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
3. 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.
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.

<table>
<thead>
<tr>
<th>License</th>
<th>Manage Named Users</th>
<th>Project Management</th>
<th>Grids</th>
<th>Upgrade Actions</th>
</tr>
</thead>
</table>

**General Settings**

- **Mileage Rate**: used to calculate the Mileage Expense.

**Project Task Settings**

- **Default Status**: Pending
- **Complete Status**: Completed
- **Initial Task Number**: 100
- **Default Task Span**: Current Month

**Time Entry Settings**

- **Invoice Status**: Invoiced
- **Default Billable**: No

**Timesheet Settings**

- **Timesheet**: Project Task and Cases
- **System Date Format**: M/d/yyyy
- **Header Date Format**: M/d
- **First Week of the Year**: First day of the year
- **Timesheet Approval**: First Day of the Week
- **System Time Format**: h:mm tt
- **System Date Separator**: /
- **First Day of the Week**: Monday

**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.