



Crowe EditAble CRM Grid

For Microsoft Dynamics® 365



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EditAble CRM Grid Overview

The Crowe EditAble CRM Grid from Crowe LLP is an adaptable add-on to Microsoft Dynamics® CRM and its next-generation Dynamics 365 that improves efficiency when creating and using customer relationship management (CRM) forms. It generates information-rich dashboards that make it easier to view and update customer information.

Solution Platform

- HTML and JavaScript based solution for Microsoft Dynamics 365
- Available for on-premises, hosted (Internet-Facing Deployment), and CRM Online
- Microsoft Dynamics 365 Managed Solution

Key Features

- Highly configurable with intuitive EditAble CRM Grid configuration module
- Supports system and custom entities
- Follows D365 style guidelines for seamless look and feel
- Supports inline editing or form-based editing
- Inline edit multiple rows at the same time
- EditAble CRM views
- Localized language and multi-currency support
- Supports most standard CRM field controls
- Enforces D365 security model

EditAble CRM Grid Scenarios

Scenario 1 – Inline Editing, Group and Summary (Sum) Options

An EditAble CRM Grid on the account form configured with grouping and summary options

The screenshot displays the Microsoft Dynamics CRM interface for an account named 'Crowe Properties'. The top navigation bar includes 'Sales', 'Accounts', and 'Crowe Properties'. The main content area is divided into sections: 'General', 'Address', and 'Buildings'.

General Information:

- Account Name: Crowe Properties
- Primary Contact: Joseph Kline
- Main Phone: 617-555-2354
- Fax: 617-555-2360
- Website: <http://www.croweproperties.web>

Address Information:

- Address Type: Primary
- Street: 14 West Main Street
- City: Boston
- State/Province: MA
- Street 2: Unit 1
- ZIP/Postal Code: 02110

Buildings Grid:

The grid shows a list of buildings with columns for Building, Unit, Price Per SqFt, SqFt, Yearly Lease, Monthly Lease, Lease Expiration, Occupancy, Tenant, and Status. Summary rows are provided for grouped buildings.

Building	Unit	Price Per SqFt	SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Occupancy	Tenant	Status
1105 Great Road				5,475.00	\$98,231.25	\$8,185.94			
1105 Great Road	Unit A	\$18.00	1,050.00	\$18,900.00	\$1,575.00	6/30/2019	Occupied	Snyder Travel	Active
1105 Great Road	Unit B	\$17.50	1,200.00	\$21,000.00	\$1,750.00	9/30/2018	Occupied	Thompson Hardware	Active
1105 Great Road	Unit C	\$18.25	1,125.00	\$20,531.25	\$1,710.94	12/31/2018	Occupied	Downtown Dentistry	Active
1105 Great Road	Unit D	\$18.00	2,100.00	\$37,800.00	\$3,150.00		Available		Active
Washington Plaza				10,650.00	\$177,775.00	\$14,814.59			
Washington Plaza	Unit A	\$17.50	3,200.00	\$56,000.00	\$4,666.67	9/3/2018	Occupied	McCloskey Realty	Active
Washington Plaza	Unit B	\$17.00	2,575.00	\$43,775.00	\$3,647.92		Available		Active
Washington Plaza	Unit C	\$16.00	4,875.00	\$78,000.00	\$6,500.00	10/23/2018	Occupied	Louie's Pizza	Active
				16,125.00	\$276,006.25	\$23,000.53			

7 rows loaded

Active

Scenario 1 Illustration

Reference: Editable CRM Grid in Edit Mode

• Buildings

SAVE CHANGES CANCEL CHANGES

Building	Unit	Price Per SqFt	SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Occupancy	Tenant	Status
1105 Great Road			5,475.00	\$98,231.25	\$8,185.94				
1105 Great Road	Unit A	\$18.00	1,050.00	\$18,900.00	\$1,575.00	6/30/2019	Occupied	Snyder Travel	Active
1105 Great Road	Unit B	\$17.50	1,200.00	\$21,000.00	\$1,750.00	9/30/2018	Occupied	Thompson Hardware	Active
1105 Great Road	Unit C	\$18.25	1,125.00	\$20,531.25	\$1,710.94	12/31/2018	Occupied	Downtown Dentistry	Active
1105 Great Road	Unit D	\$18.00	2,100.00	\$37,800.00	\$3,150.00		Available		Active
Washington Plaza			10,650.00	\$177,775.00	\$14,814.59				
Washington Plaza	Unit A	\$17.50	3,200.00	\$56,000.00	\$4,666.67	9/3/2018	Occupied	McCloskey Realty	Active
Washington Plaza	Unit B	\$17.00	2,575.00	\$43,775.00	\$3,647.92		Available		Active
Washington Plaza	Unit C	\$16.00	4,875.00	\$78,000.00	\$6,500.00	10/23/2018	Occupied	Louie's Pizza	Active
			16,125.00	\$276,006.25	\$23,000.53				

7 rows loaded

- Enter information directly into fields without having to launch a Microsoft Dynamics 365 form
- Inline controls include text fields, option sets, date fields, lookups, and memo fields
- Enter new records or delete records from within the Editable CRM Grid
- Summary Options can be displayed by Group and/or Total (footer)

Reference: Editable CRM Grid with Field Level Security

Buildings

EXPORT

Unit	Price Per SqFt	SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Occupancy
Building 1			5,125.00	\$90,250.00	\$7,520.83	
Unit A	\$18.00	1,050.00	\$18,900.00	\$1,575.00	*****	Occupied
Unit B	\$18.00	950.00	\$17,100.00	\$1,425.00	*****	Occupied
Unit C	\$18.00	1,125.00	\$20,250.00	\$1,687.50	*****	Occupied
Unit D	\$17.00	2,000.00	\$34,000.00	\$2,833.33	*****	Available
Building 2			10,575.00	\$169,200.00	\$14,100.00	
Unit A	\$16.00	3,200.00	\$51,200.00	\$4,266.67	*****	Occupied
Unit B	\$16.00	2,500.00	\$40,000.00	\$3,333.33	*****	Available
Unit C	\$16.00	4,875.00	\$78,000.00	\$6,500.00	*****	Occupied
		15,700.00	\$259,450.00	\$21,620.83		

7 rows loaded

Active

- CRM Field Level Security and Security Roles are inherited and maintained in the Editable CRM Grid

Scenario 2 – Dynamic EditAble CRM Grids

Add multiple EditAble CRM Grids or create associations between related EditAble CRM Grids

The screenshot displays the Microsoft Dynamics CRM interface for the 'Crowe Properties' account. The top navigation bar includes 'Sales', 'Accounts', and 'Crowe Properties'. Below the navigation bar, there are action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. The main content area is titled 'Crowe Properties' and is divided into sections: 'General', 'Address', and 'Investment Properties'.

General Information:

- Account Name: Crowe Properties
- Primary Contact: Joseph Kline
- Parent Account: --
- Main Phone: 617-555-2354
- Fax: 617-555-2360
- Website: http://www.croweproperties.web

Address Information:

- Address Type: Primary
- Street: 14 West Main Street
- Street 2: Unit 1
- City: Boston
- State/Province: MA
- ZIP/Postal Code: 02110

Investment Properties (Table 1):

Property	City	# Offices	Total SqFt	Avail SqFt	Annual Lease	Monthly Lease	% Occupancy	Management Company
100 Milk St.	Boston	8	24,500	6,000	\$356,400.00	\$29,682.67	87.50	J. Hill Properties
1040 West Park	Boston	7	16,500	2,000	\$268,000.00	\$22,333.33	85.71	J. Hill Properties
4 Miles Lane	Cambridge	6	9,100	3,100	\$160,150.00	\$13,352.50	66.67	J. Hill Properties
50 Park Drive	Allston	10	22,600	11,700	\$245,200.00	\$22,785.00	60.00	Devonshire
600 Mass Ave	Brighton	12	24,000	2,000	\$165,300.00	\$33,169.50	91.67	Devonshire
			96,700		\$1,195,050.00	\$121,323.00		

5 rows loaded

Investment Properties (Table 2):

Office	Tenant	SqFt	Price / SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Status
Unit 1	ARC Systems	2,700	\$16.00	\$43,200.00	\$3,600.00	8/1/2018	Occupied
Unit 2	Valient Software	3,900	\$15.00	\$58,500.00	\$4,875.00	6/1/2019	Occupied
Unit 3	CHP Diagnostics	1,900	\$17.00	\$32,300.00	\$2,691.67	9/1/2018	Occupied
Unit 4		2,000	\$17.00	\$34,000.00	\$2,833.33		Available
Unit 5	Variety Tower LLC	3,000	\$16.00	\$48,000.00	\$4,000.00	2/1/2019	Occupied
Unit 6	Advanced Networks	2,000	\$17.00	\$34,000.00	\$2,833.33	3/1/2019	Occupied
Unit 7	Earth Sports Inc	1,000	\$18.00	\$18,000.00	\$1,500.00	9/30/2018	Occupied
		16,500		\$268,000.00	\$22,333.33		

7 rows loaded

Active

Scenario 2 Illustration

Reference: Selecting a different record in the Investment Properties EditAble CRM Grid loads the corresponding data into the associated grid below

Investment Properties

+ NEW EDIT DELETE ↻

✓	Property ↑	City	# Offices	Total SqFt	Avail SqFt	Annual Lease	Monthly Lease	% Occupancy	Management Company
	100 Milk St.	Boston	8	24,500	6,000	\$356,400.00	\$29,682.67	87.50	J. Hill Properties
	1040 West Park	Boston	7	16,500	2,000	\$268,000.00	\$22,333.33	85.71	J. Hill Properties
✓	4 Miles Lane	Cambridge	6	9,100	3,100	\$160,150.00	\$13,352.50	66.67	J. Hill Properties
	50 Park Drive	Allston	10	22,600	11,700	\$245,200.00	\$22,785.00	60.00	Devonshire
	600 Mass Ave	Brighton	12	24,000	2,000	\$165,300.00	\$33,169.50	91.67	Devonshire
				96,700		\$1,195,050.00	\$121,323.00		

5 rows loaded

+ NEW EDIT DELETE ↻

✓	Office	Tenant	SqFt	Price / SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Status
	Unit 1	KLP Group LLC	1,200	\$18.00	\$21,600.00	\$1,800.00	6/1/2019	Occupied
	Unit 2	ZPG Resource Group	2,000	\$17.00	\$34,000.00	\$2,840.00	3/1/2018	Occupied
	Unit 3	Mindshare Software	1,600	\$17.50	\$28,000.00	\$2,333.33	8/1/2020	Occupied
	Unit 4		1,400	\$18.00	\$25,200.00	\$2,100.00		Available
	Unit 5		1,700	\$17.50	\$29,750.00	\$2,479.17		Available
	Unit 6	Earth Sports Inc	1,200	\$18.00	\$21,600.00	\$1,800.00	1/31/2019	Occupied
			9,100		\$160,150.00	\$13,352.50		

6 rows loaded

Scenario 3 – Export to Microsoft Excel®

Export the information from any Editable CRM Grid directly into Excel spreadsheet software

Buildings

+ NEW EDIT DELETE EXPORT 										
Building	Unit	Price Per SqFt	SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Occupancy	Tenant	Status	
1105 Great Road			5,475.00	\$98,231.25	\$8,185.94					
1105 Great Road	Unit A	\$18.00	1,050.00	\$18,900.00	\$1,575.00	6/30/2019	Occupied	Snyder Travel	Active	
1105 Great Road	Unit B	\$17.50	1,200.00	\$21,000.00	\$1,750.00	9/30/2018	Occupied	Thompson Hardware	Active	
1105 Great Road	Unit C	\$18.25	1,125.00	\$20,531.25	\$1,710.94	12/31/2018	Occupied	Downtown Dentistry	Active	
1105 Great Road	Unit D	\$18.00	2,100.00	\$37,800.00	\$3,150.00		Available		Active	
Washington Plaza			10,650.00	\$177,775.00	\$14,814.59					
Washington Plaza	Unit A	\$17.50	3,200.00	\$56,000.00	\$4,666.67	9/3/2018	Occupied	McCloskey Realty	Active	
Washington Plaza	Unit B	\$17.00	2,575.00	\$43,775.00	\$3,647.92		Available		Active	
Washington Plaza	Unit C	\$16.00	4,875.00	\$78,000.00	\$6,500.00	10/23/2018	Occupied	Louie's Pizza	Active	
			16,125.00	\$276,006.25	\$23,000.53					

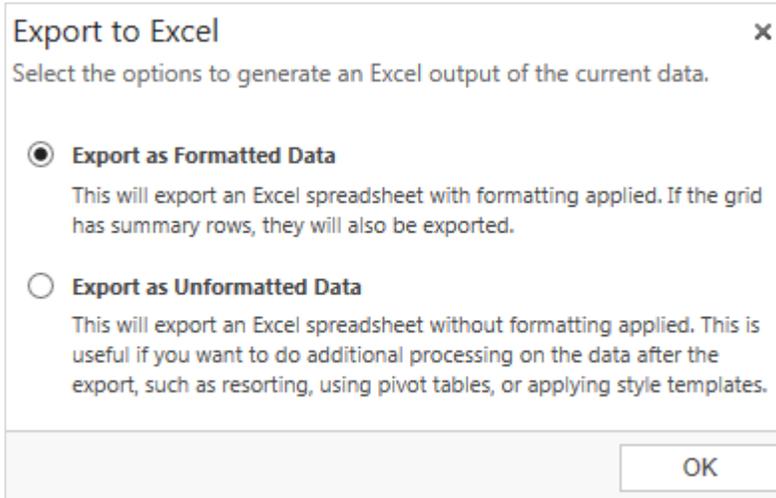
7 rows loaded

Export to Excel

The Editable CRM Grid toolbar can be configured to include an Export to Excel button. The user can choose to maintain the formatting of the Editable CRM Grid or export as unformatted data.

Scenario 3 Illustration

Reference: "Export to Excel" formatting options



Reference: 'Export as Formatted Data' output

	A	B	C	D	E	F	G	H	I	J	K
1	Building		Unit	Price Per SqFt	SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Occupancy	Tenant	Status
2	1105 Great Road				5,475.00	\$98,231.25	\$8,185.94				
3	1105 Great Road	Unit A	\$18.00	1,050.00	\$18,900.00	\$1,575.00	6/30/2019	Occupied	Snyder Travel	Active	
4	1105 Great Road	Unit B	\$17.50	1,200.00	\$21,000.00	\$1,750.00	9/30/2018	Occupied	Thompson Hardware	Active	
5	1105 Great Road	Unit C	\$18.25	1,125.00	\$20,531.25	\$1,710.94	12/31/2018	Occupied	Downtown Dentistry	Active	
6	1105 Great Road	Unit D	\$18.00	2,100.00	\$37,800.00	\$3,150.00		Available		Active	
7	Washington Plaza				10,650.00	\$177,775.00	\$14,814.59				
8	Washington Plaza	Unit A	\$17.50	3,200.00	\$56,000.00	\$4,666.67	9/3/2018	Occupied	McCloskey Realty	Active	
9	Washington Plaza	Unit B	\$17.00	2,575.00	\$43,775.00	\$3,647.92		Available		Active	
10	Washington Plaza	Unit C	\$16.00	4,875.00	\$78,000.00	\$6,500.00	10/23/2018	Occupied	Louie's Pizza	Active	

Reference: 'Export as Unformatted Data' output

	A	B	C	D	E	F	G	H	I	J
1	Building	Unit	Price Per SqFt	SqFt	Yearly Lease	Monthly Lease	Lease Expiration	Occupancy	Tenant	Status
2	1105 Great Road	Unit A	\$18.00	1,050.00	\$18,900.00	\$1,575.00	6/30/2019	Occupied	Snyder Travel	Active
3	1105 Great Road	Unit B	\$17.50	1,200.00	\$21,000.00	\$1,750.00	9/30/2018	Occupied	Thompson Hardware	Active
4	1105 Great Road	Unit C	\$18.25	1,125.00	\$20,531.25	\$1,710.94	12/31/2018	Occupied	Downtown Dentistry	Active
5	1105 Great Road	Unit D	\$18.00	2,100.00	\$37,800.00	\$3,150.00		Available		Active
6	Washington Plaza	Unit A	\$17.50	3,200.00	\$56,000.00	\$4,666.67	9/3/2018	Occupied	McCloskey Realty	Active
7	Washington Plaza	Unit B	\$17.00	2,575.00	\$43,775.00	\$3,647.92		Available		Active
8	Washington Plaza	Unit C	\$16.00	4,875.00	\$78,000.00	\$6,500.00	10/23/2018	Occupied	Louie's Pizza	Active

Scenario 4 – Inline Editing, Group and Summary (Count) Options

An Editable CRM Grid on the Account form configured with grouping and summary (count) options

Microsoft Dynamics CRM

🏠 Sales ▾ Accounts ▾ Crowe Properties ▾
 🕒
+
🔍
📄
⚙️
?

+ NEW
🔒 DEACTIVATE
🔗 CONNECT ▾
📄 ADD TO MARKETING LIST
👤 ASSIGN
📧 EMAIL A LINK
✖ DELETE
⋮

↑
↓
🔄
✖

ACCOUNT : INFORMATION ▾

Crowe Properties

General

Account Name *	Crowe Properties	Main Phone	617-555-2354
Primary Contact	● Joseph Kline	Fax	617-555-2360
Parent Account	--	Website	http://www.croweproperties.web

Address

Address Type	Primary	City	Boston
Street	14 West Main Street	State/Province	MA
Street 2	Unit 1	ZIP/Postal Code	02110

Cases

+ NEW ▾
✎ EDIT
🗑 DELETE
🔧 🔄

Title	Building	Unit	Owner	Follow Up By	Description
Active (4)					
Sink issue	Building 1	Unit D	Bobby Drake	6/3/2017	Won't stop dripping
Temp too cold	Building 2	Unit B	Kurt Wagner	7/8/2017	Temperature is stuck at 67 degrees
Blown Circuit	Building 1	Unit A	Max Eisenhardt	8/12/2017	Waiting on parts to replace
Broken Window	Building 2	Unit C	Erik Lensherr	9/18/2017	Window boarded up while waiting for new pane
Canceled (2)					
Toilet Issue	Building 1	Unit C	Max Eisenhardt	1/16/2017	
Smoke Detector	Building 2	Unit A	James Howlett	2/9/2017	
Resolved (5)					
Slow Drain	Building 1	Unit B	Max Eisenhardt	6/6/2017	
No Heat	Building 2	Unit B	Henry McCoy	3/11/2017	
Disposal Jammed	Building 2	Unit A	Remy LeBeau	5/13/2017	
Alarm Beeping	Building 1	Unit C	Max Eisenhardt	4/20/2017	
No Hot Water	Building 1	Unit D	Max Eisenhardt	2/28/2017	

11 rows loaded

Scenario 4 Illustrations

Reference: EditAble CRM Grid in Edit Mode with multi-row selection and Lookup Control

Cases

SAVE CHANGES
 CANCEL CHANGES

Title	Building	Unit	Owner	Follow Up By
Active (4)				
Sink issue	Building 1	Unit D	Bobby Drake	6/3/2017
Temp too cold	Building 2	Unit B	Kurt Wagner	7/8/2017
Blown Circuit	Building 1	Unit A	Max Eisenhardt	8/12/2017
Broken Window	Building 2	Unit C	Erik Lensherr	9/18/2017
Canceled (2)				
Toilet Issue	Building 1	Unit C	Max Eisenhardt	1/16/2017
Smoke Detector	Building 2	Unit A	James Howlett	2/9/2017
Resolved (5)				
Slow Drain	Building 1	Unit B	Max Eisenhardt	6/6/2017
No Heat	Building 2	Unit B	Henry McCoy	3/11/2017
Disposal Jammed	Building 2	Unit A	Remy LeBeau	5/13/2017
Alarm Beeping	Building 1	Unit C	Max Eisenhardt	4/20/2017
No Hot Water	Building 1	Unit D	Max Eisenhardt	2/28/2017

11 rows loaded

- Grouping records provides for quick visibility into metrics you would otherwise have to calculate on your own
- Microsoft Dynamics 365 Security Roles are inherited so the same privileges and access levels to information in the EditAble CRM Grid are maintained

Scenario 5 – Inline Calculations & Custom Toolbar Buttons

An EditAble CRM Grid on the Account form configured with grouping, calculated field options, and a custom button

Microsoft Dynamics CRM
Sales | Accounts | Crowe Bank

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE

ACCOUNT : INFORMATION

Crowe Bank

General

Account Name*	Crowe Bank	Main Phone	617-555-2354
Primary Contact	Joseph Kline	Fax	617-555-2360
Parent Account	--	Website	http://www.croweproperties.web

Address

Address Type	Primary	City	Boston
Street	14 West Main Street	State/Province	MA
Street 2	Unit 1	ZIP/Postal Code	02110

Metals Inventory

+ NEW EDIT DELETE TODAY'S METAL PRICES

Product Category	Price Per Ounce	Ounces	Value (\$)
Gold			
Bars	\$1,635.00	200.00	\$327,000.00
Coins	\$1,635.00	127.00	\$207,645.00
Palladium			
Bars	\$770.00	250.00	\$192,500.00
Coins	\$775.00	405.00	\$313,875.00
Platinum			
Bars	\$1,705.00	300.00	\$511,500.00
Coins	\$1,705.00	450.00	\$767,250.00
Silver			
Bars	\$27.50	4,890.00	\$134,475.00
Coins	\$27.50	905.00	\$24,887.50
		7,527.00	\$2,479,132.50

8 rows loaded

Active

Scenario 5 Illustrations

Reference: EditAble CRM Grid in Edit Mode with required and calculated fields

▸ **Metals Inventory**

SAVE CHANGES
 CANCEL CHANGES

Product Category	Price Per Ounce	Ounces	Value (\$)
Gold			
Bars	\$1,635.00	200.00	\$327,000.00
Coins	\$1,635.00	127.00	\$207,645.00
Palladium			
Bars	\$770.00	250.00	\$192,500.00
Coins	\$775.00	405.00	\$313,875.00
Platinum			
Bars	\$1,705.00	300.00	\$511,500.00
Coins	\$1,705.00	450.00	\$767,250.00
Silver			
Bars	\$27.50	4,890.00	\$134,475.00
Coins	\$27.50	905.00	\$24,887.50
		7,527.00	\$2,479,132.50

8 rows loaded

- Create inline calculations like the example here: Price Per Ounce times Ounces equals Value
- Business Required fields are highlighted in red within the EditAble CRM Grid

Reference: Custom toolbar button

Metals Inventory

+ NEW ✎ EDIT 🗑 DELETED 🔍 TODAY'S METAL PRICES

Product Category	Price Per Ounce	Ounces	Value (\$)
Gold			
Bars	\$1,635.00	200.00	\$327,000.00
Coins	\$1,635.00	127.00	\$207,645.00
Palladium			
Bars	\$770.00	250.00	\$192,500.00
Coins	\$775.00	405.00	\$313,875.00
Platinum			
Bars	\$1,705.00	300.00	\$511,500.00
Coins	\$1,705.00	450.00	\$767,250.00
Silver			
Bars	\$27.50	4,890.00	\$134,475.00
Coins	\$27.50	905.00	\$24,887.50
		7,527.00	\$2,479,132.50

8 rows loaded

- Custom toolbar buttons can be used to interact with information in the EditAble CRM Grid, launch to external sites, or even extend the EditAble CRM Grid's functionality
- Reference: Launch web page for current metal prices

NEW New York Spot Price

🇺🇸 US Dollar oz
MARKET IS OPEN
🔔 Market Alerts

(Will close in 2 hrs. 57 mins.)

Metals	Date	Time (EST)	Bid	Ask	Change		Low	High
🏠 GOLD	01/30/2017	14:04	1194.40	1195.40	+3.10	+0.26%	1190.70	1200.20
🏠 SILVER	01/30/2017	14:02	17.10	17.20	-0.02	-0.12%	16.98	17.37
🏠 PLATINUM	01/30/2017	14:02	985.00	990.00	+1.00	+0.10%	969.00	995.00
🏠 PALLADIUM	01/30/2017	13:59	737.00	742.00	-3.00	-0.41%	722.00	742.00
🏠 RHODIUM	01/27/2017	10:00	780.00	880.00	-10.00	-1.28%	-	-

Scenario 6 – Navigation Pane Configuration

An EditAble CRM Grid can be configured to launch from the navigation pane

The screenshot displays the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM' and a hamburger menu icon. Below this, there are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main area shows a table of CRM records. A dropdown menu is open over the 'Users' column, listing several users including Bobby Drake, Cain Marko, Erik Lensherr, Henry McCoy, James Howlett, Kurt Wagner, Lucas Bishop, Max Eisenhardt (highlighted), Ororo Munroe, Remy LeBeau, System Administrator, and Warren Worthington. Below the users list, there is a 'Teams' section with 'EditAble CRM Grid' and 'Sales - West'. The table below has columns for 'Topic', 'Close Date', 'Est. Revenue', and 'Next Steps'. Several cells in the 'Topic' column are highlighted with red boxes: 'FBC Associates', 'Misc Supplies', 'Integrated Systems', 'Markers', 'Hotel Cortez', 'Pilot Project', 'ARC Systems', 'Folders', and 'Redstone Associates'. The table shows various records with their respective dates, revenue, and next steps.

Topic	Close Date	Est. Revenue	Next Steps
1 - Identify		\$40,000.00	
✓ FBC Associates Misc Supplies	10/20/2017	\$40,000.00	Send email to Bob
2 - Budget		\$210,000.00	
CHP Diagnostics Dry Erase Boards	7/16/2017	\$30,000.00	Identify budget range
ZPG Resource Group Printers	10/31/2017	\$180,000.00	Call Tom on Monday
3 - Proposal		\$54,000.00	
✓ Integrated Systems Markers	3/31/2017	\$18,000.00	Send proposal email
Devonshire Staples	5/1/2017	\$11,000.00	Call with John on Friday
Crowe Properties Paper Goods	5/6/2017	\$25,000.00	Schedule a call
4 - Verbal		\$502,000.00	
✓ Hotel Cortez Pilot Project	6/30/2017	\$202,500.00	Budgetary meeting set
✓ ARC Systems Folders	7/17/2017	\$229,000.00	Reviewing financials
KLP Group LLC Poster Board	8/27/2017	\$15,000.00	Create proposal
✓ Redstone Associates Paper	10/11/2017	\$55,500.00	Call Hank on Tuesday
5 - Won		\$120,000.00	
Firestar Software Pencils	2/28/2017	\$120,000.00	Send thank you email
		\$926,000.00	

Tailor the records displayed by defining Criteria in the EditAble CRM Grid’s configuration record.

Navigation Menu Configuration
 An Opportunity EditAble CRM Grid launched from the Navigation Pane makes the sales pipeline visible and allows quick information updates. EditAble CRM Grids can be added to the Navigation Pane by simply modifying the Site Map.

Scenario 7 – Dynamic Grouping Options

The Scenario 6 Editable CRM Grid grouped by Owner instead of Sales Stage

Data Grid Options ✕

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

Enable Grouping

Group By Owner ▼

Then By [None] ▼

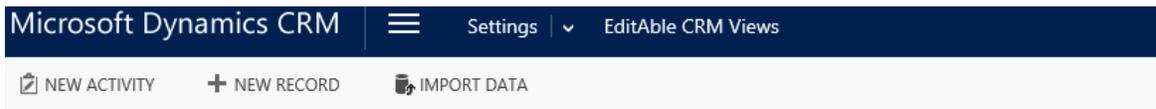
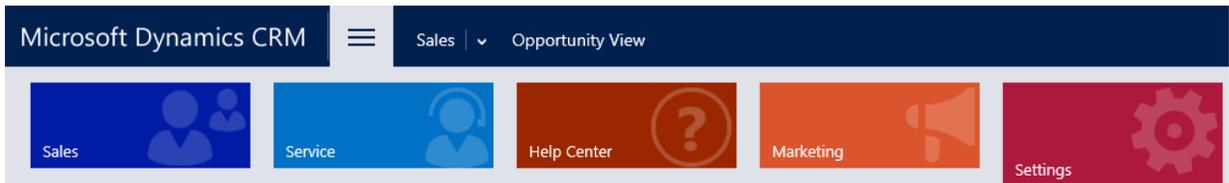
Microsoft Dynamics CRM							Sales	Opportunity View	Remy LeBeau Editable CRM Grid		?
+ NEW		EDIT	DELETE	EXPORT							
Potential Customer	Topic	Sales Stage	Est. Close Date	Est. Revenue	Next Steps						
Remy LeBeau				\$551,500.00							
Firestar Software	Pencils	5 - Won	2/28/2017	\$120,000.00	Send thank you email						
Hotel Cortez	Pilot Project	4 - Verbal	6/30/2017	\$202,500.00	Budgetary meeting set						
ARC Systems	Folders	4 - Verbal	7/17/2017	\$229,000.00	Reviewing financials						
Max Eisenhardt				\$58,000.00							
Integrated Systems	Markers	3 - Proposal	3/31/2017	\$18,000.00	Send proposal email						
FBC Associates	Misc Supplies	3 - Proposal	6/30/2017	\$40,000.00	Send email to Bob						
Lucas Bishop				\$180,000.00							
ZPG Resource Group	Printers	2 - Budget	10/31/2017	\$180,000.00	Call Tom on Monday						
Kurt Wagner				\$30,000.00							
CHP Diagnostics	Dry Erase Boards	2 - Budget	7/16/2017	\$30,000.00	Identify budget range						
James Howlett				\$81,500.00							
Devonshire	Staples	3 - Proposal	5/1/2017	\$11,000.00	Call with John on Friday						
KLP Group LLC	Poster Board	4 - Verbal	8/27/2017	\$15,000.00	Create proposal						
Redstone Associates	Paper	4 - Verbal	10/11/2017	\$55,500.00	Call Hank on Tuesday						
Erik Lensherr				\$25,000.00							
Crowe Properties	Paper Goods	3 - Proposal	5/6/2017	\$25,000.00	Schedule a call						
				\$926,000.00							

11 rows loaded Page 1

Grouping Options
 An Editable CRM Grid can be configured to allow the user to choose how they want to group information. Grouping options are accessed from the Options icon when Dynamic Grouping is enabled.

Scenario 8 – Editable CRM Views

In Editable CRM Views you can select any view in your organization and make it editable without the need to configure a grid



Editable CRM Views

Select a view to open in an Editable CRM Grid

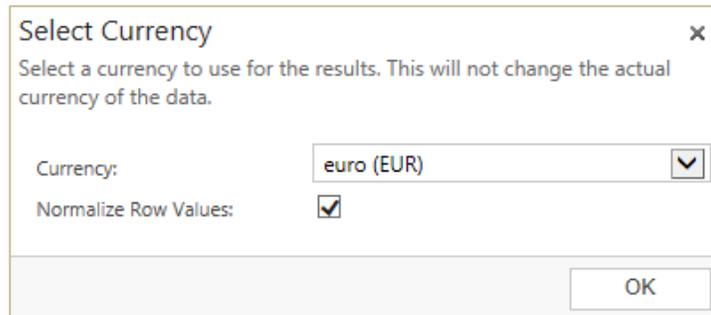
Entity: View:

SAVE CHANGES CANCEL CHANGES

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	
✓ Pencils	Firestar Software	2/28/2017	\$120,000.00	75	
Markers	Integrated Systems	3/31/2017	\$18,000.00	50	
Staples	Devonshire	5/1/2017	\$11,000.00	50	
✓ Paper Goods	Crowe Properties	5/6/2017	\$25,000.00	75	
Pilot Project	Hotel Cortez	<div style="text-align: center;"> May 2017 Su Mo Tu We Th Fr Sa 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 Today: 1/30/2017 </div>		\$202,500.00	50
Misc Supplies	FBC Associates		\$40,000.00	50	
Dry Erase Boards	CHP Diagnostics		\$30,000.00	50	
Folders	ARC Systems		\$229,000.00	25	
Poster Board	KLP Group LLC		\$15,000.00	50	
Paper	Redstone Associates		\$55,500.00	50	
Printers	ZPG Resource Group		\$180,000.00	25	

Scenario 9 – Multi-Currency Support

Apply multi-currency support to an EditAble CRM Grid



Reference: An EditAble CRM Grid configured to normalize currency values to Euros

+ NEW EDIT DELETE EXPORT						
Potential Customer	Topic	Sales Stage	Est. Close Date ↑	Est. Revenue	Next Steps	
Bobby Drake				€19,000.00		
Crowe Properties	Paper Goods	3 - Proposal	5/6/2017	€19,000.00	Schedule a call	
James Howlett				€61,940.00		
Devonshire	Staples	3 - Proposal	5/1/2017	€8,360.00	Call with John on Friday	
KLP Group LLC	Poster Board	4 - Verbal	8/27/2017	€11,400.00	Create proposal	
Redstone Associates	Paper	4 - Verbal	10/11/2017	€42,180.00	Call Hank on Tuesday	
Kurt Wagner				€22,800.00		
CHP Diagnostics	Dry Erase Boards	2 - Budget	7/16/2017	€22,800.00	Identify budget range	
Lucas Bishop				€136,800.00		
ZPG Resource Group	Printers	2 - Budget	10/31/2017	€136,800.00	Call Tom on Monday	
Max Eisenhardt				€44,080.00		
Integrated Systems	Markers	3 - Proposal	3/31/2017	€13,680.00	Send proposal email	
FBC Associates	Misc Supplies	1- Identify	6/30/2017	€30,400.00	Send email to Bob	
Remy LeBeau				€419,140.00		
Firestar Software	Pencils	5 - Won	2/28/2017	€91,200.00	Send thank you email	
Hotel Cortez	Pilot Project	4 - Verbal	6/30/2017	€153,900.00	Budgetary meeting set	
ARC Systems	Folders	4 - Verbal	7/17/2017	€174,040.00	Reviewing financials	
				€703,760.00		

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- Multi-currency support is inherited from the currencies and exchange rates set up in Microsoft Dynamics 365

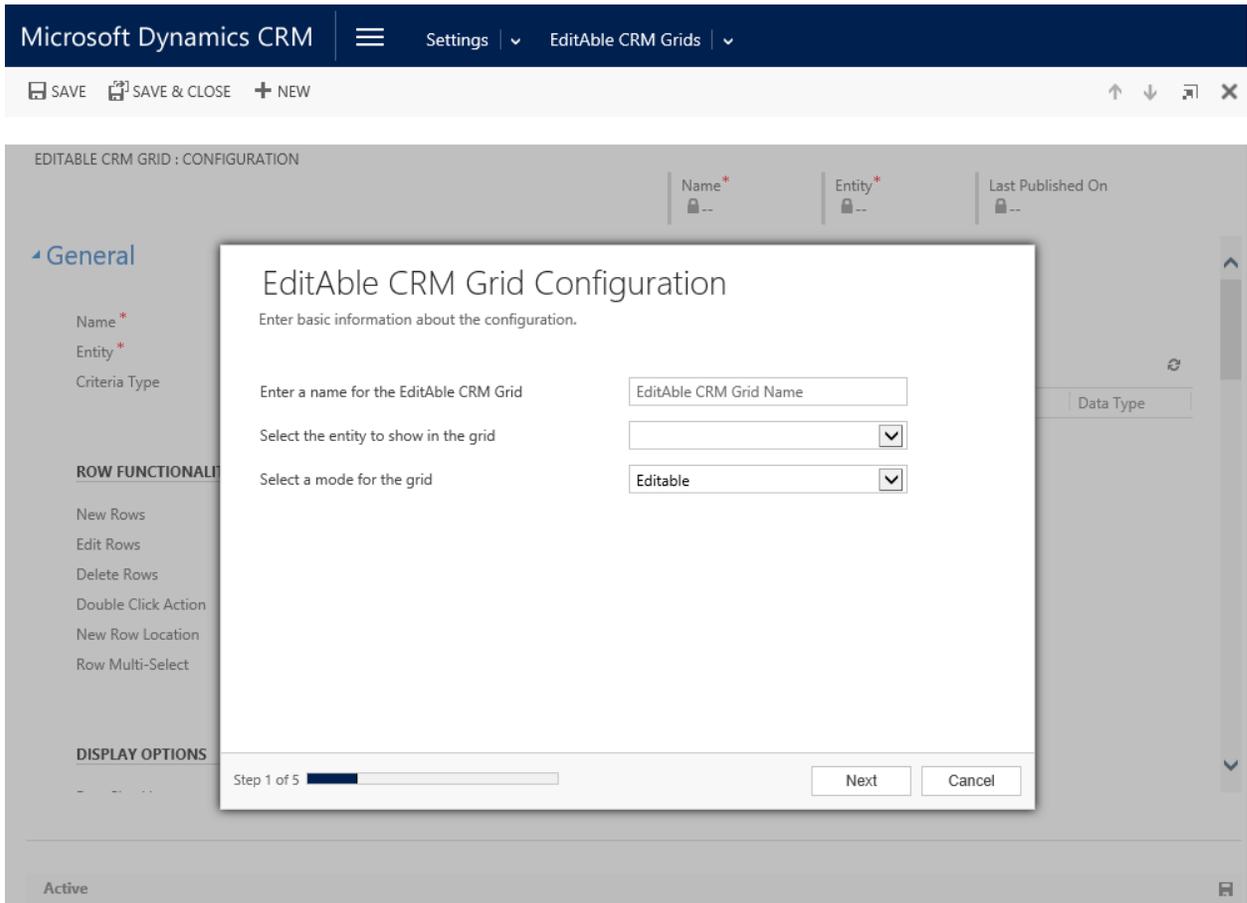
Scenario 9 – Multi-Language Support

Apply multi-language support to an EditAble CRM Grid

- Language support is available for English, Danish, French and German
- Additional languages can also be added

Scenario 10 – Configuring an Editable CRM Grid

When creating a new Editable CRM Grid, a helpful Configuration Wizard guides the process



EditAble CRM Grids are configured through a familiar CRM record interface

The screenshot shows the configuration interface for an Editable CRM Grid named 'Metals Inventory'. The interface is divided into several sections:

- General:** Includes fields for Name (Metals Inventory), Entity (abdgs_metalsinventory), Criteria Type (Show Related Records), Parent Entity Name (Account), and Parent Entity Key (abdgs_AccountId).
- ROW FUNCTIONALITY:** Options for New Rows (Create Inline), Edit Rows (Edit Inline), Delete Rows (Use Toolbar Button), Double Click Action (Edit Inline), New Row Location (Bottom), and Row Multi-Select (Enabled).
- DISPLAY OPTIONS:** Settings for Row Checkboxes (Hidden), Header (Yes), Footer (Yes), Border, Toolbar, and Status Bar.
- Grouping:** Enable Grouping is checked, with Group Count set to 1. Group Behavior is set to Collapsible, Expanded By Default.
- Additional Options:** Features like Quick Copy, Quick Filter, Save and New, Currency Conversion, and Multi-Currency Support are mostly disabled.
- ADVANCED OPTIONS & OVERRIDES:** Auto Publish is No, Privilege Handling is Disabled, Keyboard Shortcuts are Enabled, and Transaction Mode is Synchronous.
- FILTER PANEL:** A 'Show' checkbox is present.
- COLUMNS:** A table listing columns such as Product Category, Price Per Ounce, Ounces, Value (\$), Metal, and Total Ounces, with their respective data types and widths.
- GROUP 1:** Configured for the 'Metal' column, sorted in Ascending order.
- FILTERS:** A section for defining filters, currently showing 'No records are available.'
- CUSTOM EVENTS:** A table listing events like 'Price Per Ounce onChange' and 'Ounces onChange' with associated JavaScript functions.

Configuring the EditAble CRM Grid
 Define options such as Grouping, Sorting, Columns, and Criteria within a standard CRM record.
 Execute custom JavaScript triggered by EditAble CRM Grid events defined in Events.

Pricing Information

User licenses are required for the number of available active logins to your CRM system, including Admin and Read only users.

Monthly Subscription Option

Active CRM Users:	Tier 1 (10-24 users)	\$9.75 per user/mo*
	Tier 2 (25-49 users)	\$6.25 per user/mo*
	Tier 3 (50-99 users)	\$4.75 per user/mo*
	Tier 4 (100-299 users)	\$3.75 per user/mo*
	Tier 5 (300-499 users)	\$2.60 per user/mo*
	Tier 6 (500-999 users)	\$2.00 per user/mo*
	Tier 7 (1000+ users)	\$1.50 per user/mo*

Perpetual License Option

Active CRM Users:	Tier 1 (10-24 users)	\$250/user (one-time fee)**
	Tier 2 (25-49 users)	\$160/user (one-time fee)**
	Tier 3 (50-99 users)	\$120/user (one-time fee)**
	Tier 4 (100-299 users)	\$95/user (one-time fee)**
	Tier 5 (300-499 users)	\$67/user (one-time fee)**
	Tier 6 (500-999 users)	\$50/user (one-time fee)**
	Tier 7 (1000+ users)	\$35/user (one-time fee)**

*Subscription payments

Though billed monthly, Subscription purchases are a yearly commitment. If a subscription is cancelled before the Subscription year has ended, the remaining balance is still due. Payments are made monthly via credit card.

**Annual Maintenance

Maintenance covers compatibility with supported versions of Microsoft Dynamics 365, as defined by Microsoft and future releases and enhancements to Crowe EditAble CRM Grid. Maintenance is 20% of the list price renewed on an annual basis. The first year of Maintenance is included in the purchase price.

*Annual maintenance only applies to the License Purchase Option.

Licensing Non-Production Licensing (Test/Dev/Staging/UAT)

Customers may acquire one or more non-production licenses at a discounted rate to use for Test/Dev/Staging/UAT environments. A non-production license cannot be purchased without a valid production license. There is no annual maintenance charge for non-production licenses. Once you have purchased a non-production license, it remains valid as long as you have a valid production license.

Non-Production Licenses: \$499/non-production environment

Technical Software Support

Technical Software Support for Crowe EditAble CRM Grid costs \$900 and provides 5 hours of support. Time will be decremented from this allotment of hours in 15-minute increments for incidents that fall into the category of covered items that are not bugs.

Crowe Partner Program

Authorized Microsoft Dynamics partners may inquire about the Crowe partner program by submitting a request to crminfo@crowe.com.

Information

For more information on Crowe, contact us at:

Crowe, LLP

(877) 600-2253 | crminfo@crowe.com

<http://www.crowecrm.com>

<https://www.crowe.com/crmcontact>

About Crowe LLP

Our experience is delivering CRM project success.

Crowe has been implementing CRM technology from the inception of contact management applications through the evolution to sales force automation and ultimately into customer relationship management systems. Our logical CRM project implementation methodology is proven and delivers success.

We know Microsoft Dynamics 365.

Crowe has worked with Microsoft Dynamics 365 since its release in 2003 through its growth into the market-leading CRM platform it is today. Its flexibility, familiar user interface, interoperability with the Microsoft Office platform (including Outlook), and its top-flight functionality make it a good investment as a CRM strategy.

Focused on success.

Our strengths are our people and their personal commitment to each customer engagement. Our logical approach, the quality of our effort, and our seriousness and professionalism are the keys to our accomplishments. At Crowe, we measure our success by our customers' success.