SmartBar for MS CRM 2015/2016 and Dynamics 365

v.2.2, November 2016

PowerSearch
(How to work with PowerSearch for MS CRM 2015/2016 and Dynamics 365)

The content of this document is subject to change without notice. “Microsoft” and “Microsoft CRM” are registered trademarks of Microsoft Inc. All other product- and company names mentioned are trademarks of their respectful owners.

Content

1 How to install SmartBar for Microsoft Dynamics CRM 2015/2016 and Dynamics 365 6
1.1 EULA (End User License Agreement) 7
1.2 Installation 7
1.3 Logon Information 8
1.4 Security Roles 11
1.5 Complete the installation 12
2 SmartBar Server Configuration 13
2.1 The SmartBar Server Configuration Surface 13
2.2 How to configure the SmartBar Server Configuration 14
3.1 Additional Configuration 15
3 SmartBar Organization Overview 19
3.1 How to reinstall/upgrade 21
4 How to embed SmartBar in MS Dynamics CRM and Dynamics 365? 22
5 The SmartBar Settings 23
5.1 The SmartBar Settings - Overview 24
5.1.1 The Buttons-tab 26
5.1.2 The SmartBar General Settings-tab 28
5.1.3 The SmartBar Styling-tab 31
5.1.3.1 Styling-tab Standard style configuration 32
5.1.4 Global Settings 34
6 Uninstall SmartBar for MS CRM 2015/2016 and Dynamics 365 36
7 Tutorials (“How To’s”) 38
7.1 How to embed SmartBar as a WebResource? 38
7.2 Embed SmartBar in Dashboards 42
7.3 How to navigate with SmartBar 45
7.3.1 How to navigate from an entity where SmartBar is embedded 45
7.3.2 How to navigate directly from the SmartBar dialog 46
7.4 How to add or remove Standard SmartBar buttons 47
7.5 How to add Custom Buttons 48
7.5.1 How to add [Javascript Function]-buttons 50
7.5.2 How to add [Link]-buttons 54
7.5.3 How to add [Entity | Sitemap]-buttons 57

7.5.4 How to add [Scroll to Section]-buttons....60
7.6 How to edit Custom Buttons....63
7.7 How to delete Custom Buttons....64
7.8 Custom Buttons Window General Style vs Custom Buttons Window Metro Style....65
7.9 How to configure customized icons....66
8 Contact....69

Preamble

This documentation is intended to guide you through the installation process of our tool. SmartBar for Microsoft Dynamics CRM 2015/2016 and/or Dynamics 365 facilitates – among other things – the navigation between related forms in MS CRM. Before installing SmartBar for Microsoft Dynamics CRM 2015/2016 and/or 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 SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM 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 CRM must be available:

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

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 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, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

Purpose of SmartBar?

SmartBar facilitates – among other – navigation in Microsoft Dynamics CRM 2015/2016 and Dynamics 365. SmartBar allows its users to navigate smart and fast between related records in Microsoft Dynamics CRM 2015/2016 and/or Dynamics 365. The tool consists of many valuable features that allow, for example, simple back and forth navigation. A number of "buttons" represent the related records per entity. Besides its easy to handle "buttons", SmartBar shows up with a few additional settings in order to provide high-quality-usability and individualization.

1 How to install SmartBar for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

The installation of SmartBar for MS Dynamics 2015/2016 or Dynamics 365 is quite easy.

First of all, run the SmartBar for MS CRM 2015/2016 Setup file. The following window appears:

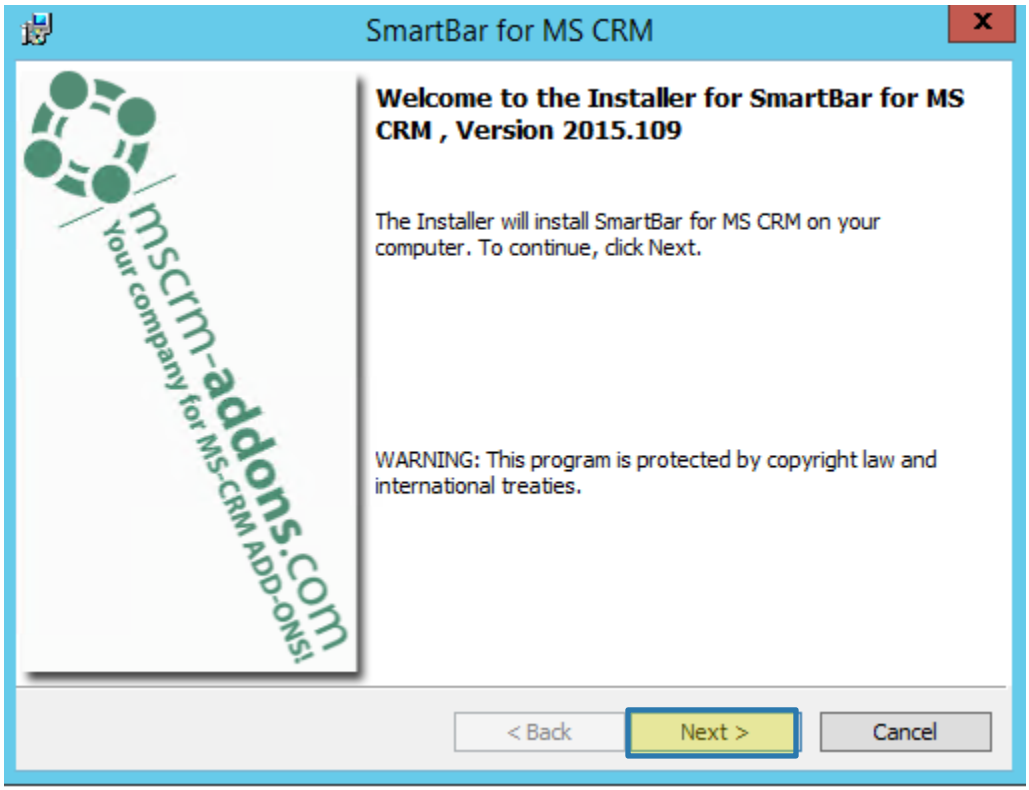


Figure 1: SmartBar Installer

Click on the ***[Next]***-button in order to proceed.

1.1 EULA (End User License Agreement)

Next, the End User License Agreement window appears. Please read it carefully and accept its terms. If you do not accept the license agreement, you cannot continue with the installation. You may also print the agreement if you want to. Click on the ***[Next]***-button in order to proceed.

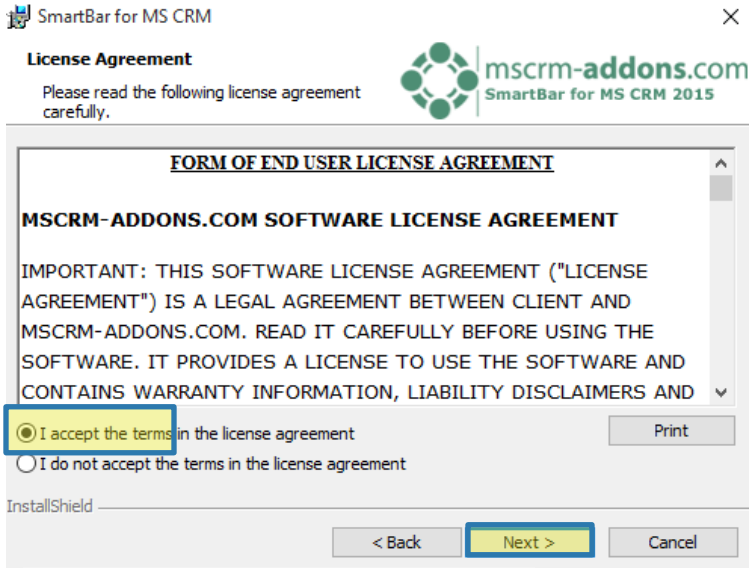


Figure 2: End User License Agreement

1.2 Installation

Next, you will be asked where to install SmartBar to. In case you want to save it somewhere else, simply click on the ***[Change…]***-button. Click on the ***[Next]***-button in order to proceed.

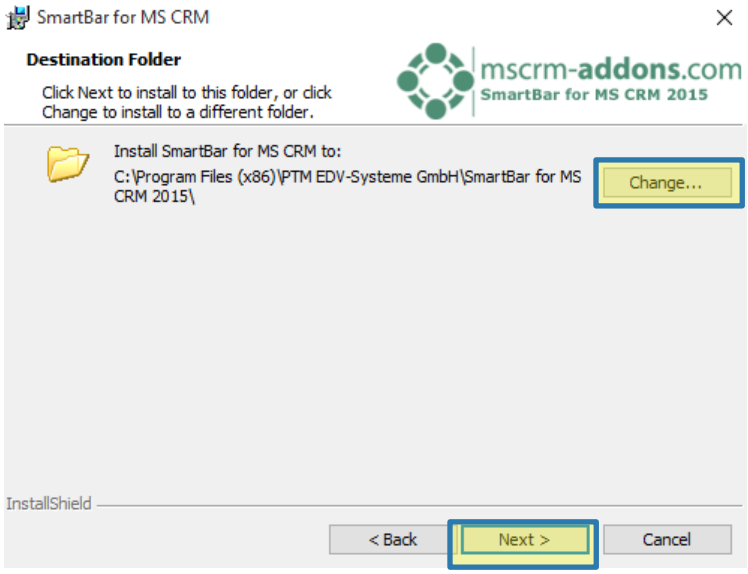


Figure 3: Destination folder

Now click on the ***[Install]***-button in order to start the installation:

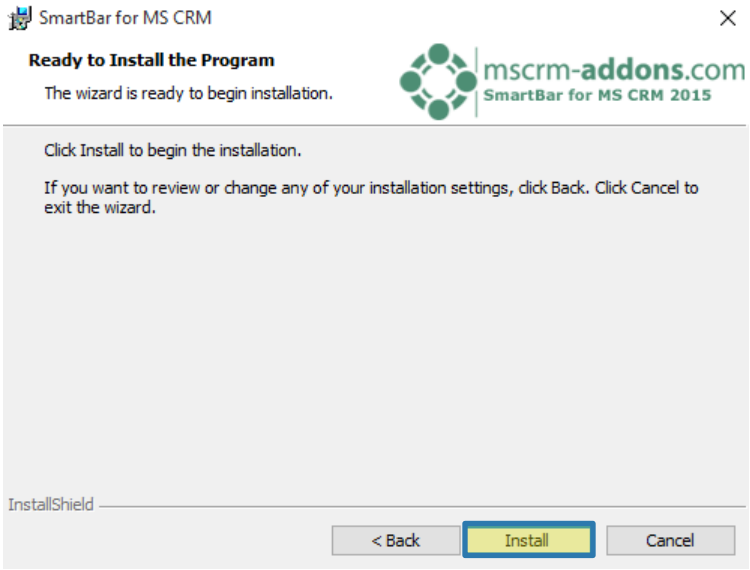


Figure 4: Installation

1.3 Logon Information

SmartBar requires a connection to CRM. To configure your CRM (or Dynamics 365) Server, select an existing profile or create a new profile. Select your preferred server path and add your login credentials by filling in the field's username, password and domain. Press the ***[Retrieve all Organizations]***-button and select your organization. For further information on the Connection dialog, have a look at our [Connection dialog documentation].

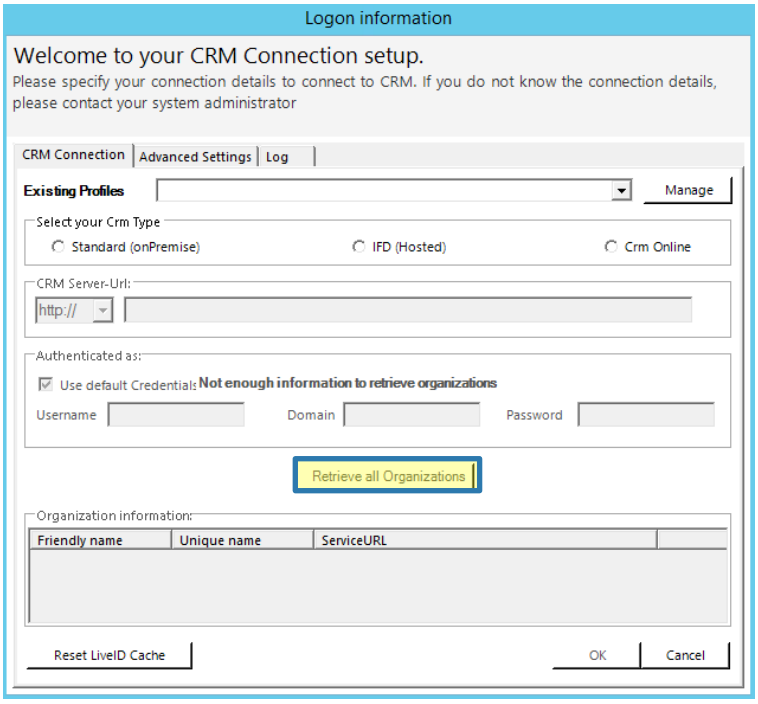


Figure 5: Installation

Once you have finished, click on the ***[OK]***-button.

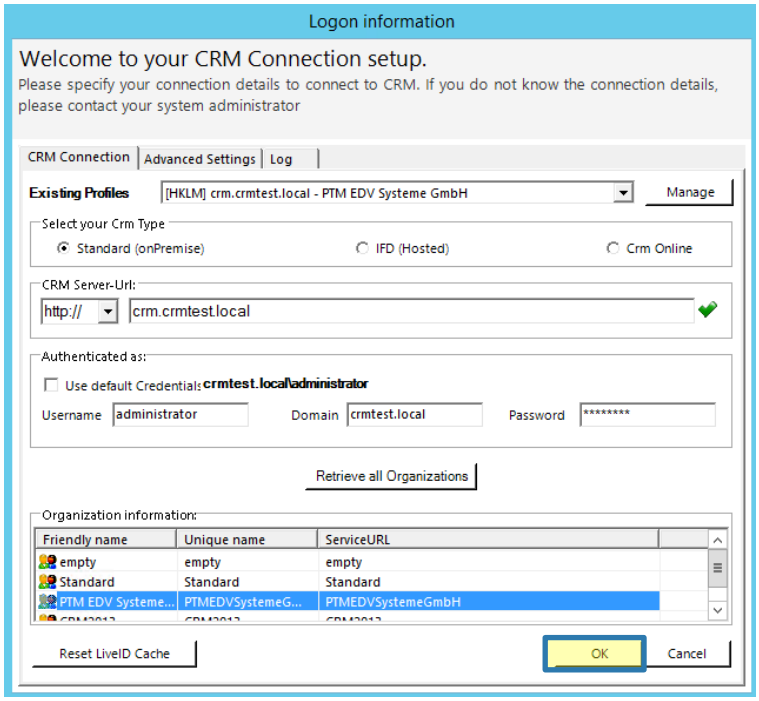


Figure 6: CRM Connection setup

The following window appears on the screen:

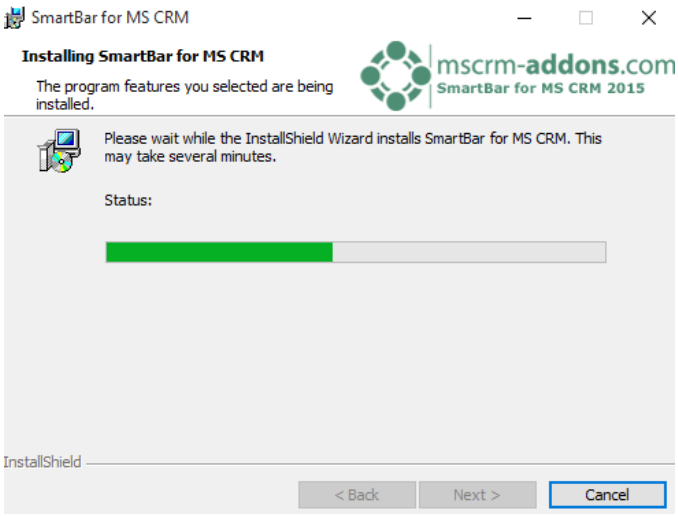


Figure 7: SmartBar Installation Shield

1.4 Security Roles

During the installation, you will be asked if you want to install the security roles for all users:

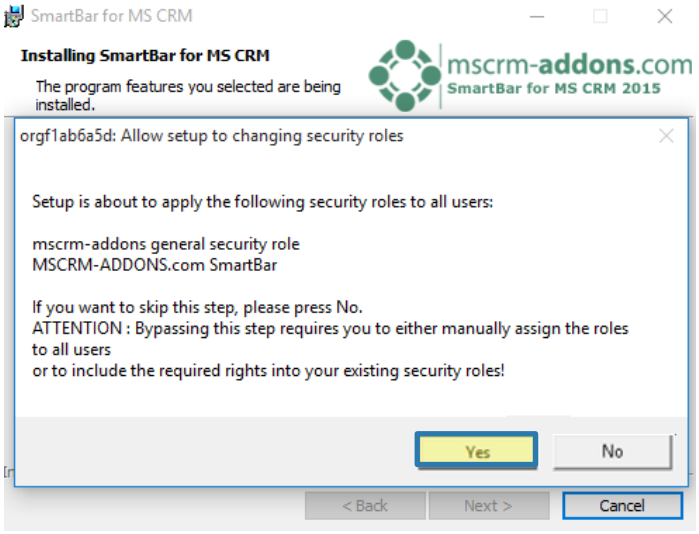


Figure 8: Security Roles for SmartBar

Click on the ***[Yes]***-button in order to continue. If you click on the ***[No]***-button, you will have to assign the roles manually to all users.

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

1.5 Complete the installation

If the installation was successful, the below window appears. Click on the [Finish]-button in order to complete the installation and to exit the installer.

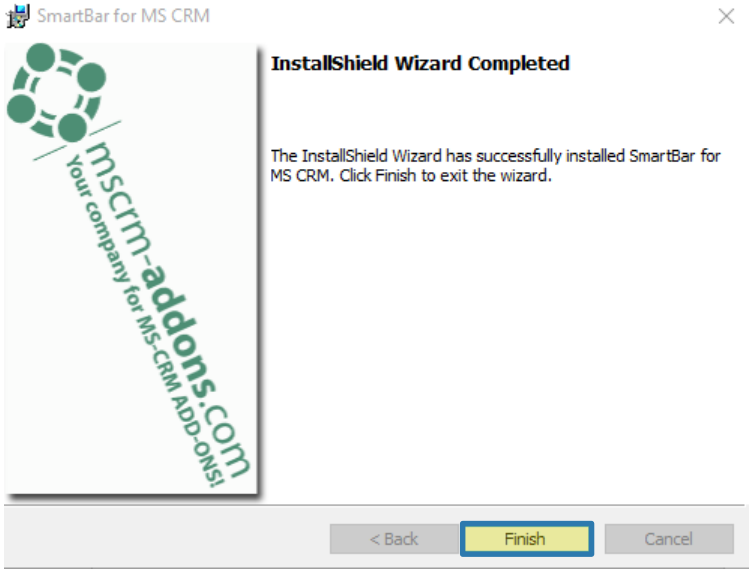


Figure 9: Installation completed

2 SmartBar Server Configuration

As soon as the installation is finished, the *SmartBar Server Config* appears.

The purpose of this configuration is to activate and configure the counting of related records in the CRM (Dynamics 365) menu.

2.1 The SmartBar Server Configuration Surface

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

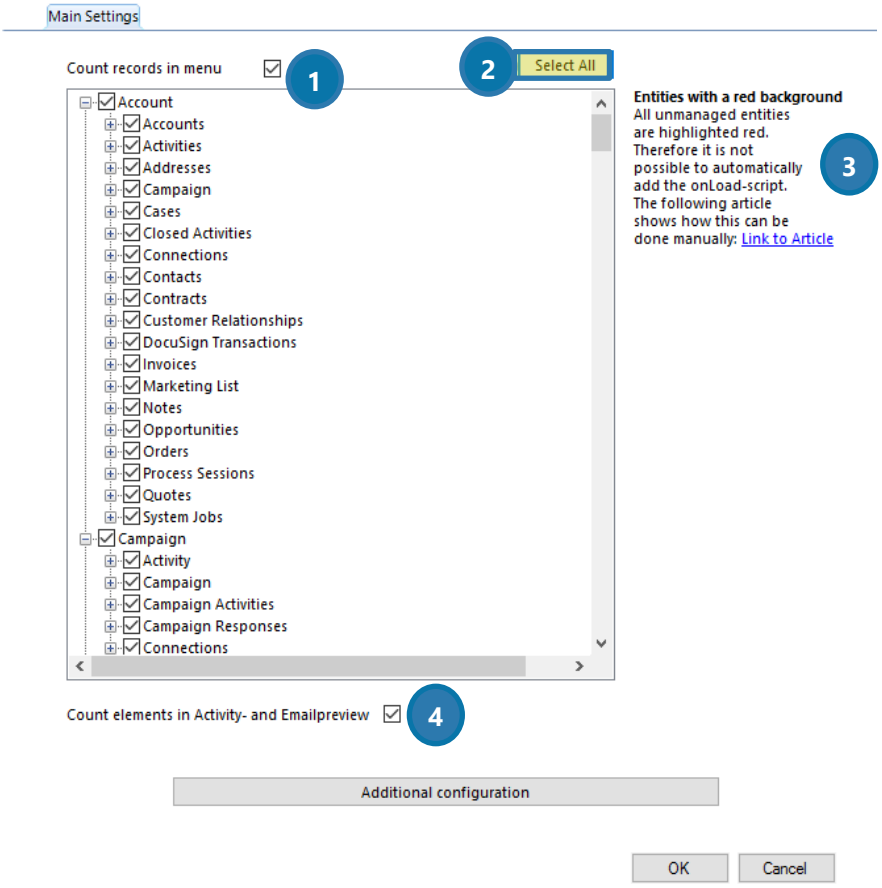


Figure 10: The SmartBar Server Configuration

1 COUNT RECORDS IN MENU: Check this box to enable the counting of related records in the menu.

2 SELECT ALL: Click this button in order to select all entities for the counting option.

3 COUNT ELEMENTS IN ACTIVITY- & EMAILPREVIEW: Check this box to use SmartBar with ActivityTools for MS CRM 2015/2016 and/or Dynamics 365. ActivityTools facilitates the CRM (Dynamics 365) internal use of activities.

4 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.

2.2 How to configure the SmartBar Server 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. If you save the changes while enabling the unmanaged entities, the following window appears:

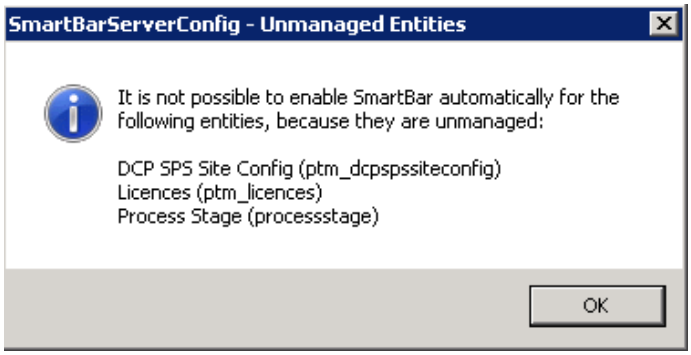


Figure 11: SmartBar Server Config – Unmanaged Entities

Click on the ***[OK]***-button in order to finish your configuration. As soon as you have saved the settings, the following below window appears. Click on the ***[OK]***-button in order to save your settings.

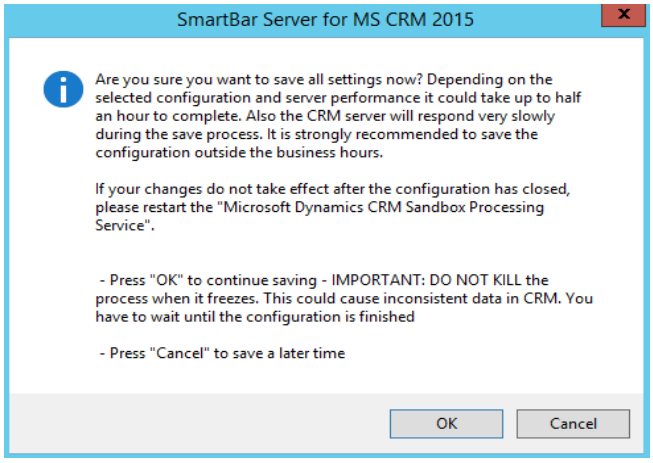


Figure 12: SmartBar Server Config – Save Settings

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.

3.1 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. For further information on the Server Configuration surface, please have a look at CHAPTER 2.1 THE SMARTBAR SERVER CONFIGURATION SURFACE ON PAGE 13.

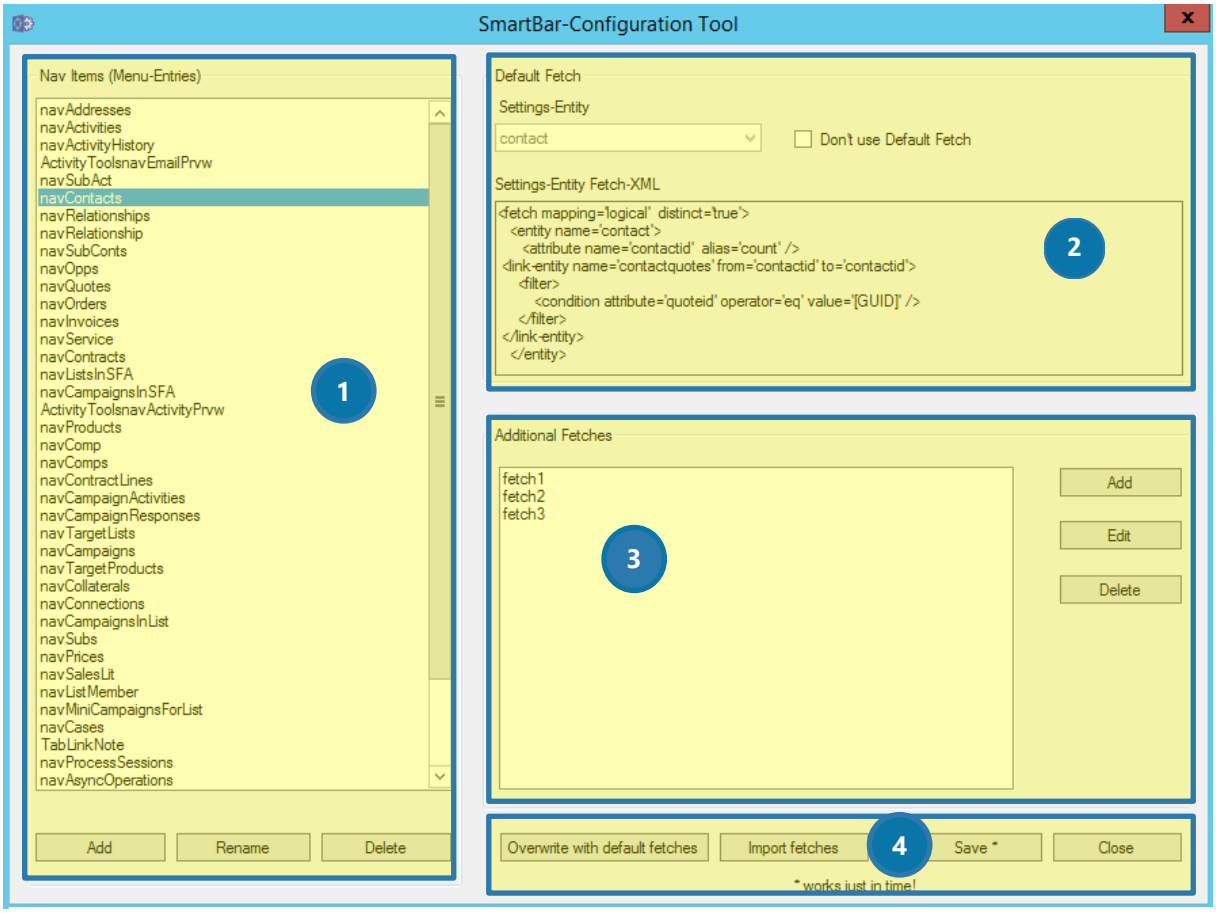


Figure 13: SmartBar Configuration Tool – Additional Configuration

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.

1 Nav Items (Menu-Entries)-Section

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*. To add, modify or delete existing entries, use the buttons at the bottom of the section.

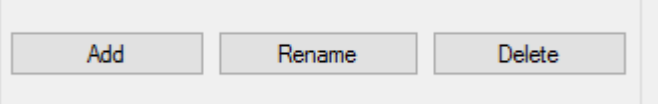


Figure 14: Nav Items section buttons

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.

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* etc.). But due to the fact that 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.

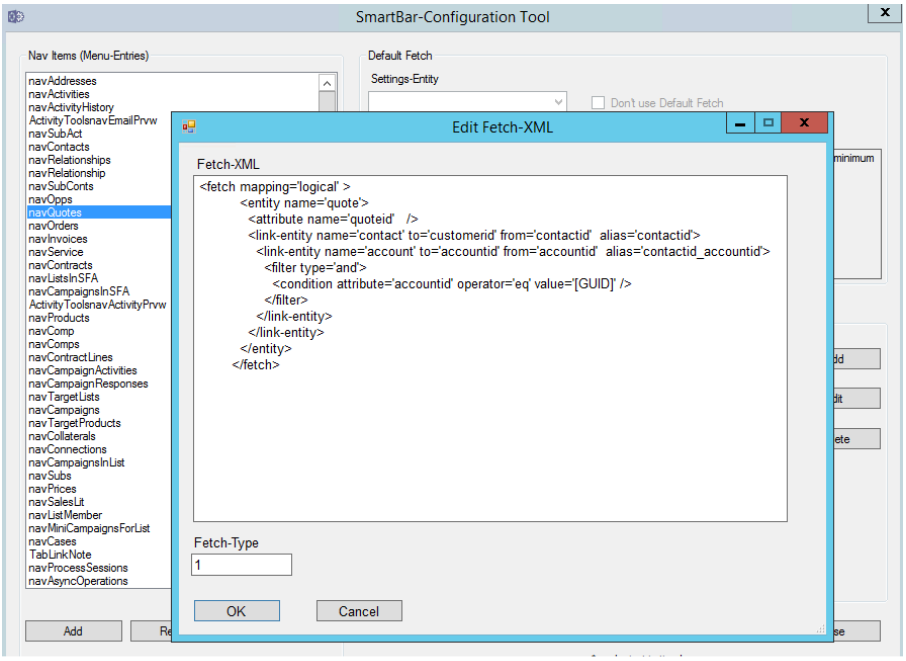


Figure 15: Edit fetch

Last but not least, the ***[Delete]***-button deletes selected fetches.

4 General Area

All buttons in this area effect the entire window.

A click on the ***[Overvrite 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 in order to save all settings of the entire Configuration Tool. The below window appears.

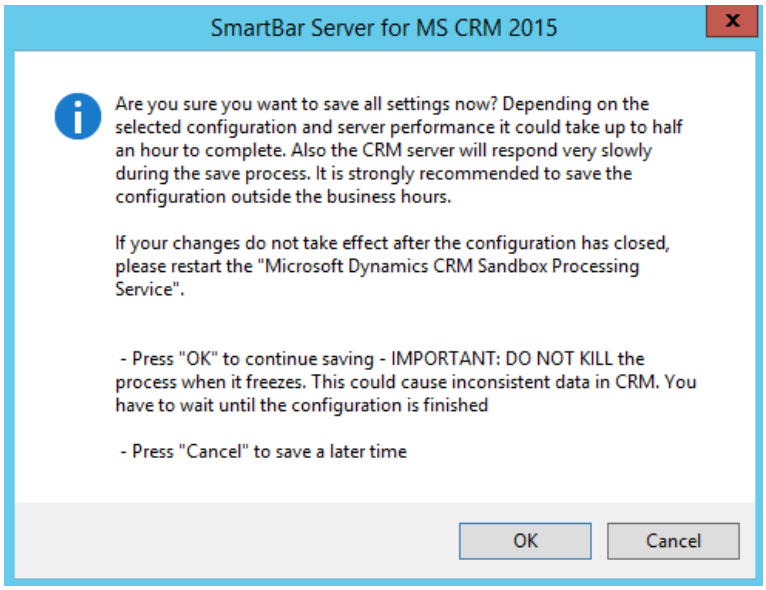


Figure 16: SmartBar Server Additional Config – Save

Click on the ***[OK]***-button in order to confirm your settings.

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.

Now, the counting of related records in the CRM (Dynamics 365) menu is set.

3 SmartBar Organization Overview

The SmartBar for Microsoft Dynamics CRM 2015/2016 and/or Dynamics 365 Configuration allows you to specify your SmartBar-Settings. To work with SmartBar Organization Overview, search for "Configuration - SmartBar for MS CRM" in the Windows Start Pane and press enter.

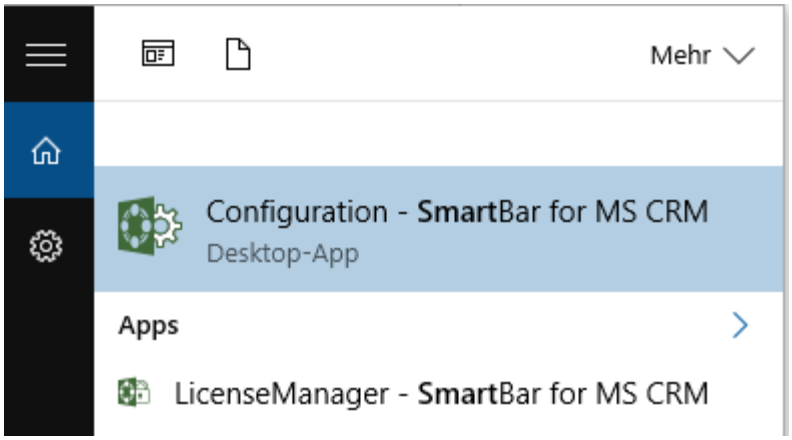


Figure 17: Configuration- SmartBar for MS CRM and Dynamics 365

The CRM (Dynamics 365) Connection setup window appears.

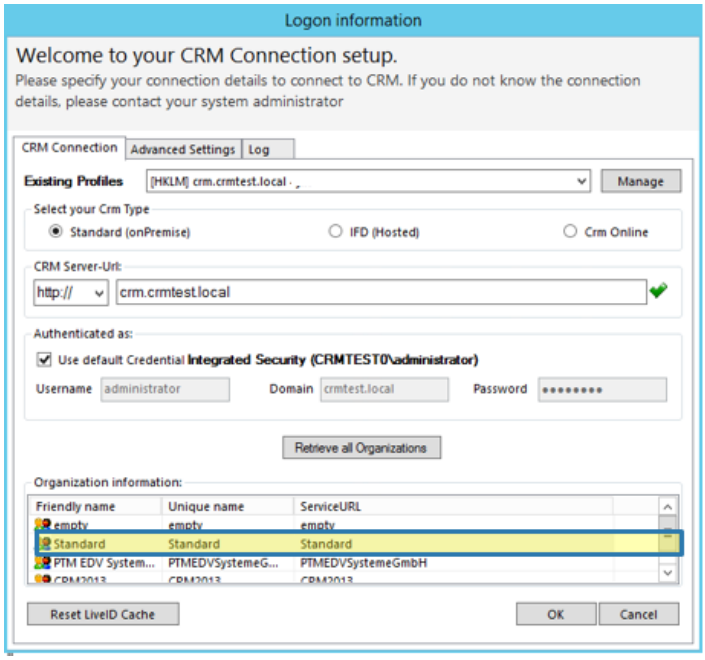


Figure 18: CRM (Dynamics 365) Connection setup

Select the appropriate organization and click on the ***[OK]***-button in order 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 in double-checking the data.

Now, the following organization overview appears:

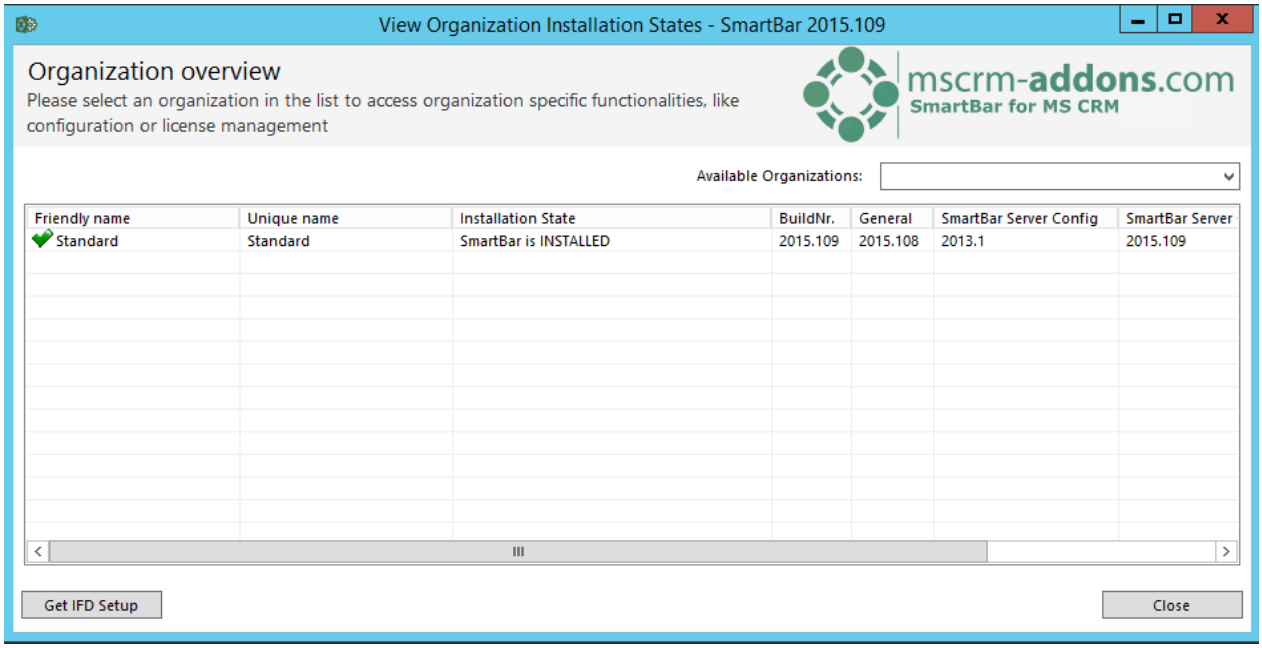


Figure 19: Organization Installation States- SmartBar

As soon as you select an organization in the list, specific function-buttons appear at the window bottom.

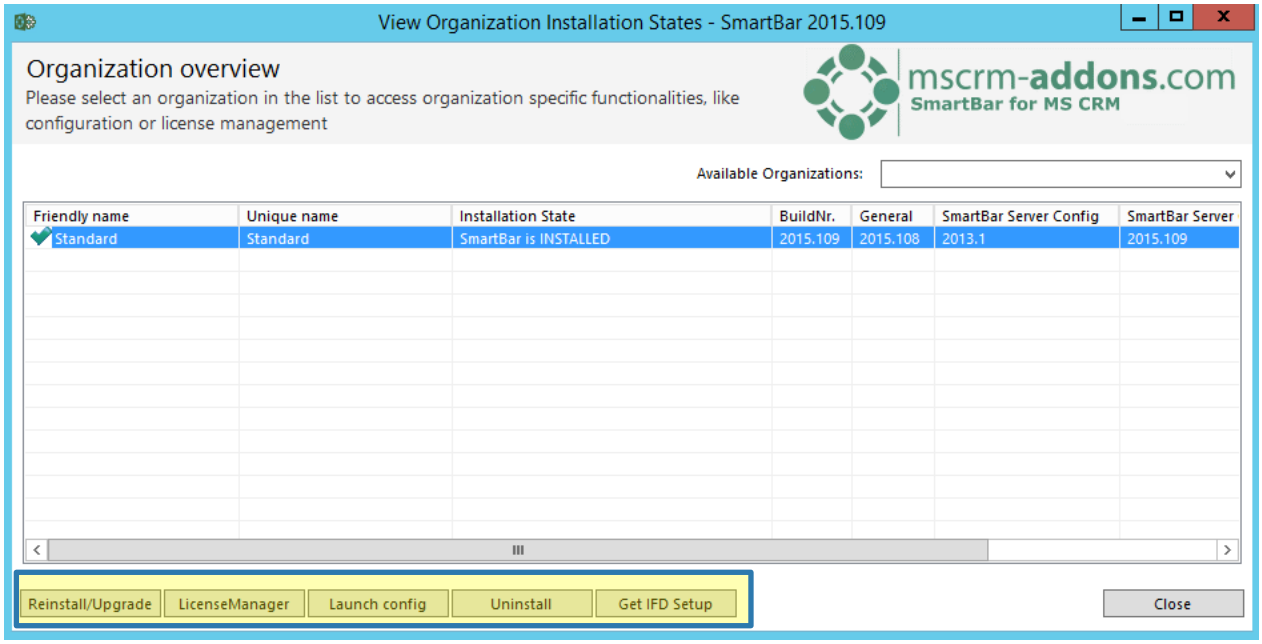


Figure 20: Organization Installation States plus specific buttons

3.1 How to reinstall/upgrade

It is very easy to reinstall/upgrade SmartBar. To do so, simply select an organization in the Organization Overview and click on the ***[Reinstall/Upgrade]***-button in order to reinstall or upgrade SmartBar for MS CRM 2015/2016 and/or Dynamics 365.

Please have a look at our License Manager Documentation for further information on how to use the License Manager. Should you have any questions, do not hesitate to contact our support team via support@mscrm-addons.com.

4 How to embed SmartBar in MS Dynamics CRM and Dynamics 365?

SmartBar for MS Dynamics CRM 2015/2016 and/or Dynamics 365 can be embedded into the entity form in two different ways.

First, you can make use of *webresources* in order to embed SmartBar in any desired entity form. Please find a detailed tutorial on how to do so in CHAPTER 7.1 HOW TO EMBED SMARTBAR AS A WEBRESOURCE? ON PAGE 38

Second, you can embed SmartBar in dashboards. Learn how to do so in CHAPTER 7.2 EMBED SMARTBAR IN DASHBOARDS ON PAGE 42.

5 The SmartBar Settings

As soon as SmartBar is embedded in MS CRM 2015/2016 and 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 21: My SmartBar – Open the 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.

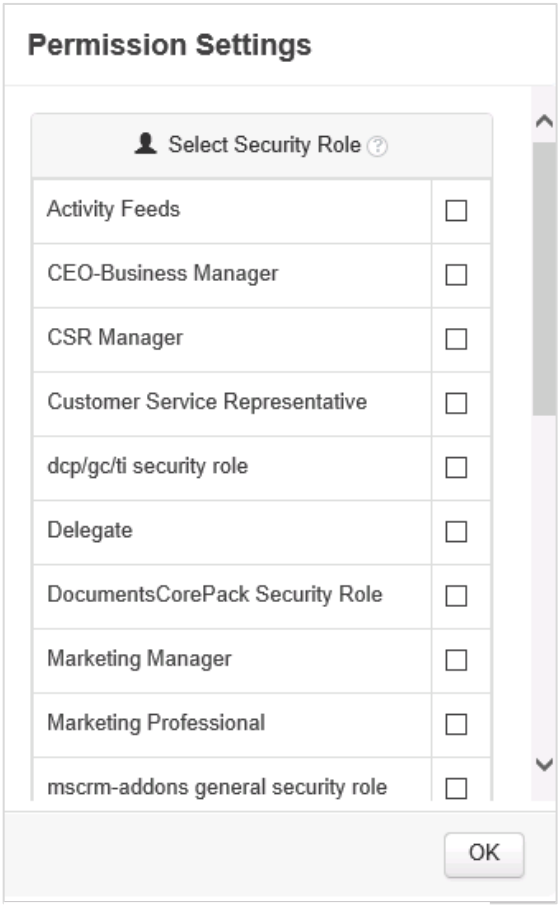


Figure 22: Permission Settings

5.1 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.

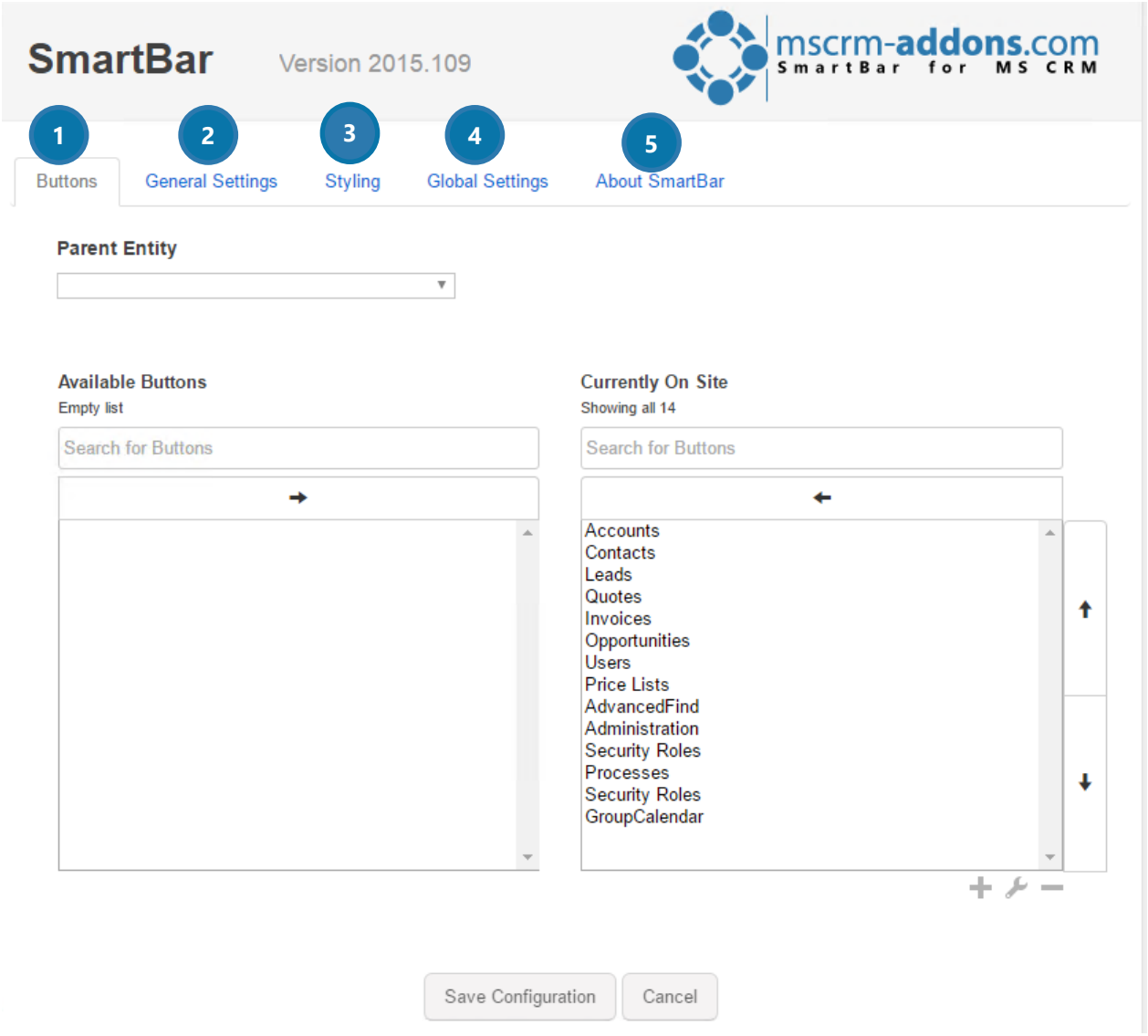


Figure 23: Permission Settings

1 The Buttons-tab

The functionalitites of this section allow you to configure the SmartBar buttons. For more information on this topic, please have a look at chapter 5.1.1 The Buttons-tab on page 26.

2 The General Settings -Tab

This section allows you to define the general settings of SmartBar. For more information on this topic, please have a look at chapter 5.1.2 The SmartBar General Settings-tab on page 28.

3 The Styling-Tab

This section allows you to define the style of your SmartBar buttons. For more information on this topic, please have a look at chapter 5.1.3 The SmartBar Styling-tab on page 31.

4 The Global Settings-Tab

Here, you can define the global settings of SmartBar. For more information on this topic, please have a look at chapter 5.1.4 Global Settings on page 34.

5 The About SmartBar-Tab

This section provides you with some information about SmartBar, like for example the version number that is currently in use.

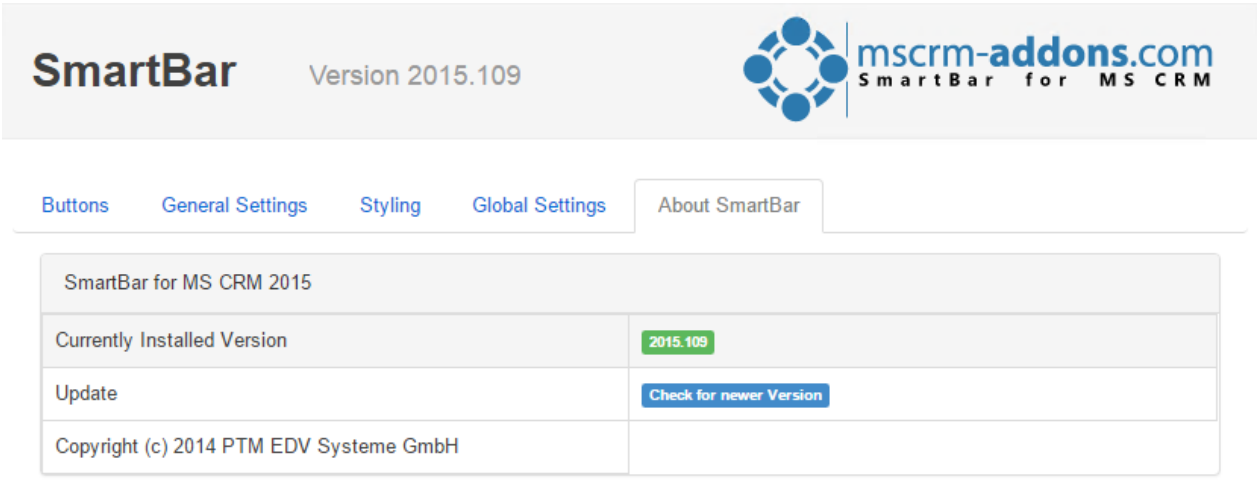


Figure 24: SmartBar – About SmartBar-tab

5.1.1 The Buttons-tab

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

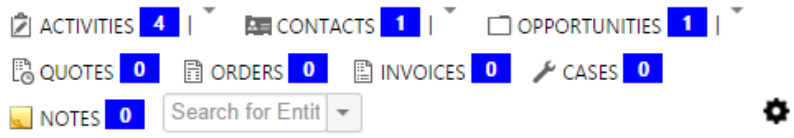


Figure 25: SmartBar buttons - example

Numbers next to the buttons display the amount 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.

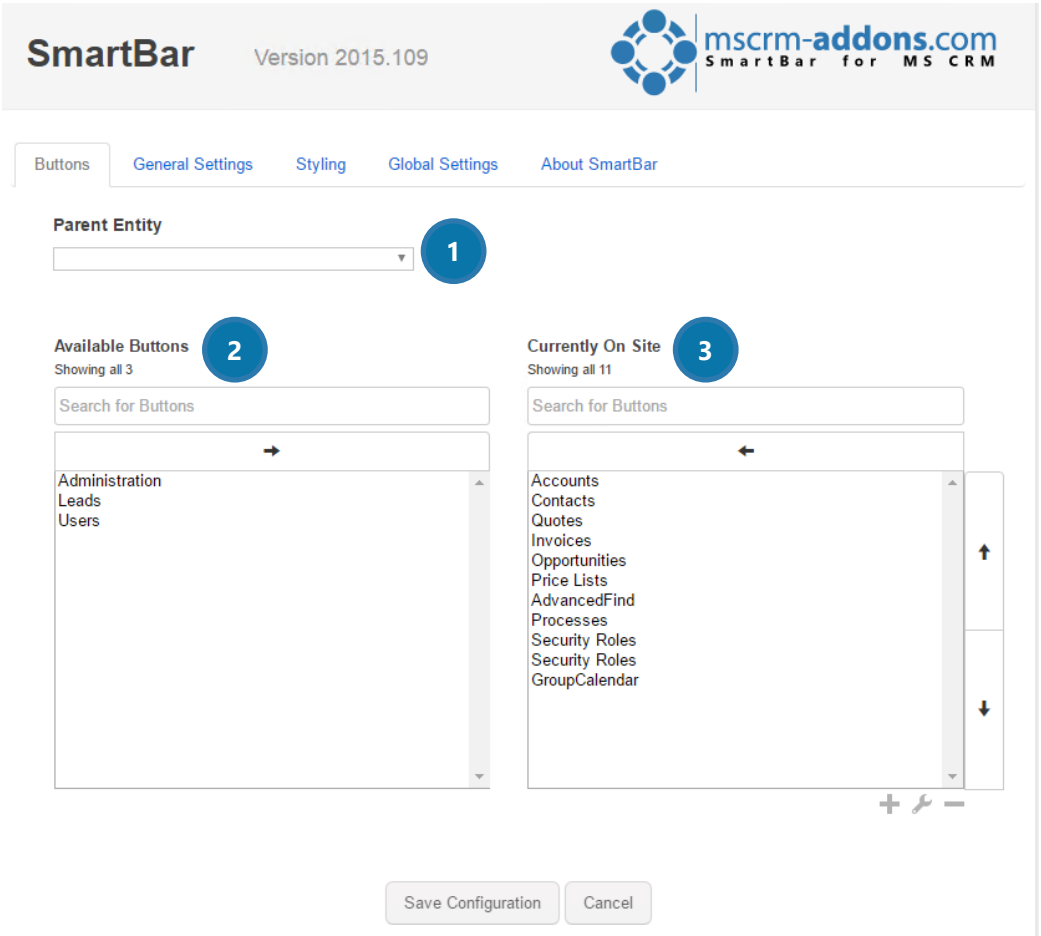


Figure 26: SmartBar – Buttons-tab

1 Parent Entity

Here, 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.

❷ Available Buttons

This section provides you with a list of all available buttons. The buttons in this list have NOT been published yet!

❸ Currently On Site

This section provides you with a list of all buttons that are currently on site.

There are two different kinds of SmartBar buttons: Standard and Custom buttons. Because of that, there are also two different ways to customize the buttons. Learn how to customize Standard buttons in CHAPTER 7.4 HOW TO ADD OR REMOVE STANDARD SmartBar buttons SMARTBAR BUTTONS ON PAGE 47. Learn how to customize Custom Button in CHAPTER 7.5HOW TO ADD CUSTOM BUTTONS ON PAGE 48.

5.1.2 The SmartBar General Settings-tab

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

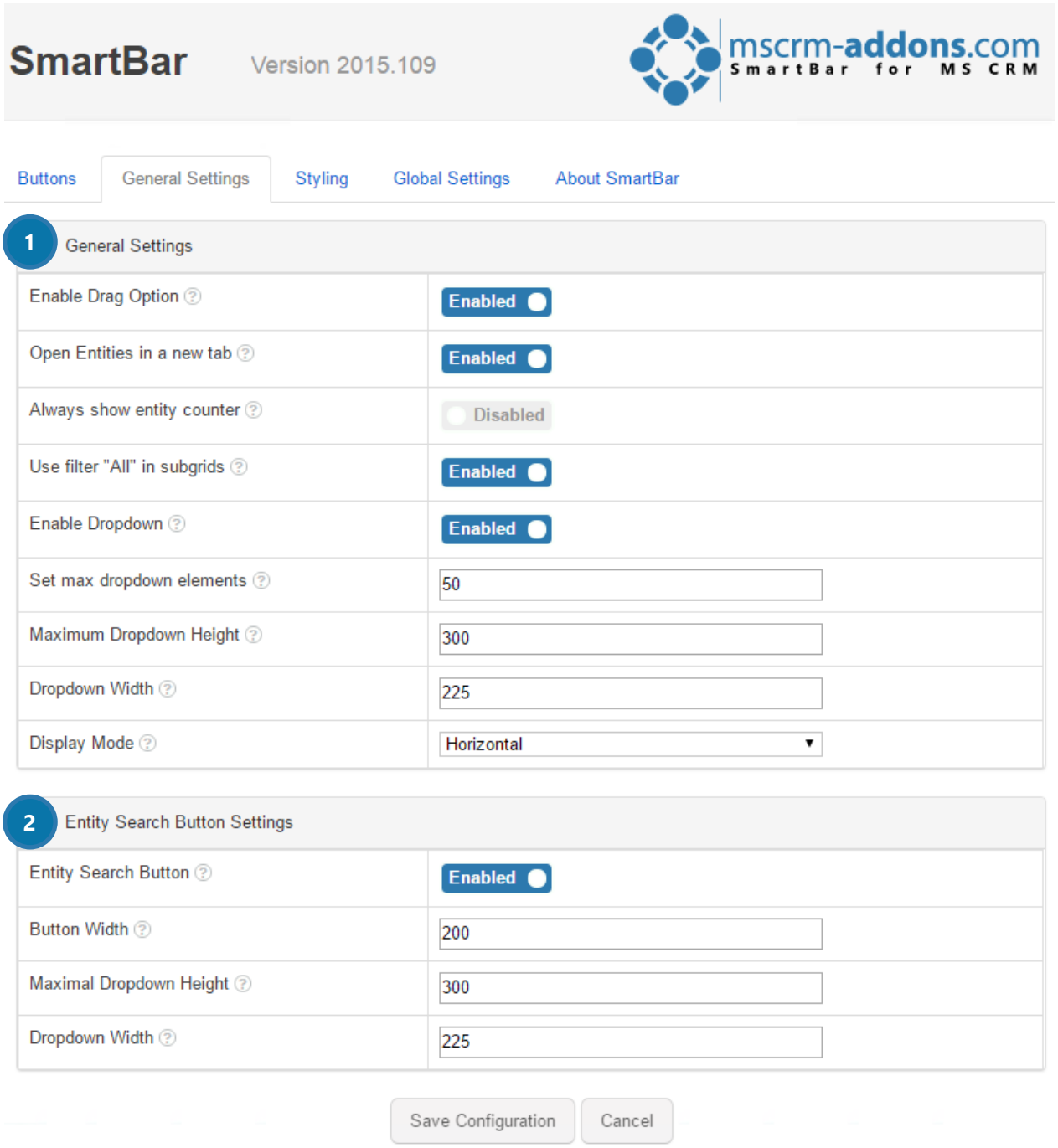


Figure 27: SmartBar – General Settings-tab

1 The General Settings

Enable Drag Option
Enable this function in order to have *draggable* SmartBar Buttons.

Open Entities 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
Enable this function to filter "All" in sub-grids.

Enable Dropdown
The dropdown functionality for related entities can be enabled here.

Set max. dropdown elements
Define how many elements should be displayed in the dropdown-menu.

Max. 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.

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

2 Entity Search Button 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.

Max. 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.

5.1.3 The SmartBar Styling-tab

SmartBar can be customized in two ways: Standard and Metro Style. Depending on the style, also the SmartBar button functions vary.

While the standard configuration only allows to modify background color and counter number color, the metro style also allows to modify the height and width of the buttons. In the Styling-tab, you can select which style you would like to use in the future.

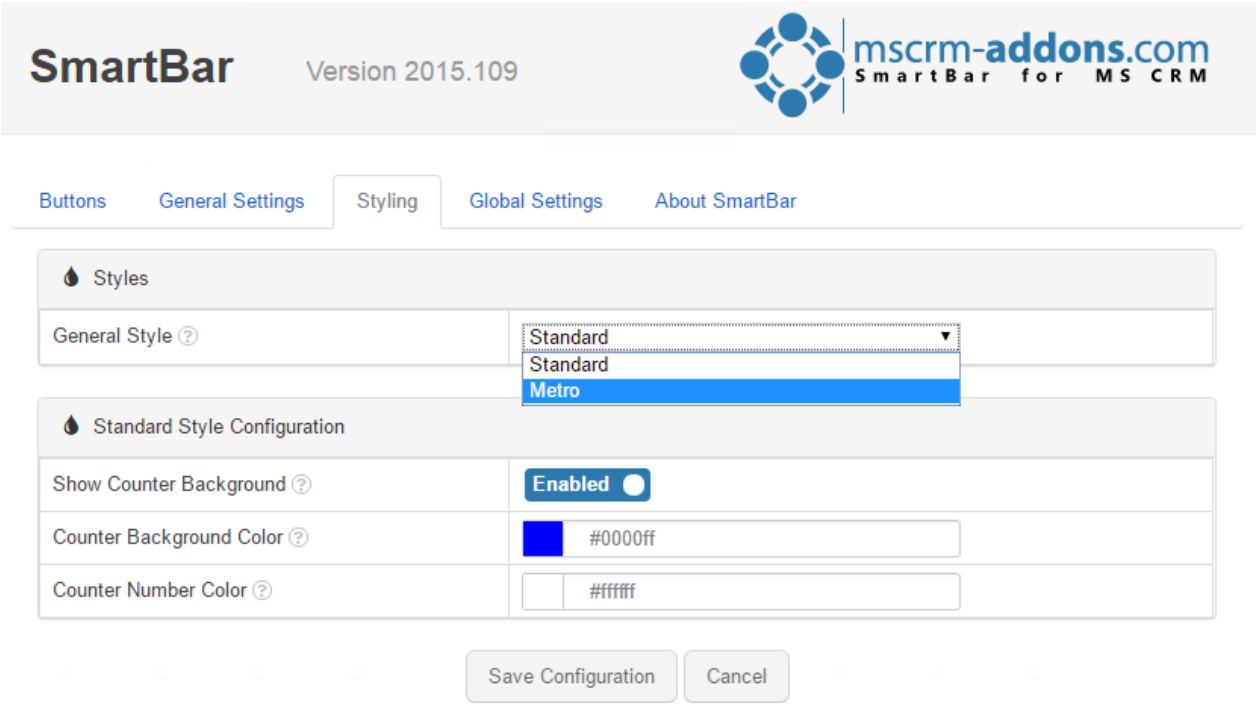


Figure 28: SmartBar – Styling-tab

5.1.3.1 Styling-tab Standard style configuration

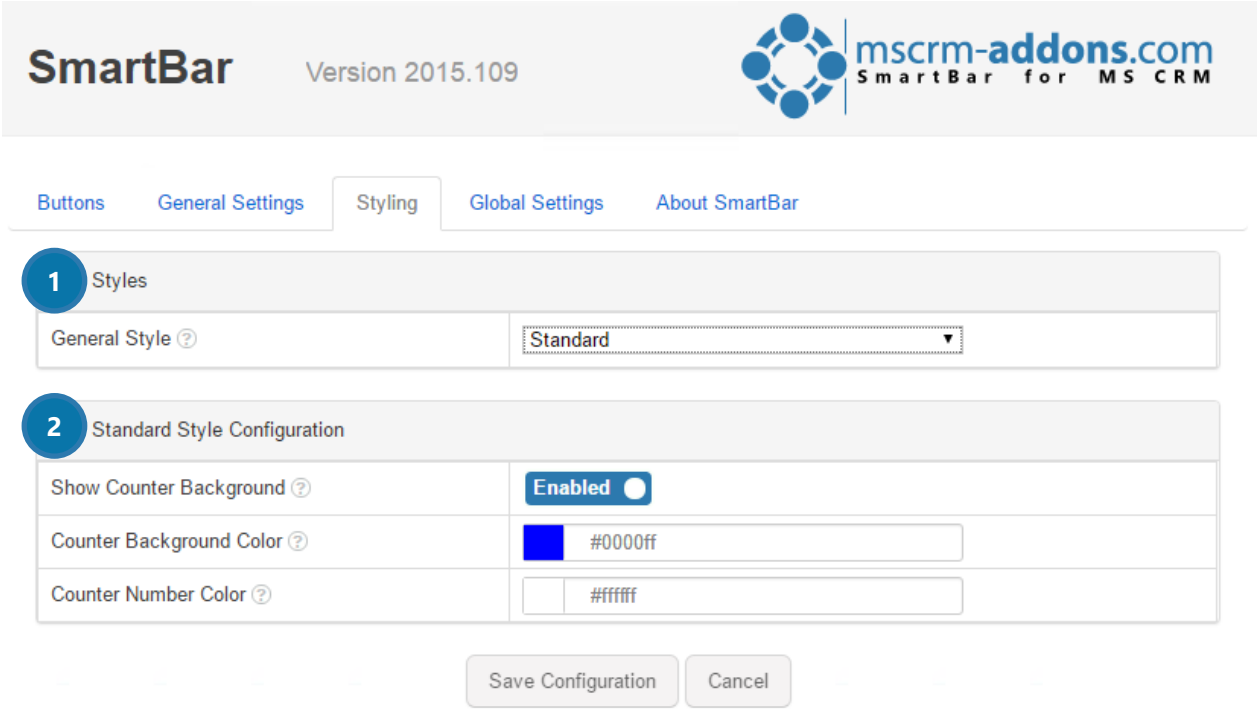


Figure 29: SmartBar – Standard style configuration

1 STYLES

GENERAL STYLE

Please use the drop-down menu in order to select between Standard or Metro Style.

2 STANDARD STYLE CONFIGURATION

SHOW COUNTER BACKGROUND

Show a background for your entity counter, which will be displayed next to your buttons.

COUNTER BACKGROUND COLOR

Set the background color of your counter.

COUNTER NUMBER COLOR

Set the color of your counter number. Make sure you use another color than for the counter background.

5.1.3.2 Styling-tab Metro Style configuration

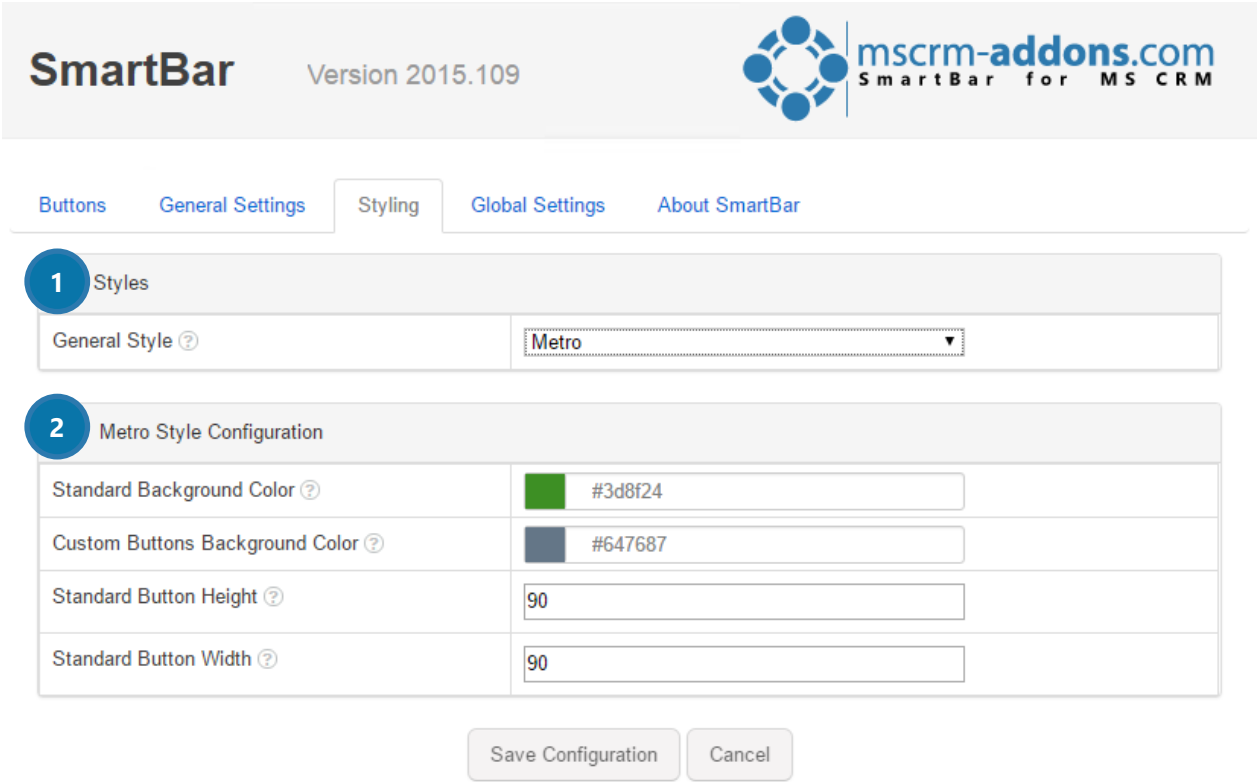


Figure 30: SmartBar – Metro style configuration

1 STYLES

GENERAL STYLE

Please use the drop-down menu in order to select between Metro or Standard Style.

2 METRO STYLE CONFIGURATION

STANDARD BACKGROUND COLOR

Please set the standard background color of your metro buttons here.

CUSTOM BUTTONS BACKGROUND COLOR:

Please define the standard background color of your custom metro buttons here.

STANDARD BUTTON HEIGHT:

Set the standard button height of your metro buttons in pixels here. (Minimum: 32).

STANDARD BUTTON WIDTH:

Set the standard button width of your metro buttons in pixels here. (Minimum: 32).

5.1.4 Global Settings

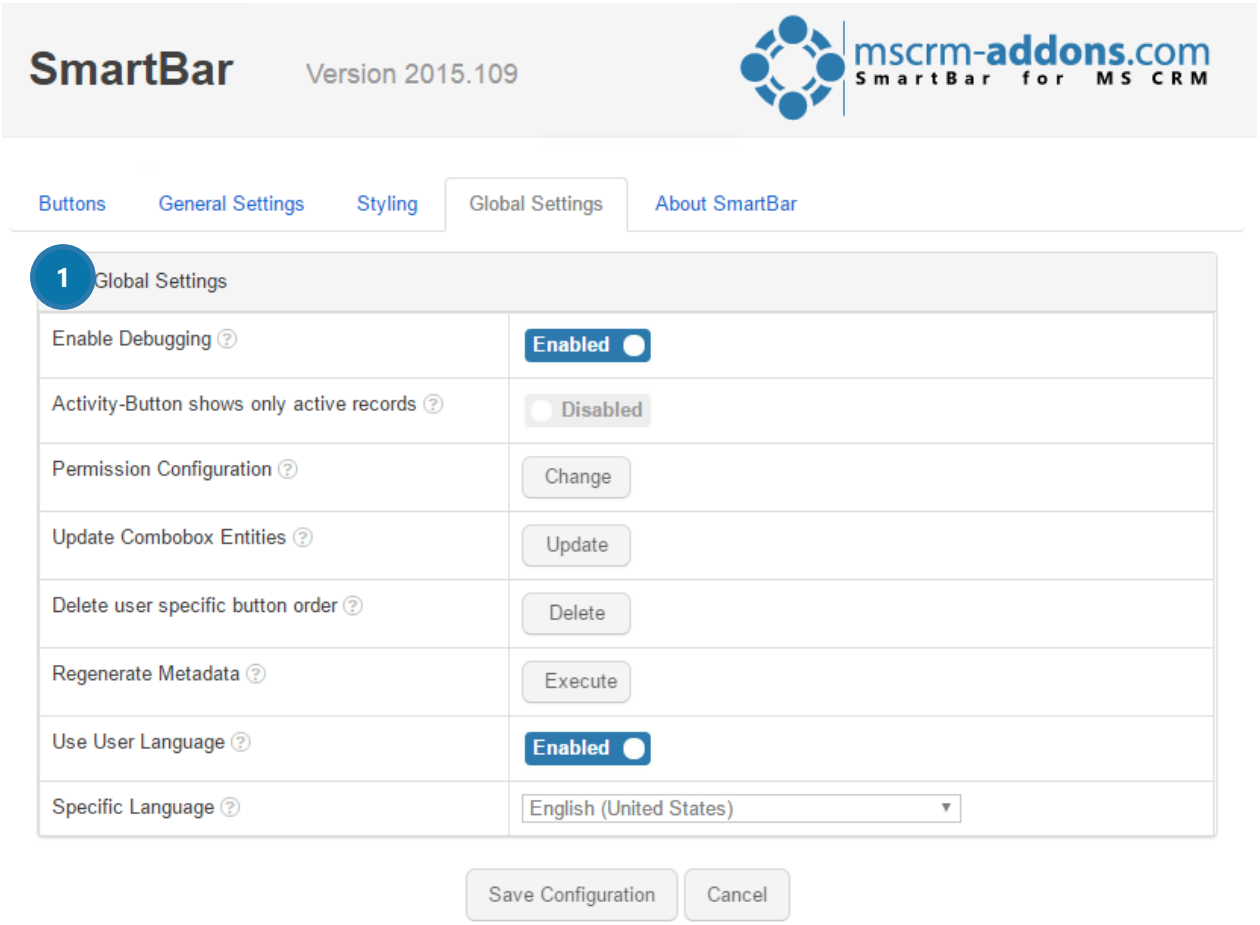


Figure 31: SmartBar – Global Settings

1 Global Settings

Enable Debugging

Switch to *enabled* to enable debugging.

Enabling this option will probably slow down your system.

Activity-Button shows only active records

The ***[Activity]***-button will only show and count active records, if this option is enabled.

Permission Configuration

Users having this security role are allowed to configure SmartBar.

Update Combobox Entities

Update the sitemap entries of the entity search button.

Delete user specific button order

Force every user to use your global button order by deleting their User/Temp Settings.

Regenerate Metadata

Generate every fetch and title of the SmartBar buttons.

Use User Language

SmartBar buttons will be shown in the selected user language if this option is enabled.

Specific Language

Define a specific language exclusively for the SmartBar buttons.

6 Uninstall SmartBar for MS CRM 2015/2016 and Dynamics 365

To uninstall SmartBar select "Programs and Features" in the Control Panel.

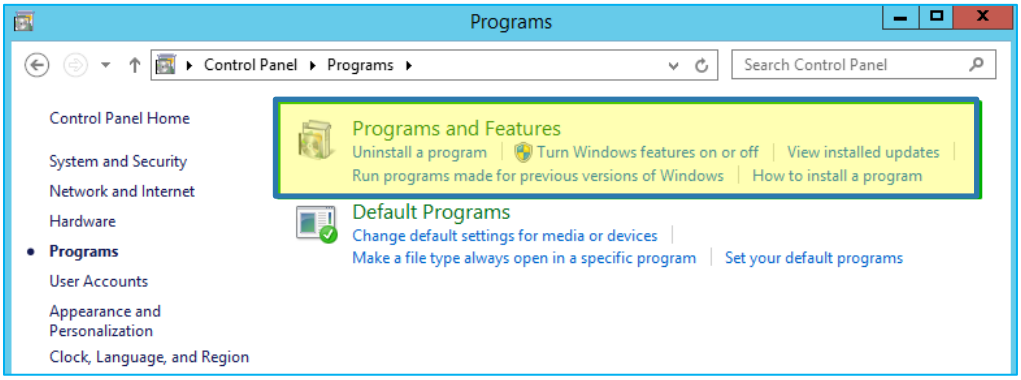


Figure 32: Uninstall – Programs and Features

Search for SmartBar for MS CRM 2015/2016 and/or Dynamics 365 in *Uninstall or change a program* and click on it in order to open the file.

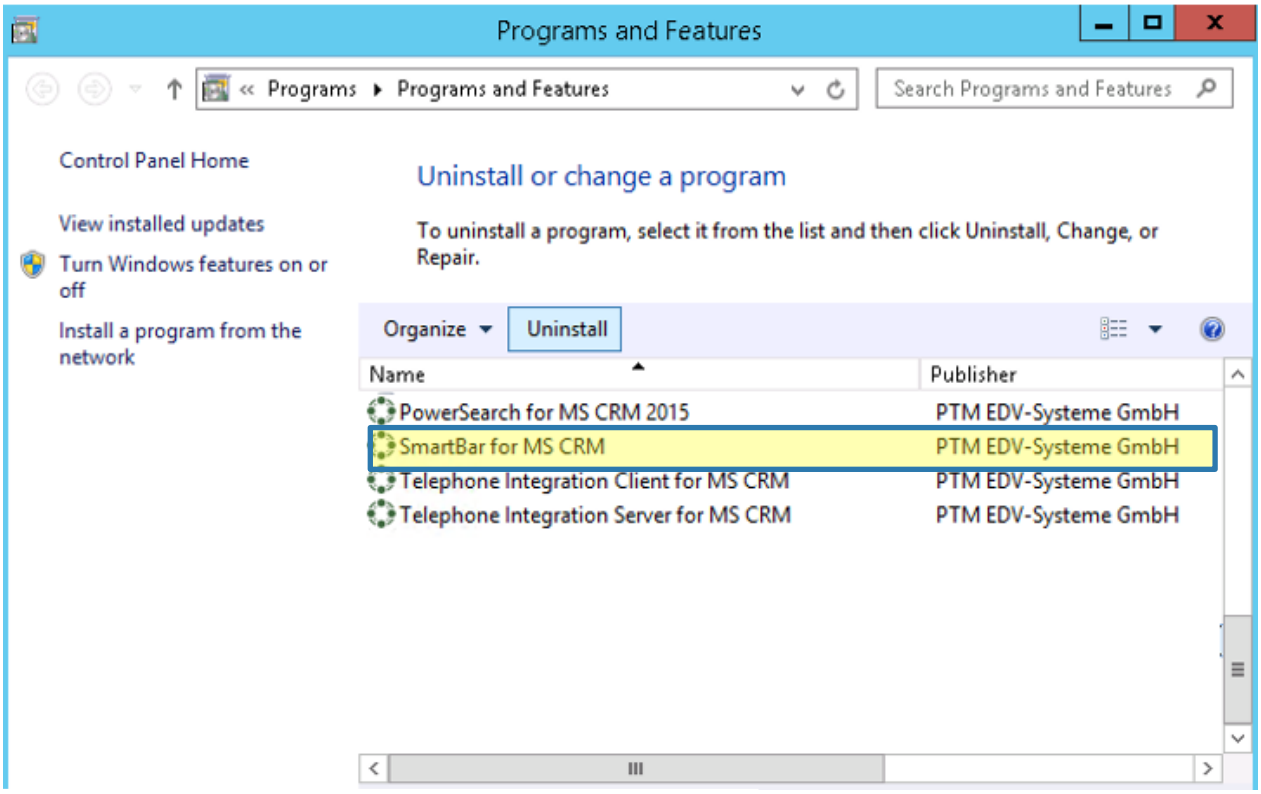


Figure 33: Uninstall – Uninstall or change a program

Check the *Full Uninstall*-option in order to remove the application and the solutions from within your CRM.

Check *Uninstall application only* in order to leave all solutions in your CRM. Only the management part for this application will be uninstalled.

Click on the ***[Continue]***-button in order to finish the uninstall process.

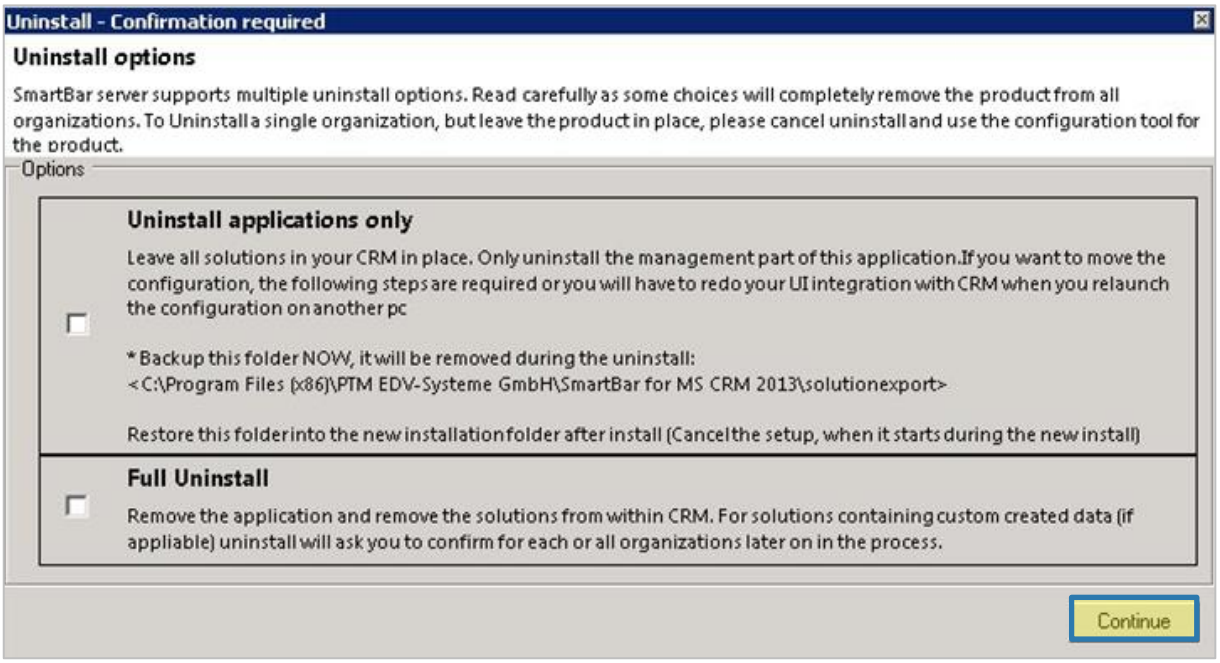


Figure 34: Uninstall – Confirmation required

7 Tutorials ("How To's")

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

7.1 How to embed SmartBar as a WebResource?

Follow this step-by-step instruction to properly embed SmartBar as a webresource into your Dynamics CRM.

1) Open the entity into which you want to embed SmartBar (here: Sample Account 1 (1)) and click on the ***[Form]***-button (2) in the command bar.

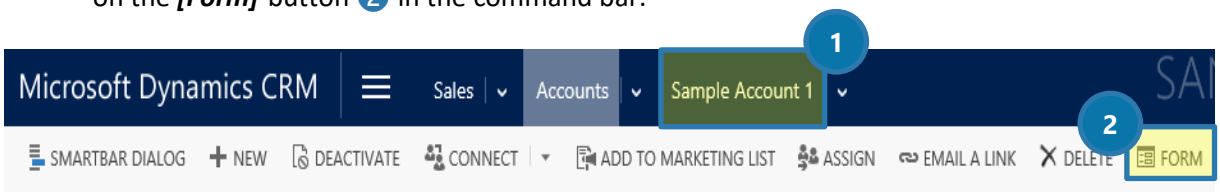


Figure 35: Dynamics CRM command bar – [Form]-button

2) In the next window select the *Insert*-tab (1) and select the ***[Web Resource]***-button (2).

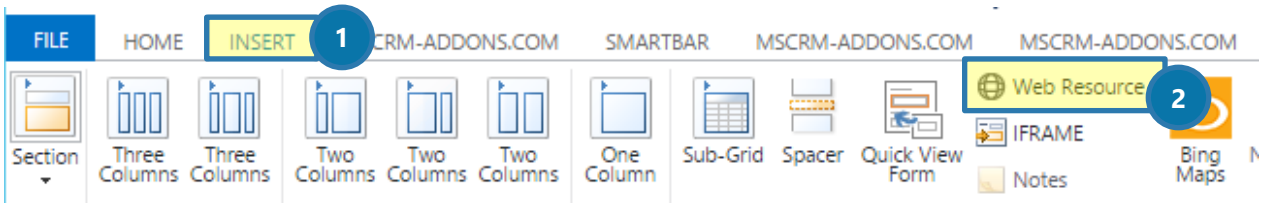


Figure 37: Insert webresource

3) The *Add Web Resource*-window opens. Look for *ptm_SmartBar/MainPage.html* in the web resource field. If it does not appear automatically, press the ***[Look up More Records]***-button (1).

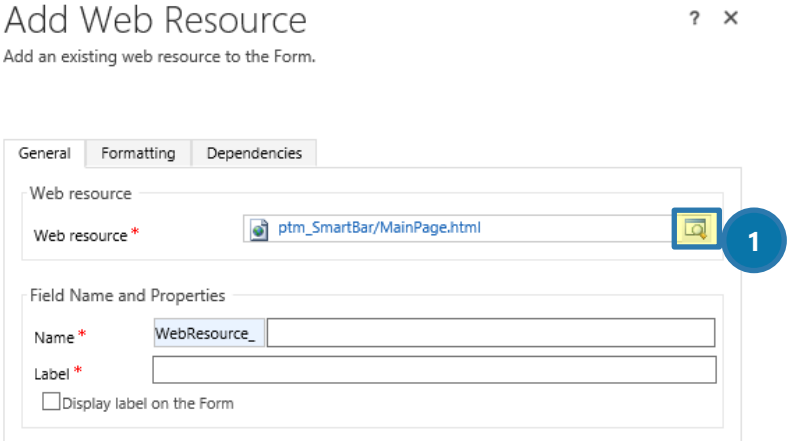


Figure 36: Look for Ptm_SmartBar/MainPage.html

4) The "Look up record"-window appears. As soon as you have found the correct file, please mark it and click on the ***[Add]***-button.

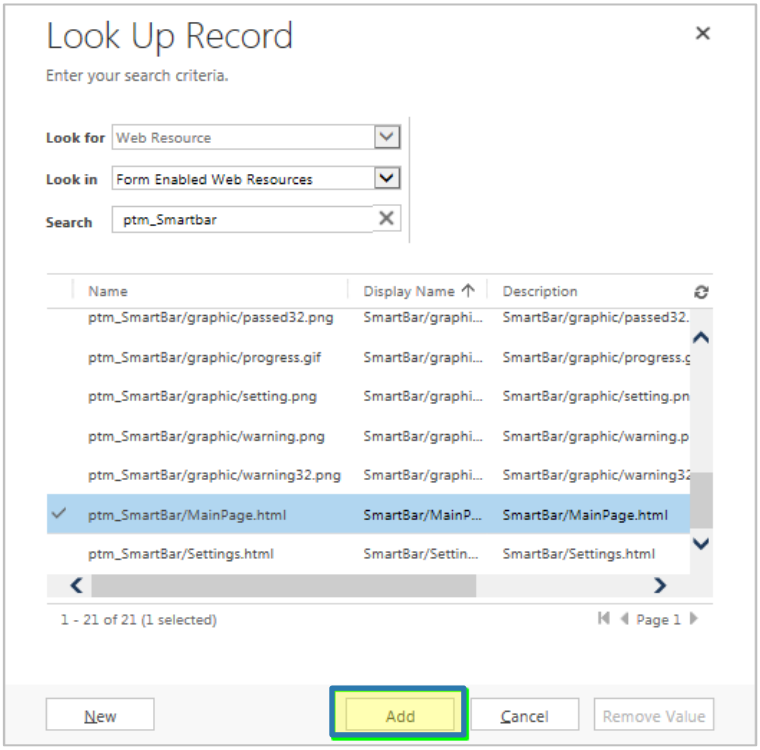


Figure 38: Look up Record-window

5) Now, the *Add Web Resource*-window appears again. Please name your web resource and insert the name in the *Name**-field (1). Next, click on the ***[OK]***- button (2) in order to proceed.

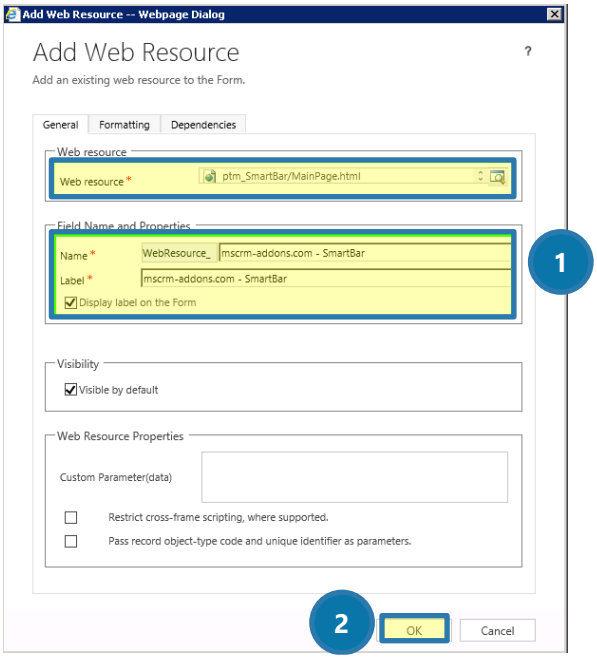


Figure 39: Add Web Resource

6) In the next window, drag and drop the new form to its future place.

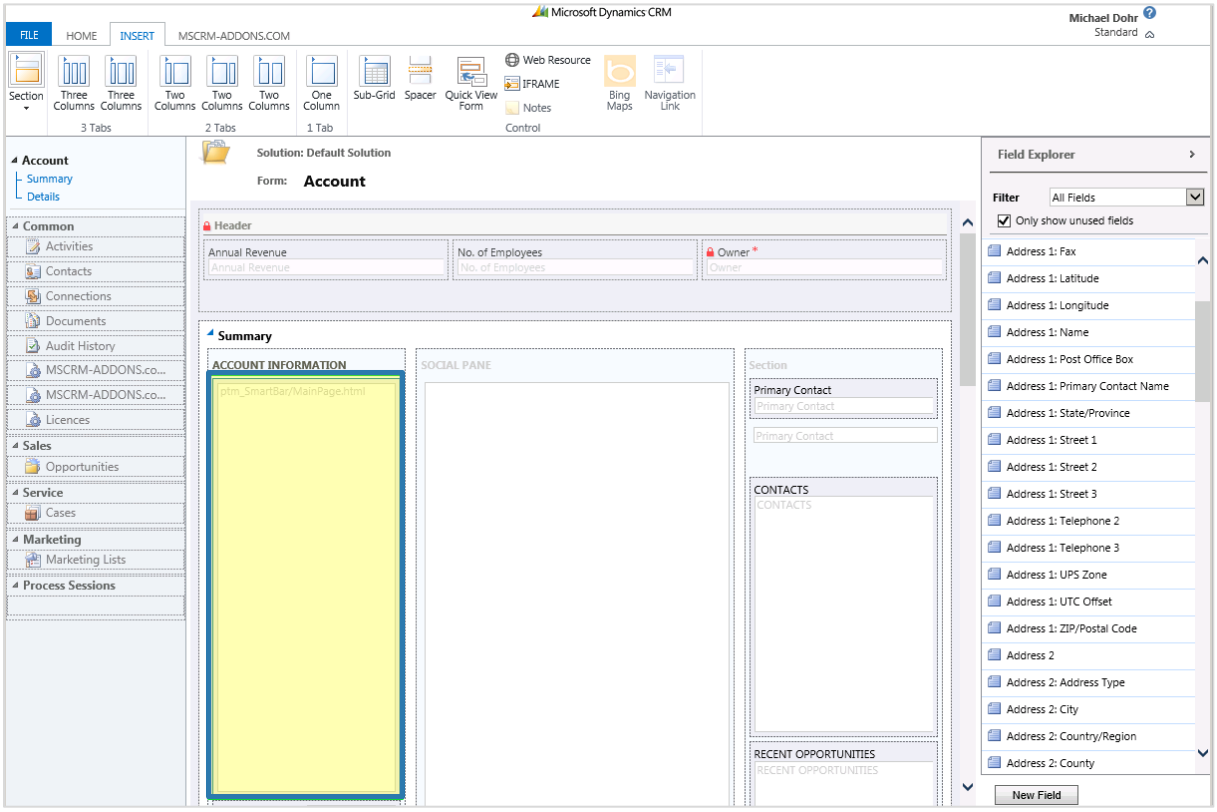


Figure 40: Drag and drop the new form

7) Once finished, please go back to the *Home*-tab and click on the ***[Save]***-button and the ***[Publish]***-button.

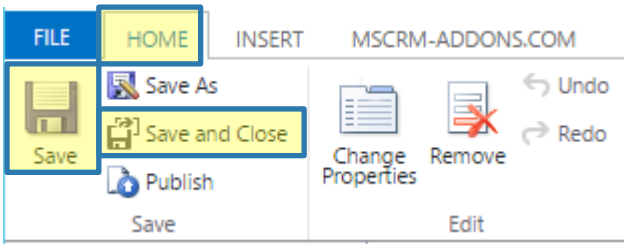


Figure 41: Home-tab

8) Now the following window appears:

Figure 42: Publishing customizations...

Now return to the entity you wanted to add SmartBar. Refresh the page. Your entity should appear like the one in figure 43.

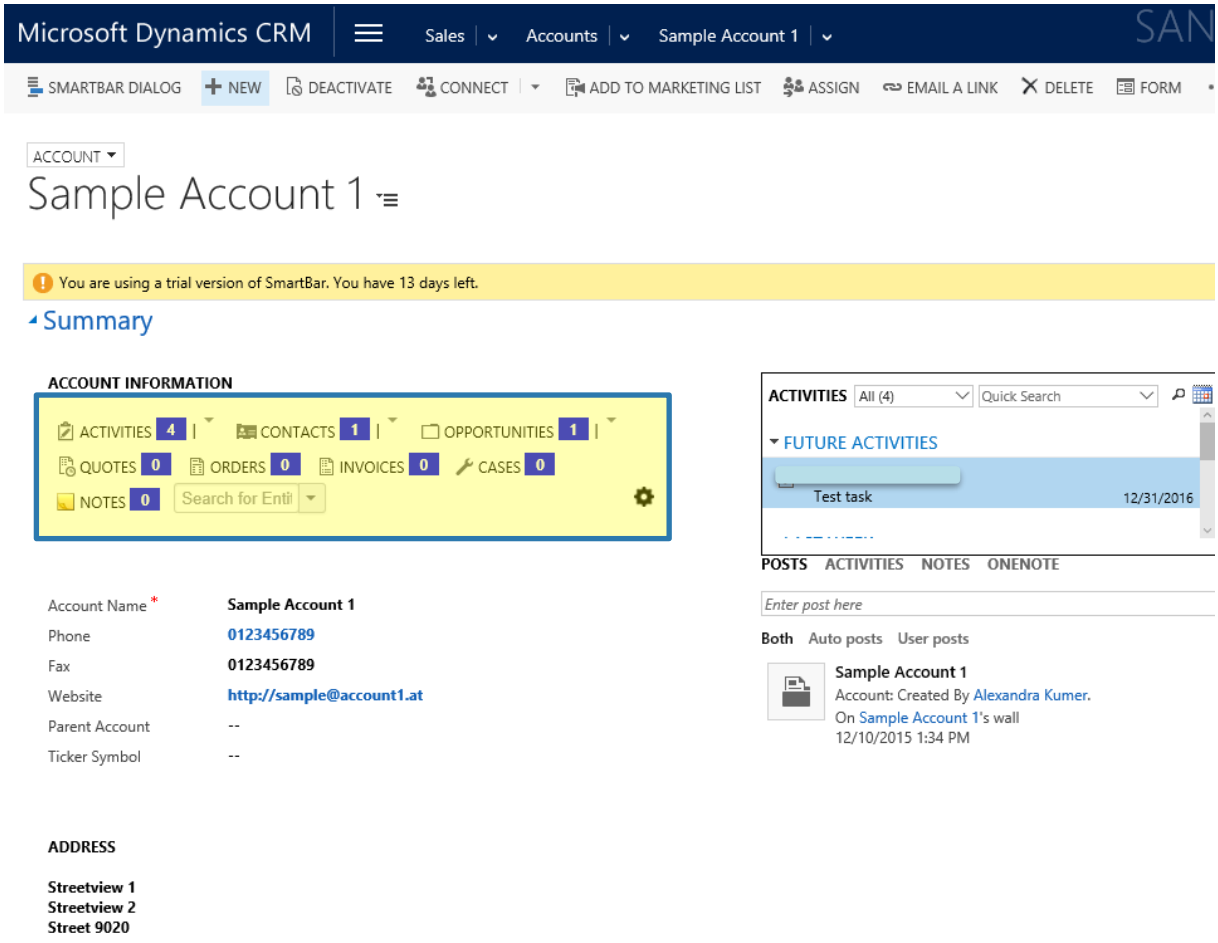


Figure 43: Example result

7.2 Embed SmartBar in Dashboards

SmartBar for MS Dynamics CRM 2015/2016 and Dynamics 365 can as well be embedded in any of your CRM-dashboards. Please follow the below tutorial in order to add SmartBar to dashboards.

1) To add SmartBar to your CRM-Dashboard e.g. for the entity Sales, please open your CRM-system and navigate to *Sales* > *Dashboard*. In order to create a new custom dashboard, click on the ***[New]***-button in the command bar. If you want to edit an existing dashboard, simply select an existing one and click on the ***[Edit]***-button. In our example, we will create a new dashboard.

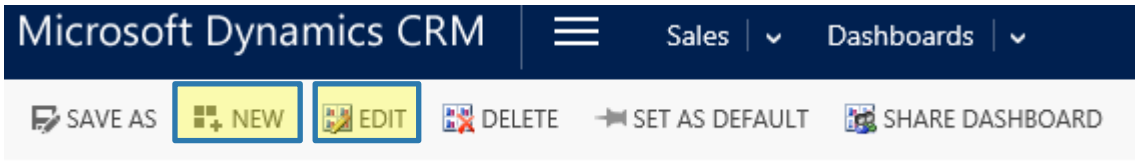


Figure 44: Open/edit a dashboard

Select an empty grid in the window that opens now and click on the ***[Create]***-button in order to continue.

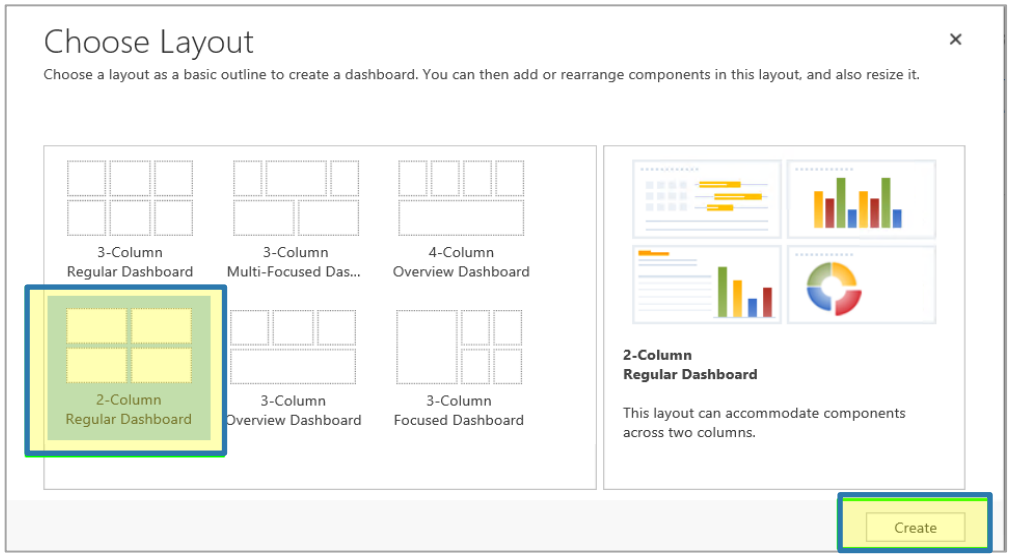


Figure 45: Select a layout

2) Afterwards, click on the ***[Webresource]***-button in the command bar or on the *web resource*-icon in the grid window that opens now:

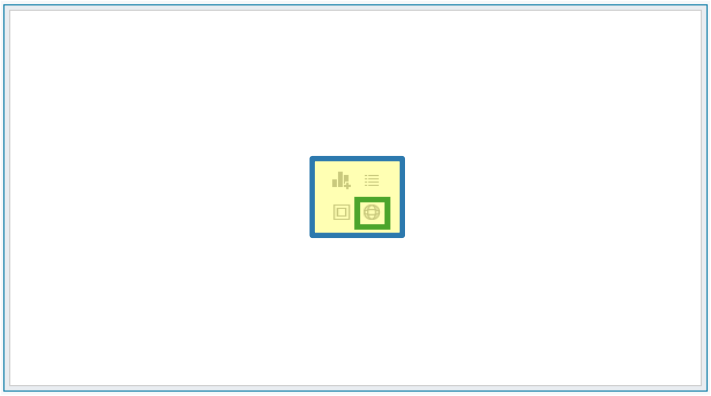


Figure 46: Open a web resource

3) Please proceed like shown in step 3 – 5 in the previous chapter. For further information on this topic, please go to CHAPTER 7.1 HOW TO EMBED SMARTBAR AS A WEBRESOURCE? ON PAGE 38 and navigate to step 3.

4) SmartBar has now been added to your dashboard. To modify the height and width, simply use the scaling buttons (1) in the command bar.

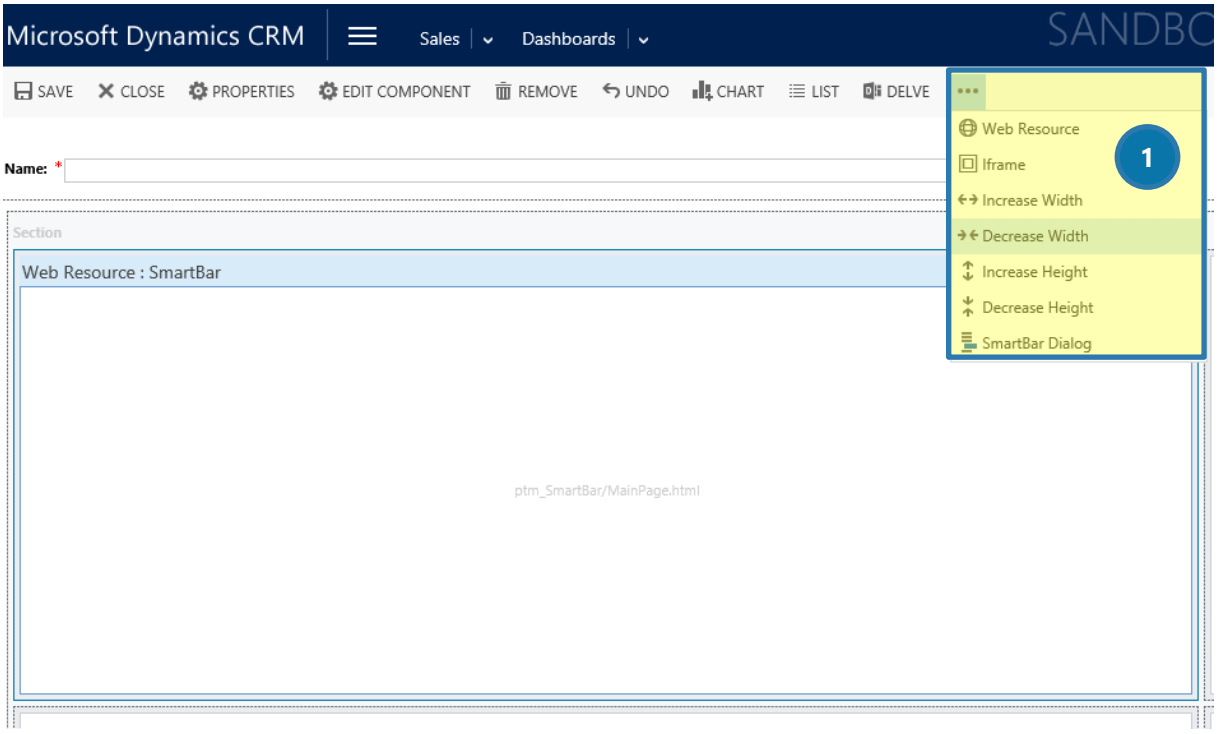


Figure 47: Modify height and width

A possible result could look like figure the one in figure 48.

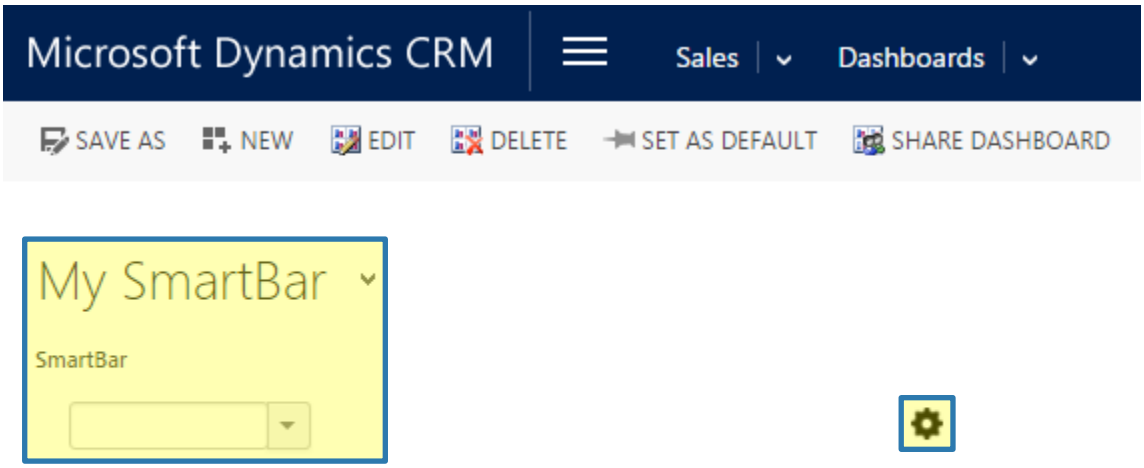


Figure 48: Modify height and width

All you have to do now is to click on the SmartBar Settings to configure your custom buttons. For more information on the SmartBar buttons, have a look at CHAPTER 5.1.1 THE BUTTONS-TAB ON PAGE 26.

7.3 How to navigate with SmartBar

SmartBar for MS Dynamics CRM 2015/2016 and/or Dynamics 365 allows a simple forth and back navigation between CRM entities and related records with a simple click on the corresponding SmartBar button. You can either navigate from an entity where SmartBar is embedded or from the SmartBar dialog.

No matter which option you select, the SmartBar persists anyway when you switch to related entities. This is the reason why SmartBar enables a simple back and forth navigation within MS CRM/Dynamics 365. Simply click on one of the listed entities, e.g. activity, to change to activities.

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.

7.3.1 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: *Opportunities*) and you will be redirected to the related opportunities.

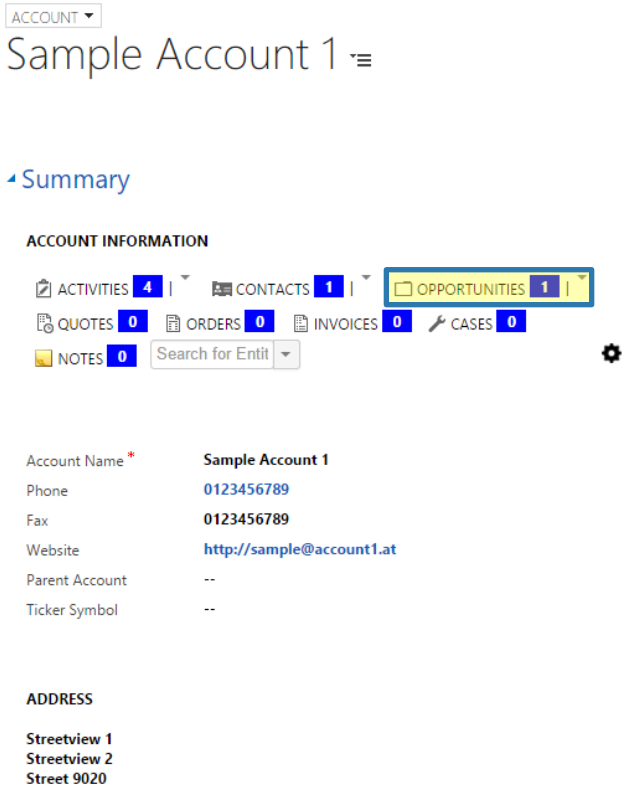


Figure 49: Modify height and width

7.3.2 How to navigate directly from the SmartBar dialog

To access the SmartBar dialog, click on the ***[SmartBar Dialog]***-button in the command bar.

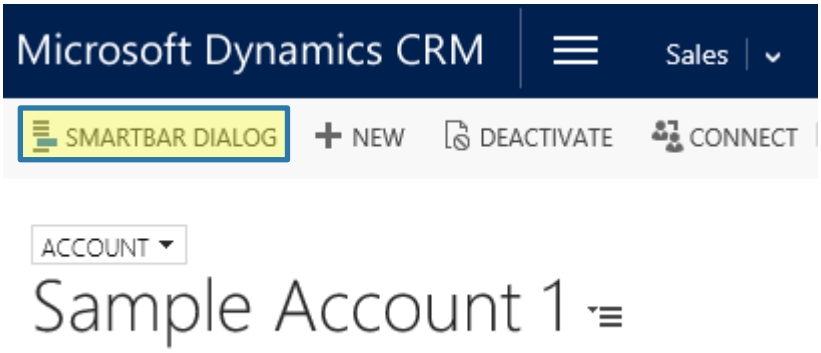


Figure 50: Open the SmartBar Dialog

The SmartBar dialog appears at the top of the current window. It can be moved up and down, as well as from the left to right if the corresponding settings are enabled.

Figure 51: SmartBar Dialog

7.4 How to add or remove Standard SmartBar buttons

The customization of Standard SmartBar buttons is said to be one of the easiest things that you can do with our addons.

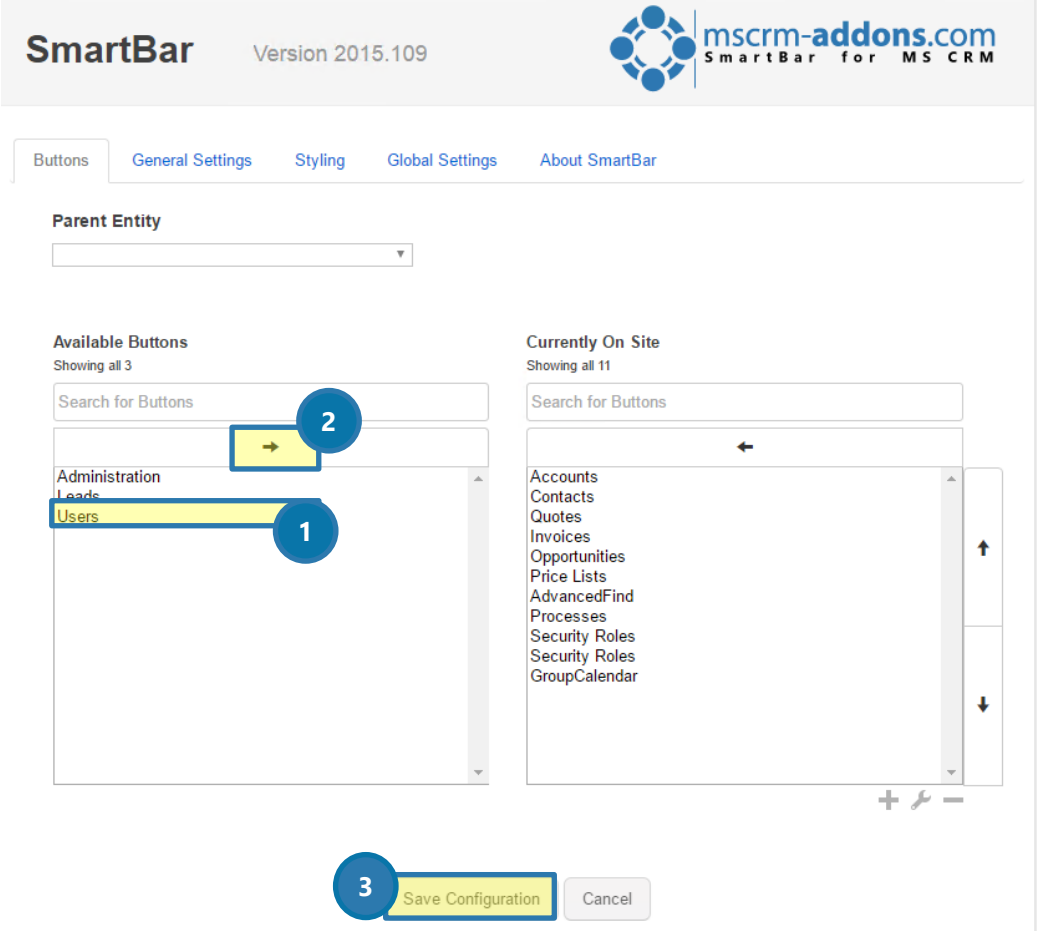


Figure 52: Buttons-tab

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 button (here: *Users*) ❶ to the SmartBar, simply click on it in the *Available Buttons*-section. Next, click on the arrow that points from left to right ❷. The button will be visible on site as soon as you save the configuration ❸.
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.

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. However, do not forget to save your configuration ❸!

7.5 How to add Custom Buttons

SmartBar for MS Dynamics CRM 2015/2016 and Dynamics 365 also allows you create customized buttons. To do so, click on the ***[Add]***-button 1 in the SmartBar settings' *Buttons*-tab in the right lower corner.

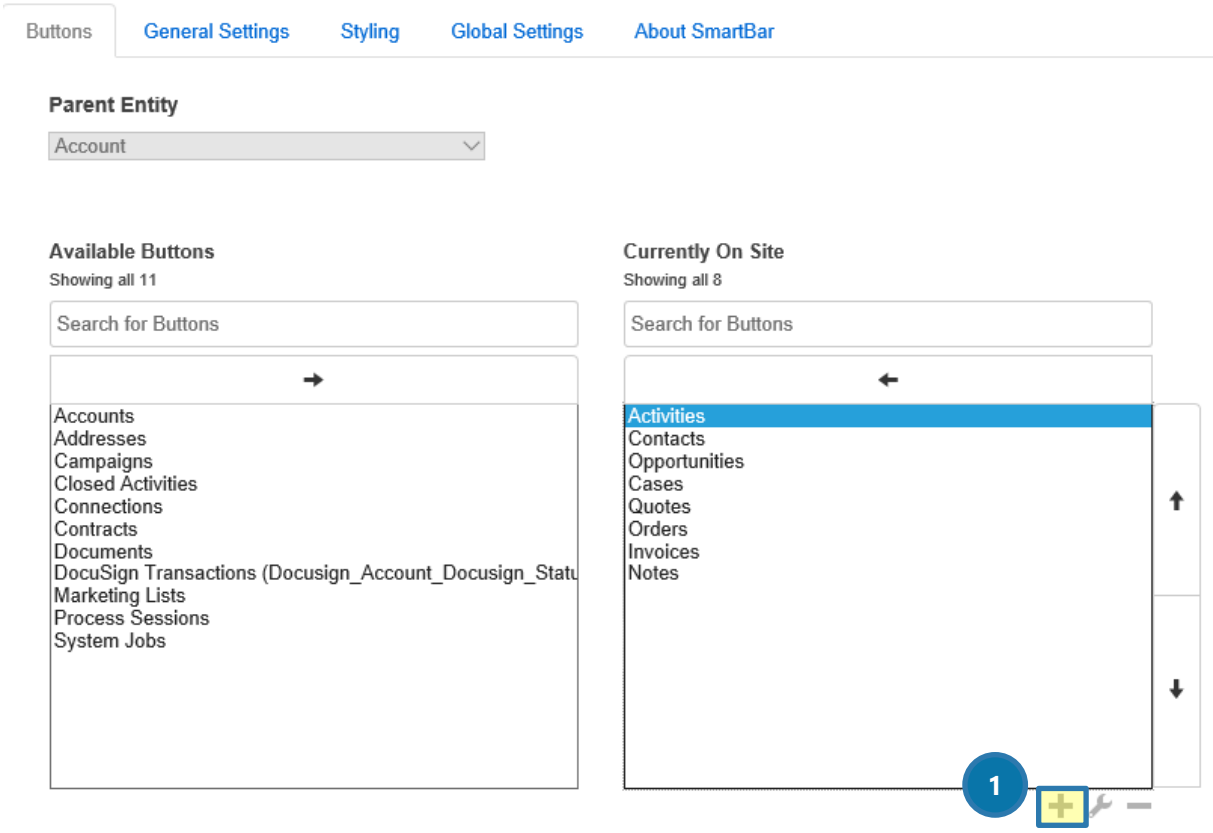


Figure 53: Add customized button

For further information on the SmartBar Settings, please have a look at CHAPTER 5 THE SMARTBAR SETTINGS ON PAGE 23.

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

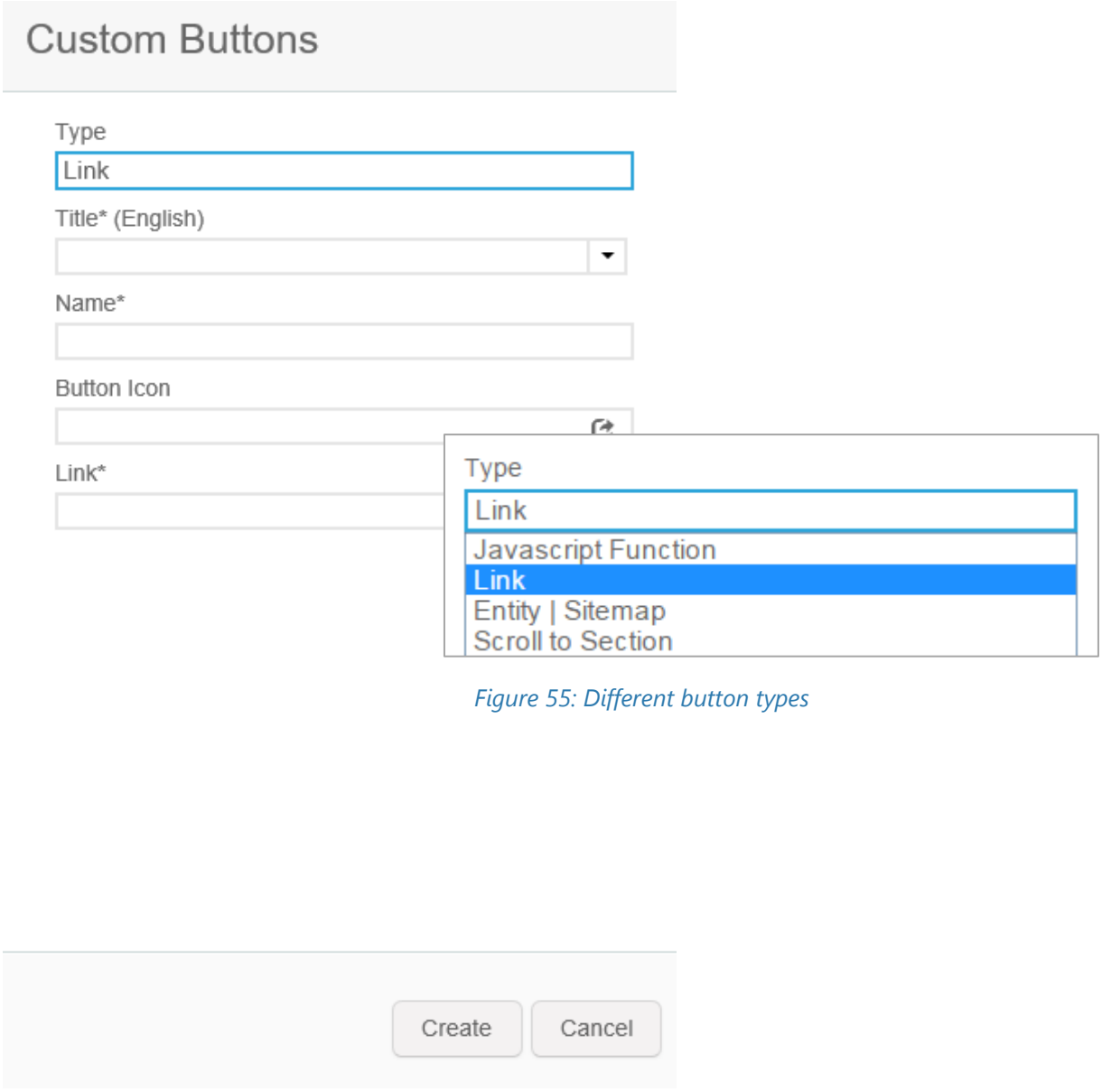


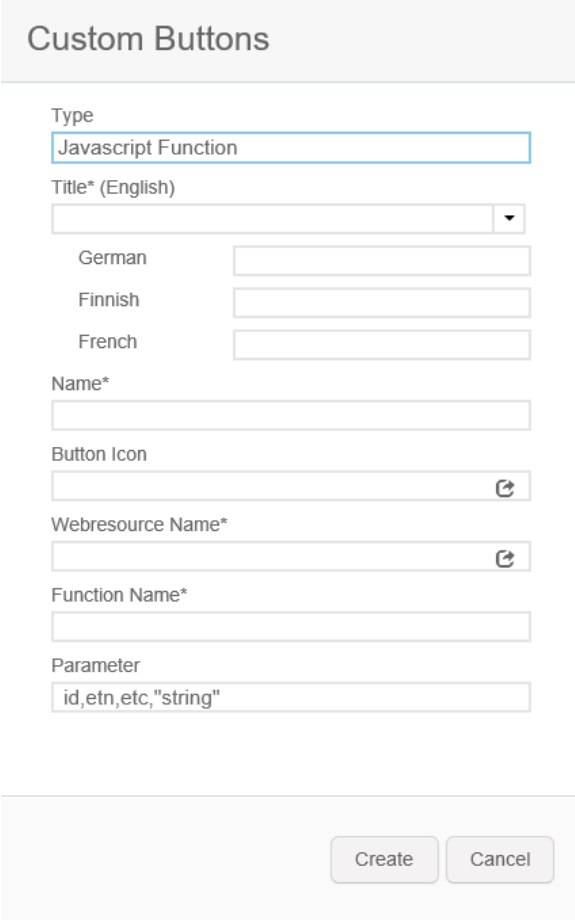
Figure 55: Different button types

Figure 55: Customize buttons-window

Please find detailed information regarding to the different types in the course of the next chapters.

7.5.1 How to add ***[Javascript Function]***-buttons

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



TYPE

Javascript Function

TITLE*

This section 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.

NAME*

Please define a unique name for your custom button. It is important, that the name is unique!

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*.
In order to create an individual icon, please follow the instructions in CHAPTER 7.8CUSTOM BUTTONS WINDOW GENERAL STYLE vs Custom Buttons Window Metro Style

There is a difference between the *Custom Button-window* in Standard Style and the *Custom Button-window* in Metro Style. If you use Metro Style, the *Custom Buttons* window offers options. Next to the already explained options, you will find the explanation for the extra buttons in this chapter.

If you switch from *Standard Style* to *Metro Style*, your *Custom Button-window* will contain all the usual components of the Custom Buttons-window plus the *Button Background Color* and the *Button Width* option.

BUTTON BACKGROUND COLOR

Define a specific color for every single type in your Metro styled SmartBar. The default color code is #647687. If you click on the code or the color, an RGB color picker drops down and allows you to change the default color.

Button Width

Please define the SmartBar Button pixels here. The default setting is 90 pixels.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

How to configure customized icons ON PAGE 65.

WEBRESOURCE NAME*

Please define the Webresource containing your Javascript function. The search for the Webresource

works similar to the search for the icon. Instead of looking for a matching icon, simply search for a matching webresource.

FUNCTION NAME*

Type in the name of the function which should be executed.

Fields with * are mandatory and must be completed in order to proceed.

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),
etc (entity type code of the CRM record) and
a custom *string*.

You can select between up to four parameters. However, they have to be separated by a comma!

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

7.5.2 How to add ***[Link]***-buttons

To add a ***[Link]***-button, simply select the below explained settings.

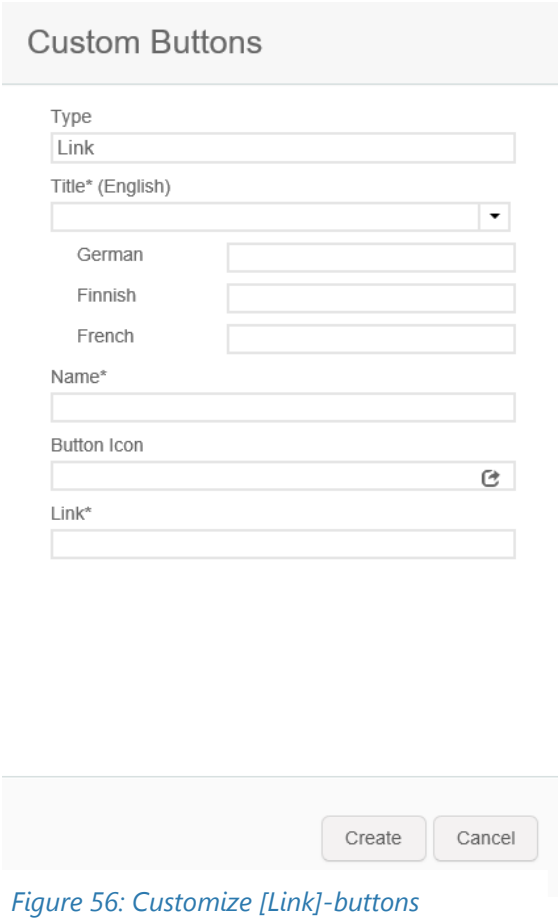


Figure 56: Customize [Link]-buttons

TYPE Link

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.

NAME*

Here you can define a unique name for your custom button. It is important that the name is unique!

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*.
In order to create an individual icon, please follow the instructions in CHAPTER 7.8CUSTOM BUTTONS WINDOW GENERAL STYLE vs Custom Buttons Window Metro Style

There is a difference between the *Custom Button-window* in Standard Style and the *Custom Button-window* in Metro Style. If you use Metro Style, the *Custom Buttons* window offers options. Next to the already explained options, you will find the explanation for the extra buttons in this chapter.

If you switch from *Standard Style* to *Metro Style*, your *Custom Button-window* will contain all the usual components of the Custom Buttons-window plus the *Button Background Color* and the *Button Width* option.

BUTTON BACKGROUND COLOR

Define a specific color for every single type in your Metro styled SmartBar. The default color code is #647687. If you click on the code or the color, an RGB color picker drops down and allows you to change the default color.

Button Width

Please define the SmartBar Button pixels here. The default setting is 90 pixels.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

How to configure customized icons ON PAGE 65.

LINK* Please type in the your 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.

Fields with a * are mandatory fields and must be completed in order to proceed.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

7.5.3 How to add ***[Entity | Sitemap]***-buttons

To add an ***[Enity | Sitemap]***-button, simply select the below explained settings.

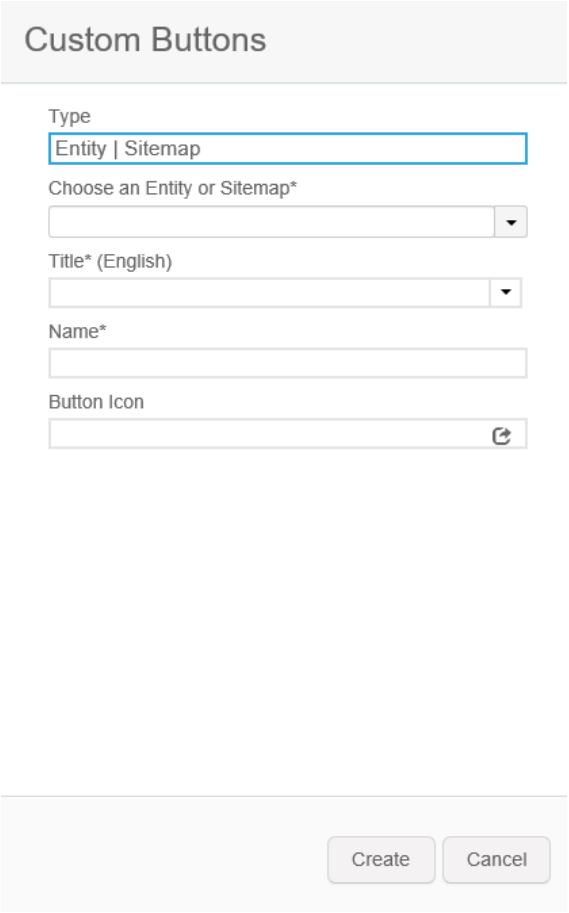


Figure 57: Customize [Entity | Sitemap]-buttons

TYPE Entity | Sitemap

CHOOSE AN ENTITY OR SITEMAP*

With a click on the drop-down arrow the window displayed here opens.

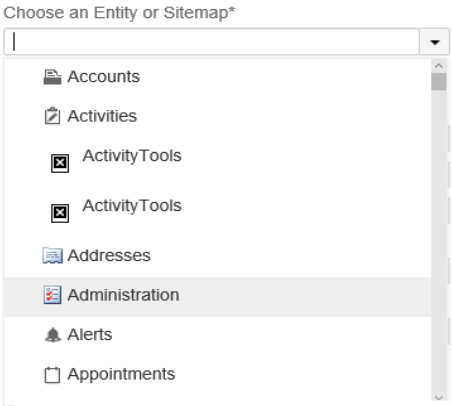


*Figure 58: Choose an Entity or Sitemap**

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.

The names must be unique!
Fields with * are mandatory fields and must be completed in order to proceed.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

In order to create an individual icon, please follow the instructions in CHAPTER 7.8CUSTOM BUTTONS WINDOW GENERAL STYLE vs Custom Buttons Window Metro Style

There is a difference between the *Custom Button-window* in Standard Style and the *Custom Button-window* in Metro Style. If you use Metro Style, the *Custom Buttons* window offers options. Next to the already explained options, you will find the explanation for the extra buttons in this chapter.

If you switch from *Standard Style* to *Metro Style*, your *Custom Button-window* will contain all the usual components of the Custom Buttons-window plus the *Button Background Color* and the *Button Width* option.

Button Background Color

Define a specific color for every single type in your Metro styled SmartBar. The default color code is #647687. If you click on the code or the color, an RGB color picker drops down and allows you to change the default color.

Button Width

Please define the SmartBar Button pixels here. The default setting is 90 pixels.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

How to configure customized icons ON PAGE 65.

7.5.4 How to add ***[Scroll to Section]***-buttons

To add an ***[Scroll to Section]***-button, simply select the below explained settings.

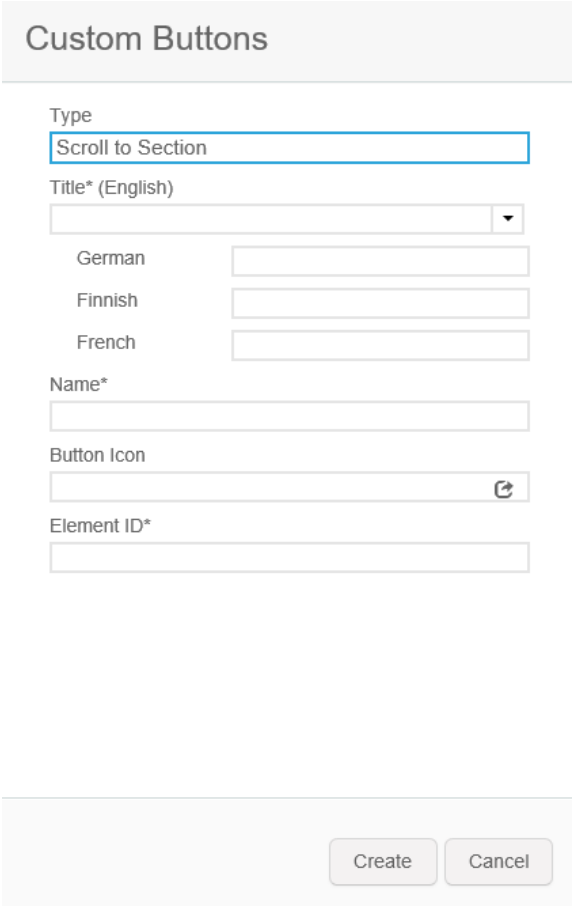


Figure 59: Customize [Scroll to Section]-buttons

TYPE

Scroll to Section

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.

NAME*

Here you can define a unique name for your custom button. It is important that the name is unique!

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*.
In order to create an individual icon, please follow the instructions in CHAPTER 7.8CUSTOM BUTTONS WINDOW GENERAL STYLE vs Custom Buttons Window Metro Style

There is a difference between the *Custom Button-window* in Standard Style and the *Custom Button-window* in Metro Style. If you use Metro Style, the *Custom Buttons* window offers options. Next to the already explained options, you will find the explanation for the extra buttons in this chapter.

If you switch from *Standard Style* to *Metro Style*, your *Custom Button-window* will contain all the usual components of the Custom Buttons-window plus the *Button Background Color* and the *Button Width* option.

BUTTON BACKGROUND COLOR

Define a specific color for every single type in your Metro styled SmartBar. The default color code is #647687. If you click on the code or the color, an RGB color picker drops down and allows you to change the default color.

Button Width

Please define the SmartBar Button pixels here. The default setting is 90 pixels.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

How to configure customized icons ON PAGE 65.

ELEMENT ID*

Please type in a html-ID from the CRM-form.

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

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

7.6 How to edit Custom Buttons

Please select a custom button from the *Currently on Site* row (here: *Activities*). Then click on the ***[Monkey wrench]***-button.

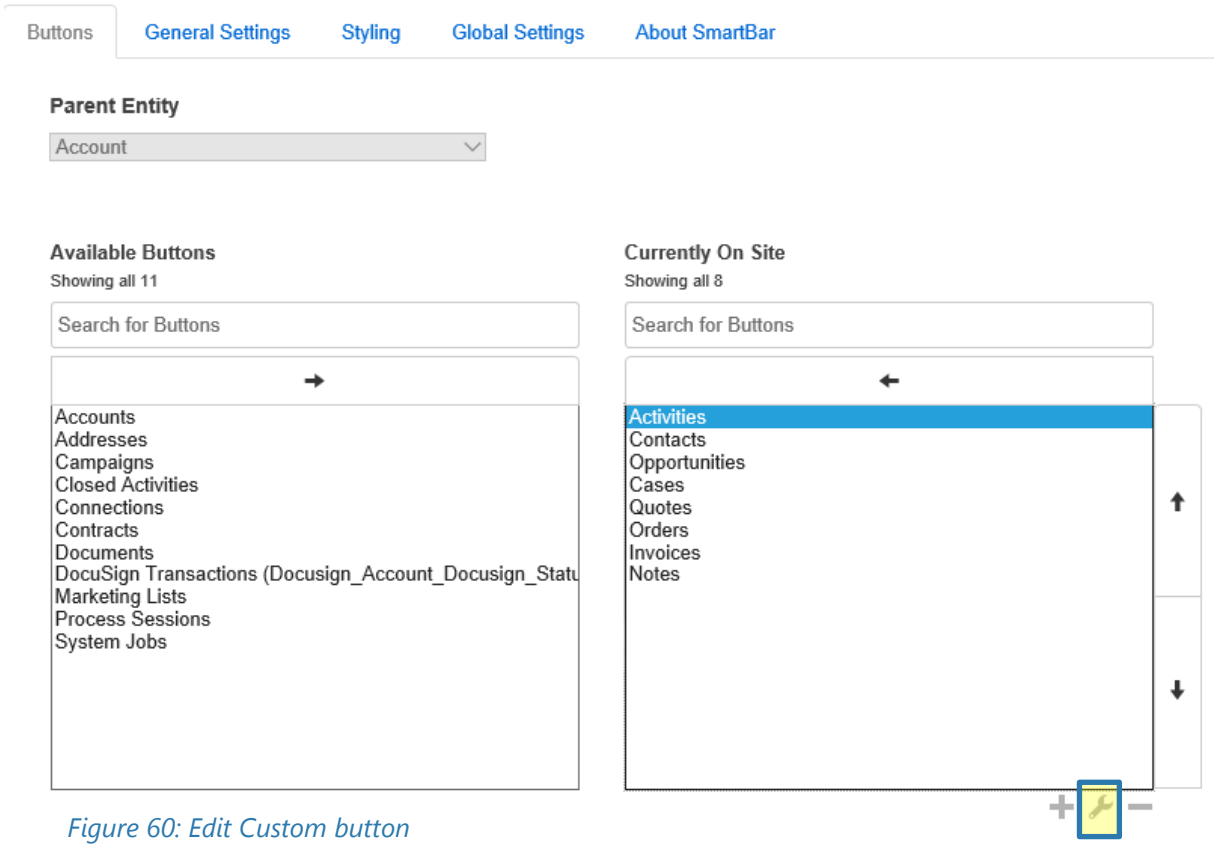


Figure 60: Edit Custom button

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

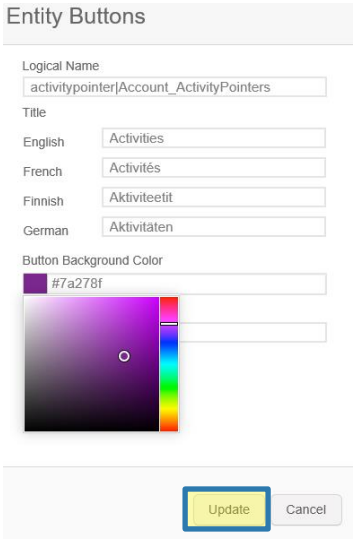


Figure 61: Edit Custom button

Please click on the ***[Update]***-button in order to save your settings.

7.7 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.

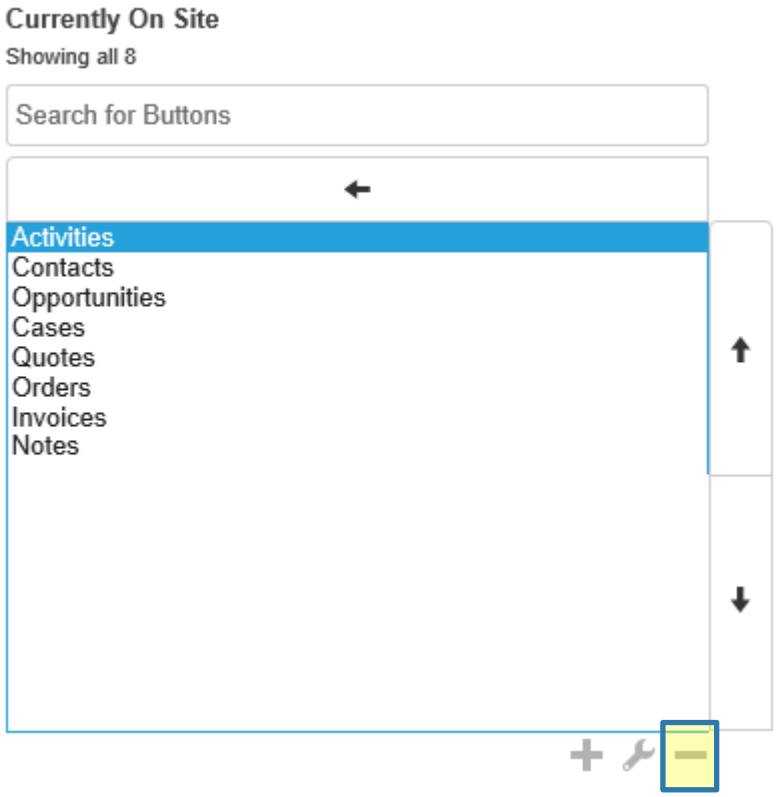


Figure 62: Delete Custom button

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.

7.8 Custom Buttons Window General Style vs Custom Buttons Window Metro Style

There is a difference between the *Custom Button*-window in Standard Style and the *Custom Button*-window in Metro Style. If you use Metro Style, the *Custom Buttons* window offers options. Next to the already explained options, you will find the explanation for the extra buttons in this chapter.

If you switch from *Standard Style* to *Metro Style*, your *Custom Button*-window will contain all the usual components of the Custom Buttons-window plus the *Button Background Color* and the *Button Width* option.

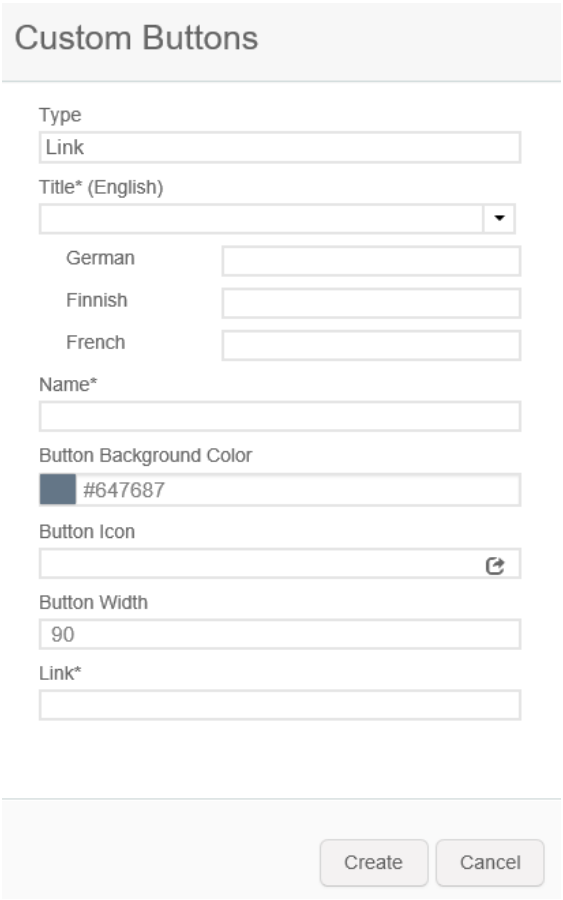


Figure 63: Custom buttons window Metro Style

Button Background Color

Define a specific color for every single type in your Metro styled SmartBar. The default color code is #647687. If you click on the code or the color, an RGB color picker drops down and allows you to change the default color.

Figure 64: Color picker

Button Width

Please define the SmartBar Button pixels here. The default setting is 90 pixels.

Please click on the ***[Create]***-button in order to add the Custom Button to the SmartBar.

7.9 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.

1) Go to the settings and select *Customizations* > *Customize the System*.

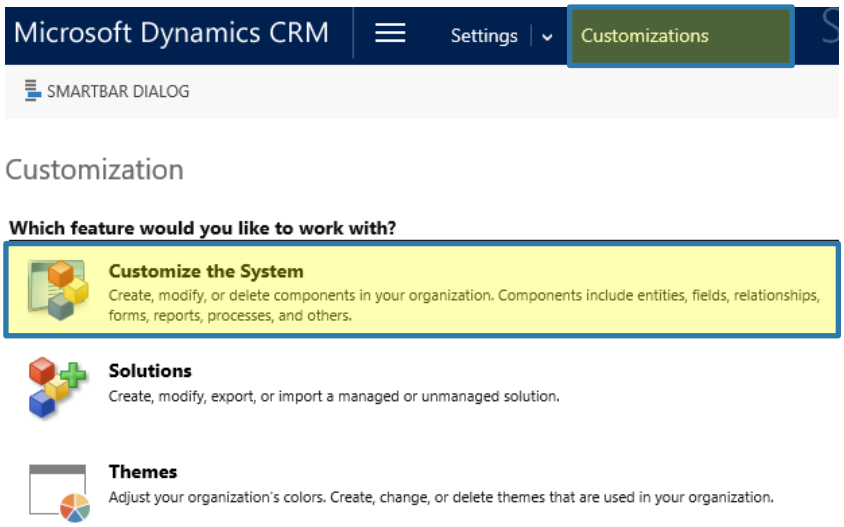


Figure 65: Customizations > Customize the system

2) Please select *Web Resource* as component type 1 and click on the ***[New]***-button 2 in the window that appears now.

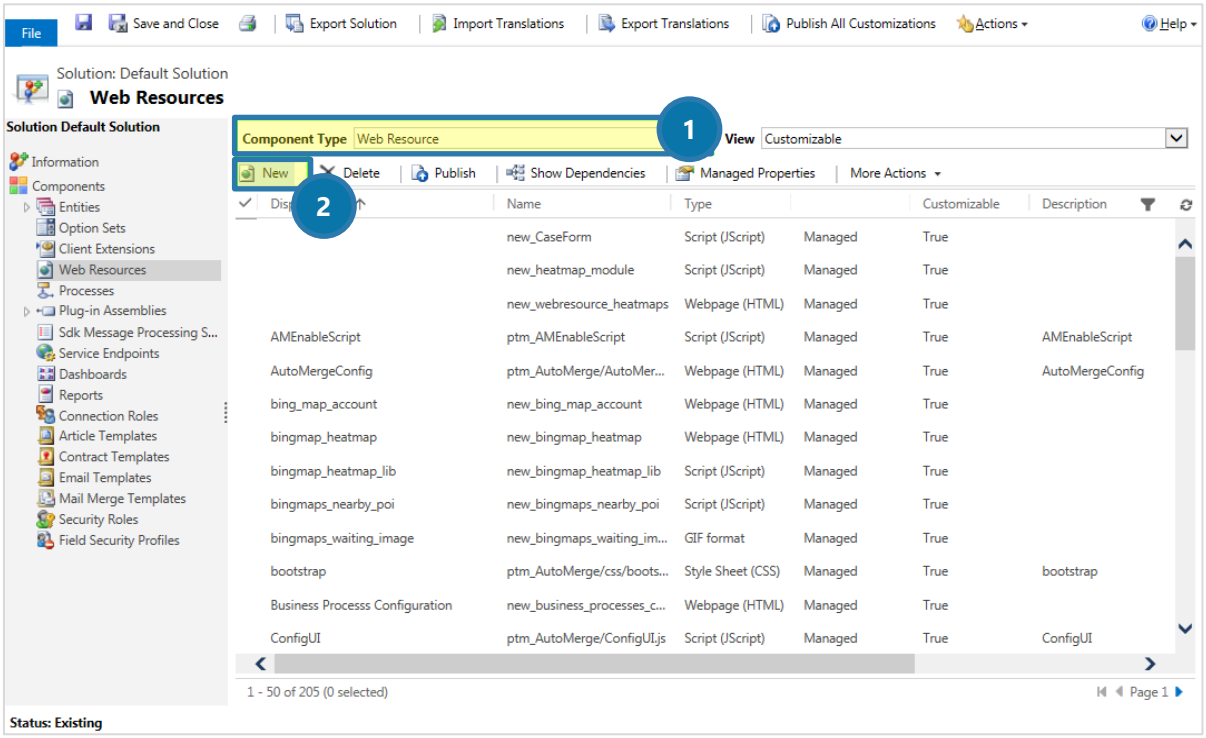


Figure 66: Select the component type

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

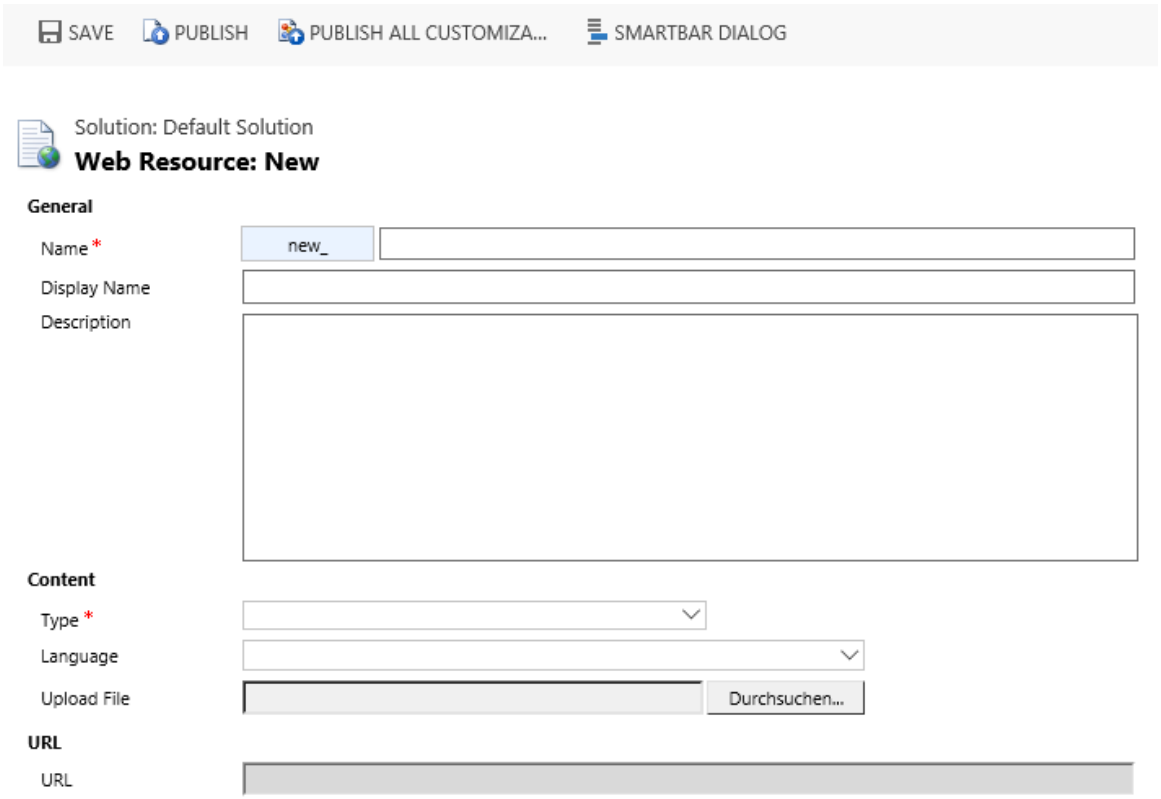


Figure 67: Customize icon

NAME*

Please fill in a name for the button.

DISPLAY NAME

Please type in a display name for the new button to be shown in the web resource overview.

DESCRIPTION

Please type in a short description here.

TYPE*

Select a file-type from the drop-down-list.

LANGUAGE

Please select a language by using the drop-down arrow.

UPLOAD FILE

Please click on the ***[Browse]***-button in order to upload a file.

URL

The URL is generated automatically after you have saved your changes.

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

4) Next, click on the ***[Save]***-button and afterwards, click on the ***[Publish]***-button in order 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.

8 Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com
or contact support@mscrm-addons.com.

For sales and licensing questions please contact office@mscrm-addons.com, or the corresponding contact information below.

Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:
7AM - 8PM GMT+1 (Monday-Friday)

Sales:
+43 316 680 880 14
sales@mscrm-addons.com

www.ptm-edv.at
www.mscrm-addons.com

Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404.720.6066

Support:
9AM - 6PM EST (Monday-Friday)

Sales:
+1 404 720 6046
mark.watson@mscrm-addons.com

www.mscrm-addons.com