



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

Microsoft Dynamics CRM | Sales | Accounts | Crowe Properties

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE SWITCH PROCESS FORM

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

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

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

Microsoft Dynamics CRM

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

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	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

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.

OK

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
Primary Contact
Joseph Kline
Parent Account
--

Main Phone
617-555-2354
Fax
617-555-2360
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
Active

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 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

- 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 (Will close in 2 hrs. 57 mins.)			Market Alerts		
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

Microsoft Dynamics CRM | Sales | Opportunity View

NEW ACTIVITY | NEW RECORD | IMPORT DATA

SAVE CHANGES | CANCEL CHANGES

Name	Topic	User	Close Date	Est. Revenue	Next Steps
1 - Identify					
FBC Associates	Misc Supplies	Max Eisenhardt	10/0/2017	\$40,000.00	Send email to Bob
2 - Budget					
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					
Integrated Systems	Markers	Max Eisenhardt	3/31/2017	\$18,000.00	Send proposal email
Devonshire	Staples	James Howlett	5/1/2017	\$11,000.00	Call with John on Friday
Crowe Properties	Paper Goods	Bobby Drake	5/6/2017	\$25,000.00	Schedule a call
4 - Verbal					
Hotel Cortez	Pilot Project	Remy LeBeau	6/30/2017	\$202,500.00	Budgetary meeting set
ARC Systems	Folders	Remy LeBeau	7/17/2017	\$229,000.00	Reviewing financials
KLP Group LLC	Poster Board	James Howlett	8/27/2017	\$15,000.00	Create proposal
Redstone Associates	Paper	James Howlett	10/11/2017	\$55,500.00	Call Hank on Tuesday
5 - Won					
Firestar Software	Pencils	Remy LeBeau	2/28/2017	\$120,000.00	Send thank you email
				\$926,000.00	

11 rows loaded | Page 1

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]

▼

OK

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

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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

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Sales' and 'Opportunity View'. The main navigation pane is divided into sections: Business, Customization, AbleBridge Editable..., and System. Under 'AbleBridge Editable...', 'Editable CRM Views' is highlighted. Below this, there are buttons for 'NEW ACTIVITY', '+ NEW RECORD', and 'IMPORT DATA'.

EditAble CRM Views

Select a view to open in an EditAble CRM Grid

Entity: View:

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	May 2017	\$202,500.00	50
Misc Supplies	FBC Associates	30 1 2 3 4 5 6	\$40,000.00	50
Dry Erase Boards	CHP Diagnostics	7 8 9 10 11 12 13	\$30,000.00	50
Folders	ARC Systems	14 15 16 17 18 19 20	\$229,000.00	25
Poster Board	KLP Group LLC	21 22 23 24 25 26 27	\$15,000.00	50
Paper	Redstone Associates	28 29 30 31 1 2 3	\$55,500.00	50
Printers	ZPG Resource Group	4 5 6 7 8 9 10	\$180,000.00	25

Today: 1/30/2017

Scenario 9 – Multi-Currency Support

Apply multi-currency support to an EditAble CRM Grid

Select Currency

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

Currency:

euro (EUR)

▼

Normalize Row Values:

☒

OK

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

<div> <div> <div>NEW</div> <div>EDIT</div> <div>DELETE</div> <div>EXPORT</div> </div> <div></div> <div></div> </div>						
✓	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	

11 rows loaded

Page 1

- 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

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Scenario 10 – Configuring an EditAble CRM Grid

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

The screenshot shows the Microsoft Dynamics CRM interface with the 'EditAble CRM Grids' menu open. A configuration wizard is displayed, titled 'EditAble CRM Grid Configuration'. The wizard is at 'Step 1 of 5' and prompts the user to 'Enter basic information about the configuration.' The configuration fields are:

- Name:** A text input field labeled 'EditAble CRM Grid Name'.
- Entity:** A dropdown menu.
- Mode:** A dropdown menu with 'Editable' selected.

The background shows the 'General' tab of the configuration page, with sections for 'ROW FUNCTIONALITY' (New Rows, Edit Rows, Delete Rows, Double Click Action, New Row Location, Row Multi-Select) and 'DISPLAY OPTIONS'. The status bar at the bottom indicates 'Active'.

EditAble CRM Grids are configured through a familiar CRM record interface

+ NEW GRID DEFINITION PUBLISH PREVIEW COPY ...

EDITABLE CRM GRID : CONFIGURATION

Metals Inventory

Name: Metals Inventory
 Entity: abdgs_metalsinventory
 Criteria Type: Show Related Records
 Parent Entity Name: Account
 Parent Entity Key: abdgs_AccountId

ROW FUNCTIONALITY
 New Rows: Create Inline
 Edit Rows: Edit Inline
 Delete Rows: Use Toolbar Button
 Double Click Action: Edit Inline
 New Row Location: Bottom
 Row Multi-Select: Enabled

DISPLAY OPTIONS
 Row Checkboxes: Hidden
 Header: Yes
 Footer: Yes
 Border: --
 Toolbar: Yes
 Status Bar: Yes

Grouping
 Enable Grouping: ☒
 Group Behavior: Collapsible, Expanded By Default
 Summary Rows: ☐ Dynamic Grouping

Additional Options
FEATURES
 Quick Copy: Disabled
 Quick Filter: Disabled
 Save and New: Enabled
 Currency Conversion: Disabled
 Multi-Currency Support: Show Actual Currencies
 Pop Out: Disabled
 Paging: Disabled
 Required Fields: Highlight
 Excel Export (IE Only): Disabled
ADVANCED OPTIONS & OVERRIDES
 Auto Publish: No
 Privilege Handling: Disabled
 Keyboard Shortcuts: Enabled
 Custom Events: Enabled
 Transaction Mode: Synchronous
 Initial Query: Load Immediate
 Initial Message: --
 Empty Results Message: --
 Server Timeout: --

COLUMNS
 + NEW EDIT DELETE CHANGE COLUMN ORDER

Column Name	Column Label	Column Type...	Data Type	Width	Visibl...	Read...	Alignmen...	Header A...	Group...
abdgs_ProductCategory	Product Category	Standard		125	✓		Left	Left	10
abdgs_PricePerOunce	Price Per Ounce	Standard		100	✓		Right	Right	20
abdgs_Ounces	Ounces	Standard		100	✓		Right	Right	30
abdgs_Extended	Value (\$)	Standard		125	✓	✓	Right	Right	40
abdgs_Metal	Metal	Standard		0			Left	Left	50
metal_totalOunces	Total Ounces	Custom					Left	Left	60

Sort by: Metal Ascending Then by: --

GROUP 1
 Column: Metal
 Sort Order: Ascending Summary Row: ☒ Show Count: ☐

FILTERS
 + NEW EDIT DELETE

Field Name	Operator	Value Type	Value	Group Name	Logical O...	Nested...
No records are available.						

CUSTOM EVENTS
 + NEW EDIT DELETE

Name	Type	Grid Event	Data Grid Column	Web Resource	Function
Price Per Ounce onCh...	Column Event		Price Per Ounce	abdgs_/scripts/dg/MetalsInve...	pricePerOunce_onChange
Ounces onChange	Column Event		Ounces	abdgs_/scripts/dg/MetalsInve...	ounces_onChange
Today's Metal Prices	Toolbar Button			abdgs_/scripts/MetalsInvento...	checkMetalPrices

Active

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
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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.