SmartBar
for MS CRM 2013

Version 2013.26 - April 2014

Installation and User Guide
(How to install/uninstall and use SmartBar for MS CRM 2013)

Table of Contents

1 Common Information

Before installing **SmartBar for MS CRM 2013**, please read this document and follow the steps carefully.

1.1 Intended Audience

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

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:
Follow each of the following steps, to complete the installation:

1. Installing SmartBar for MS CRM 2013
2. SmartBar Configuration

2 SmartBar for Microsoft Dynamics CRM 2013 Prerequisites

Supported web browsers and versions

- Internet Explorer 9 and higher
- Firefox
- Chrome

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

- On-premises editions of Microsoft Dynamics CRM Server 2013
- Microsoft Dynamics CRM Online

Any one of the following operating systems is required:

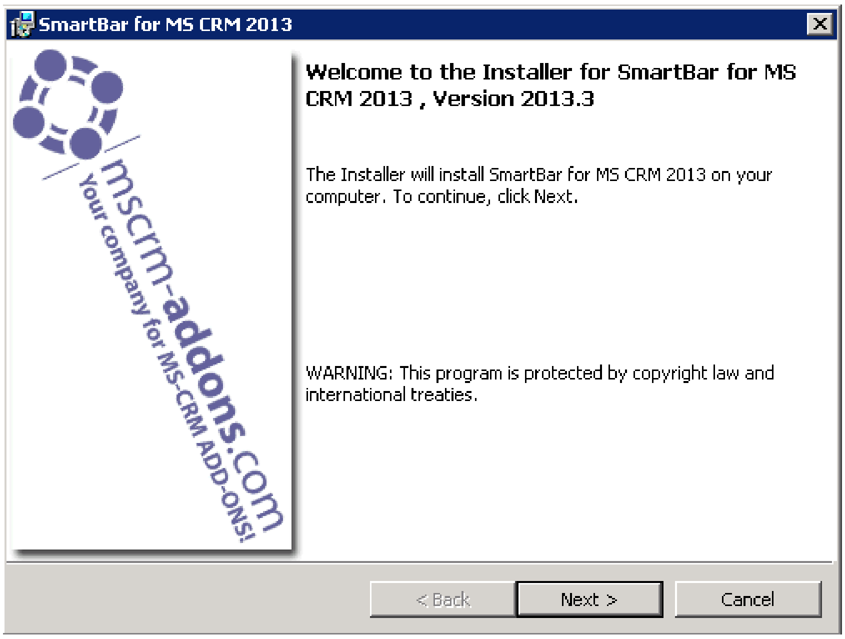
- Windows 8 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Vista SP2 (6-bit and 32-bit versions)
- Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

3 Installation

You could install SmartBar for Microsoft Dynamics CRM 2013 on any supported operating system which is able to connect to your CRM 2013 Server.

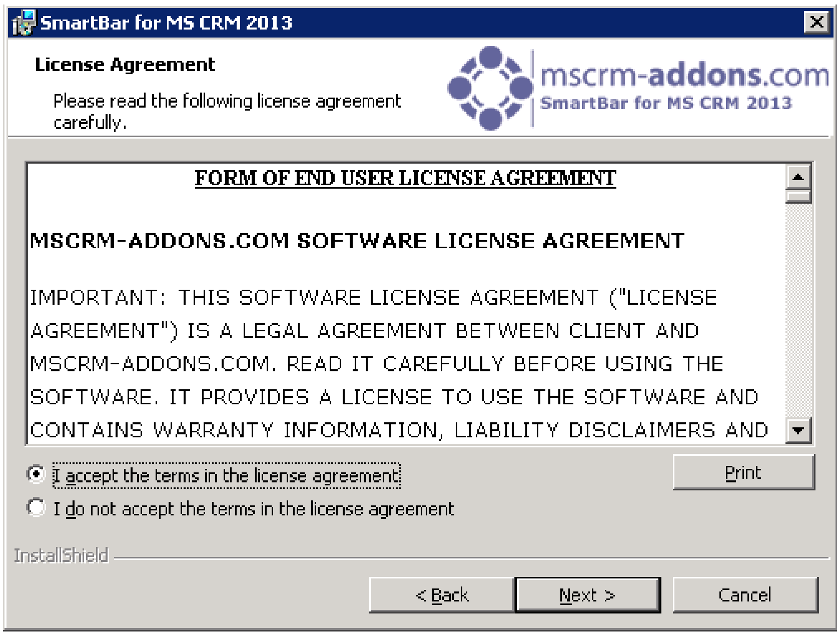
3.1 Introduction

Run the SmartBar for MS CRM 2013 Setup file.
The following window appears:



Click [Next] to proceed

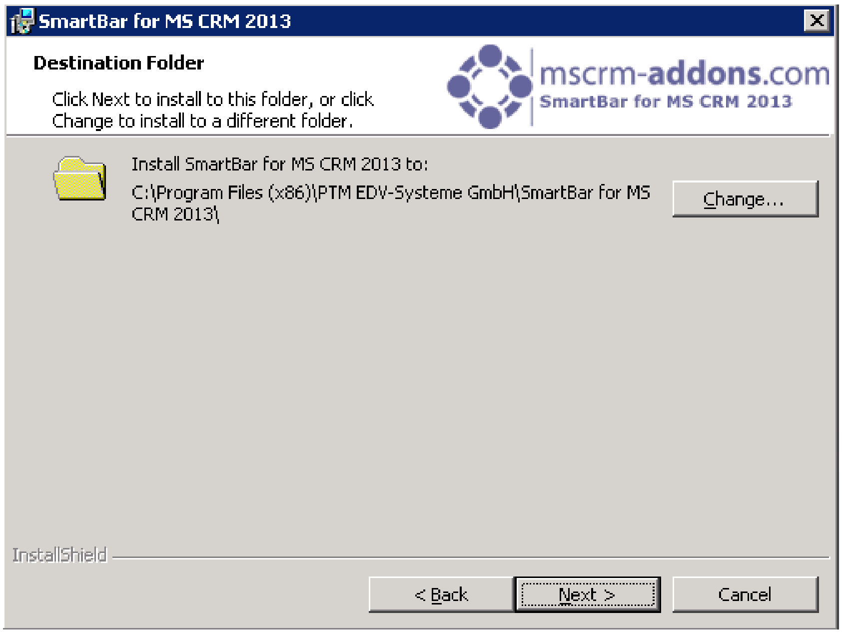
3.1.1 EULA



Accept the terms in the license agreement and click [Next] to proceed.

3.1.2 Folder Selection

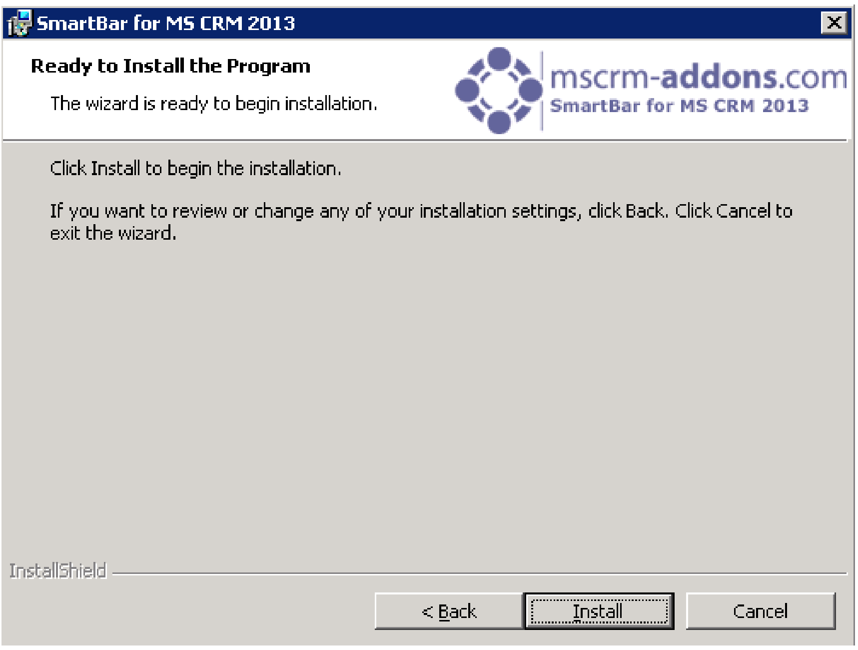
Here it’s possible to set the installation directory.



Click [Change] to specify a different installation path.
Click [Next] to proceed.

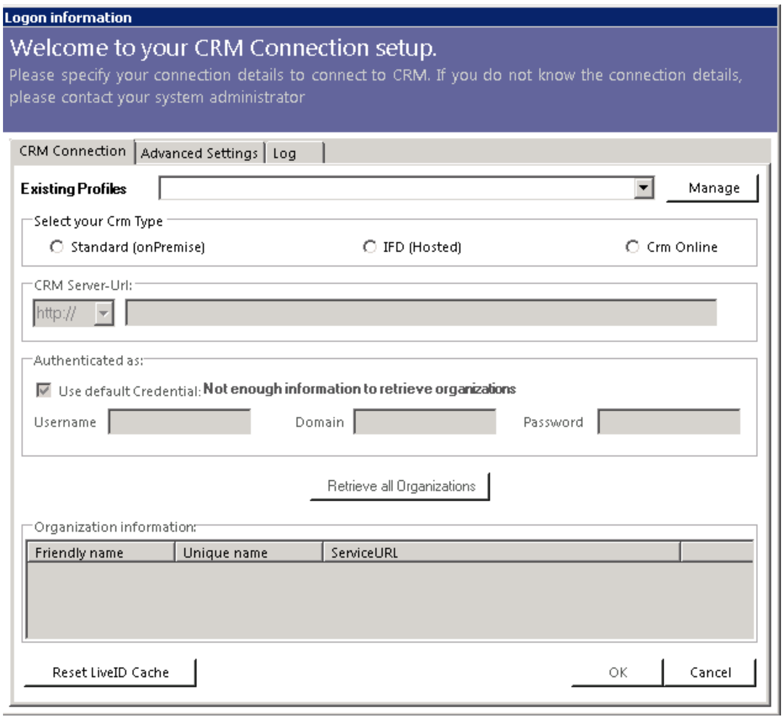
3.1.3 Confirm Installation

To start the installation, click on [Install].
To change the settings, click on [Back].

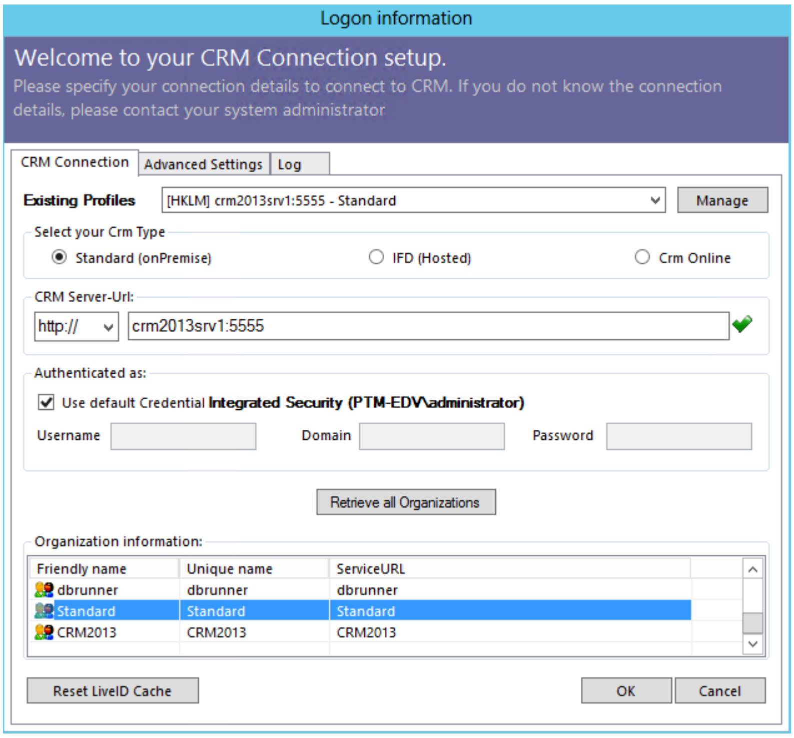


3.1.4 Configure CRM Server

To configure your CRM Server, select your Profile or create a new one and select your CRM Server type:



Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. As soon as the organizations are retrieved press the [OK]-button. (See screenshot below)

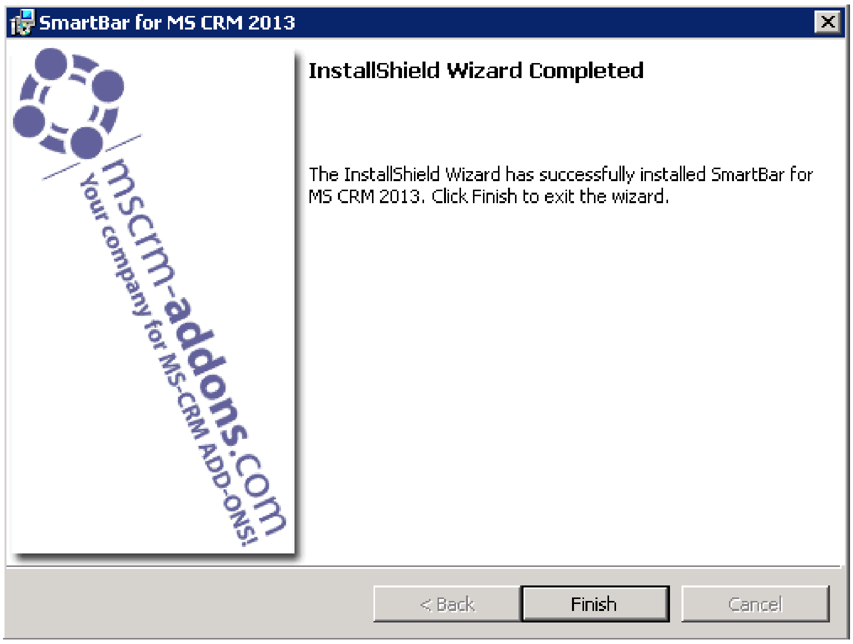


3.1.5 Security Roles

Click on [Yes] to apply “mscrm-addons general security role” to all users. Press [No] so skip this step.

ATTENTION: Bypassing this step requires you either to manually assign the roles to all users or to include the required rights into your existing security roles!

3.1.6 Finish

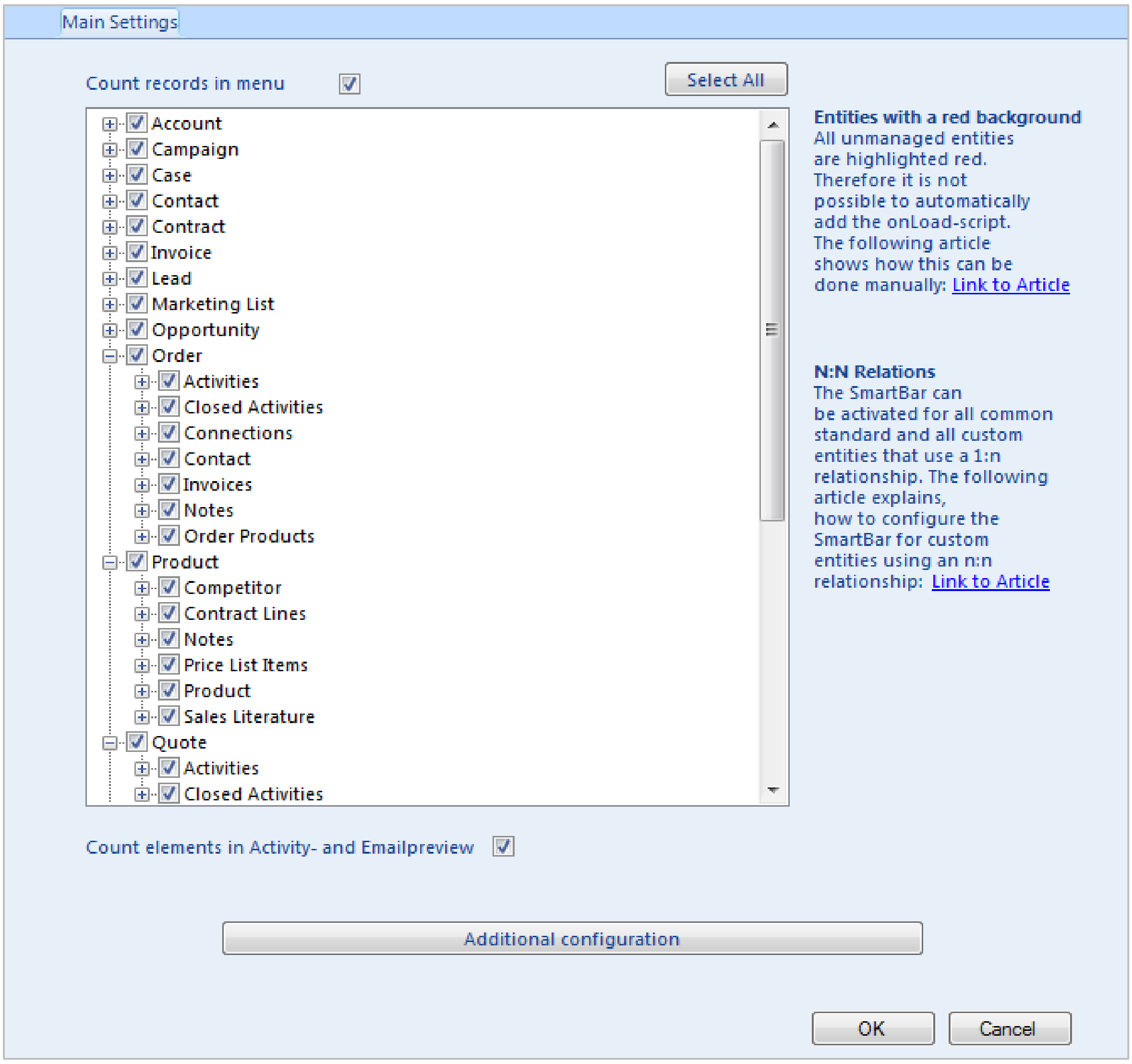


Click on [Finish] to finish the installation.

4 SmartBar Server Configuration

IMPORTANT: The only purpose of this configuration is to activate and configure the counting of related records in the CRM menu.

Once finishing installation the "SmartBar Server Config" appears:



Count records in menu: Activate this checkbox to enable counting of related records in the CRM menu.

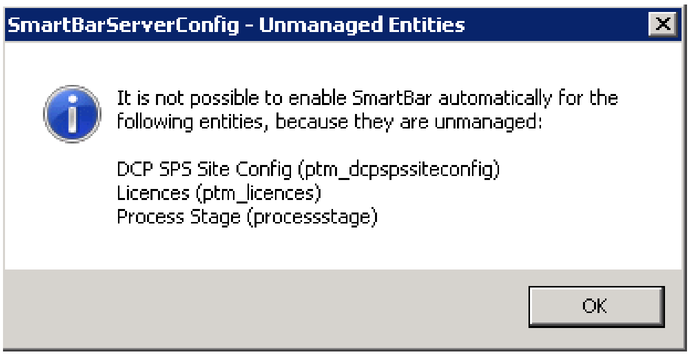
Select All: Click this button to select all Entities to be used for counting.

Count elements in Activity- and Emailpreview: Activate this checkbox to use SmartBar with ActivityTools for MS CRM 2013. One of our other addons, to simplify the CRM internal use of activities. It provides the possibility to define email-presets and Outlook-like visualization options.

Entities with a red background: All unmanaged entities are highlighted in 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

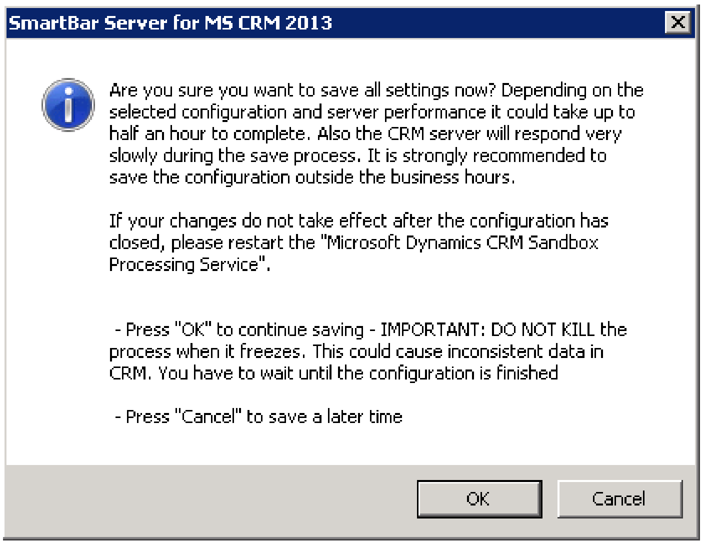
N:N Relations: The SmartBar can be activated for all common standard and all custom entities that use a 1:n relationship. The following article explains, how to configure the SmartBar for custom entities using a n:n relationship. [Link to Article.](#) (Coming soon!)

By saving the changes with enabling the unmanaged entities, following window appears:



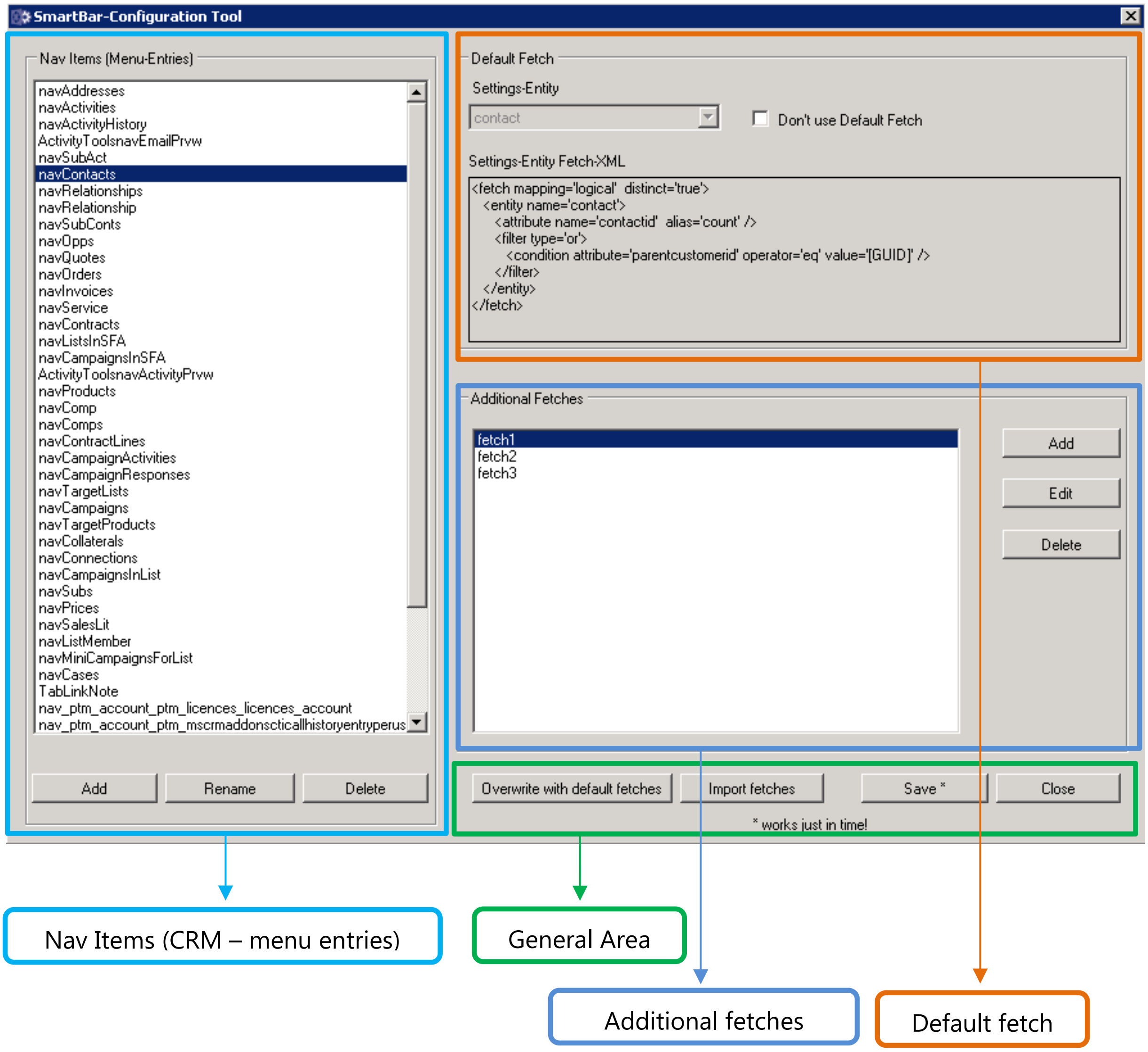
Click on [OK] to finish your configuration.

If you save your settings following window appears:



Click [OK] to save your settings.

Additional Configuration



SmartBar can be activated for all common standard and all custom entities that use a 1:N relationship. All custom entities using a N:N-relationships will have to be configured manually. This tool was developed for exactly that reason. Our tool can also be used to change existing SmartBar-settings of all your entities.

Important: Before you can use the tool, at least one entity has to be checked and the SmartBar Server Config has to be saved once.

Nav Items (CRM – menu entries)

This area manages the navigation items (menu items in CRM). 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".

Buttons:

- Add: Adds a new entry to the list.
- Rename: Used to modify existing entries.
- Delete: Deletes the selected entry.

Important: By clicking these buttons, actions are performed immediately without a warning window. However, the changes are not saved until the button "Save" in the "general area" is pressed.

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.

Additional fetches

These fetches, count all records which are not directly related to the entity (like recursive relations and so on). Here you can also add user-defined fetches.

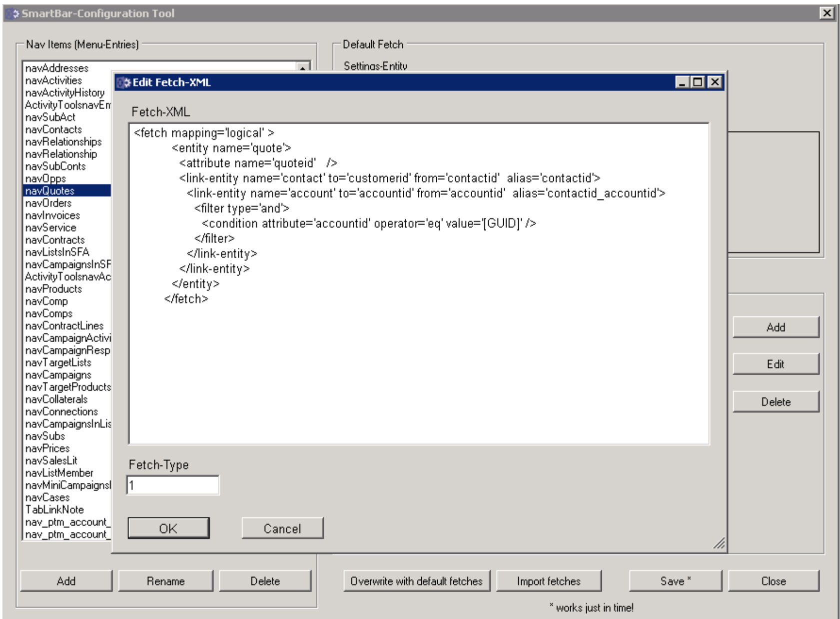
Buttons:

- Add: Opens a blank screen 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 underneath "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 click on the "ok"-button.
- Edit: Opens the selected fetch in a new window to be modified.
- Delete: Deletes the selected fetch.

Wrong fetches 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 and so on). But due to the fact that the text field includes "1" (entity-type-code for account) the fetch will be executed for the quote-navigation entry in account's menu bar.



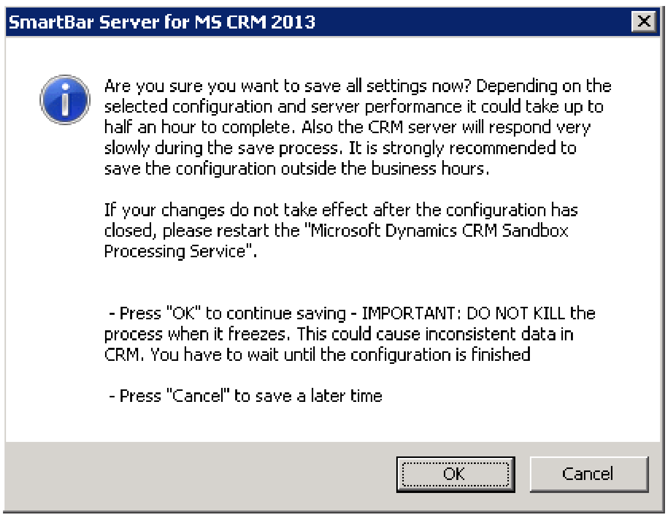
General Area

All buttons in this area are effective for the entire window.

Buttons:

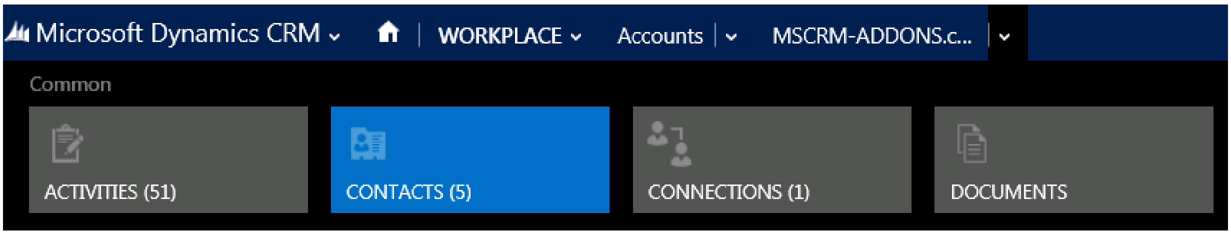
- „Overwrite with default fetches“: Default Values will be restored. You have the chance to save the current configuration before it is overwritten.
- “Import fetches”: imports an optional NavigationItems-XML-file (settings file) and overwrites the current one.
- “Save”: Saves all settings of the entire Configuration Tool.
- “Close”: Closes the configuration tool (after confirmation).

If you click on [Save] following window appears:



Click on [OK] to confirm your settings.

As a result, the number of related records is also shown on the CRM navigation bar in brackets.



5 SmartBar for MS CRM 2013 – General Information

Navigation
SmartBar for MS CRM 2013 allows a simple forth and back navigation, as it persists when switching within standard and custom CRM entities and related records.

SmartBar Buttons
Within the compact overview "buttons" represent the related records. Additionally, a number next to the "button" shows the amount of related records per entity. The number is also shown in the entities command bar.

SmartBar counts and displays related records. By clicking the dropdown-button, all related records can be opened in the current or in an extra window.

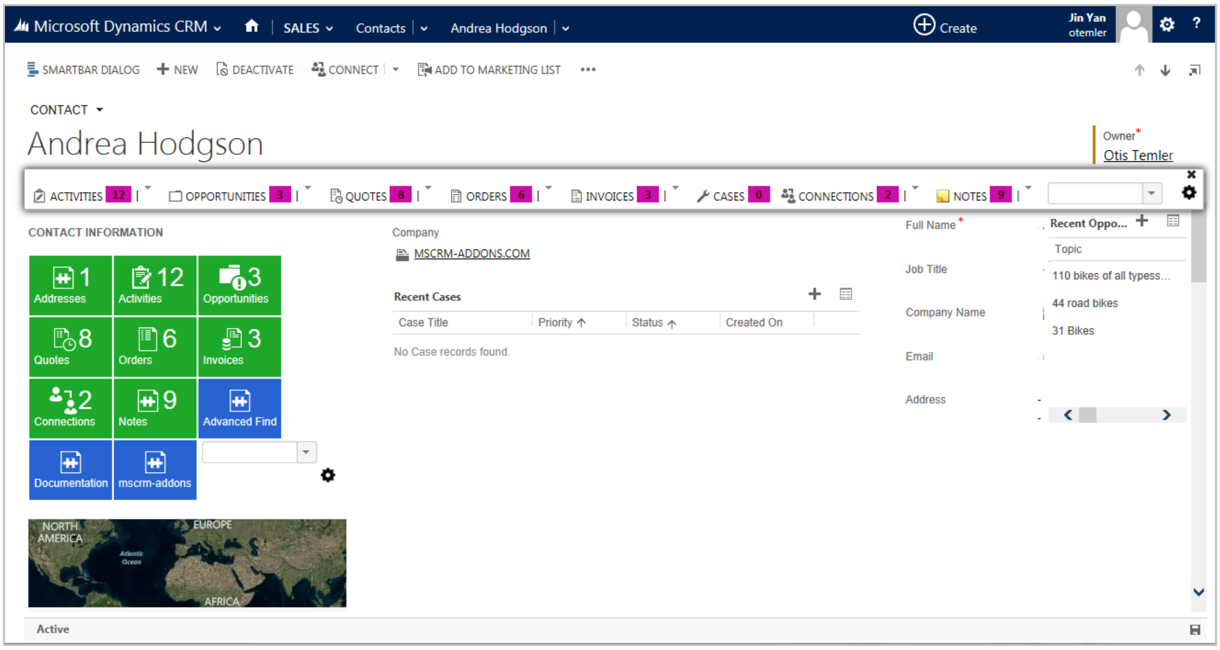
Additional Settings
SmartBar can be embedded on a preferred place on any CRM-form. Additional settings allow to display SmartBar in a vertical or horizontal view. SmartBar "buttons" can be added or deleted from the bar and users can rearrange the order via drag & drop according to their needs.

Additional Features
Users can easily add Custom buttons to the SmartBar. With the integrated search field, Entities and SiteMap entries can be opened directly from the SmartBar. This enables a quick and easy navigation to every Entity and SiteMap entry from the SmartBar. The SmartBar can also be displayed in a Standard or Metro Style.

5.1 SmartBar for MS CRM 2013 – Introduction

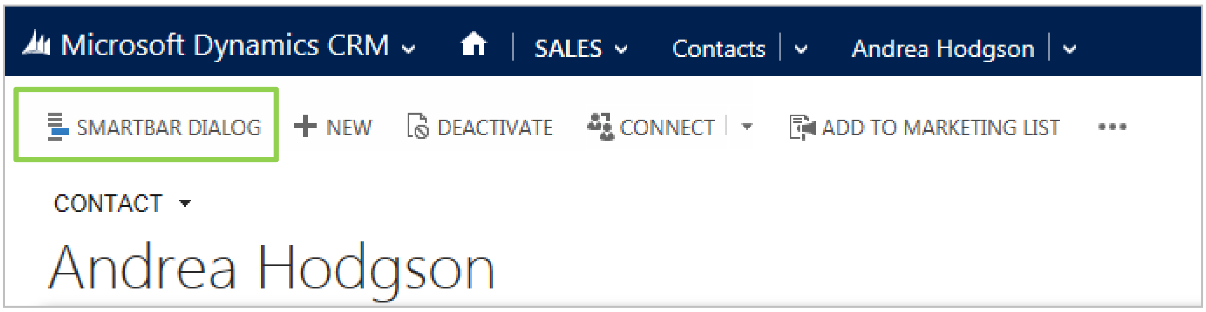
SmartBar for MS CRM 2013 can be displayed twice at the same time on any CRM-entity:

- One way is to *display the SmartBar on a preferred place on any CRM-form*. For details please read chapter 6 How to embed SmartBar in the entity form.
- Another option is to *open the SmartBar Dialog*. The SmartBar Dialog is displayed at the top of the current window and can be moved up and down as well as from left to right if the vertical display option is set. (See next screenshot)

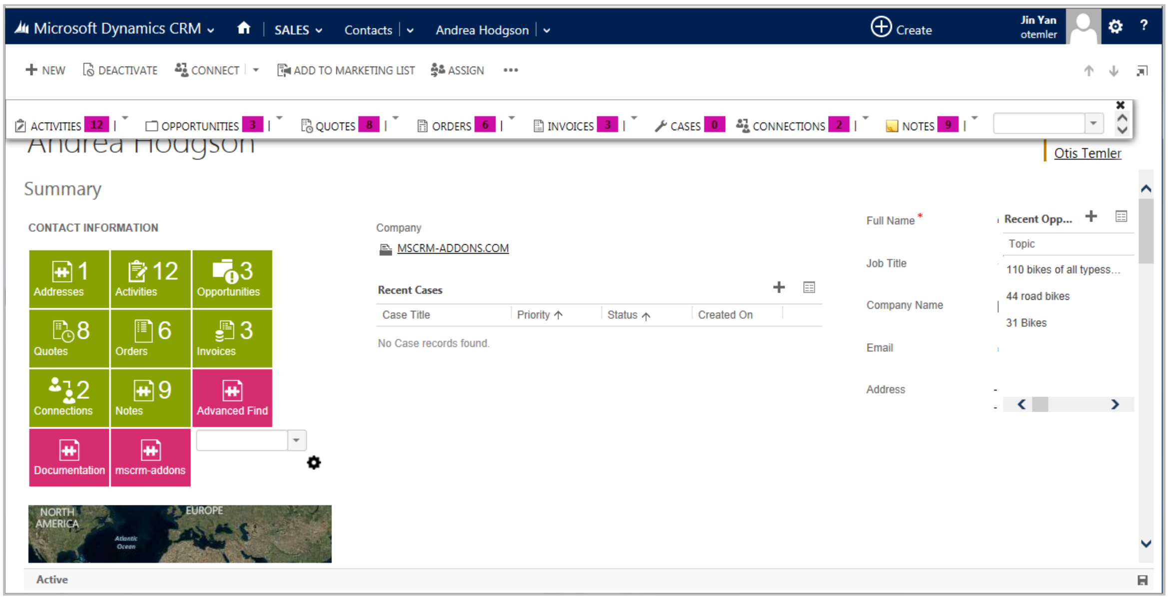


Show SmartBar Dialog

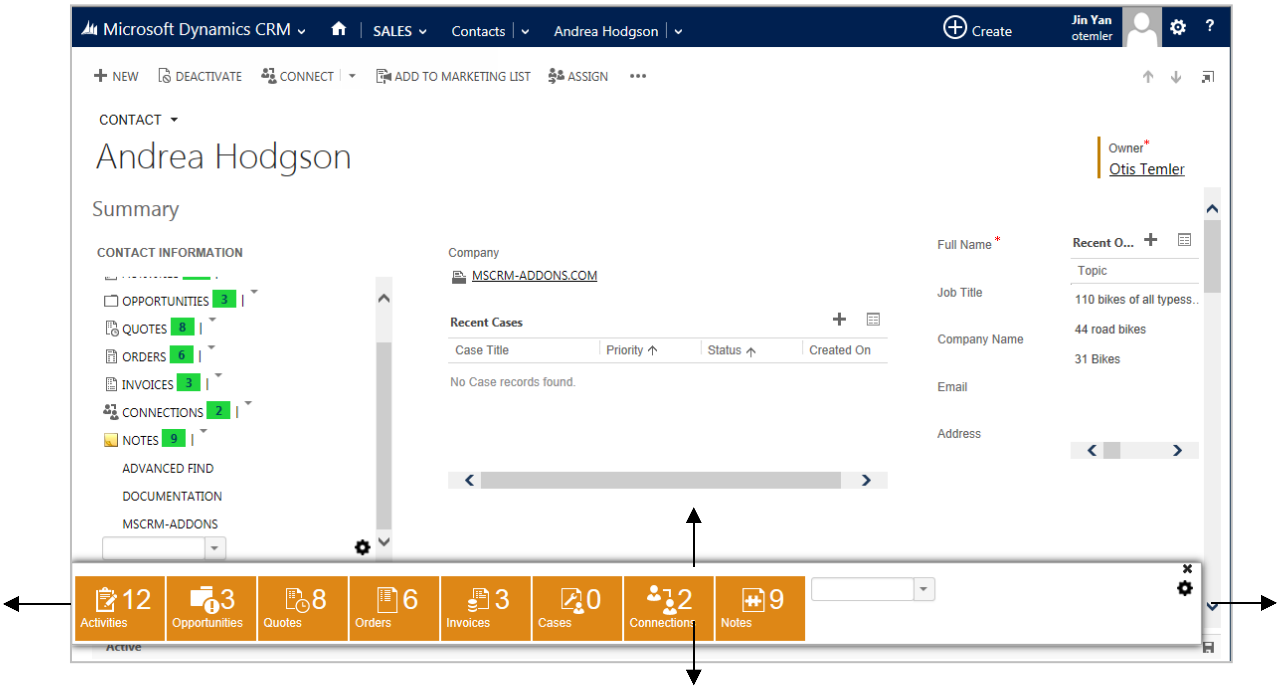
To access the SmartBar Dialog, open your CRM and open any entity. You can find the "SmartBar Dialog" at the top of the form. (See example screenshot below)



Once clicked, the *SmartBar Dialog* is activated and shown at the top of the current opened entity. (See next screenshot)



With a click on the *SmartBar Dialog*, users can move it up and down. Depending on your SmartBar Dialog width, the Dialog can also be moved from left to right. (See next screenshot)



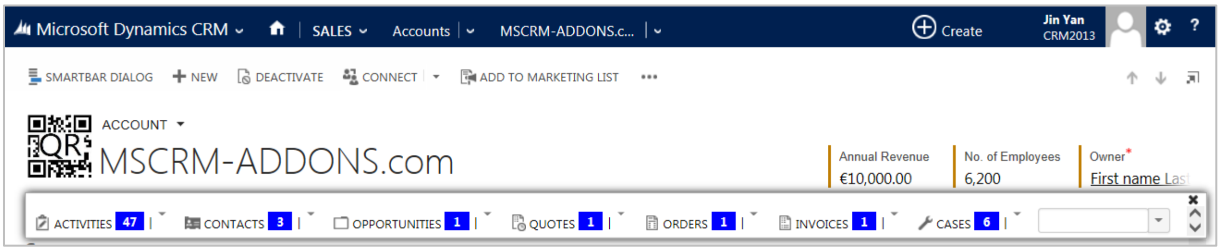
The *SmartBar* as well as the *SmartBar Dialog* can also be shown in a vertical view. This can be done in the General Settings Tab in the Settings area. We recommend displaying the *SmartBar Dialog* view as a horizontal menu.

Additional Settings allow to display the SmartBar in a Standard or Metro Style and to change the button color. Besides SmartBar allows creating, managing and deleting custom buttons.

5.2 The SmartBar Buttons

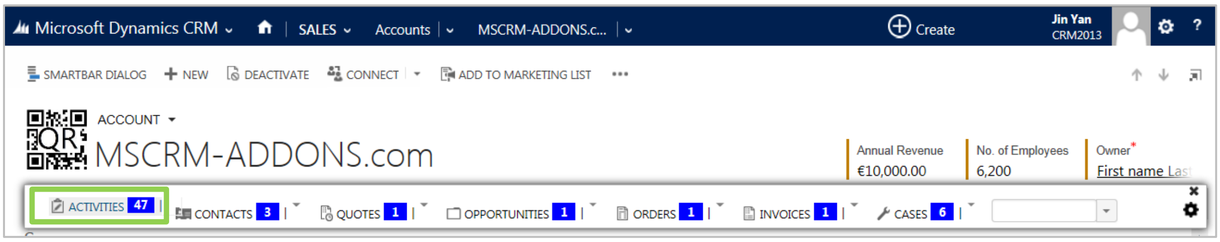
General

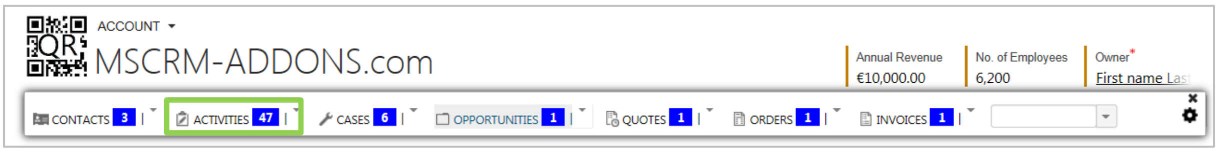
The SmartBar buttons e.g. contacts, opportunities, quotes, cases etc… represent the related records according to the initially opened one. (Screenshot below shows the SmartBar in Standard Style).



Drag & Drop

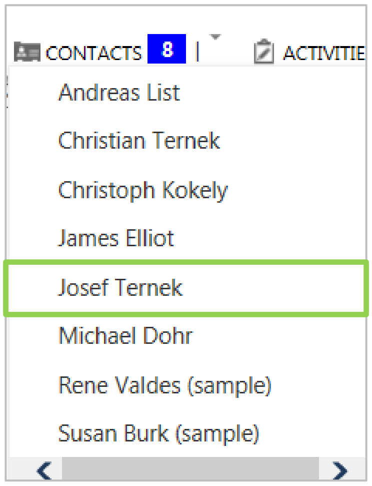
With drag & drop, users can rearrange the order of the buttons according to their needs. This function has to be activated in the Settings area. For more information please read chapter 5.2.1 SmartBar Buttons- Settings. (See next screenshots)





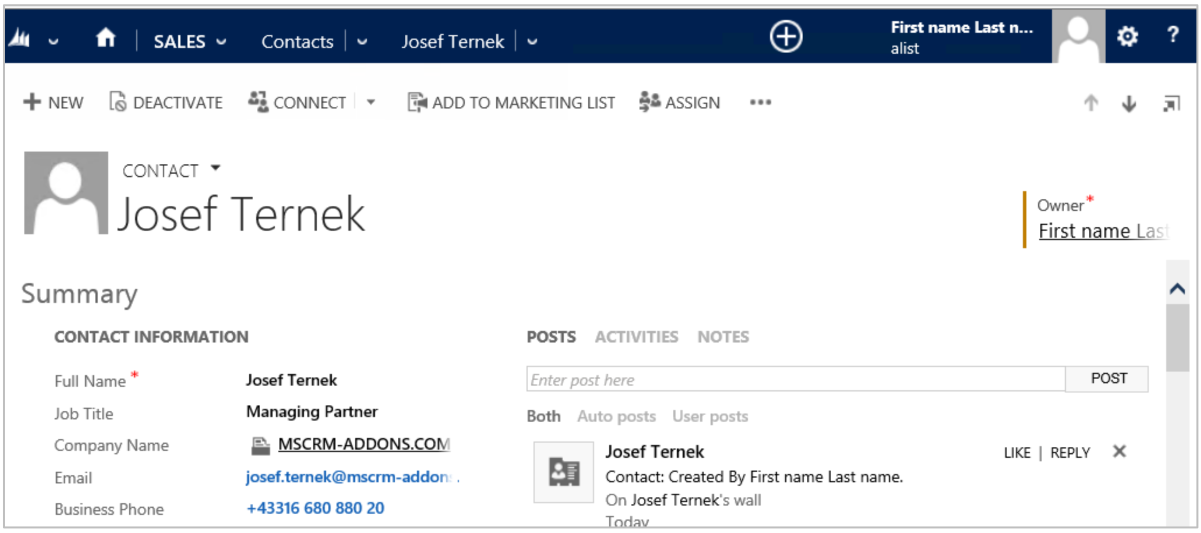
SmartBar buttons can also be added ore removed from the bar. This can be done in the Settings. For more information please read chapter 7.2 SmartBar General Settings.

Related entities



The number next to the button shows the amount of the related record(s) per entity. It counts and displays the number of e.g. contacts, opportunities, quotes, orders etc. related to the opened record. (See screenshot on the left).

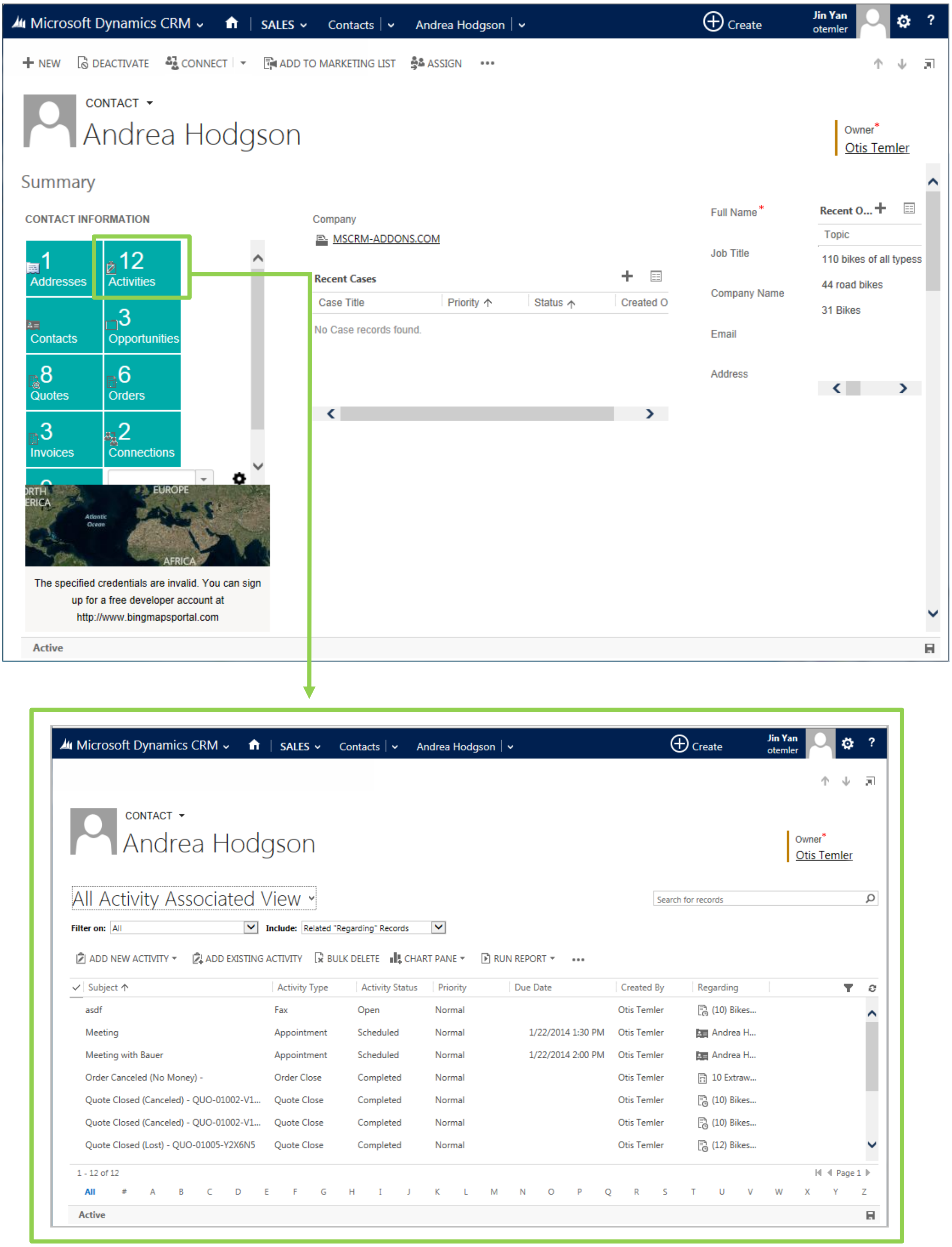
With a click on the drop-down-button next to the number (only available for Standard Style) users get a list of the related records to choose from. With a click on the record itself it can be opened in the current or in an extra window. (See screenshot below).



The drop-down-button is not available if SmartBar is displayed in Metro Style. With a click on a related entity CRM will open the entity directly in an extra window. (See next chapter).

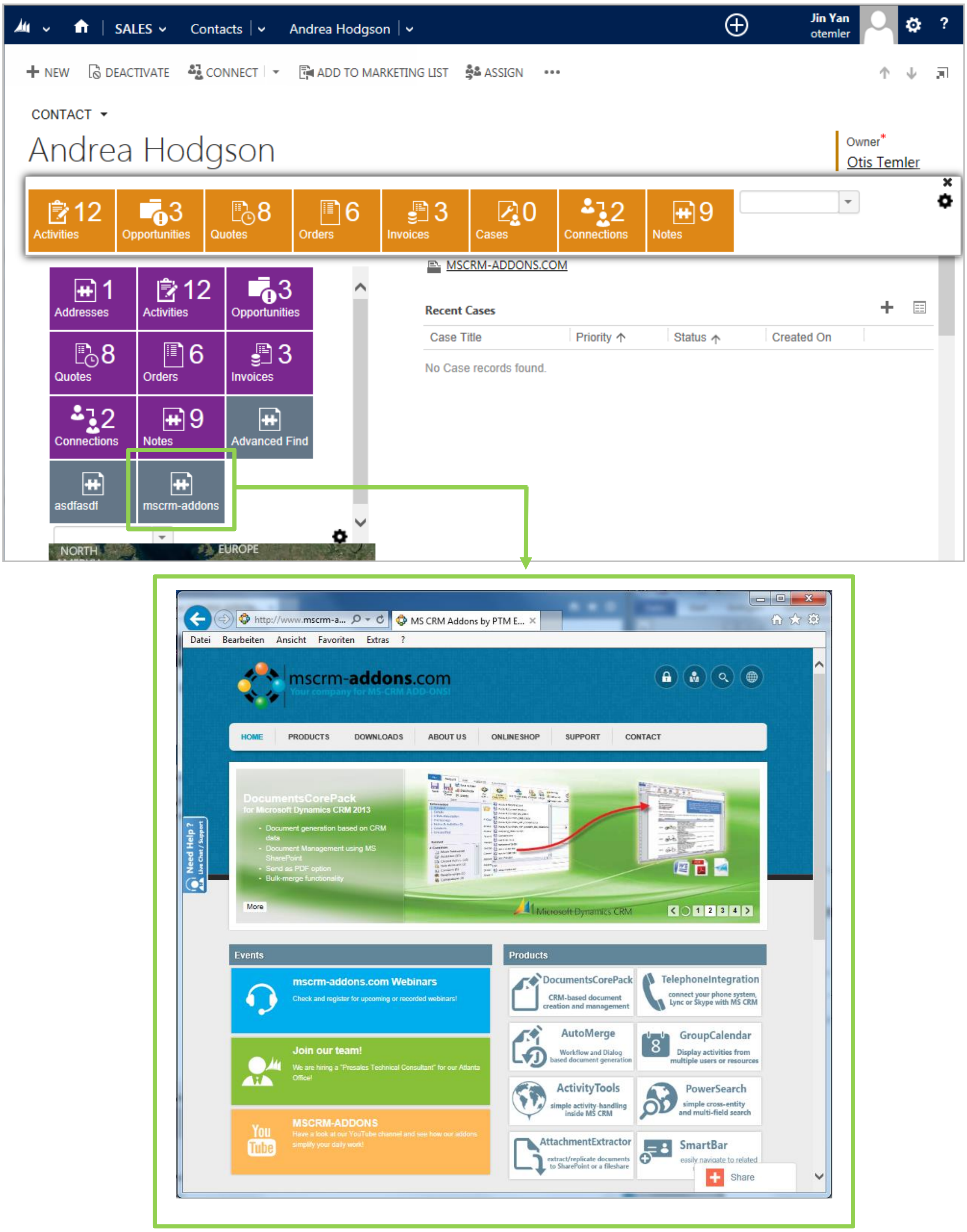
5.3 Easy navigation & compact overview

The SmartBar persists when switching to related entities, enabling a simple back and forth navigation within MS CRM. Click on one of the listed entity, e.g. activity, to change to activities. (See screenshot below).



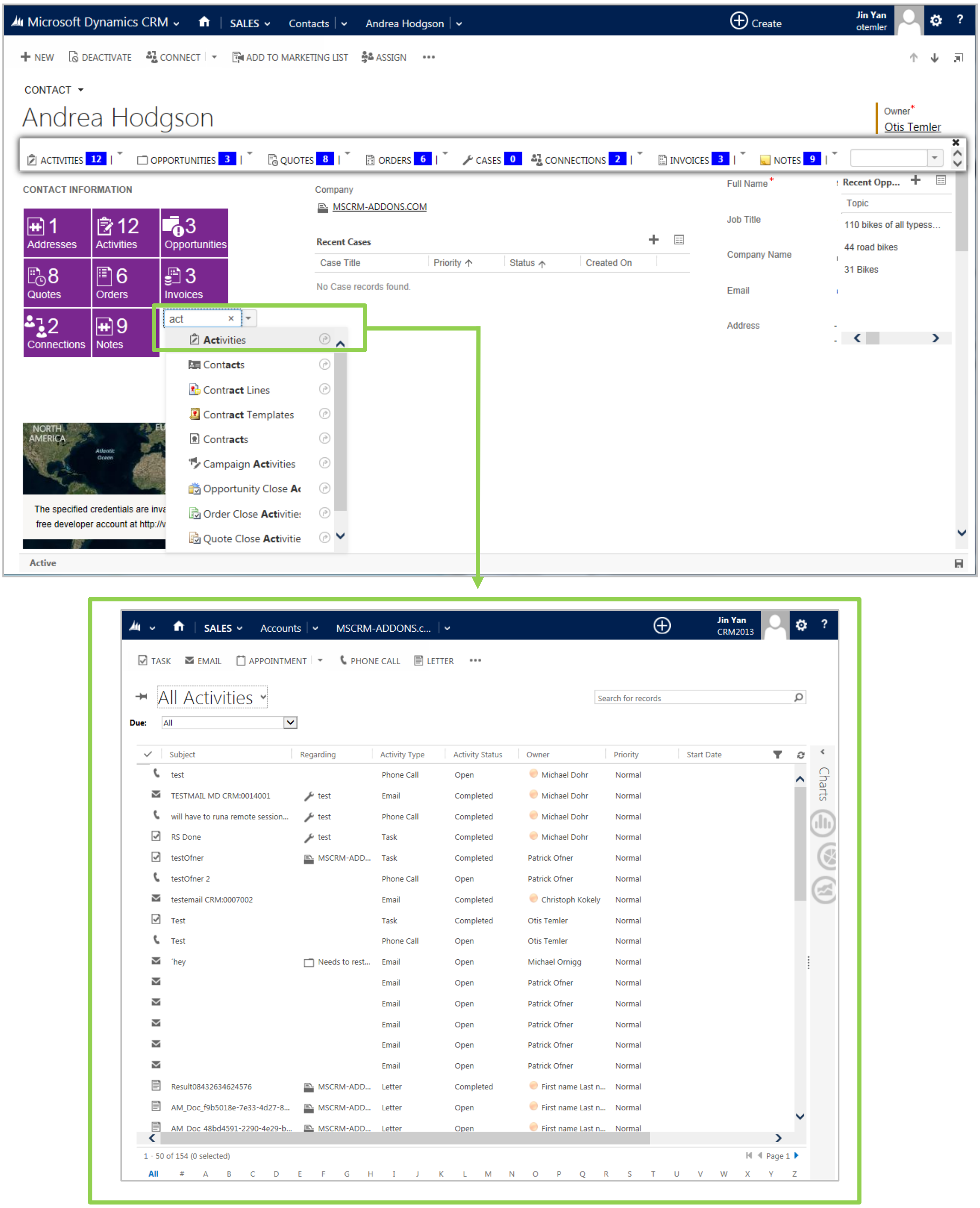
5.4 SmartBar: Custom Buttons

Additional settings allow to add custom buttons very easily. For a better overview, the buttons-color can be defined. For detailed information, please read chapter 7.1.1 SmartBar – How to add custom buttons.



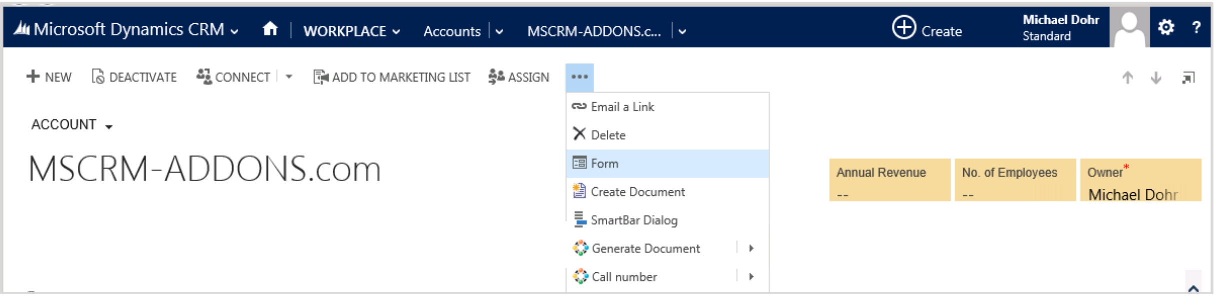
5.5 Open Entities and SiteMap entries directly from the SmartBar

The integrated SmartBar search field allows to search and open CRM Entities and SiteMap entries directly from the SmartBar. (See screenshot below). SmartBar also enables to add Custom Buttons which directly leads you to a specified Entity or SiteMap Entry. (For detailed information, please read chapter 7.1.1.2 Entity | SiteMap).

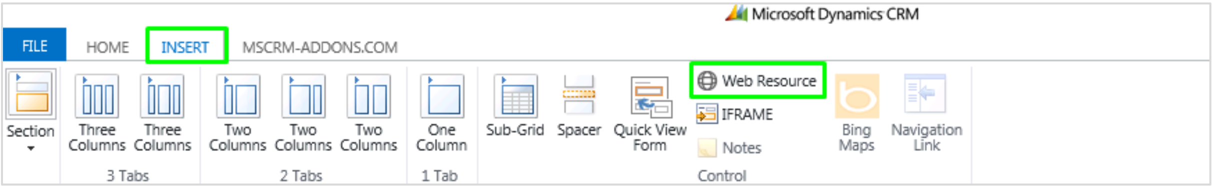


6. How to embed SmartBar in the entity form

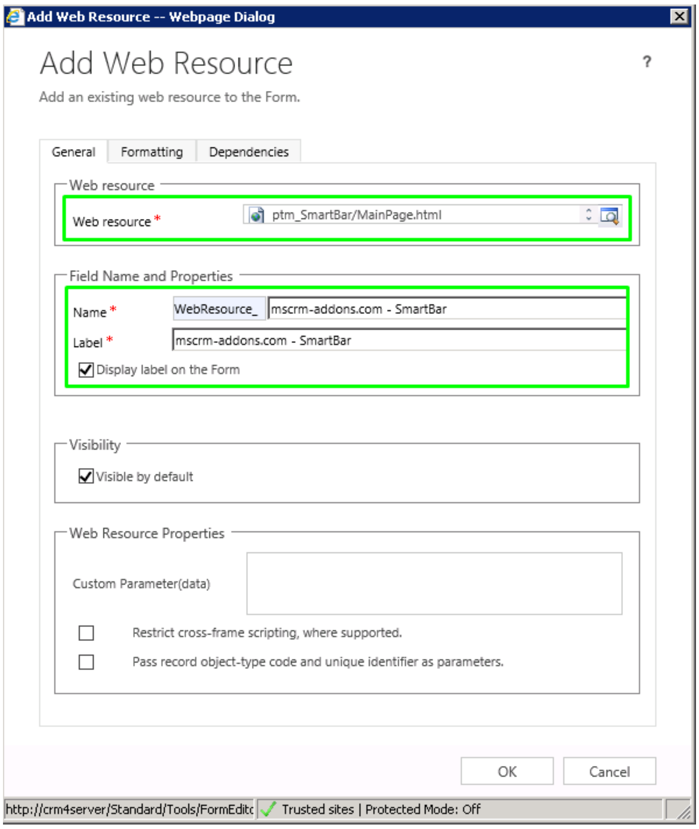
SmartBar for MS CRM 2013 can also be embedded into the entity form at a preferred place. This can be done via web resources. To do this, open the entity window for which you want to embed the SmartBar for and click on “more commands at the top” and choose “Form”.



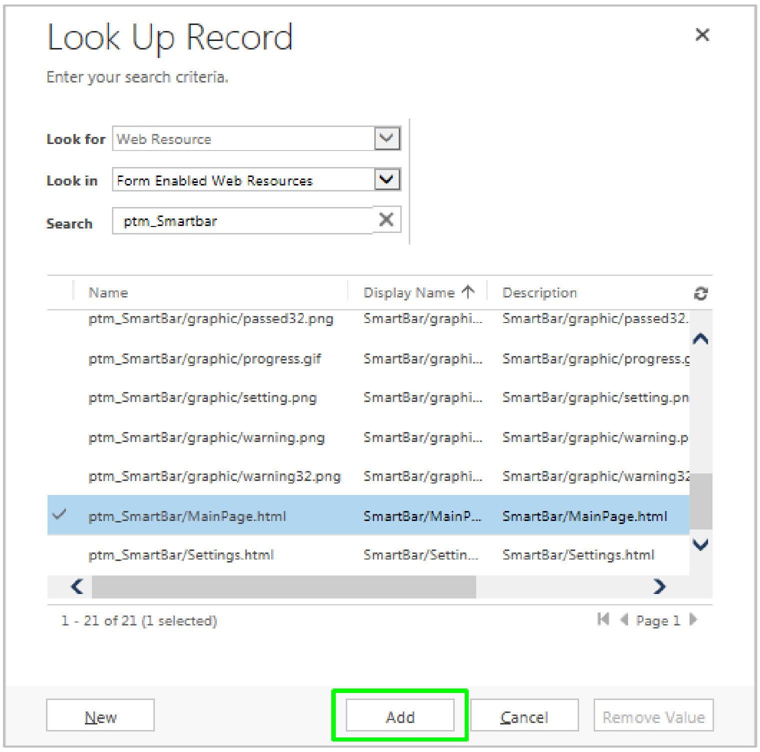
In the next window click on the “INSERT”-tab and choose “Web Resource”.



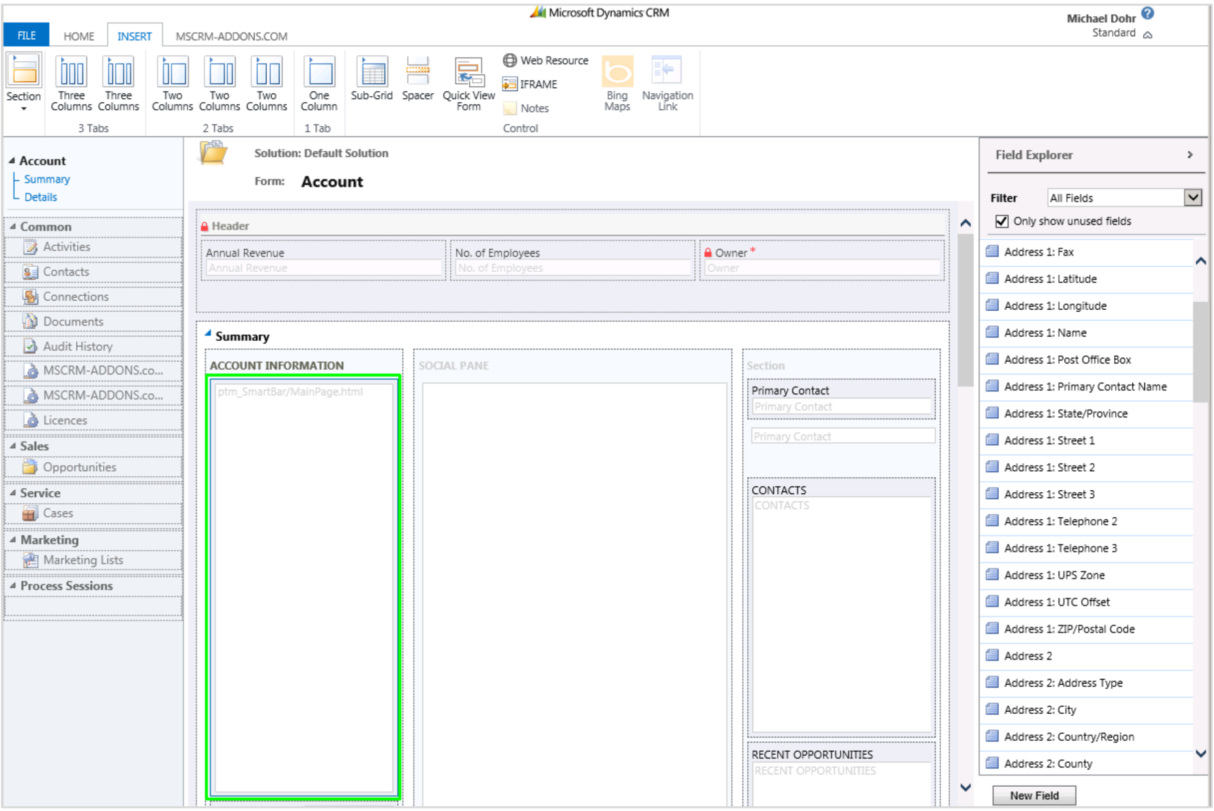
The “Add Web Resource – Webpage Dialog” opens:



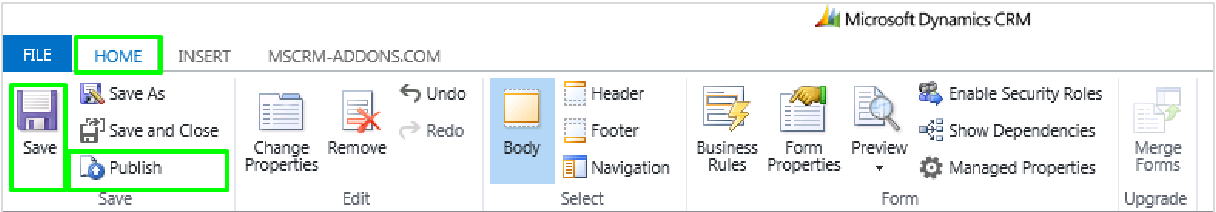
In the “Gernal”-tab look for “ptm_SmartBar/MainPage.html”. (See next screenshot)



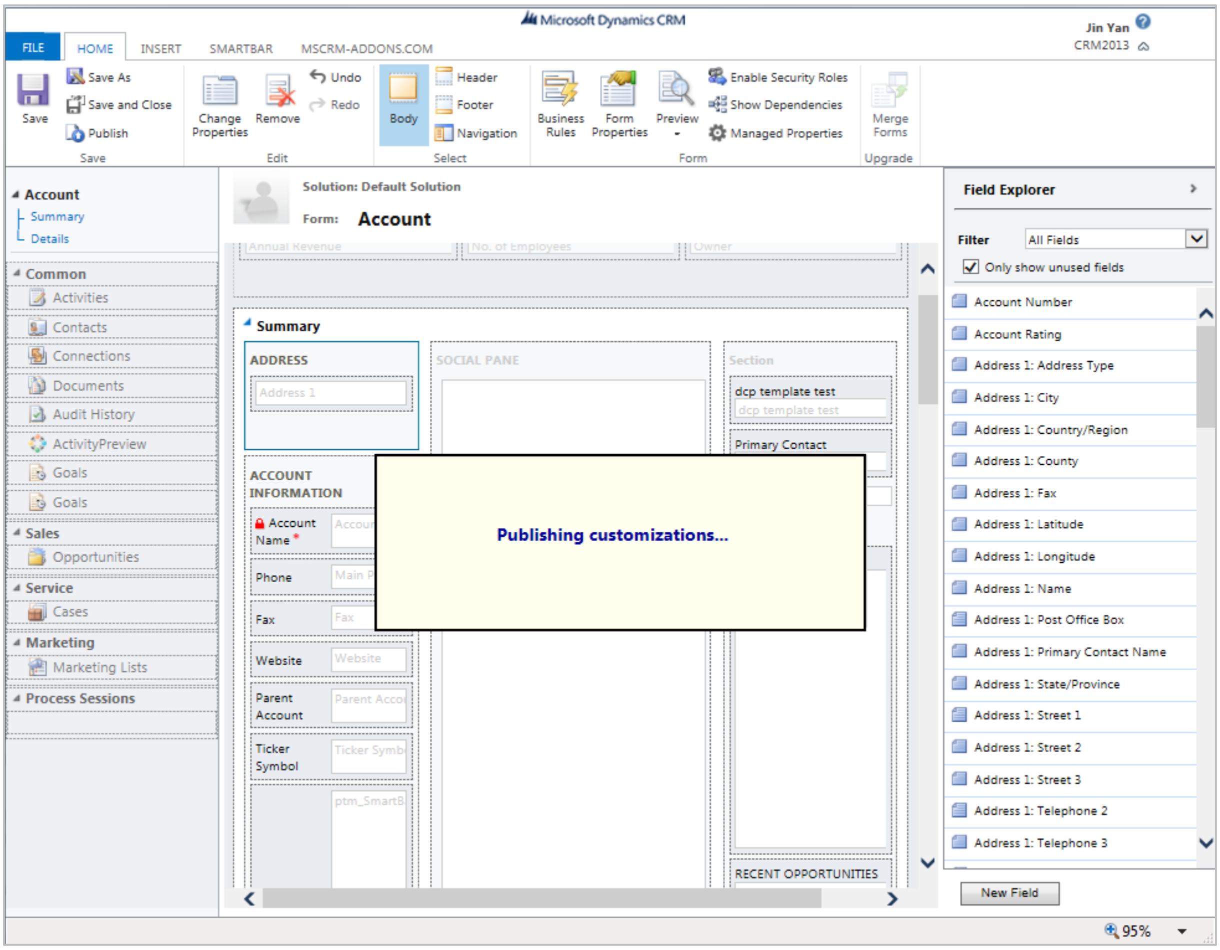
A name for the Web Resource has to be defined in order to continue e.g. SmartBar. On The “Add Web Resource”-window click on [OK] to save your settings. With drag & drop the new SmartBar Web Resource can be placed at the preferred place in the “Account” entity form. (See next screenshot)



Once finished, please go back to the "HOME"-tab and save and publish your settings. (See next screenshot).

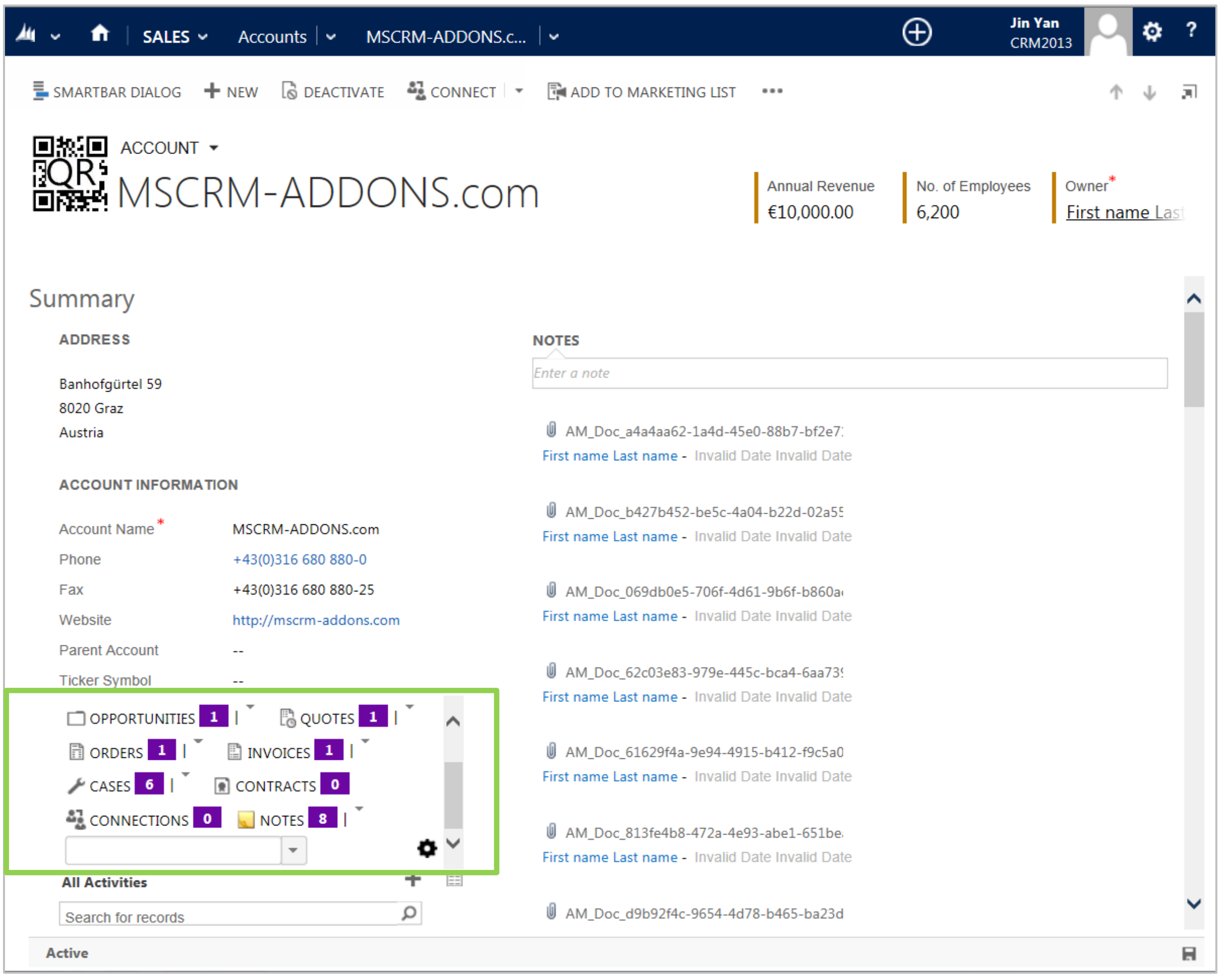


Following window appears:



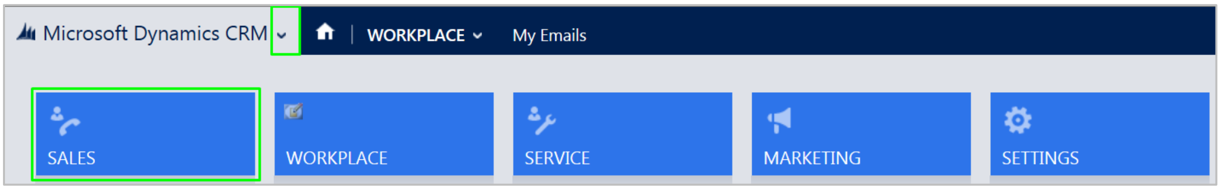
Now close the window and go back to the main for which you wanted to add the SmartBar for and refresh the page with [Ctrl] + [F5].

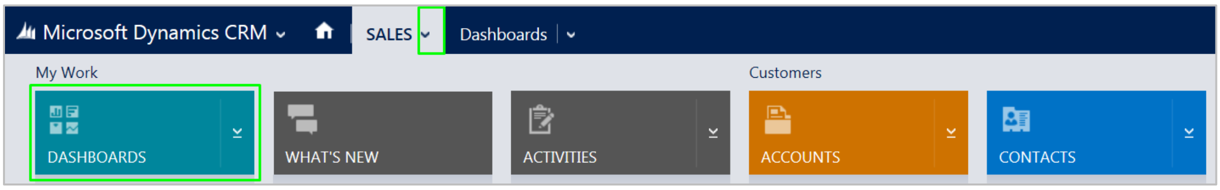
If you successfully added this new Web Resource your entity looks like following:



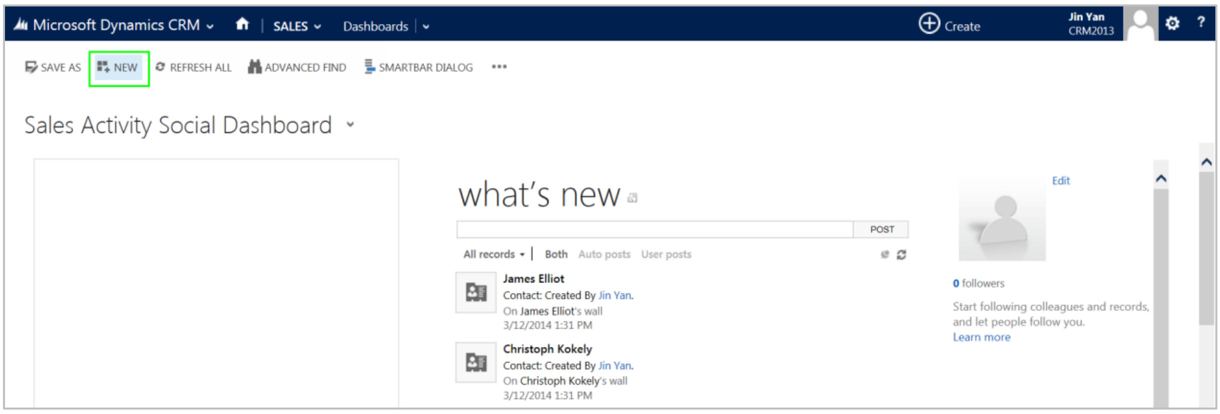
6.1 How to embed SmartBar in Dashboards

SmartBar for MS CRM 2013 can also be embedded in any of your CRM-Dashboards. Please note, that only custom buttons can be displayed on the Dashboard. To add SmartBar to your CRM-Dashboard e.g. for the entity Sales, please open your CRM-system, navigate to Sales and click on Dashboard. (See screenshots below)

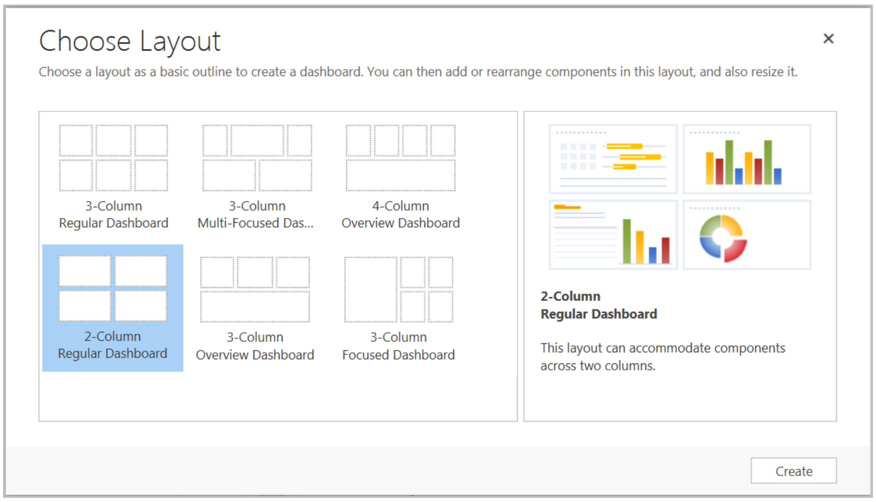




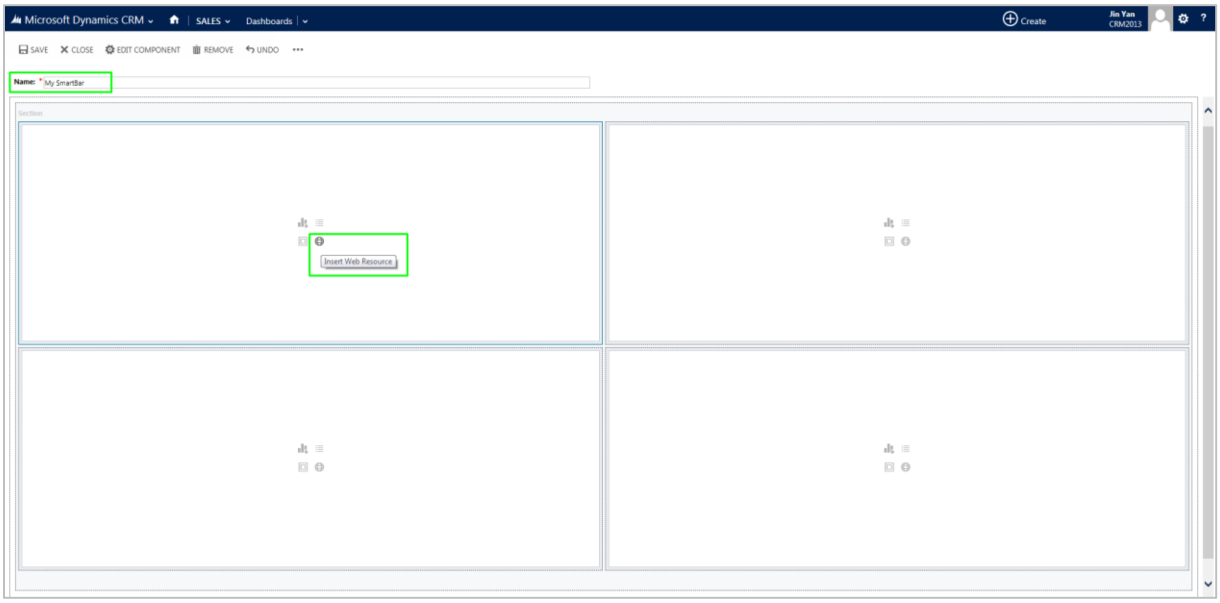
In the next window click on [New] at the top to create a new Dashboard. (See next screenshot)



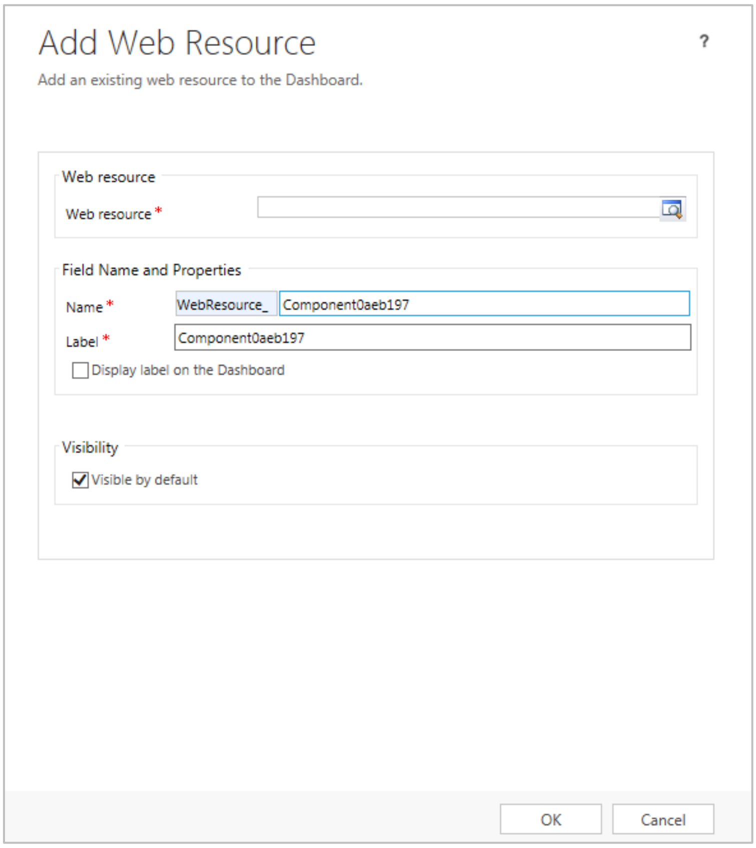
In the following window, choose a Dashboard Layout and click on [Create]. (See next screenshot)



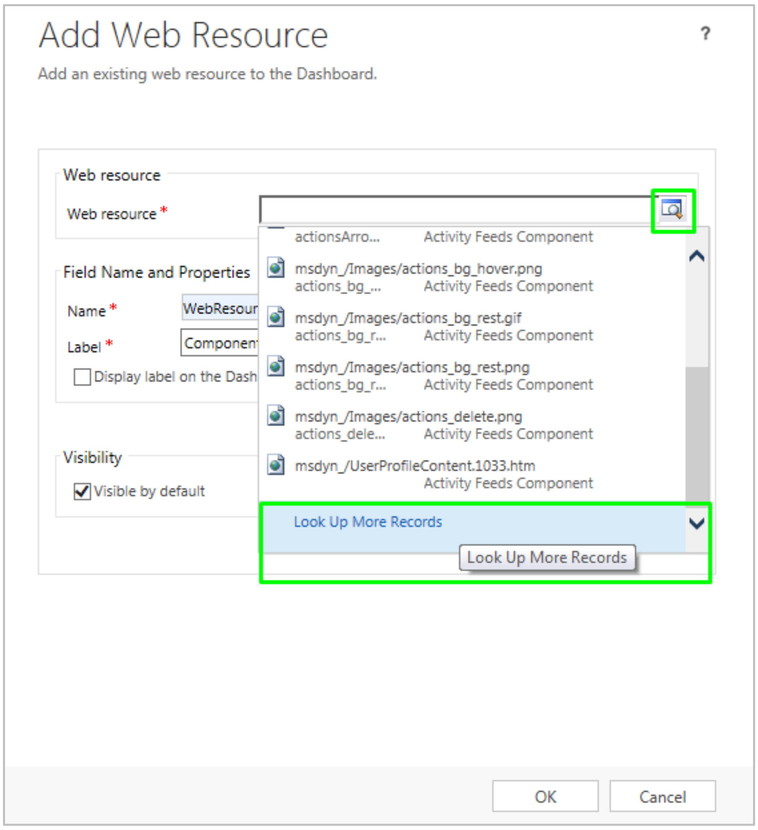
Following window opens:



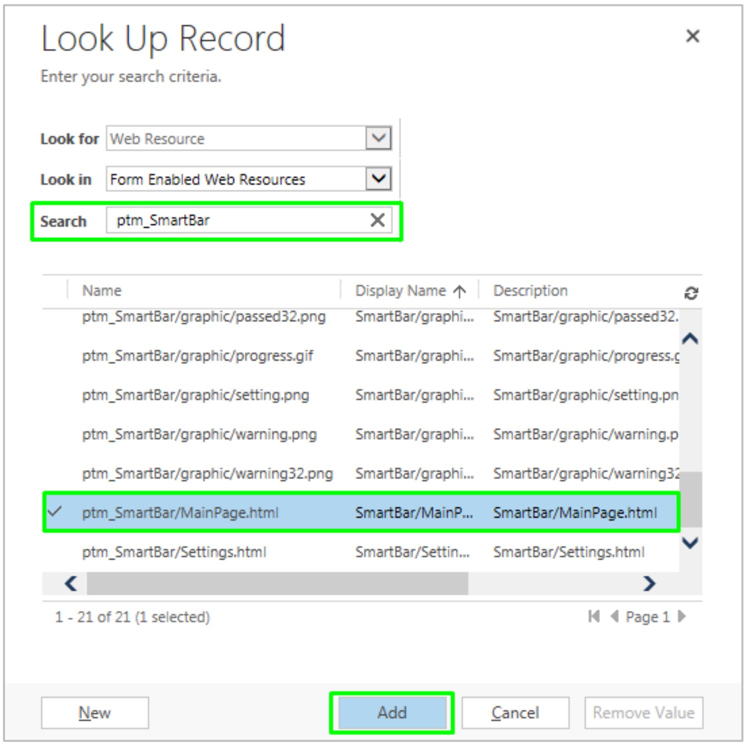
In the window you see above, type in a name for the SmartBar and click on the "Insert Web Resource" sign in the form where you want to your SmartBar do be displayed. The "Insert Web Resource"-window opens:



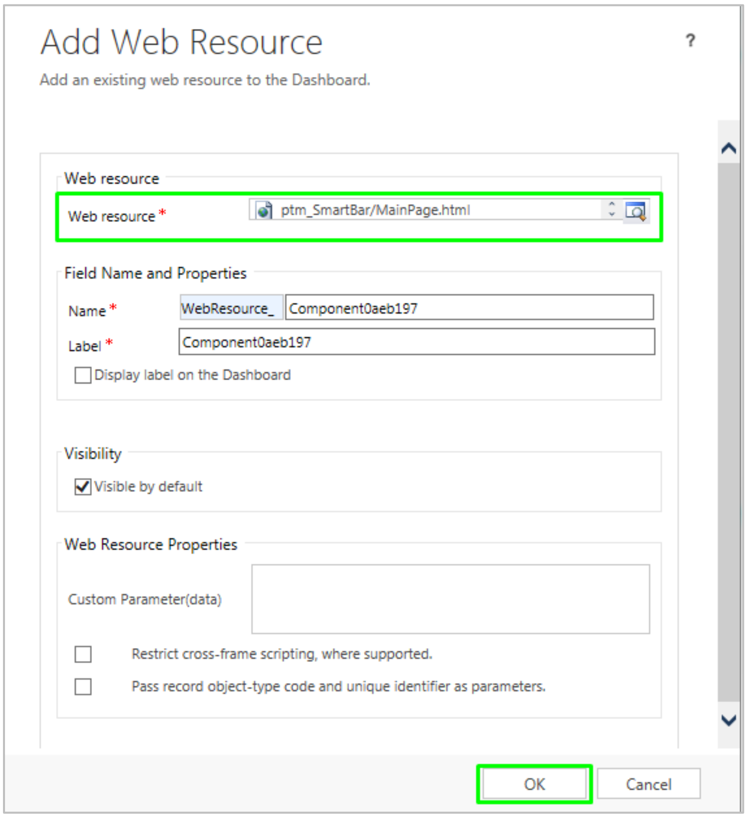
In this window search for the Web resource: ptm_SmartBar/MainPage.html. This can be done with a click on the Look up button and a click on “Look up More Records”. (See next screenshots)



Search for ptm_SmartBar/MainPage.html and click on [Add]. (See next screenshot)



Now your "Add Web Resource"-window looks like follows:



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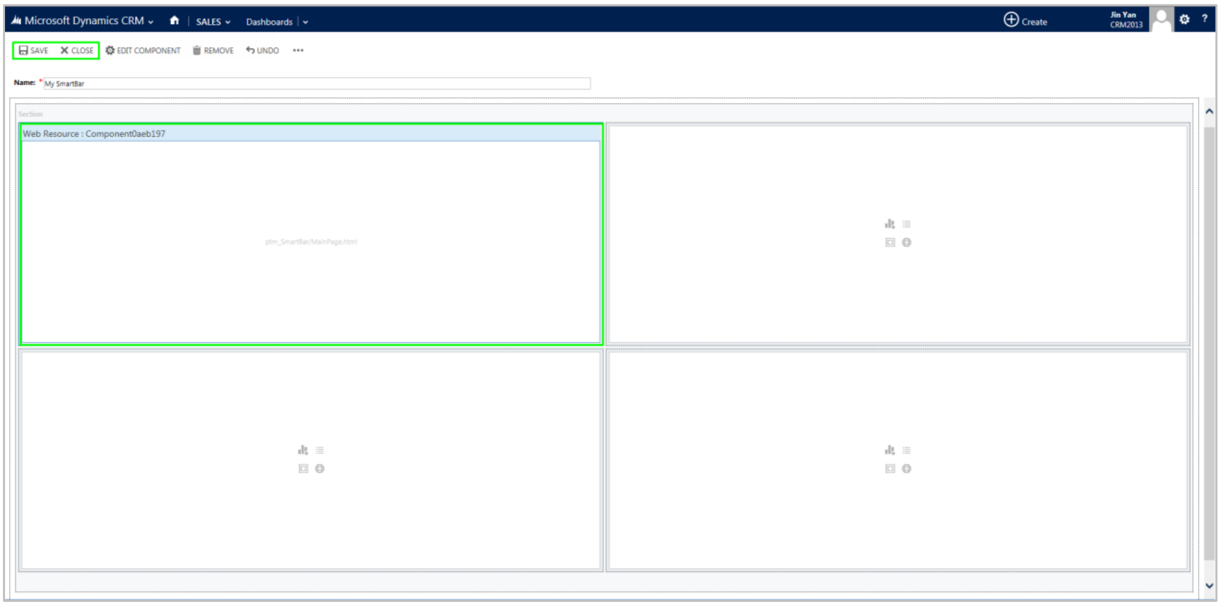
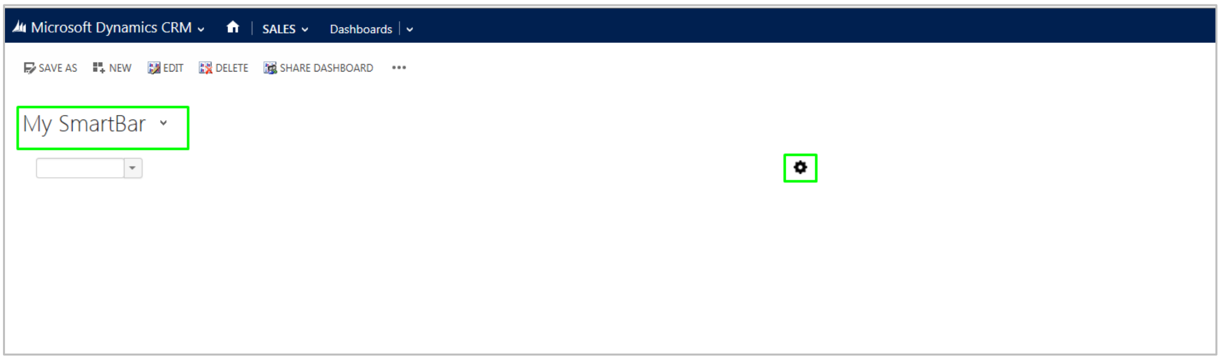
Click on [OK] to continue.

Follow window appears:



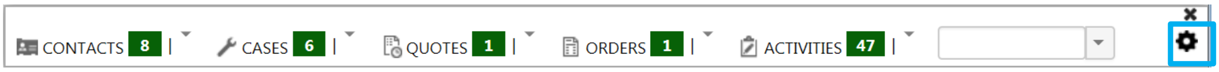
In the screenshot you see above, click on [Save] and [Close] at the top to save your settings. The result looks like this:



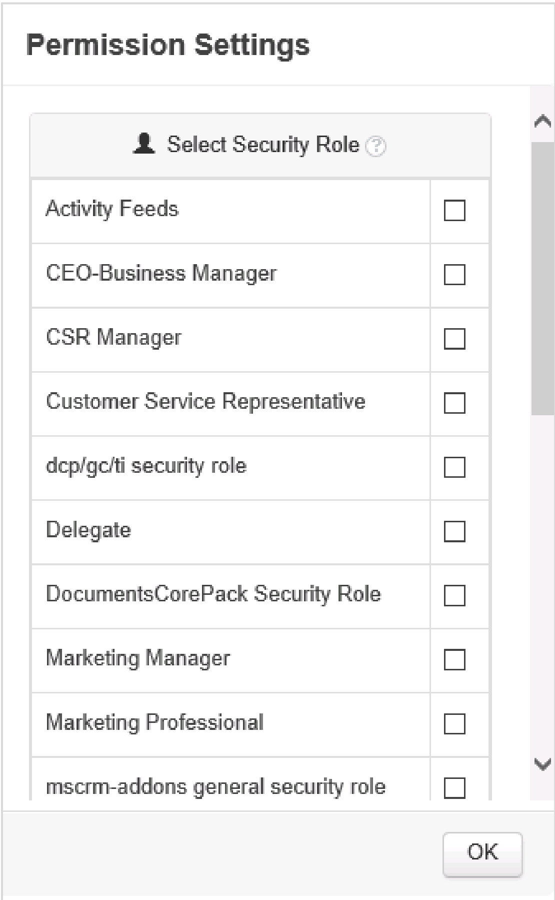
All you have to do now is to click on the SmartBar Settings to configure your custom buttons. For more information, please read chapter 7.1.1 SmartBar – How to add custom buttons.

7. SmartBar Settings

SmartBar for MS CRM 2013 allows administrators to configure different settings. You can find the SmartBar Settings at the end of the Smart Bar.

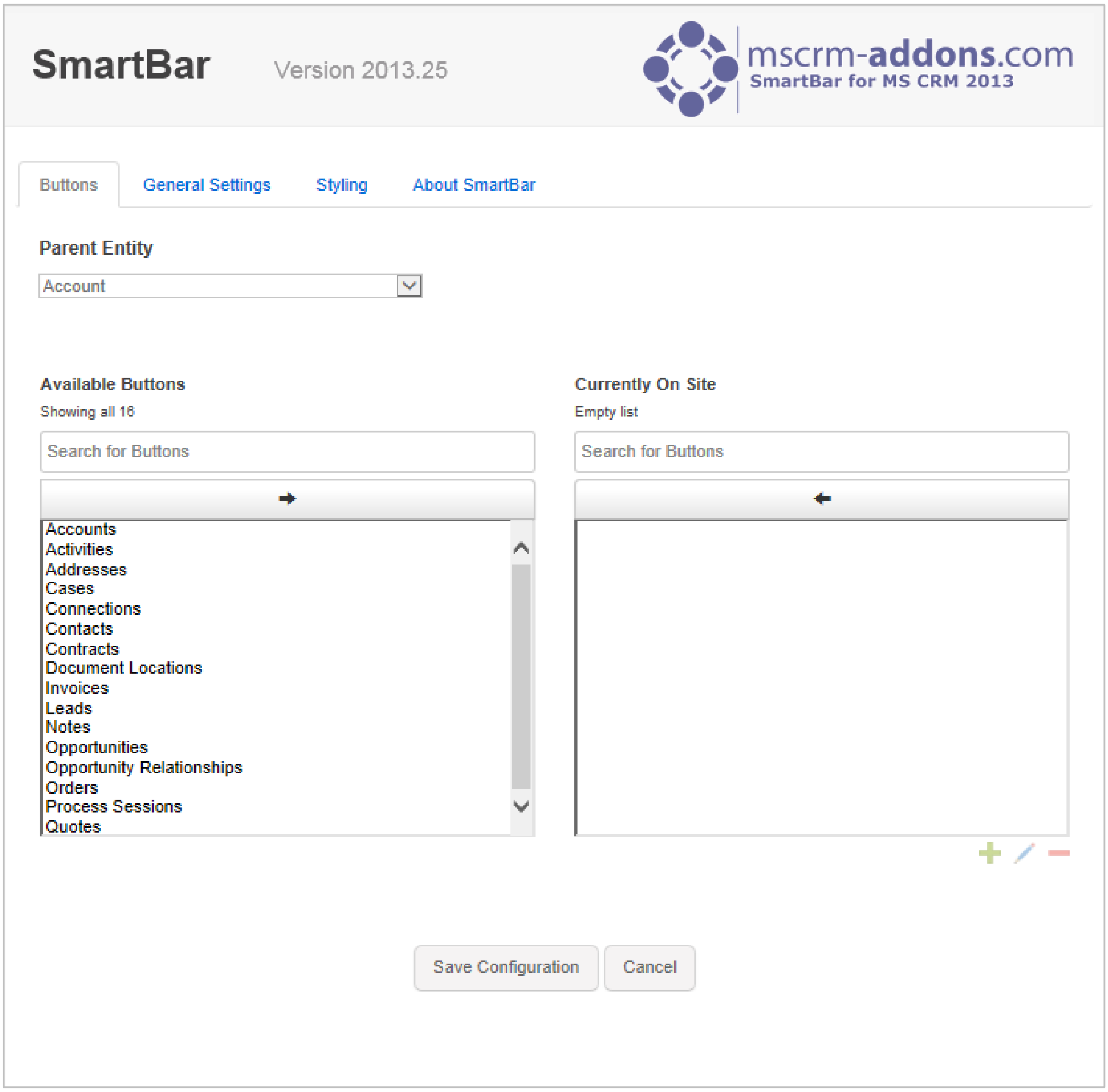


First time you will be asked to select Security Roles. The purpose of this selection is to define which users should be able to access the settings page. Only user owning at least one of the selected roles, will see the link to the settings page and will be allowed to change settings when using SmartBar.



7.1 SmartBar: Buttons

SmartBar Buttons can be added or removed from the current entity. In the left column you can see a list of all available buttons. In the right column the buttons shown in the SmartBar are listed. Click on an Entity e.g. “Orders” and remove it from the SmartBar with a click on the arrow.



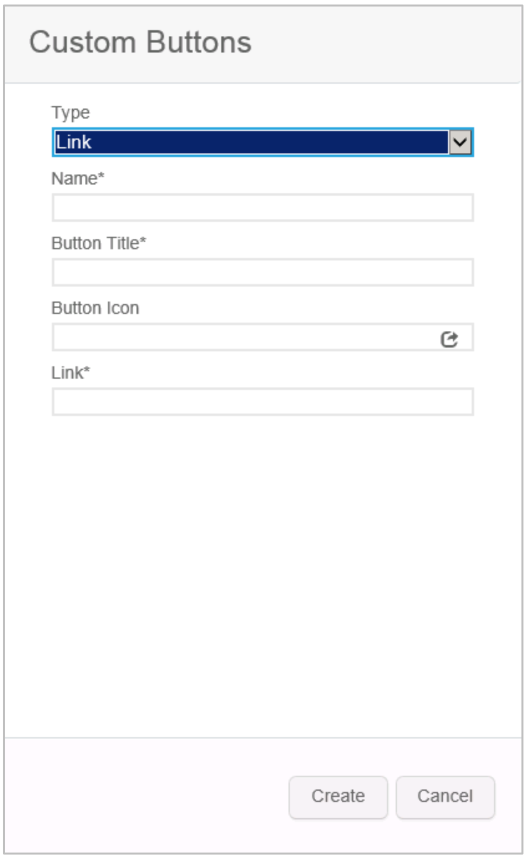
Please note that predefined Entity-Buttons still exists in the list if you remove it from the Bar. If you delete Custom Buttons, they will be deleted permanently.

7.1.1 SmartBar – How to add custom buttons

SmartBar for MS CRM 2013 allows to add custom buttons to fit your personal need. Therefore click on the green + sing in the SmartBar settings "Buttons"-tab. (See next screenshot)

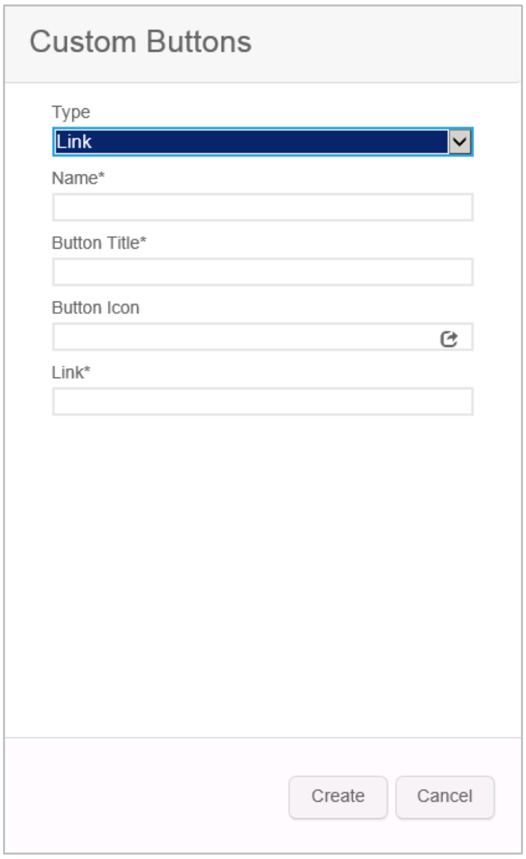
Add a Custom Button

Following window appears:



Type: Choose between Entity | Sitemap, Javascript Function, Link, Scroll to Section. (See next picture)

7.1.1.1 Link



Type: Link

Name: Here you can define a unique name for your custom button. It is important, that you only use the name once.

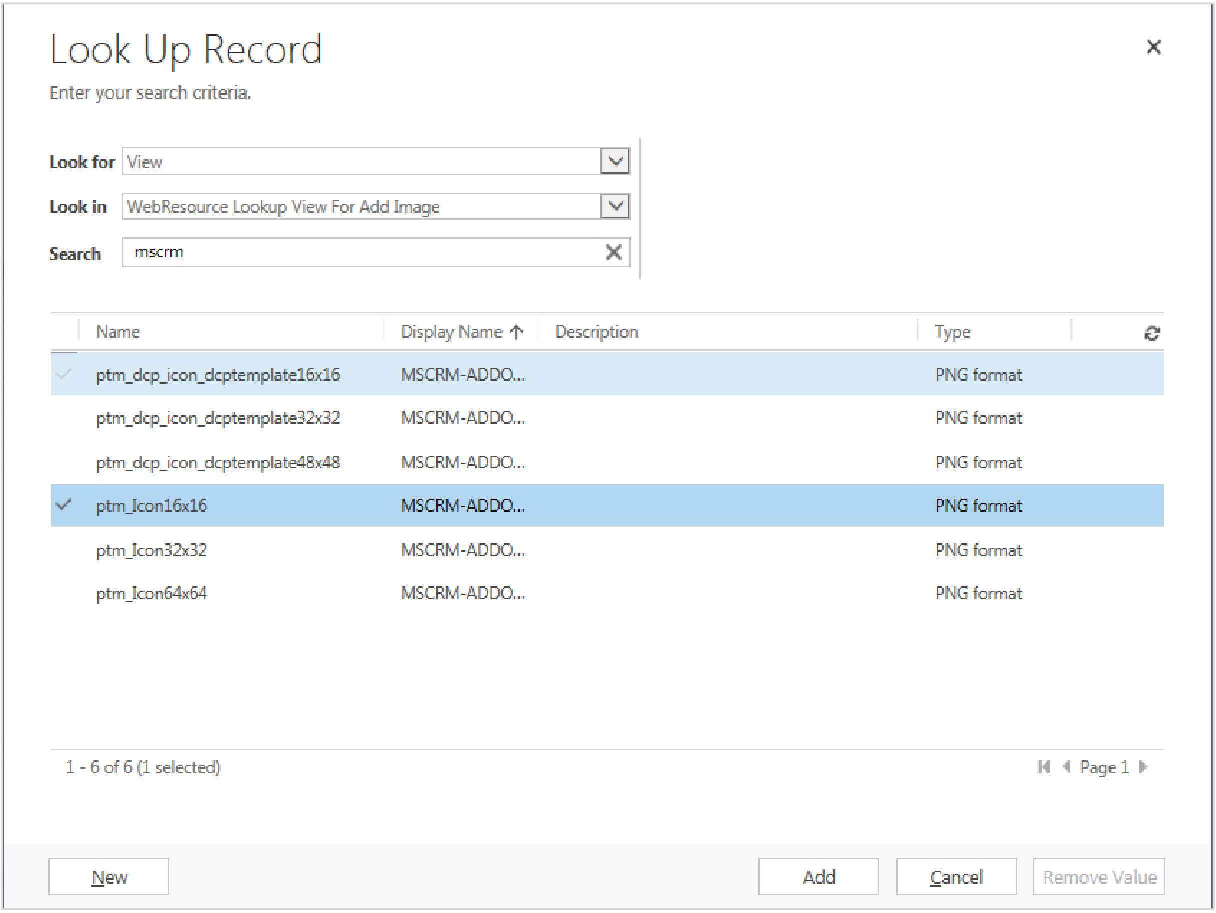
Button Title: This field will be filled automatically. It represents the title of the button.

Button Icon: The purpose of this field is to configure the icon on the button. It will also be filled automatically. With a click on you will get to the Web Resource Overview. (For detailed information, see next screenshots).

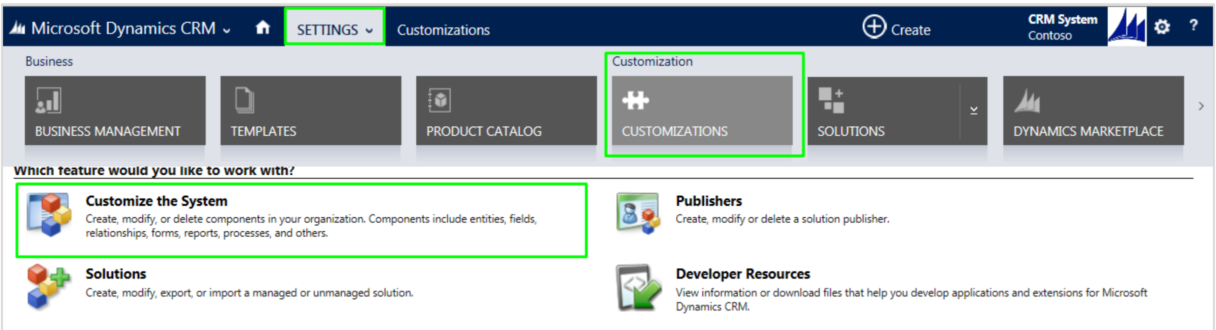
Link: Please type in the Link to the website you want to display.

Click on [Create] to create your button.

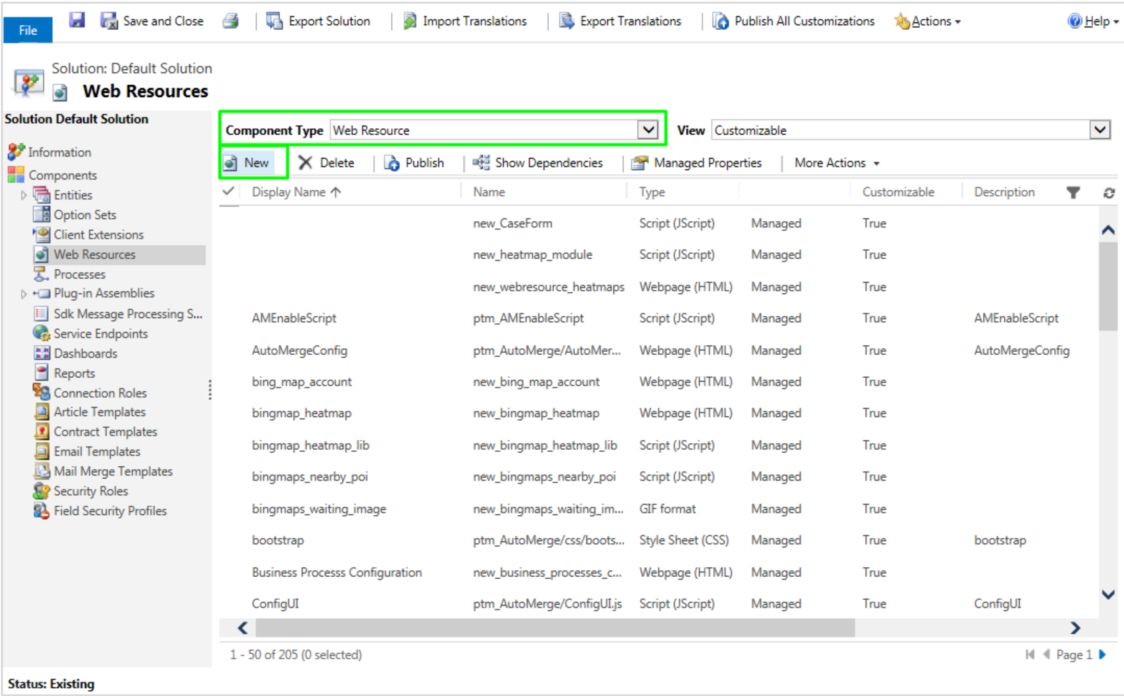
Add a new Button Icon



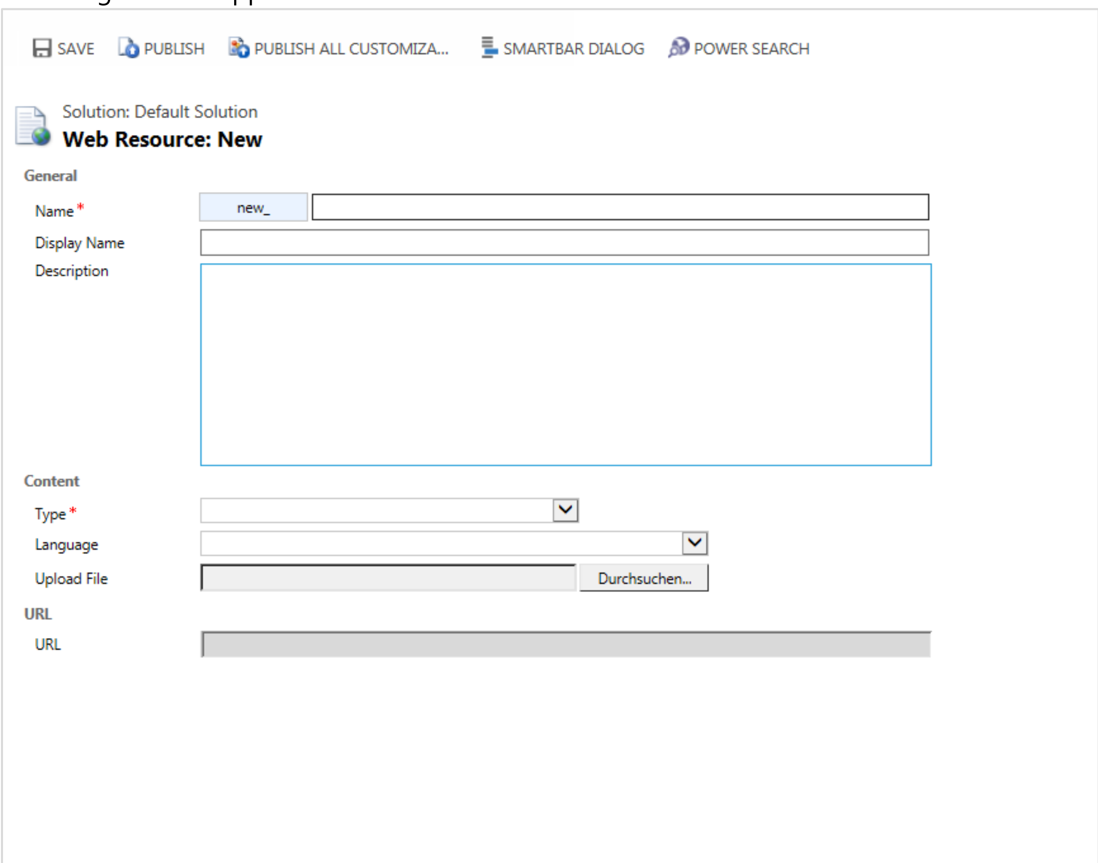
Here you can add an Icon to your Custom Button. Choose an Icon from the list or add a new one as web resource in your CRM-system. Therefore got to Settings ➔ Customizations ➔ Customize the System and choose customize the system. (See next screenshot).



In the following window, please select "Web Resource" as component type and click on [New]. (See next screenshot).



Following window appears:



Name*: Please type in a name for the web resource.

Display Name: Here you can type in a display name for the new web resource to be shown in the web resource overview.

Description: Here you can type in a description.

Type*: Choose the appropriate file-type from the drop-down-list.

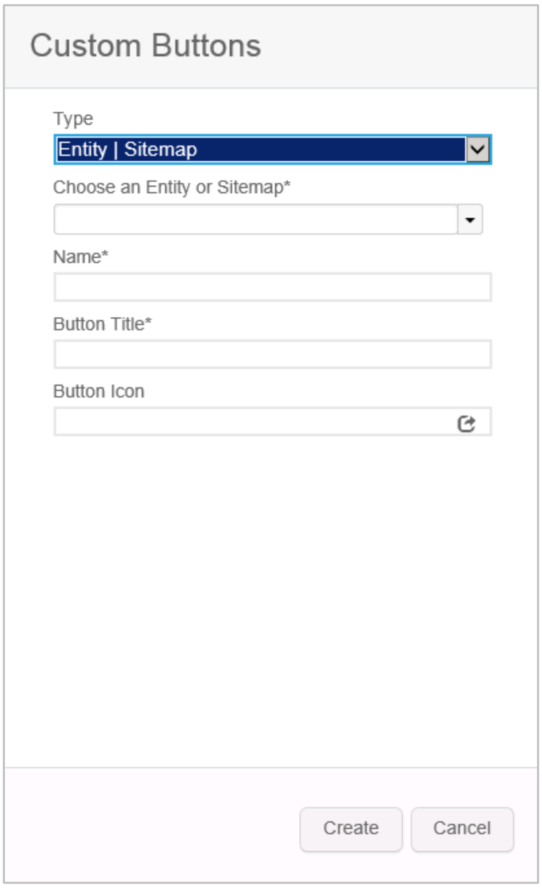
Language: Here a language can be selected.

Upload File: Click on the [Upload] button to upload the file.

URL: The URL to the picture will be filled in automatically.

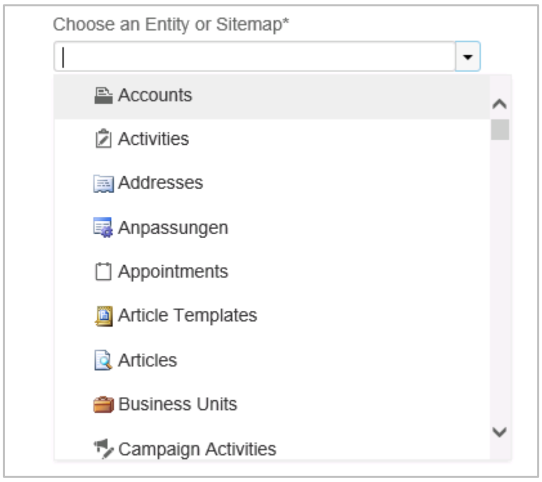
Next, click on [Save] and [Publish] to add your icon to the web resource overview.

7.1.1.2 Entity | Sitemap



Type: Entity | Sitemap

Choose an Entity or Sitemap: With a click on the drop-down-button following window appears:



Here you can define which Entity or Sitemap Entry should be opened when clicking on the Custom Button.

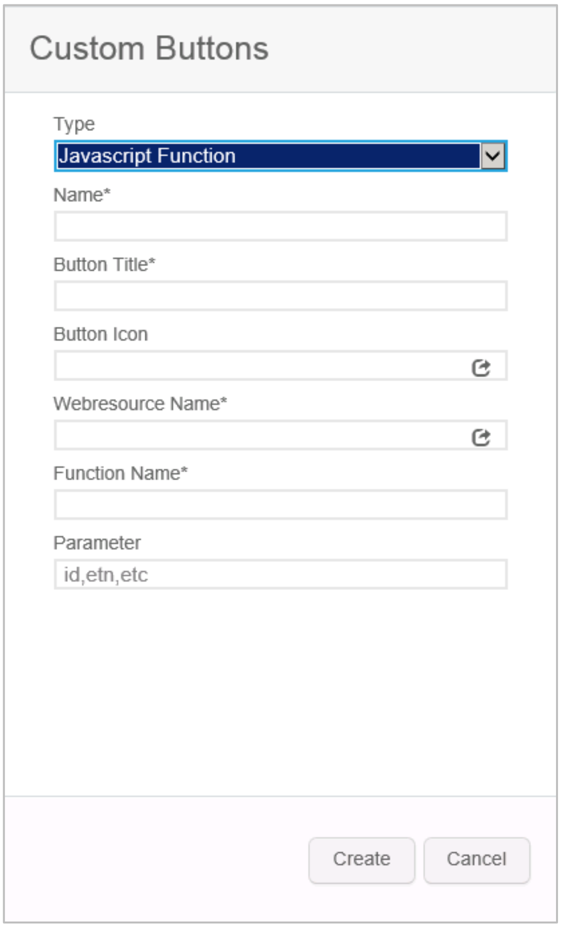
Name: This field will be filled automatically by mscrm-addons.com but you can of course type in a unique name for your Custom Button by your own. It is crucial that the name is only given one.

Button Title: This field will be filled automatically. It represents the title of the button.

Button Icon: The purpose of this field is to configure the icon on the button. It will also be filled automatically. With a click on you will get to the Web Resource Overview. (For detailed information on how to add new Icons please read chapter 7.1.1.1, Link – paragraph Button Icon).

Click on [Create] to add the Custom Button to the SmartBar.

7.1.1.3 Javascript Function



Name: Please type in the unique name for your Custom Button. It is crucial that the name is only given one.

Button Title: This field will be filled automatically. It represents the title of the button.

Button Icon: The purpose of this field is to configure the icon on the button. It will also be filled automatically. With a click on you will get to the Web Resource Overview. (For detailed information, please read chapter 7.1.1.1, Link - paragraph Button Icon).

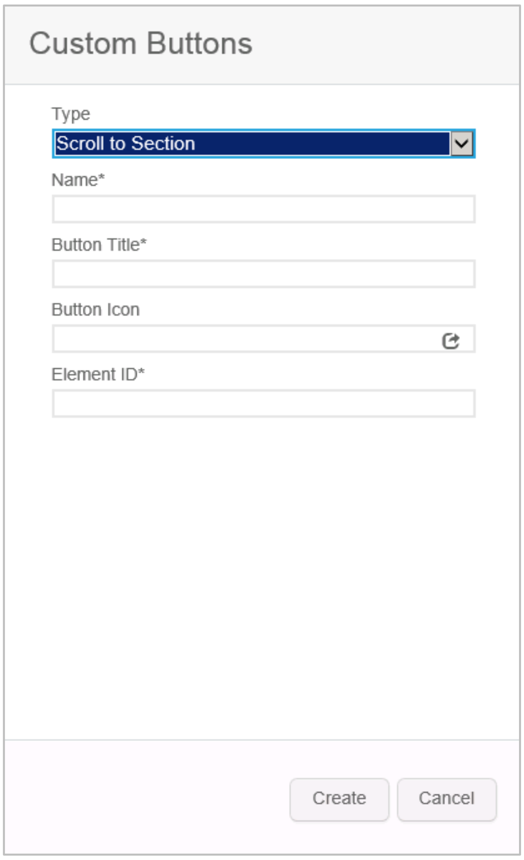
Webresource Name: Please define the webresource containing your Javascript function. It works similar to the icon above.

Function Name: Type in a name of the function which should be executed.

Parameter: Here you can define parameters which should be passed to your function. Available parameters are “id” (unique id to the starting CRM record), “etn” (entity type name of the CRM record) and “etc” (entity type code of the CRM Record). Important is that the parameters are separated by a “,” (comma).

Click on [Create] to add the Custom Button to the SmartBar.

7.1.1.4 Scroll to Section



Name: Please type in the unique name for your Custom Button. It is crucial that the name is only given one.

Button Title: Please type in a Display Name for the Custom Button.

Button Icon: Here you can define an Icon to be displayed on the Button. With a click on you will get to the Web Resource Overview. (For detailed information on how to add new Icons please read chapter 7.1.1.1, Link - paragraph Button Icon).

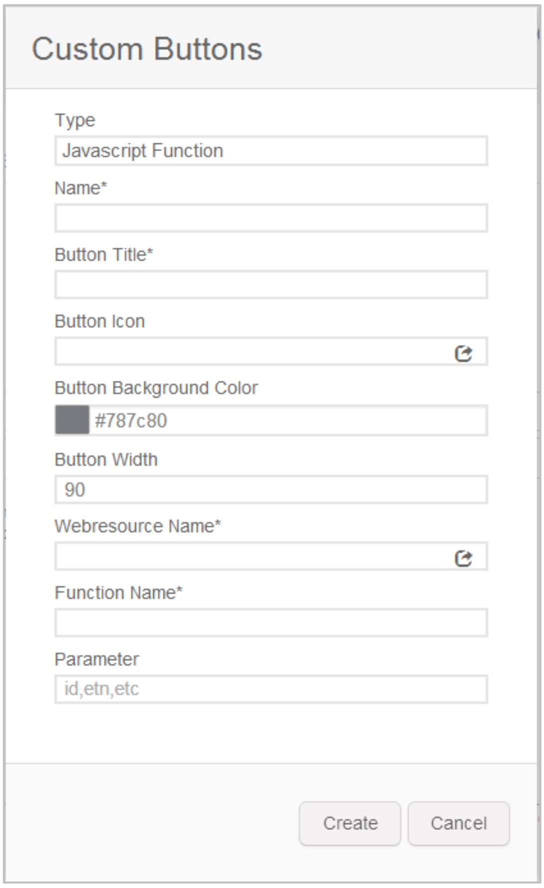
Element ID*: Type in an existing html-id of the CRM-form.

Click on [Create] to add the Custom Button to the SmartBar.

With a click on this Custom Button the user will be guided to the specific paragraph of this ID.

View Custom Buttons – Metro Style

When choosing the Metro Style the Custom Buttons Configuration Window looks like following:



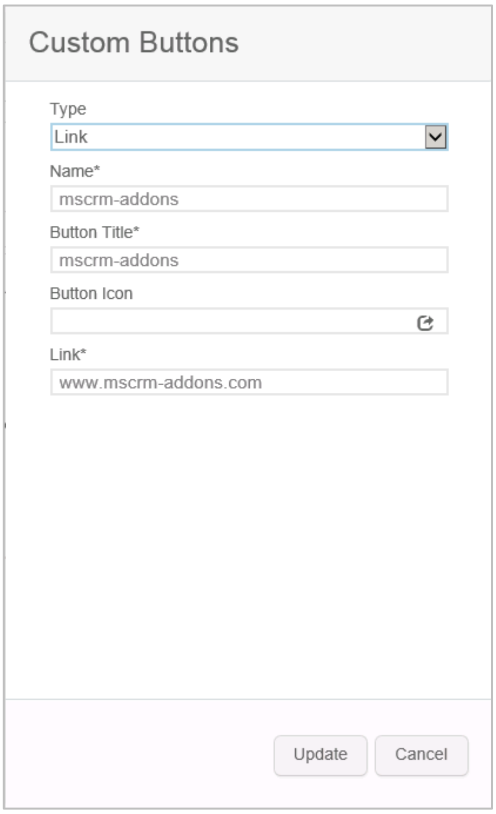
The Settings Button Background Color and Button Width have been defined under the "Styling"-tab Metro Style.

Here you have the possibility to define a specific color for each of your Metro Style Custom Button as well as to set the Button Width.

Edit Custom Buttons

Choose a custom button from the "Currently On Site" row and click on the blue pen to edit the button settings.

Following window appears:



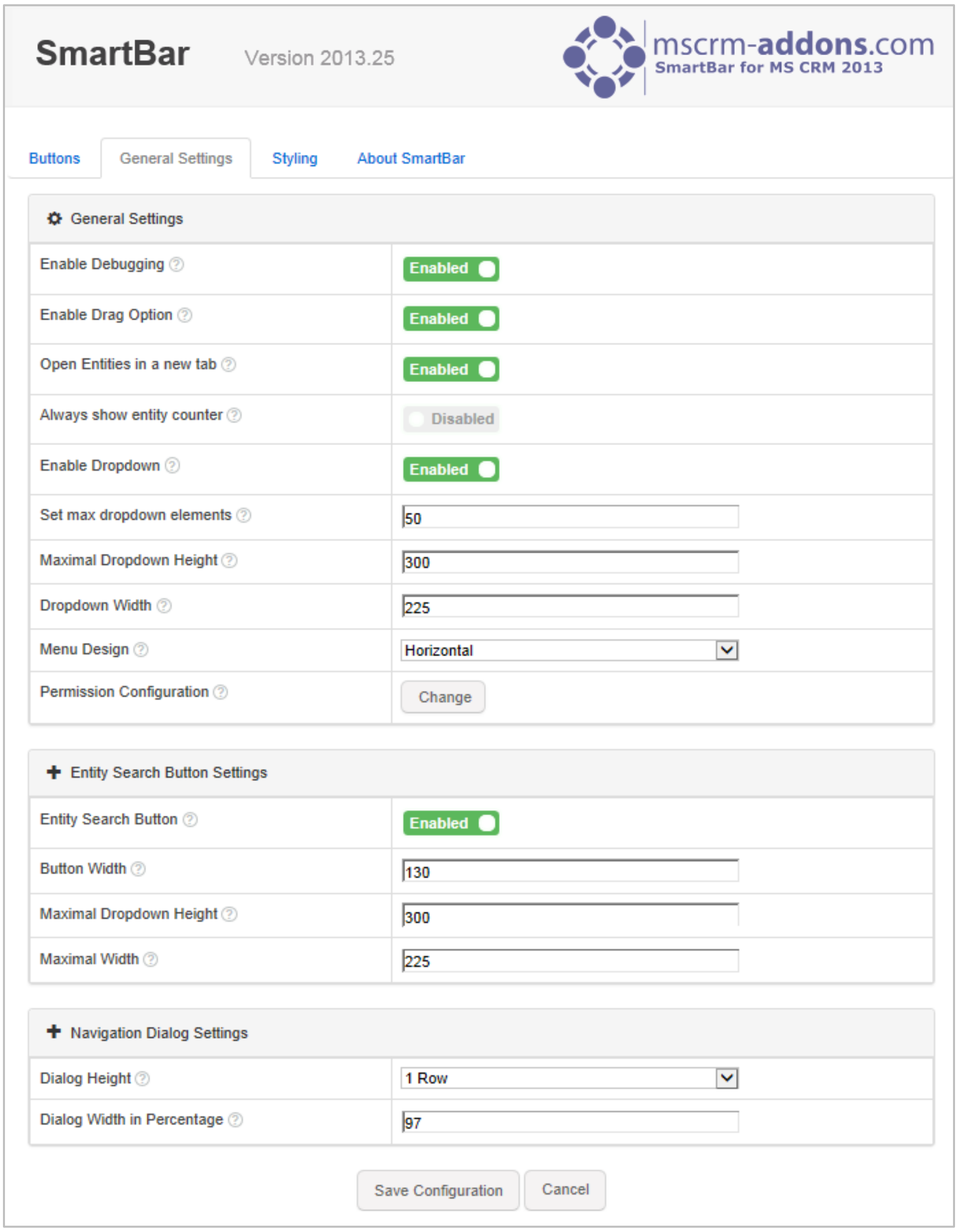
Save your settings with a click on [Update]

Delete Custom Buttons

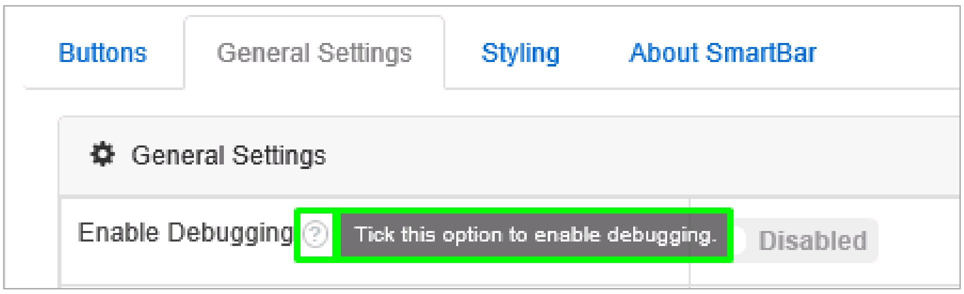
Choose a custom button from the "Currently on Site" row and click on the red minus sign to remove the button from the list. Please note, that only custom buttons can be deleted from the list.

7.2 SmartBar General Settings

In the Basic Settings Tab, the SmartBar-Settings can be configured.



Move the cursor over the question mark next to the settings to display the message box.



General Settings

Enable Debugging: Activating this function will enable Debugging. Users can also activate debugging manually via MSCRM-ADDONS.com Settingskey. Click here for detailed information.

Enable Drag Option: Enable this function in order to drag & drop the SmartBar Buttons.

Open Entities in a new tab: Enable this function to open entities in the dropdown menu in a new window.

Always show entity counter: Enable this function will also display the count value next to the button, even if the value is zero.

Enable Dropdown: Here you can enable the dropdown functionality for the related entities to be shown.

Set max. dropdown elements: Here you can define how many related notes should be displayed in the dropdown-menu.

Menu Design: Click on the dropdown button to display the menu in a horizontal or vertical menu.

Permission Configuration: Here you can change the Permission Configuration, which you have configured in chapter 7 SmartBar Settings.

Entity Search Button Settings

Entity Search Button: Tick this option to enable the entity search button.

Button Width: Here you can set the Width of your entity search button.

Maximal Dropdown Height: Here you can set the maximal Dropdown Height of your Entity Search Button.

Dropdown Width: Set the width of your Entity Search Button Dropdown in pixels.

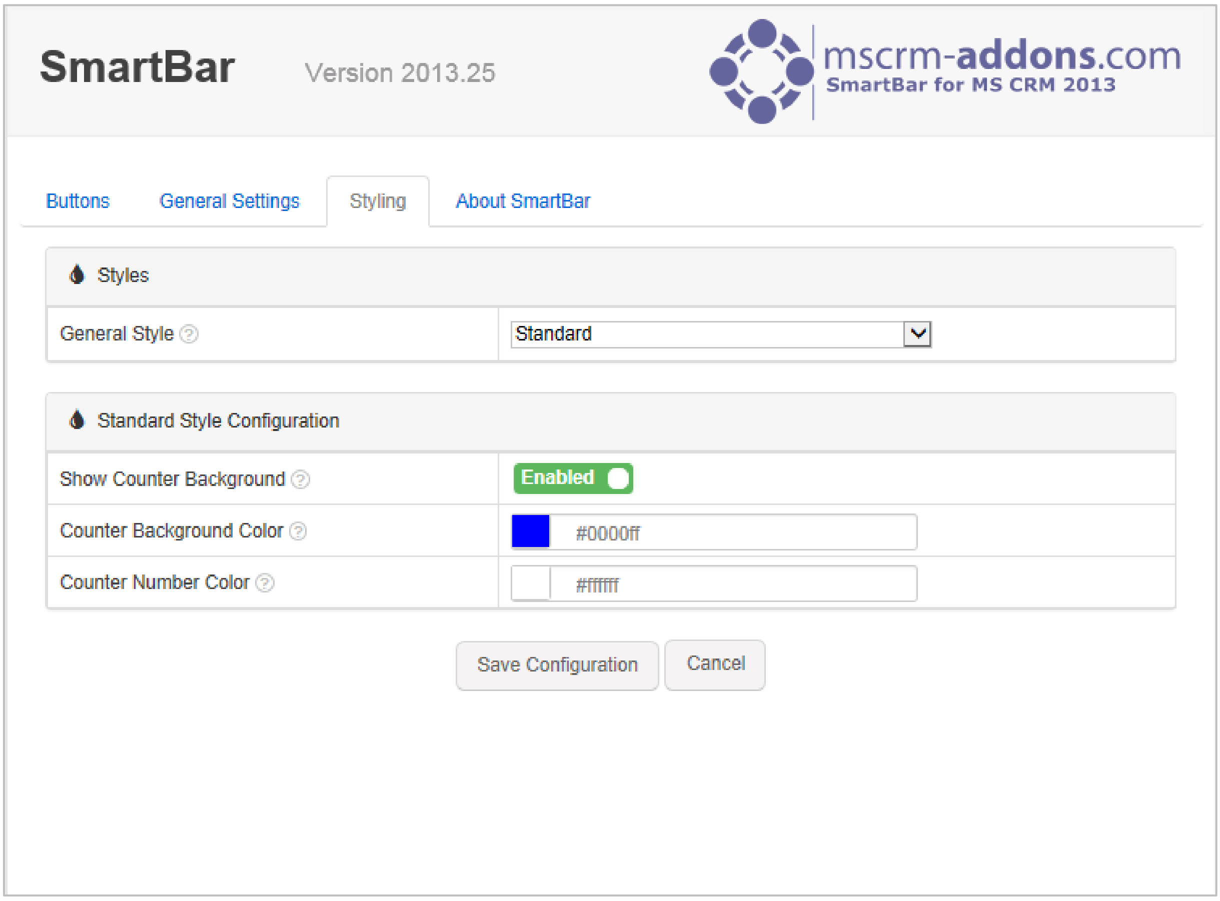
Navigation Dialog Settings

Navi Dialog Height: Here you can define the Dialog Height. The maximum value can be set with 5 Rows.

Navi Dialog Width in Percentage: Here the dialog width can be defined. 100 Percent indicates that the SmartBar Dialog Width has the same size as your CRM window.

Please note, that these settings are only available in the settings-page of the SmartBar Dialog!

7.3 SmartBar Styling



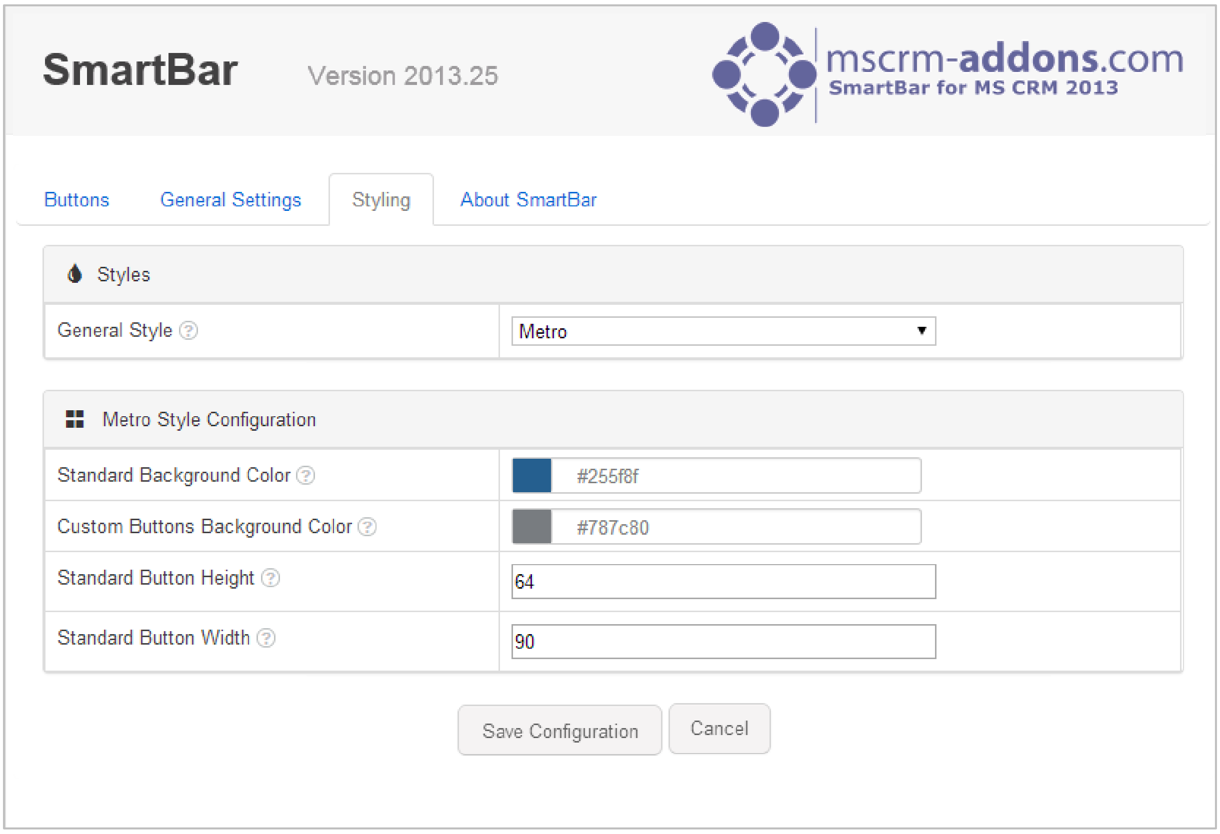
General Style: Choose between Standard or Metro Style.

Show Counter Background: Show a background for your entity counter, which will be displayed beside your buttons.

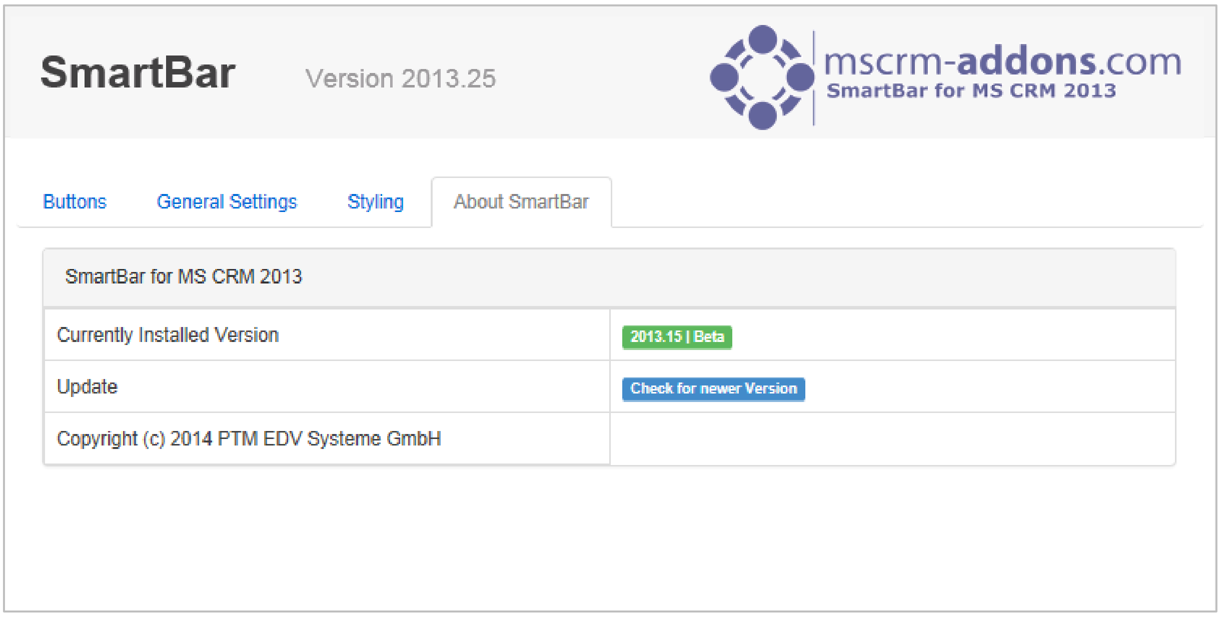
Counter Background Color: Here the background color of your entity counter can be set.

Counter Number Color: Click here to set the color of your entity counter.

When choosing Metro Style, you have also the possibility to set the Buttons Height and Width. (See next Screenshot).



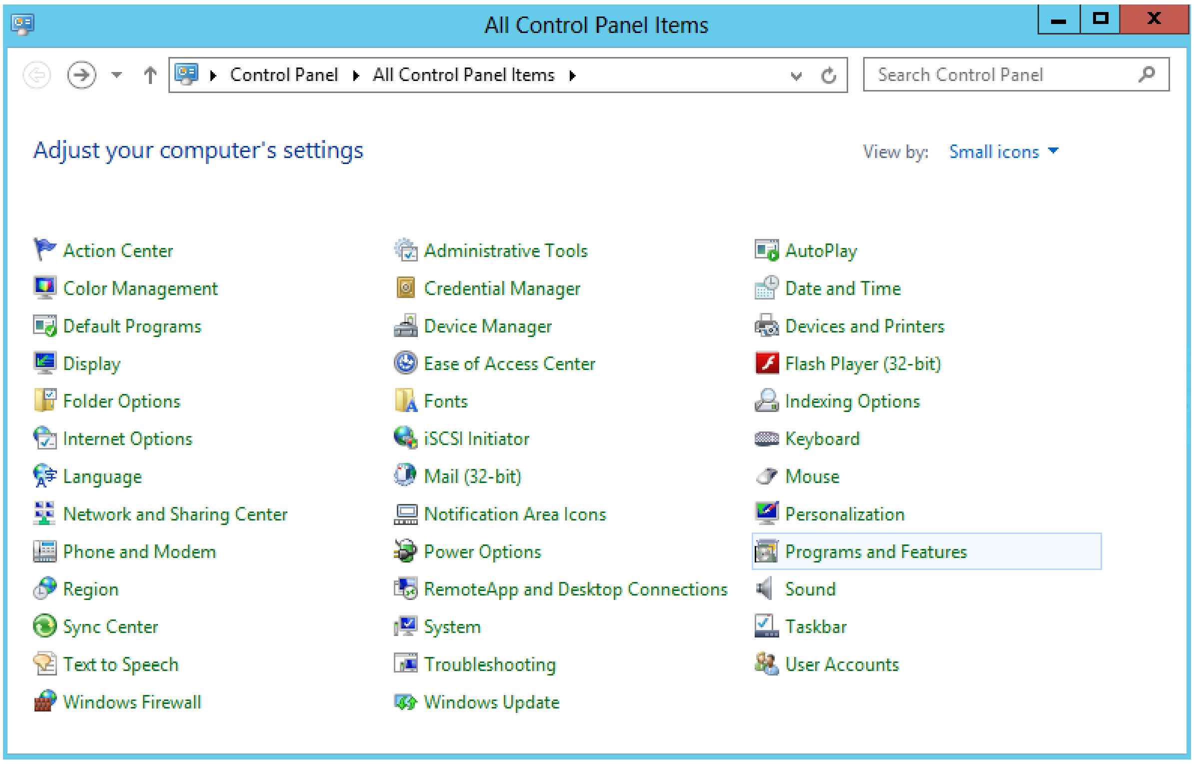
7.4 About SmartBar



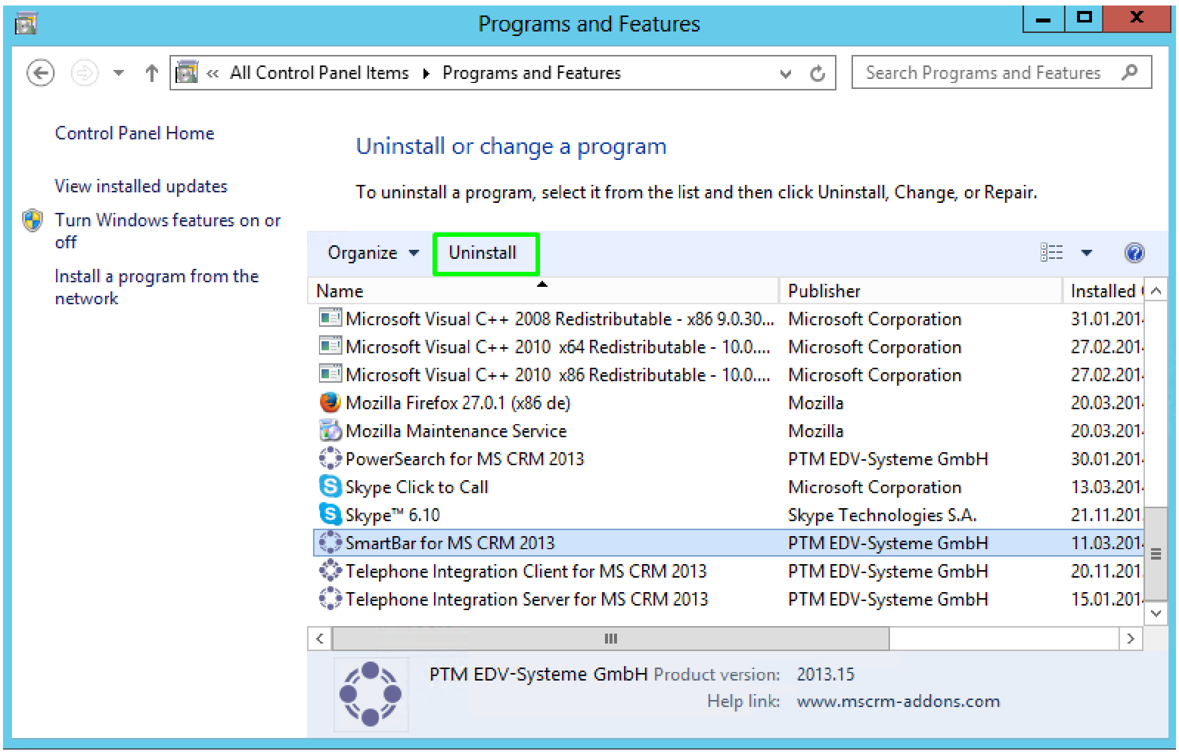
Here you can find some product information and check for new product versions.

8 Uninstall SmartBar for MS CRM 2013

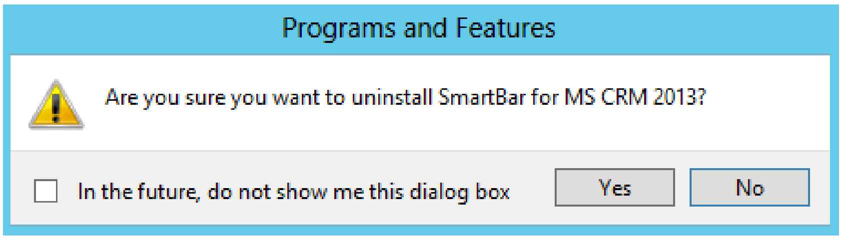
To uninstall SmartBar, select “Programs and Features” in Control Panel. (See next screenshot)



Search for SmartBar CRM 2013 in “Uninstall or change a program” and click on [Uninstall].

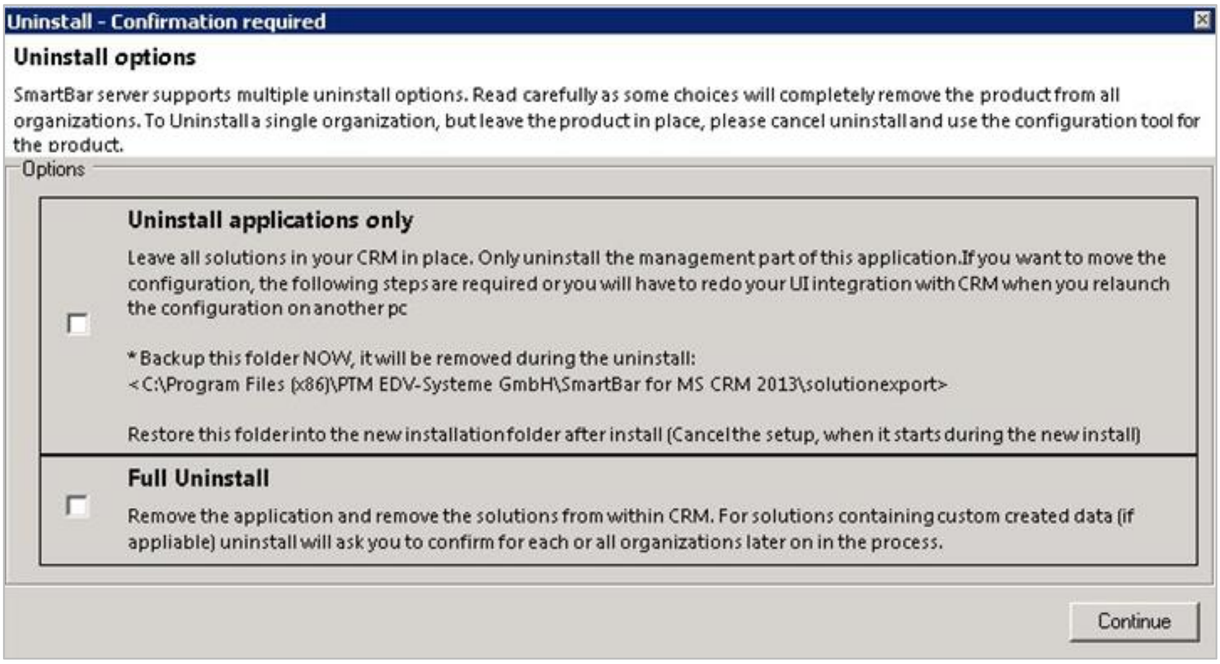


Following window appears:



Click on [Yes] to uninstall SmartBar for MS CRM 2013.
Click on [No] of you don't want to uninstall SmartBar for MS CRM 2013.

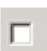
If you click [Yes], following window appears:



Check "Full Uninstall" to remove the application and the solutions from within CRM.

Check "Uninstall application only" will leave all solutions in your CRM in place and will only uninstall the management part for this application.

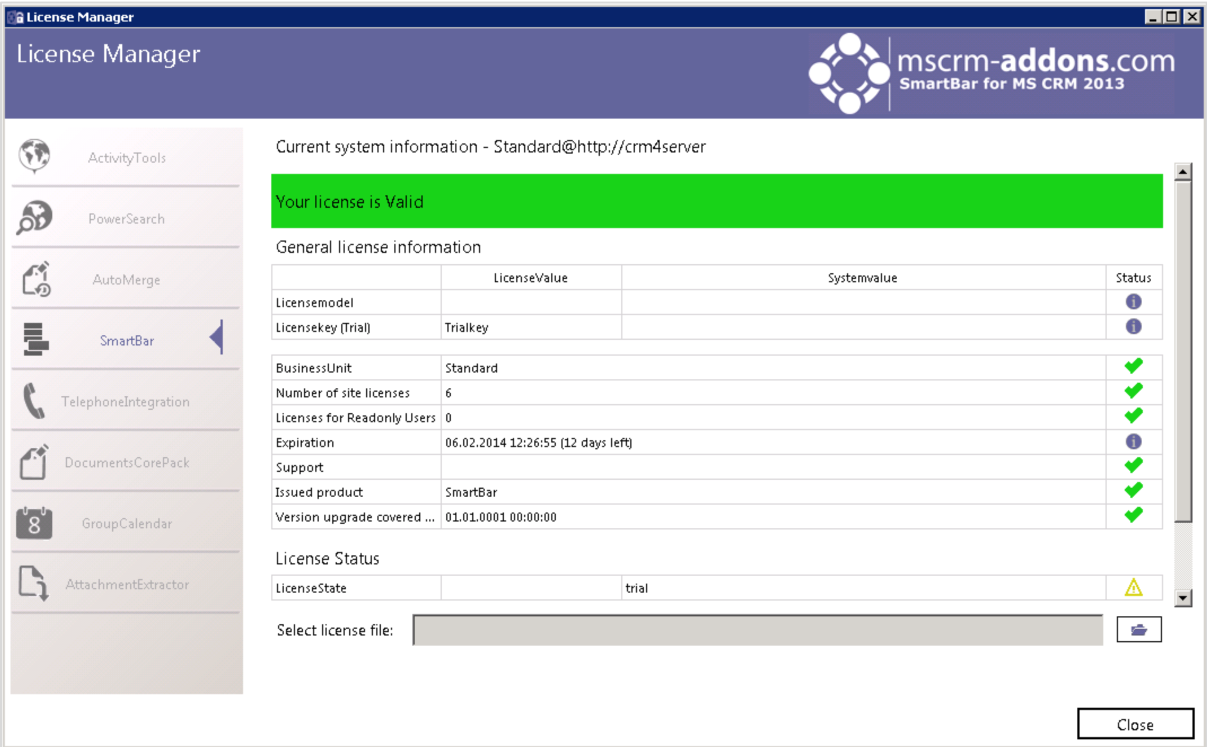
Click [Continue] to go on with uninstall SmartBar.



9 License Management

9.1 License Manager

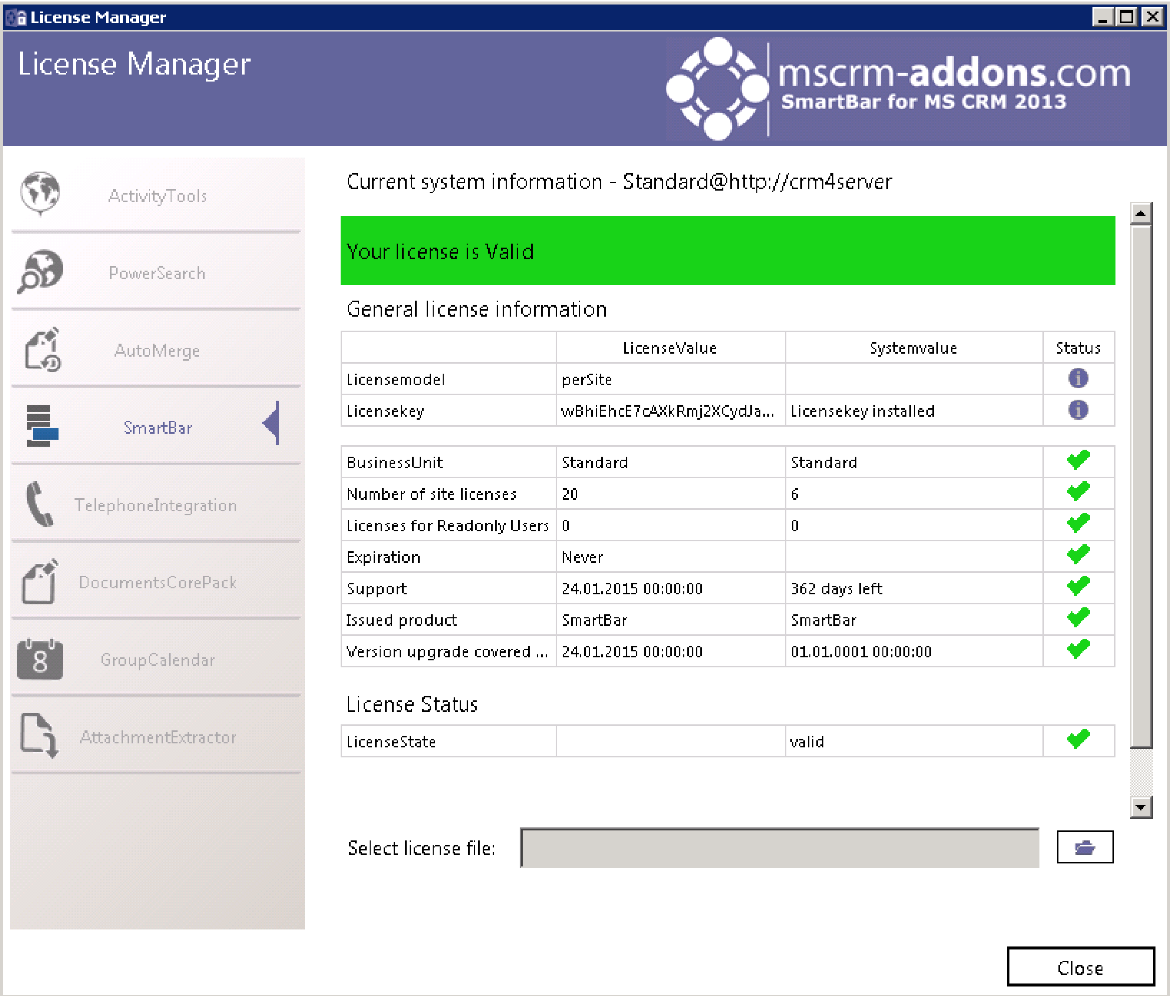
Open SmartBar License Manager from the start menu (www.mscrm-addons.com) and choose the connection (usually you just need to hit OK).



While the Trial version is enabled you will see the above screen.

To install a license select the "Open"-button (folder icon) and you will be prompted to install the license file. Open and install the license file.

The next screenshot shows that the selected license is valid and contains a support contract for further 361 days. Then hit the "Install this license" to complete the installation process. After installing, the license Manager will display the license as shown in the next picture:



10 Contact

If you have questions to the product send an email to
support@mscrm-addons.com
or visit our blog
http://blogs.mscrm-addons.com

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