



Crowe BenefitsBridge

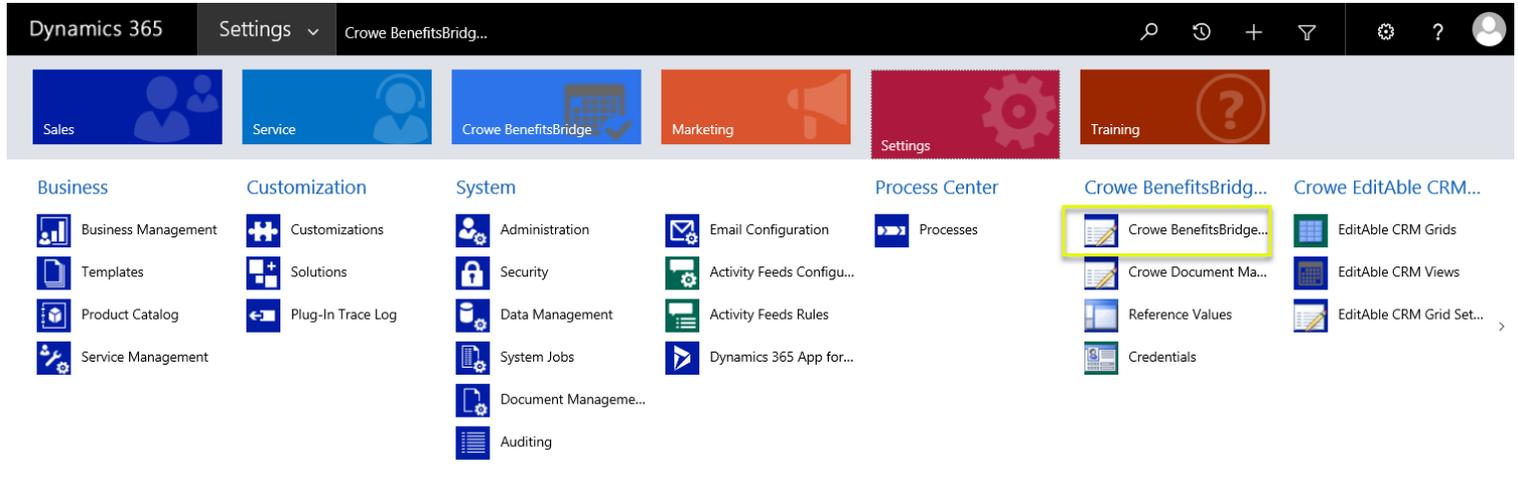
For Microsoft Dynamics 365™
Trial Setup



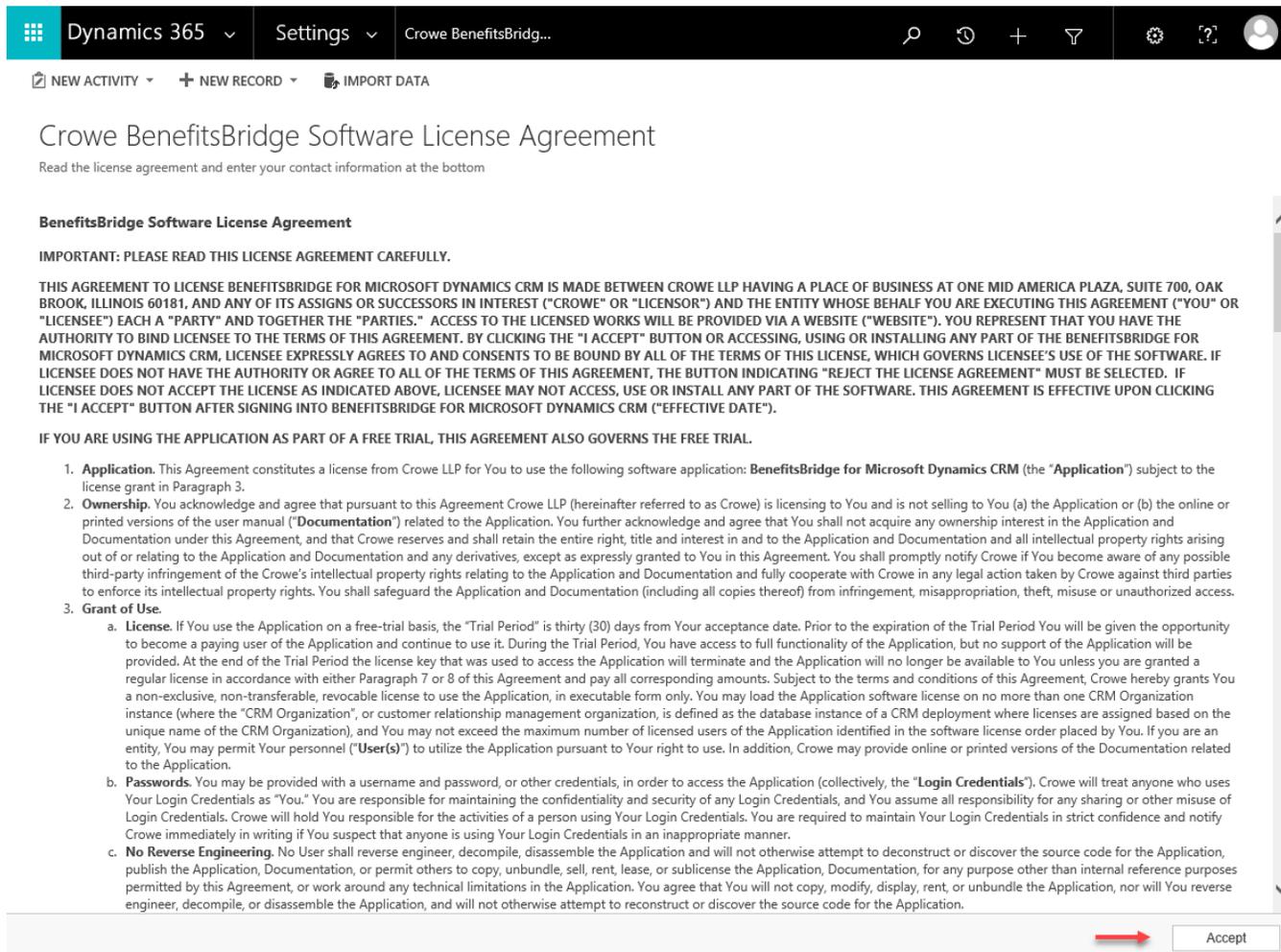
Application Setup

Accepting the EULA

Go to Settings → BenefitsBridge Settings



Scroll to the bottom and click Accept



BenefitsBridge Settings

Click the Import Configurations button

The screenshot shows the Dynamics 365 Settings interface for 'Crowe BenefitsBridge'. The top navigation bar includes 'Dynamics 365', 'Settings', and the user name 'Crowe BenefitsBridg...'. Below the navigation bar are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main content area is titled 'Crowe BenefitsBridge Settings' with the instruction 'Select the settings you want to apply to the system'. There are several expandable sections: 'General Settings' (with 'Enable GA Mode' checked), 'Copy Policy Settings', 'Copy/Renew Policy Terms Settings', 'Copy/Renew Commission Settings', 'Install Default Data', and 'Apply Map License'. At the bottom, there is a row of buttons: 'Apply New License', 'Named Users', 'Import Configurations' (highlighted in blue), 'License Agreement', 'Save', and 'Cancel'.

Expand the Install Default Data tab

- Click Create Default List Items
- Once completed, click Install Sample Plan Data
 - (please note, this may take a few minutes)

This screenshot shows the same Dynamics 365 Settings interface, but with the 'Install Default Data' section expanded. The 'Create Default List Items' button is highlighted with a red arrow. Below it, the text reads: 'Records will be created for the following lists: Account Type, Coverage, Coverage Type, Insured Type, and Rate Label.' The 'Install Sample Plan Data' button is also highlighted with a red arrow. Below it, the text reads: 'Records will be created for the following entities: Plan Data Label, Plan Data Label Value, Plan Data Template, and Plan Data Template Detail.' The bottom navigation bar remains the same as in the previous screenshot.

Adding a Trial License (Trials do not require a license for 30 days)

Click Apply New License

- Paste the entire xml code provided by Crowe into the box using Ctrl +V
- The license will automatically be applied once pasted

Dynamics 365 Settings Crowe BenefitsBridge...

NEW ACTIVITY NEW RECORD IMPORT DATA

Crowe BenefitsBridge Settings

Select the settings you want to apply to the system

- General Settings
 - Enable GA Mode
- Copy Policy Settings
- Copy/Renew Policy Terms Settings
- Copy/Renew Commission Settings
- Install Default Data
- Apply Map License

Apply New License Named Users Import Configurations License Agreement Save Cancel

Crowe BenefitsBridge Settings

View and update your license information

- Current License Details
 - Customer
 - Product
 - User Count
 - Organization
 - License Type
 - Expires After
 - Show Current License
- Apply New License
 -

Apply Close

Crowe BenefitsBridge Settings

View and update your license information

- Current License Details
 - Customer
 - Product
 - User Count
 - Organization
 - License Type
 - Expires After
 - Show Current License
- Apply New License
 - ```
<Organization>
<Server />
<ProductCode>Crowe BenefitsBridge</ProductCode>
<UserCode>20</UserCode>
<IncludesSupportUser>true</IncludesSupportUser>
<SupportUserCount>2</SupportUserCount>
<ExpireDate>2100-12-31T00:00:00</ExpireDate>
</CroweProductLicense>
```

OK

Apply Close

# Assign BenefitsBridge Security Roles

- Go to Settings x Security x Users
- Select Users and click Manage Roles
- Apply the appropriate roles

Manage User Roles

What roles would you like to apply to the 7 Users you have selected?

Role Name	Business Unit
<input type="checkbox"/> Activity Feeds	bb-82x-uat
<input checked="" type="checkbox"/> BenefitsBridge Administrator	bb-82x-uat
<input checked="" type="checkbox"/> BenefitsBridge Commission Tracking	bb-82x-uat
<input checked="" type="checkbox"/> BenefitsBridge User	bb-82x-uat
<input type="checkbox"/> CEO-Business Manager	bb-82x-uat
<input type="checkbox"/> Crowe EditAble CRM Grid Administrator	bb-82x-uat

OK Cancel

Everyone needs the BenefitsBridge User Role

BenefitsBridge Administrator is able to access BB admin areas (templates, etc.)

Commissions Tracking role is for anyone who needs access to Commission Schedules & Payments