EditAble CRM Grid
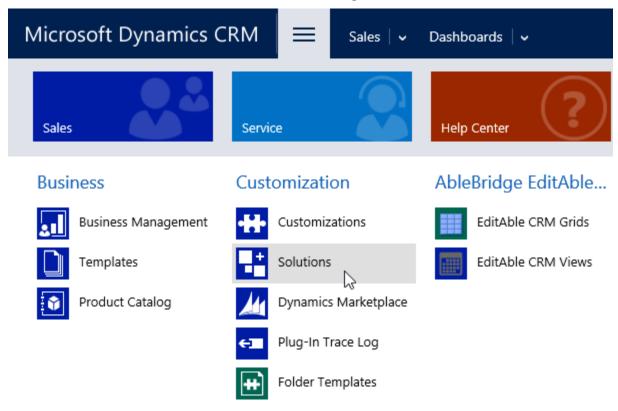
For Microsoft Dynamics CRM
Trial Setup
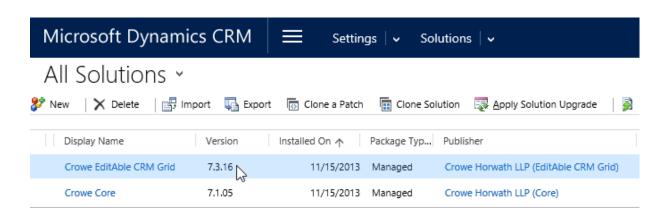
CERTIFIED FOR

Microsoft
Dynamics

Application Setup
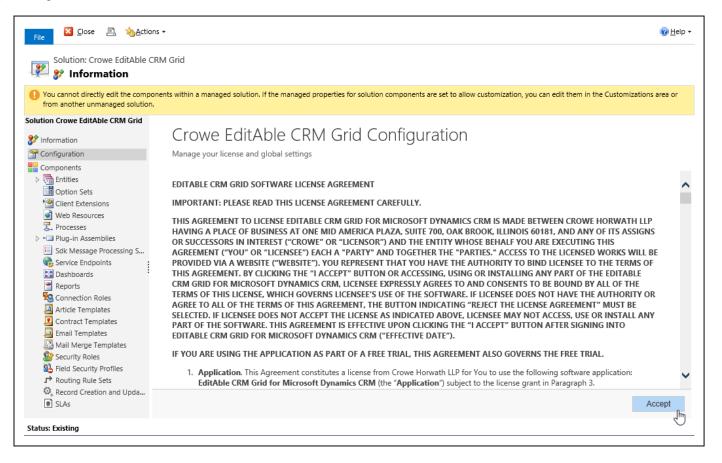
Accepting the EULA

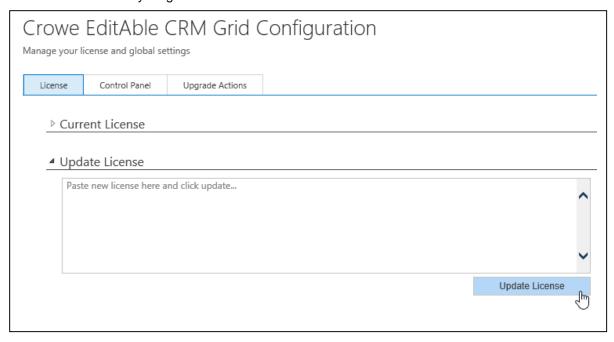1. Go to "**Solutions**" under the Customization area of **Settings**.

2. Open the EditAble CRM Grid Solution

Accept the Agreement

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.
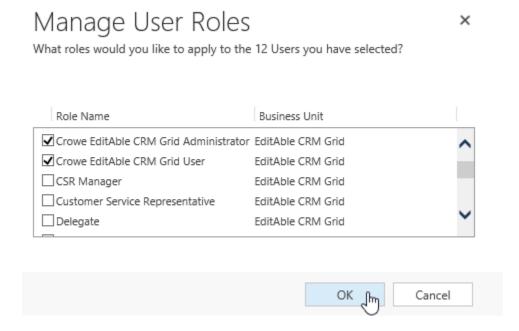
Adding Security Roles

1. Go to Settings → System → Security
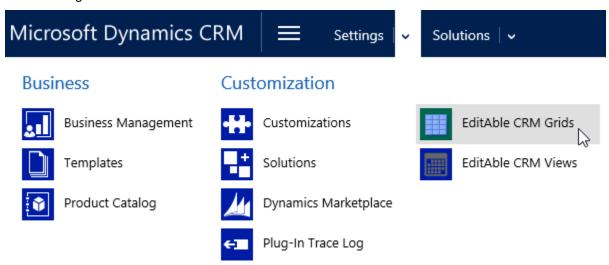
2. Click Users

3. Select all users and click Manage Roles

4. Select all users and click Manage Roles

5. Give everyone the Crowe EditAble CRM Grid User role

6. Give the Crowe EditAble CRM Grid Administrator role to anyone who should have access to create and/or update EditAble CRM Grid Configurations

Creating EditAble CRM Grids

1. Go to Settings → EditAble CRM Grid and click New

2. Use the wizard to set up a new EditAble CRM Grid