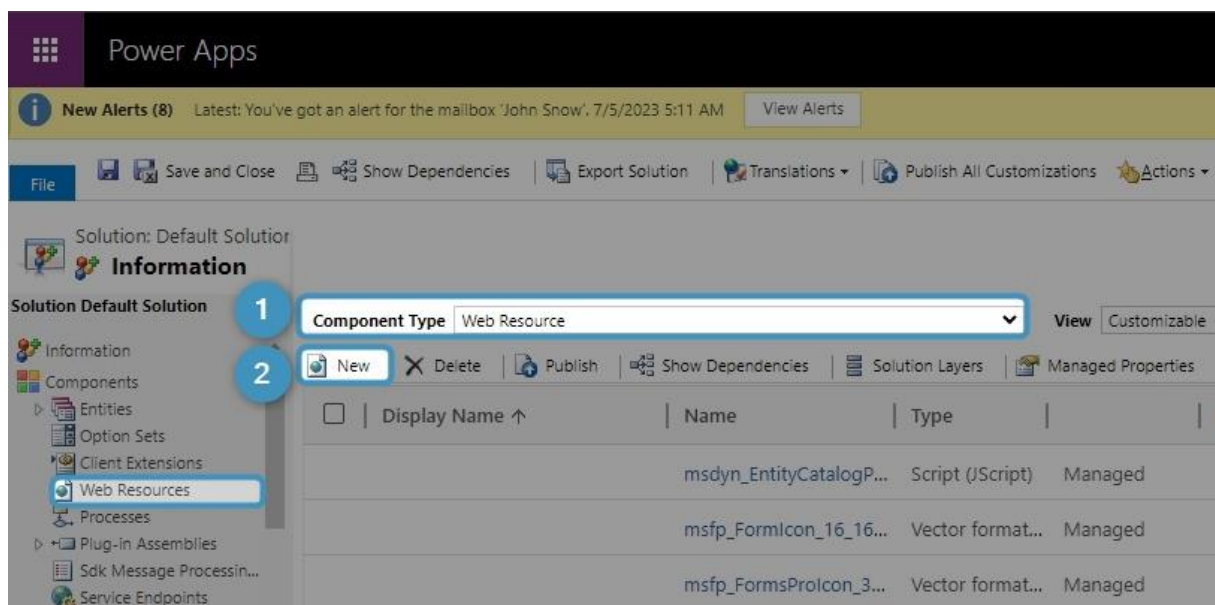


Figure 67: Select the Component Type

In the next window, you can customize your icon. Please find a detailed description of the fields below.

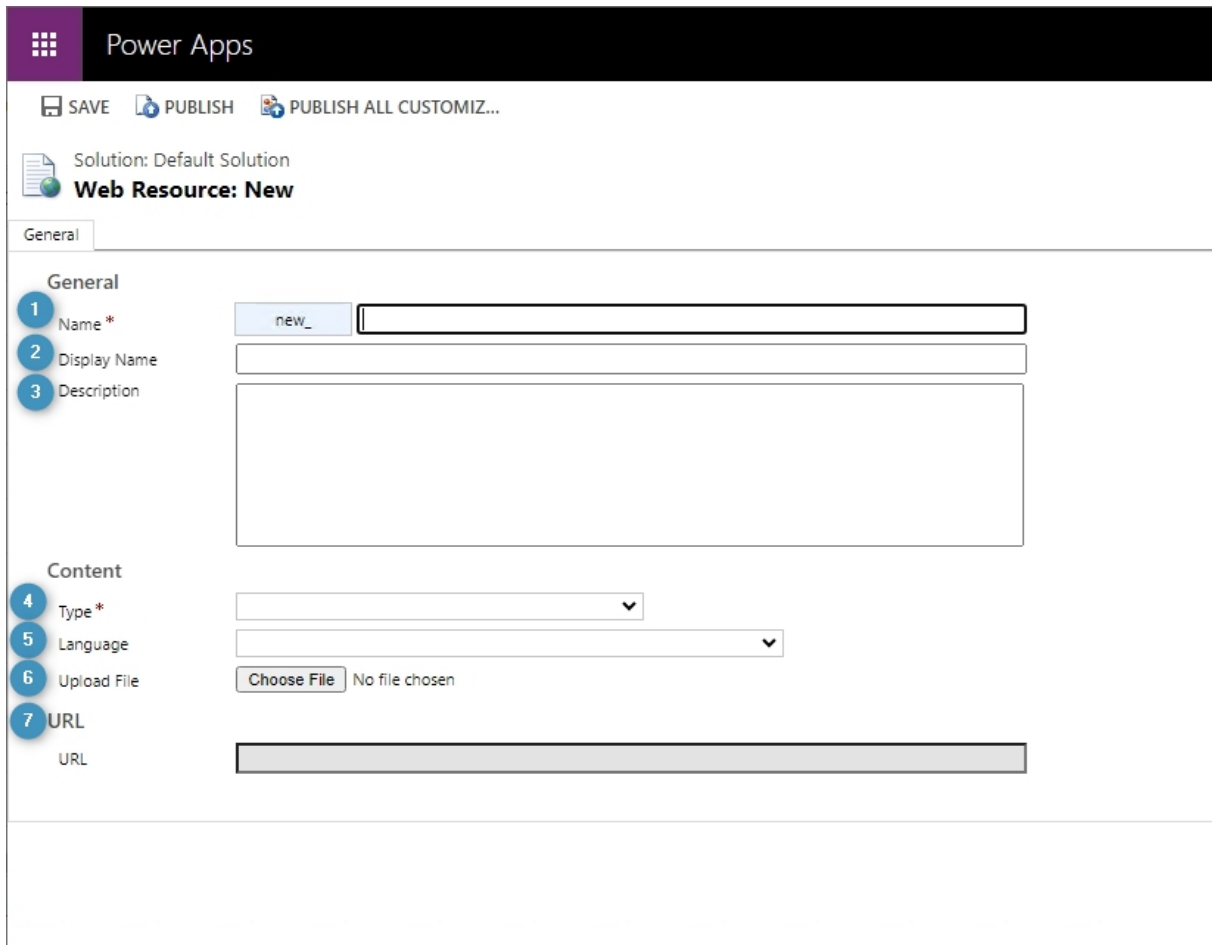


Figure 68: Customize Icon

- 1 **Name:** Please fill in a name for the button.
- 2 **Display Name:** Please type in a display name for the new button to be shown in the web resource overview.
- 3 **Description:** Please type in a short description here.
- 4 **Type:** Select a file-type from the drop-down-list.
- 5 **Language:** Please select a language by using the drop-down arrow.
- 6 **Upload File:** Please click on the **Browse** button in order to upload a file.
- 7 **URL:** The URL is generated automatically after you have saved your changes.

Please note: Fields with * are mandatory fields and must be completed in order to proceed.

Click on the **Save** button and afterwards, click on the **Publish** button to add your icon to the web resource overview. Your icon will be displayed in the Look Up Record-window, and you can use it anytime you want.

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7. Contact

For further technical questions, please visit our [blog](#) or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



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