Project Management
For Microsoft Dynamics CRM
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Solution Relationships

- Accounts
- Opportunities
- Leads
- Campaigns

Projects
- Task & Resource Management
- Time and Expense
- Project Workflow
- Invoices

Microsoft Dynamics GP

- Project & Milestone Planning
- Task Scheduling & Resource Utilization
- Time and Budget Visibility

Project Management for Microsoft Dynamics CRM™

Power of Choice: On Premises or CRM Online
Main Menu – End User Navigation

Projects

Provides a list of Projects across Customer Accounts

Project Tasks

Provides a list of Project Tasks across Projects and Resources

Timesheets

Provides a list of Timesheets by Calendar Week and Resource

Time Entry

Provides a list of individual Time Entries by Project Tasks, Cases and Resources

Expenses

Provides a list of Expenses by Projects and Resources

Projects

Creating a New Project

There are three ways to create a new Project.

+ NEW

Creates a new Project record.

COPY PROJECT

Creates a new Project record by copying an existing Project record.

CONVERT TO PROJECT

Creates a new Project record by converting an existing sales Opportunity record. When converting a sales Opportunity to a Project the user also has the option of copying an existing Project record.

Tip: Copy Projects

Reduce the administrative effort needed to create new project records and maintain consistency across similarly structured Projects by creating standard project “templates” which new projects can be copied from. The structure of all project information is maintained.
Copy Project

Creates a duplicate of a Project and allows you to change the PM and associated account. You also have the option to keep Project Milestones, Project Tasks and their related items.

Copy Project
Copy the selected project as a new project.

This action will copy the existing project and related project records. This process may take up to a minute to complete.

Project Name: [Copy of] Implement CRM
Account: Applied Systems
Project Manager: Remy LeBeau
Start Date
End Date

Maintain the following from the selected project:

- Project Milestones
  - Project Milestone Dates
- Project Tasks
  - Project Task Dates
  - Project Task Resource Assignments
  - Related Project Task Activities

[OK] [Cancel]
Shift Project

Allows you to move a Project, Project Milestones, Project Tasks or Related Project Task Activities by a specified number of days

Shift Project Dates
Shift the following dates for the selected project(s)

This process may take up to a minute to complete.

- Project
- Project Milestone
- Project Task
  - Related Project Task Activities

Shift By [_______] Day(s)

Include Weekends

OK Cancel

Shift Milestone

Allows you to move a Project Milestone, Related Project Tasks and/or its related Project Task Activities by a specified number of days

Shift Milestone Dates
Shift the following dates for the selected Milestone

This process may take up to a minute to complete.

- Project Milestone
- Project Task
  - Related Project Task Activities

Shift By [_______] Day(s)

Include Weekends
Shift Project Task

Allows you to move a Project Task, its Dependent Child Project Tasks and/or its related Project Task Activities by a specified number of days.

Shift Task Dates

Shift the following dates for the selected task(s):

- This process may take up to a minute to complete.
- Dependent Child Tasks
- Related Project Task Activities
- Shift By [ ] Day(s)
- Include Weekends

[OK] [Cancel]
# Project Form Layout

## Project Management for Microsoft Dynamics CRM

### New CRM Rollout

#### General

- **Project Name**: New CRM Rollout
- **Account**: Jabilian Energy
- **Category**: Implementation
- **Type**: In Progress
- **Start Date**: 7/8/2014
- **End Date**: 8/30/2014
- **Project Manager**: Remy LeBeau
- **Percent Complete**: 75%

#### Project Budget & Billing

- **Billing Type**: Hourly
- **Billing Rate Type**: Project Bill Rate
- **Budgeted (hr)**: 240.00
- **Bill Rate**: $200.00
- **Project Budget**: $48,000.00

#### Project Task Summary

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Needed By</th>
<th>% Complete</th>
<th>Assigned To</th>
<th>Hours</th>
<th>Rate</th>
<th>Billable (hrs)</th>
<th>Billable ($)</th>
<th>Actual (hrs)</th>
<th>Actual ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/17/2014 - Requirements Phase</td>
<td>Completed</td>
<td>1/17/2014 9:00 AM</td>
<td>100%</td>
<td>Remy LeBeau</td>
<td>10.00</td>
<td>$2,000.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1/22/2014 - Functional Requirements</td>
<td>Completed</td>
<td>1/22/2014 9:00 AM</td>
<td>100%</td>
<td>Remy LeBeau</td>
<td>32.00</td>
<td>$4,000.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1/31/2014 - IT Infrastructure Review</td>
<td>Completed</td>
<td>1/31/2014 9:00 AM</td>
<td>100%</td>
<td>Bobby Drake</td>
<td>8.00</td>
<td>$1,000.00</td>
<td>8.00</td>
<td>$1,000.00</td>
<td>8.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>2/7/2014 - Data Migration</td>
<td>Completed</td>
<td>2/7/2014 9:00 AM</td>
<td>100%</td>
<td>Kurt Wagner</td>
<td>12.00</td>
<td>$2,400.00</td>
<td>12.00</td>
<td>$2,400.00</td>
<td>12.00</td>
<td>$2,400.00</td>
</tr>
<tr>
<td>2/15/2014 - Initial Data Migration</td>
<td>Completed</td>
<td>2/15/2014 12:00 AM</td>
<td>100%</td>
<td>Kurt Wagner</td>
<td>16.00</td>
<td>$3,200.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>2/20/2014 - Customization and Configuration</td>
<td>Completed</td>
<td>2/20/2014 9:00 AM</td>
<td>100%</td>
<td>James Howlett</td>
<td>40.00</td>
<td>$8,000.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>4/10/2014 - Server Installation &amp; Configuration</td>
<td>Completed</td>
<td>4/10/2014 9:00 AM</td>
<td>100%</td>
<td>Remy LeBeau</td>
<td>40.00</td>
<td>$8,000.00</td>
<td>34.00</td>
<td>$6,800.00</td>
<td>35.00</td>
<td>$7,000.00</td>
</tr>
<tr>
<td>5/8/2014 - UI Form Design</td>
<td>In Progress</td>
<td>5/8/2014 9:00 AM</td>
<td>40%</td>
<td>Max Eisenhardt</td>
<td>24.00</td>
<td>$4,800.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>6/5/2014 - QA / Testing</td>
<td>In Progress</td>
<td>6/5/2014 9:00 AM</td>
<td>13%</td>
<td>James Howlett</td>
<td>12.00</td>
<td>$2,400.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>7/11/2014 - Go Live Phase</td>
<td>Pending</td>
<td>7/11/2014 9:00 AM</td>
<td>0%</td>
<td>Remy LeBeau</td>
<td>20.00</td>
<td>$4,000.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>11.00</td>
<td>$2,200.00</td>
</tr>
</tbody>
</table>

- **Actual (hrs)**: 66.50
- **Actual ($)**: $13,300.00

- **Billable (hrs)**: 54.00
- **Billable ($)**: $10,800.00

- **Percent Complete**: 75%

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Form Header

The header area provides quick visibility into the overall Project Budget, Project Status, Actual and Billable Hours to date. Actual and Billable Hours for the Project are automatically calculated from the Time Entry related to the Project Tasks associated to the Project.

General Tab

The General tab is where you define and view basic Project information.

The Project Budget and Billing section defines the Project budget and the method in which billing is accounted for. The Project Billing Rate Type field provides the option of using the bill rate defined for the Project or using bill rates defined for each resource based on the role they play on the Project. Default resource role bill rates are defined in Administrative Settings but can also be changed from the Project Team menu for each individual Project.

Project Task Summary

The Project Task Summary section provides an organized view of the Project’s related Project Tasks.

Inline editing makes it easy for users to quickly edit a Project Task without leaving the Project Task Summary tab. A hyperlink on the Project Task Name allows the users to click through the Project Task form for more detailed reviews and updates.

Dynamic grouping options can be enabled from the Project Task Summary toolbar. Project Tasks can be grouped by Milestone, Milestone and Target Date, Task Category, Resource or Status. Primary and secondary grouping can provide multiple ways of summarizing a Project for better visibility across the entire Project.

Details Tab

The Details tab is where you can include a brief summary of the Project and define Project Milestones.

The Milestones section signifies the project timeline against key target dates. Milestones can also be used to group Project Tasks related to a specific Milestone. The % Complete column represents the summary of completeness for each Project Task assigned to a specific Milestone.

Tip: Export to Excel

Data can be exported with or without formatting. The formatted option is useful for internal or external project status updates. The unformatted version can be used to create pivot tables, additional reports or utilized for data imports.
### Project Task Summary – Inline Edit Mode

Required fields can be configured to be outlined in red.

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
<th>Status</th>
<th>% Complete</th>
<th>Resource</th>
<th>Est (hrs)</th>
<th>Est ($)</th>
<th>Billable (hrs)</th>
<th>Billable ($)</th>
<th>Actual (hrs)</th>
<th>Actual ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/3/2014</td>
<td>Requirements Phase</td>
<td>In Progress</td>
<td>100%</td>
<td>Remy LeBeau</td>
<td>10.00</td>
<td>$2,000.00</td>
<td>$2,000.00</td>
<td>$2,000.00</td>
<td>10.00</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>2/21/2014</td>
<td>Data Migration</td>
<td>Completed</td>
<td>100%</td>
<td>Kurt Wagner</td>
<td>12.00</td>
<td>$2,400.00</td>
<td>$2,400.00</td>
<td>$2,400.00</td>
<td>12.00</td>
<td>$2,400.00</td>
</tr>
<tr>
<td>7/21/2014</td>
<td>Implementation Phase</td>
<td>Completed</td>
<td>100%</td>
<td>James Howlett</td>
<td>40.00</td>
<td>$8,000.00</td>
<td>$8,000.00</td>
<td>$8,000.00</td>
<td>40.00</td>
<td>$8,000.00</td>
</tr>
<tr>
<td>8/25/2014</td>
<td>Go Live Phase</td>
<td>Pending</td>
<td>0%</td>
<td>Remy LeBeau</td>
<td>20.00</td>
<td>$4,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Go Live Documentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Administrator Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>End User Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 228.00 $45,600.00 $172.00 $34,400.00 $178.50 $35,700.00
Project Task Summary Options

**Export to Excel**
Select the options to generate an Excel output of the current data.

- **Export as Formatted Data**
  This will export an Excel spreadsheet with formatting applied. If the grid has summary rows, they will also be exported.

- **Export as Unformatted Data**
  This will export an Excel spreadsheet without formatting applied. This is useful if you want to do additional processing on the data after the export, such as resorting, using pivot tables, or applying style templates.

**Data Grid Options**
Select from the options below to change how this Data Grid presents records.

- **Enable Grouping**
  Group By: Milestone Target Date - Milestone
  Then By: Project Category

**Select Currency**
Select a currency to use for the results. This will not change the actual currency of the data.

- **Currency:** US Dollar (USD)
- **Normalize Row Values:**
The Gantt Chart provides a timeline view of Project Task Start and Needed By dates. Project Milestones are also displayed.

Similar to the Project Task Summary, grouping options can be applied to provide multiple ways of viewing the project timeline. For example, grouping by Resource provides a timeline view of Resources and their assigned Project Tasks.

Edit the Start and Needed By dates for a Project Task by simply dragging or expanding the Project Task marker within the Gantt Chart.
Project Form – Associated Relationships

- **Project Milestones**: View or create Project Milestones for the current Project.
- **Project Tasks**: View or create Project Tasks for the current Project.
- **Project Team**: View or create Project Team resources and the roles they will play on the Project.
- **Time Entry**: View or create time entry for the current Project. Time entered from this menu will create a new Timesheet record if one doesn’t exist for the specified time period. Alternatively, it will update an existing Timesheet record if one already exists.
- **Expenses**: View or create Project Expenses for the current Project.
### Project Task Form Layout

**General**
- **Project Task Name**: Functional Requirements Documentation
- **Priority**: 3 - Normal
- **Project**: New CRM Rollout
- **Parent Project Task**: Business Requirements Documentation
- **Assigned To**: Remy LeBeau

**Details**
- **Start Date**: 1/7/2014 8:00 AM
- **Needed By Date**: 1/22/2014 9:00 AM
- **Actual End Date**: 1/17/2014 3:00 PM
- **Est. (Hrs)**: 32.00
- **Est. ($)**: $6,400.00

**Description**
Gather technical requirements that will serve as a blueprint for the project.

<table>
<thead>
<tr>
<th>Actual (Hrs)</th>
<th>32.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual ($)</td>
<td>6,400.00</td>
</tr>
</tbody>
</table>

**Tip: Project Task Dependencies**
On the Project Task form, there is a field that allows you to designate a Parent Project Task. This comes in handy when you have tasks that need to be completed before others begin.
Timesheet Form Layout

To enter time, just click inside any box to launch the time entry window:

TIME ENTRY - 7/9/2014

**Project:** Plan Document Templates

**Project Task:** Data Review

**Desc.**

Data Review

**Summary**

**Actual**

| 90 |

**Billable**

| 58 |

**Project Task Summary**

- Est. (Hrs) 90
- Est. ($) $18,000.00
- Actual (Hrs) 65
- Actual ($) $13,000.00
- Billable (Hrs) 58
- Billable ($) $11,600.00

Save & Close
## Time Entry Form Layout

### General
- **Description**: Data Review
- **Regarding Type**: Project Task

- **Project**: Plan Document Templates
- **Service Date**: 7/16/2014
- **Summary**: --

- **Owner**: Remy LeBeau
- **Actual (hrs)**: 8.00
- **Billable (hrs)**: 8.00
- **Time Entry Status**: Invoiced

### Invoice Details
- **Invoice**: Data Review
- **Invoice Date**: 7/21/2014

### Timesheet Form
The Timesheet form allows a user to quickly enter time in bulk on a weekly basis. Time can be entered against multiple Project Tasks or Cases.

Timesheet submissions can follow an approval process based on a company’s time review and billing procedures.

Time Entry can be associated with an Invoice for direct billing within Microsoft Dynamics CRM. Or it can be integrated with Microsoft Dynamics GP or another ERP / Accounting package.

### Time Entry Form
Time can also be entered by launching a new Time Entry Form from either the Time Entry List View or from a Project Task.
### Time Entry Associated Views

From the Project form, you can view all Time Entries related to a Project.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Actual (hrs)</th>
<th>Billable (hrs)</th>
<th>Time Entry Status</th>
<th>Project Task</th>
<th>Project</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/10/2014</td>
<td>Server Installation &amp; Configuration</td>
<td>8.00</td>
<td>8.00</td>
<td></td>
<td>Server Installation &amp; Configuration</td>
<td>New CRM Rollout</td>
<td>Remy LeBoeau</td>
</tr>
<tr>
<td>4/9/2014</td>
<td>Server Installation &amp; Configuration</td>
<td>4.00</td>
<td>4.00</td>
<td></td>
<td>Server Installation &amp; Configuration</td>
<td>New CRM Rollout</td>
<td>Remy LeBoeau</td>
</tr>
<tr>
<td>4/8/2014</td>
<td>Server Installation &amp; Configuration</td>
<td>9.00</td>
<td>8.00</td>
<td></td>
<td>Server Installation &amp; Configuration</td>
<td>New CRM Rollout</td>
<td>Remy LeBoeau</td>
</tr>
<tr>
<td>4/7/2014</td>
<td>Server Installation &amp; Configuration</td>
<td>6.00</td>
<td>6.00</td>
<td></td>
<td>Server Installation &amp; Configuration</td>
<td>New CRM Rollout</td>
<td>Remy LeBoeau</td>
</tr>
<tr>
<td>4/4/2014</td>
<td>Server Installation &amp; Configuration</td>
<td>8.00</td>
<td>8.00</td>
<td>Approved</td>
<td>Server Installation &amp; Configuration</td>
<td>New CRM Rollout</td>
<td>Remy LeBoeau</td>
</tr>
<tr>
<td>2/6/2014</td>
<td>Data Review</td>
<td>2.00</td>
<td>2.00</td>
<td>Invoiced</td>
<td>Data Review</td>
<td>New CRM Rollout</td>
<td>Kurt Wagner</td>
</tr>
<tr>
<td>2/5/2014</td>
<td>Data Review</td>
<td>4.00</td>
<td>4.00</td>
<td>Invoiced</td>
<td>Data Review</td>
<td>New CRM Rollout</td>
<td>Kurt Wagner</td>
</tr>
<tr>
<td>2/4/2014</td>
<td>Data Review</td>
<td>6.50</td>
<td>6.00</td>
<td>Invoiced</td>
<td>Data Review</td>
<td>New CRM Rollout</td>
<td>Kurt Wagner</td>
</tr>
<tr>
<td>1/30/2014</td>
<td>IT Infrastructure Review</td>
<td>3.00</td>
<td>3.00</td>
<td>Invoiced</td>
<td>IT Infrastructure Review</td>
<td>New CRM Rollout</td>
<td>Bobby Drake</td>
</tr>
<tr>
<td>1/29/2014</td>
<td>IT Infrastructure Review</td>
<td>5.00</td>
<td>5.00</td>
<td>Invoiced</td>
<td>IT Infrastructure Review</td>
<td>New CRM Rollout</td>
<td>Bobby Drake</td>
</tr>
</tbody>
</table>

Total:
- Actual (hrs): 55.50
- Billable (hrs): 54.00
- Percent Complete: 75%
From the Case form, you can view all Time Entries related to a Case

**CASE**

### Applied Systems 2014 Support

- **Priority**: Normal
- **Created On**: 11/25/2013 5:19 PM
- **Status**: In Progress
- **Owner**: Remy LeBeau

#### Time Entry Associated View

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Actual (hrs)</th>
<th>Billeble (hrs)</th>
<th>Time Entry Status</th>
<th>Project Task</th>
<th>Project</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/7/2014</td>
<td>CRM 2013 Outlook Client Issue</td>
<td>1.00</td>
<td>1.00</td>
<td>Approved</td>
<td></td>
<td></td>
<td>Max Eisenhardt</td>
</tr>
<tr>
<td>3/14/2014</td>
<td>Help with Project Task Activities</td>
<td>2.50</td>
<td>2.00</td>
<td>Invoiced</td>
<td></td>
<td></td>
<td>Remy LeBeau</td>
</tr>
<tr>
<td>2/15/2014</td>
<td>Timesheet Calculation Error</td>
<td>1.50</td>
<td>1.50</td>
<td>Invoiced</td>
<td></td>
<td></td>
<td>James Howlett</td>
</tr>
</tbody>
</table>
Expense Form Layout

The General tab is where you enter and track project expenses. Pre-defined Expense Categories dynamically display the relevant fields for each type of Expense. Expense Category and Mileage Rates are managed within the Project Management Administration menus.
Dashboard Charts

Project Management Dashboard

Active Projects by Categories

Projects by Budgeted Hours

Active Time Entry by Resource

Projects by Project Manager

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Reports
Pre-built Project Management reports provide quick insight into your Projects and can be found by selecting the Reports Menu.

- PM - Project Hours By Resource
- PM - Project Summary Report
- PM - Utilization By Month
- PM - Utilization By Week - Any Year
- PM - Utilization By Week - Current Year
- PM - Utilization By Week - Last Year

Project Hours By Resource

<table>
<thead>
<tr>
<th>Project</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Actual [hrs]</th>
<th>Billable [hrs]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bobby Drake</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Plan Onboarding Project</td>
<td>In Progress</td>
<td>11/19/2013</td>
<td>8/31/2014</td>
<td>5.00</td>
<td>4.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Bobby Drake Total</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5.00</td>
<td>4.00</td>
</tr>
<tr>
<td>James Howlett</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New CRM Rollout</td>
<td>In Progress</td>
<td>7/1/2013</td>
<td>4/1/2014</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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# Project Summary by Project Category

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<th>Project Manager</th>
<th>Project Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Budgeted (hrs)</th>
<th>Billable (hrs)</th>
<th>Actual (hrs)</th>
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</table>
Main Menu - Administration Navigation

Administrative settings allow each customer to define the most appropriate settings for their organization. These settings are typically reserved for a CRM Administrator.

**Task Categories**
Provides a list of the Categories that can be assigned to a Project Task within a Project record. Task Category templates can be defined so a standard set of Task Categories is applied to every Project by default. Task Categories can help an organization segment and group Project Tasks according to their scope or purpose.

**Time Entry Type**
Provides a list of Types that can be assigned to a Time Entry record. Time Entry Types can help an organization segment and group Time Entry according to their scope or purpose.

**Member Roles**
Provides a list of the Roles that can be assigned to a Project Team member within a Project record. Member Roles help an organization define the roles and responsibilities each Project Team Member will serve on a particular Project.

**Expense Categories**
Provides a list of Categories that can be assigned to an Expense record.
About Crowe Horwath

Our experience is delivering CRM project success.

We have been implementing CRM technology from the inception of contact management applications through the evolution to sales force automation and ultimately customer relationship management (CRM) systems. Our logical CRM project implementation methodology is proven and is focused on project success.

We know Microsoft Dynamics CRM.

At Crowe we are focused on Microsoft Dynamics CRM and the Microsoft technology platform. Our involvement with Microsoft CRM dates back to the first release in 2003 and continues through its evolution into the market-leading CRM platform it is today. The flexibility of the platform, familiar user interface, interoperability with the Microsoft Office platform, including Outlook, and its top-flight functionality make it a smart investment choice for any organization looking to implement a CRM technology strategy.

Focused on success.

Crowe strengths are our people and their personal commitment to each customer engagement. Our logical approach, the quality of our effort, and the seriousness and professionalism we bring to the table have been the keys to our accomplishments. We measure our success by our customers’ success.