

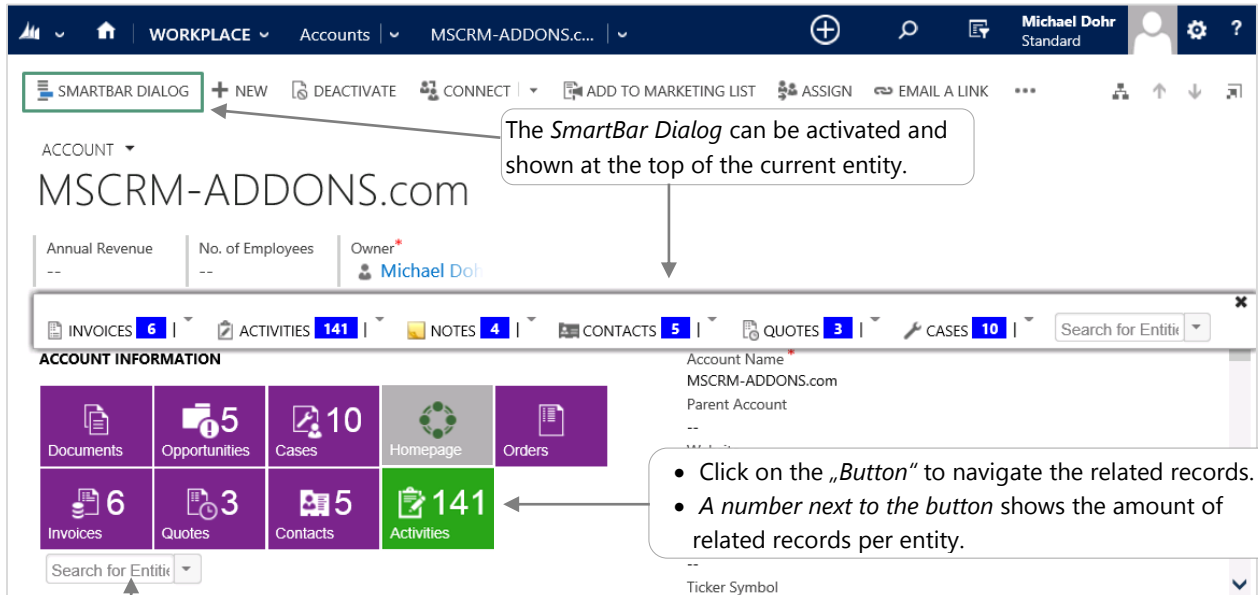
SmartBar - Getting Started

Hello!

Thank you for using [SmartBar](#). This getting started guide will help you to work with this Add-On right away, introducing the main features. For detailed information, please take a look at our [guides](#) or [blog](#).

Installation: For details on how to install and display SmartBar, please read the [installation guide](#). If SmartBar is already installed, please continue reading.

How to use SmartBar: Depending on the configuration SmartBar can be accessed directly on the entity form.



The screenshot shows the Microsoft CRM 2015 interface with the SmartBar dialog integrated into the top of the entity form. The dialog includes buttons for 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', and 'EMAIL A LINK'. Below the dialog, the account information for 'MSCRM-ADDONS.com' is displayed, including fields for Annual Revenue, No. of Employees, and Owner (Michael Dohr). The SmartBar buttons are arranged in a grid, showing counts for various entities: Documents, Opportunities (5), Cases (10), Homepage, Orders, Invoices (6), Quotes (3), Contacts (5), and Activities (141). A search field is integrated into the bar, allowing users to search for entities and sitemap entries directly from the bar.

The *SmartBar Dialog* can be activated and shown at the top of the current entity.

- Click on the „*Button*“ to navigate the related records.
- A *number next to the button* shows the amount of related records per entity.

The „*integrated SmartBar search field*“ allows to search & open Entities and Sitemap entries directly from the bar.

Additional Features

- Drag and Drop Buttons to rearrange the order
- The “SmartBar Dialog”-view offers a drop-down-button showing an overview of related records
- Add and configure CustomButtons
- Configure the Color of the buttons
- Configure size of SmartBar buttons
- Display SmartBar in different styles (Metro or Standard)
- Embed SmartBar into the entity form at a preferred place

License Manager

All our Add-Ons come with a 14-days trial license. Once received the license file from our support-team, open the License Manager to install it.

Contact

We hope our product is to your full satisfaction and a useful supplement to your business activities. If you have questions to the product please send an email to support@mscrm-addons.com
Tel US +1 404.720.6066 | Tel Austria +43 316 680-880-0 | www.mscrm-addons.com