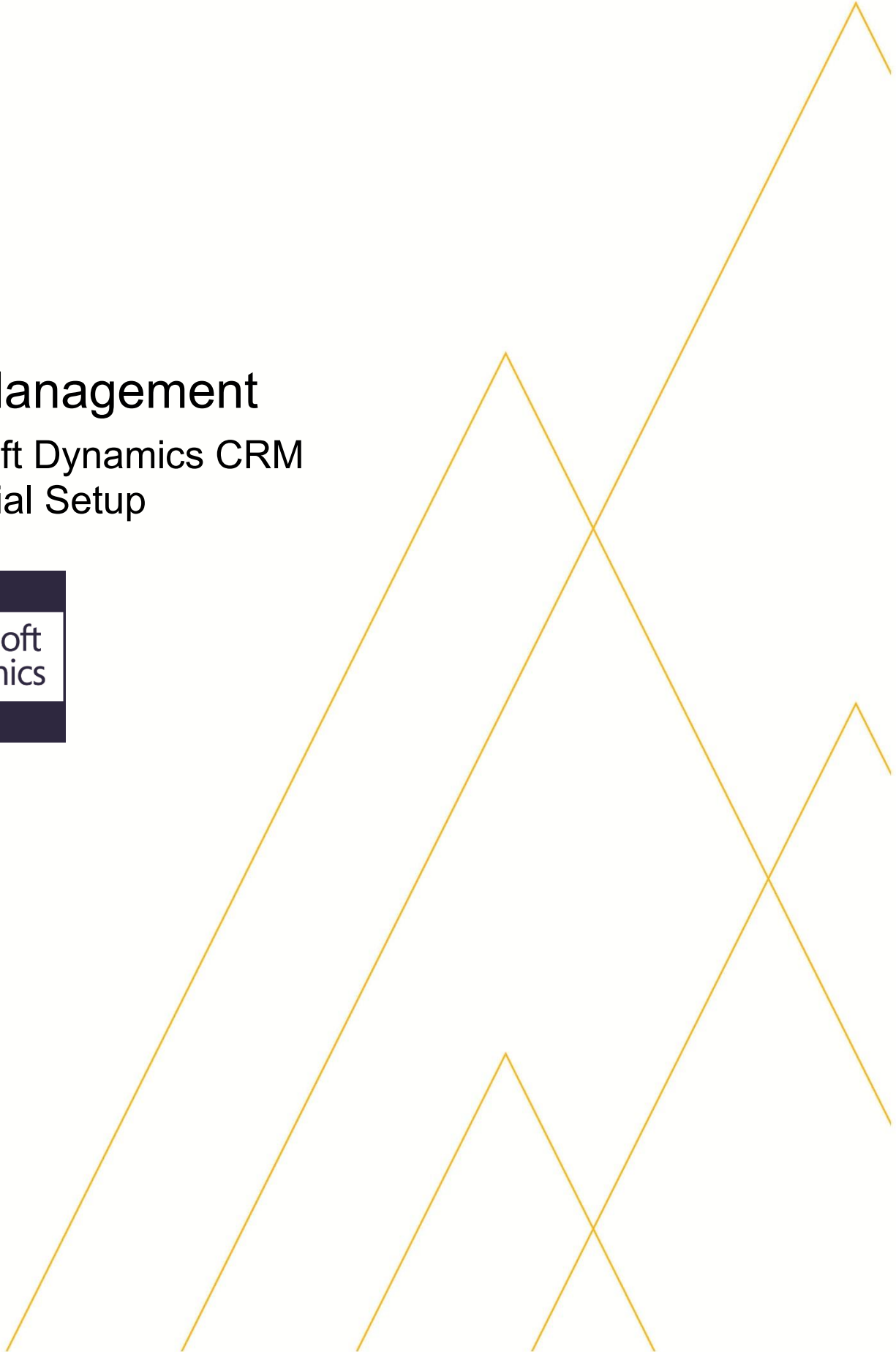


Project Management

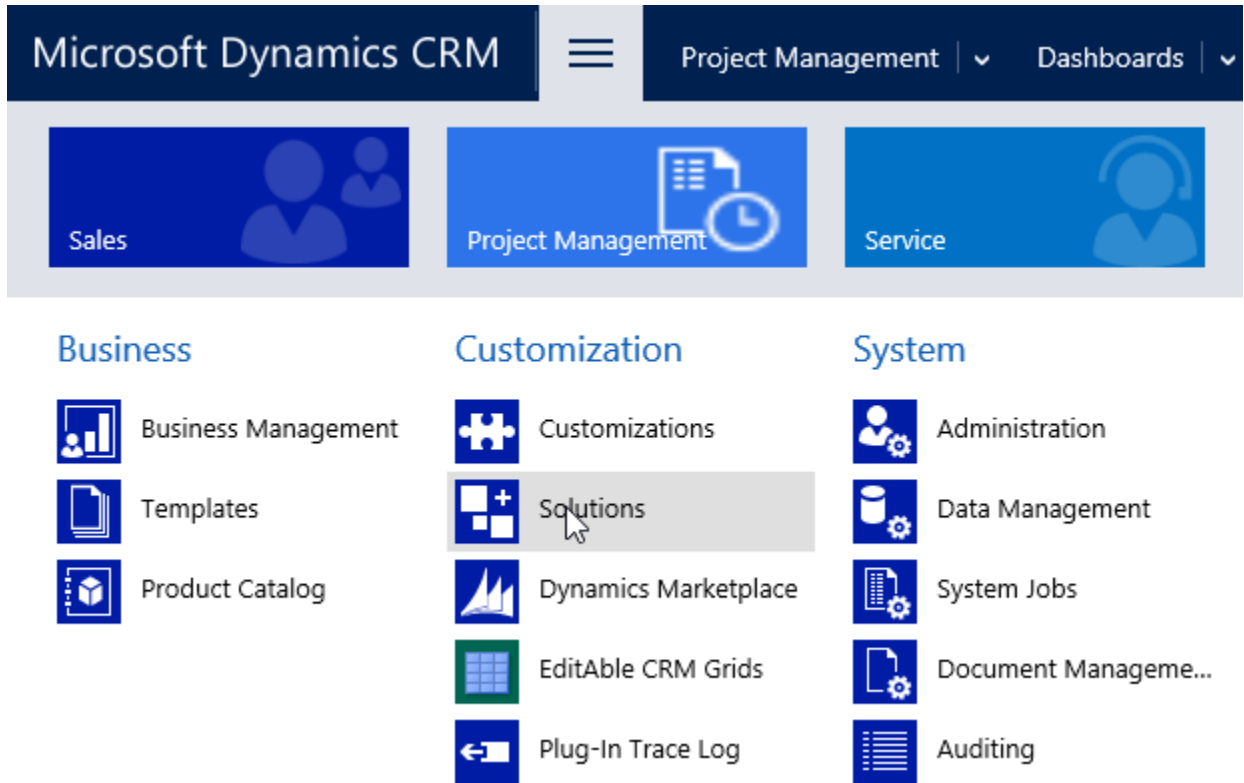
For Microsoft Dynamics CRM Trial Setup



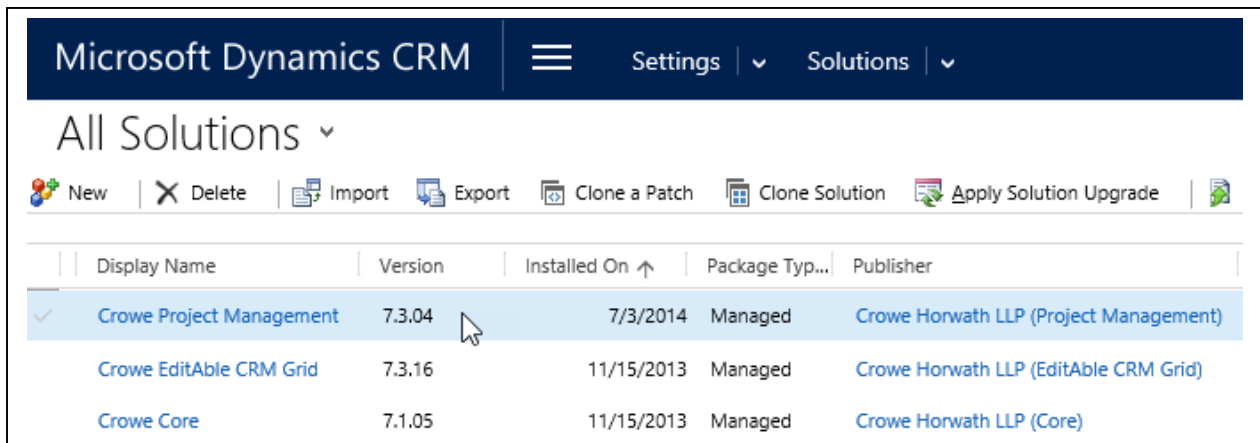
Application Setup

Accepting the EULA

1. Go to **"Solutions"** under the Customization area of **Settings**.



2. Open the Project Management Solution



Accept the Agreement

The screenshot shows the 'Crowe Project Management Configuration' window. The title bar includes 'File', 'Close', and 'Actions' menus. Below the title bar, the window title is 'Solution: Crowe Project Management' and the main heading is 'Information'. A yellow warning banner states: 'You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.'

The left sidebar shows a navigation tree with 'Configuration' selected. The main content area is titled 'Crowe Project Management Configuration' with the subtitle 'Manage your license and global settings.' Below this is the 'PROJECT MANAGEMENT SOFTWARE LICENSE AGREEMENT' section, which includes an 'IMPORTANT: PLEASE READ THIS LICENSE AGREEMENT CAREFULLY.' notice and a detailed text block explaining the terms of the license agreement between Crowe Horwath LLP and the user. A blue 'Accept' button is located at the bottom right of the agreement text.

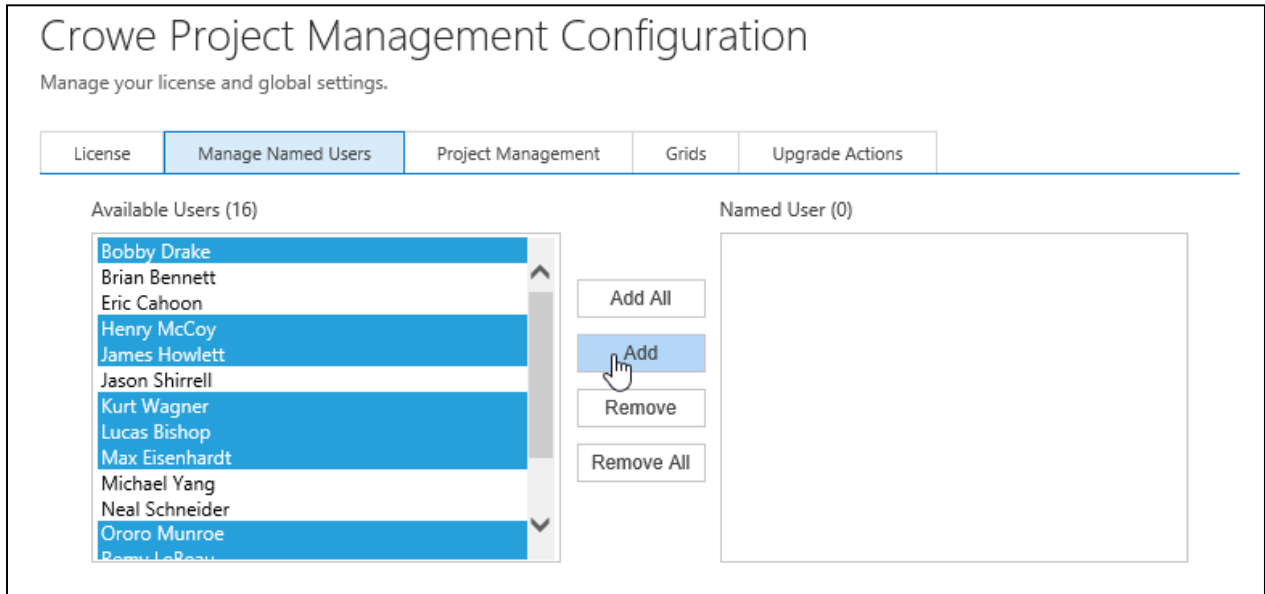
At the bottom left of the window, the status is 'Status: Existing'.

- Next, you'll see an area to paste your license (you will do this when you purchase the product). At this time, you won't need to enter anything here.

The screenshot shows the 'Crowe Project Management Configuration' window with the 'License' tab selected. The main heading is 'Crowe Project Management Configuration' with the subtitle 'Manage your license and global settings.' Below the heading is a navigation bar with tabs: 'License', 'Manage Named Users', 'Project Management', 'Grids', and 'Upgrade Actions'. The 'License' tab is active, showing a 'Current License' section with a blank text field and an 'Update License' section with a text area labeled 'Paste product license here ...'. A blue 'Update License' button is located at the bottom right of the text area.

Adding Users to Project Management

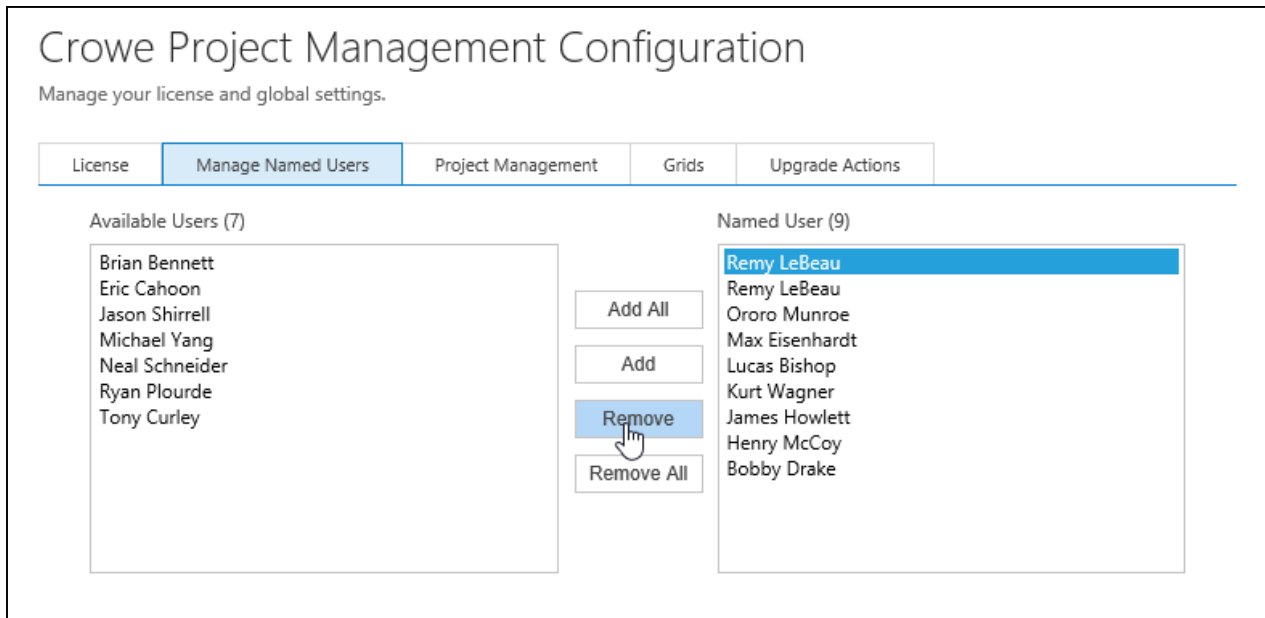
1. Click the **“Manage Named Users”** Tab on the Project Management Configuration screen.



2. Select the one or many users and click Add or just click Add All to make everyone a Named User.

Removing Users from Project Management

1. Click the **“Manage Named Users”** tab on the Project Management Configuration screen.



2. Select one or many users and click Remove or click Remove All to clear everyone out.

Project Management Global settings

Click the “**Project Management**” tab from the Configuration screen for Project Management.

Crowe Project Management Configuration

Manage your license and global settings.

- License
- Manage Named Users
- Project Management**
- Grids
- Upgrade Actions

General Settings

Mileage Rate

Project Task Settings

Default Status Complete Status
Initial Task Number Default Gantt Chart Period
Default Task Span

Time Entry Settings

Invoice Status Default Billable

Timesheet Settings

Timesheet Timesheet Approval
System Date Format System Time Format
Header Date Format System Date Separator
First Week of the Year First Day of the Week

Mileage Rate: used to calculate the Mileage Expense.

Initial Task Number: allows you to set the starting point for Task Numbers

Default Gantt Chart Period: allows you to set the default view for the Gantt Chart as Week, month or Year

Default Task Span: allows you to set the default view for the Gantt Chart

Invoice Status: used to default the Invoice Status when an invoice is associated to a Time Entry.

Default Billable: with this set to yes, Billable Hours will be defaulted from Actual Hours.

Timesheet: choose whether time can be entered against Cases on the Timesheet.

Timesheet Approval: when you approve a Timesheet, choose whether all related Time Entries will also be approved.

System Date Format: used to set the Timesheet Name date format.

System Time Format: used to set the Timesheet Name date format.

Header Date Format: used to set the Timesheet's Day headers columns.

System Date Separator: used to set the Timesheet Name date format.

First Week of the Year: used to determine the Week Numbers.

First Day of the Week: the start of the week for the timesheet view.