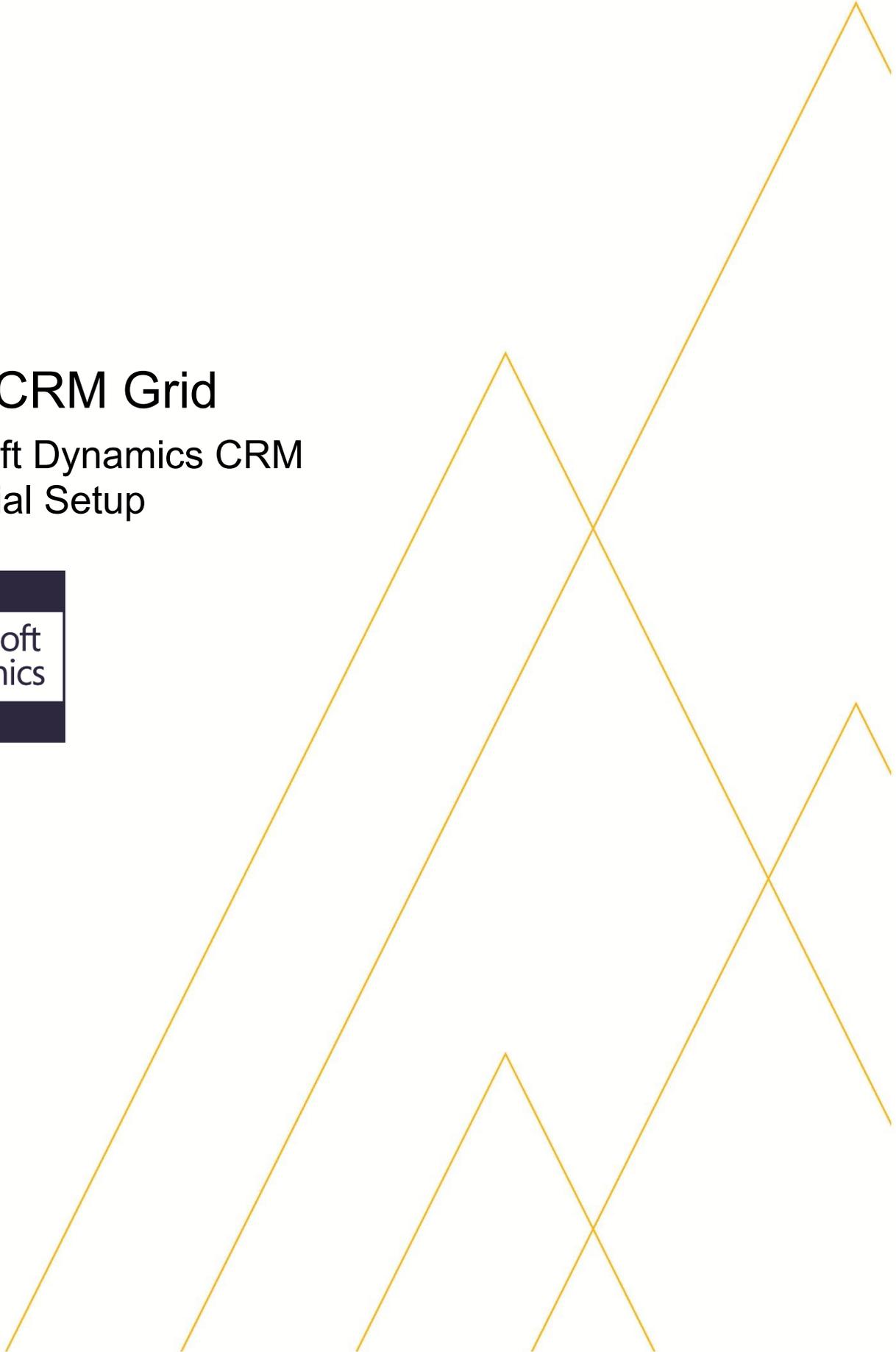


# EditAble CRM Grid

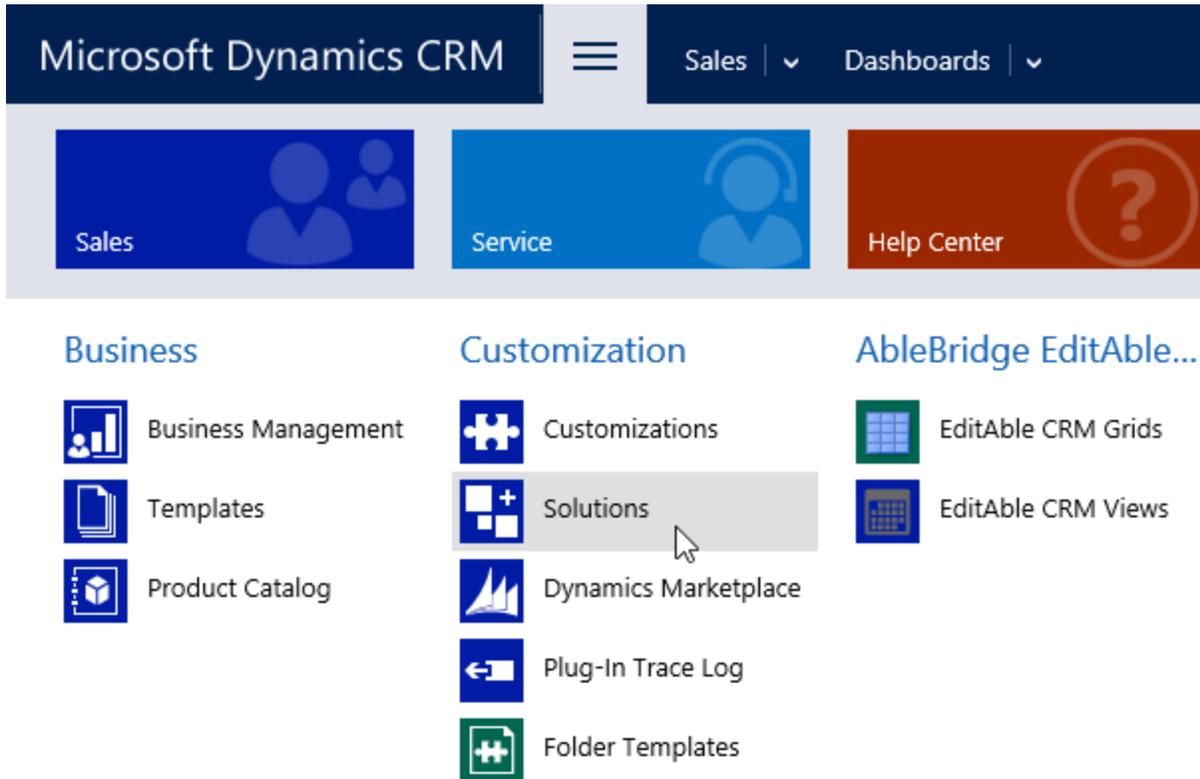
## For Microsoft Dynamics CRM Trial Setup



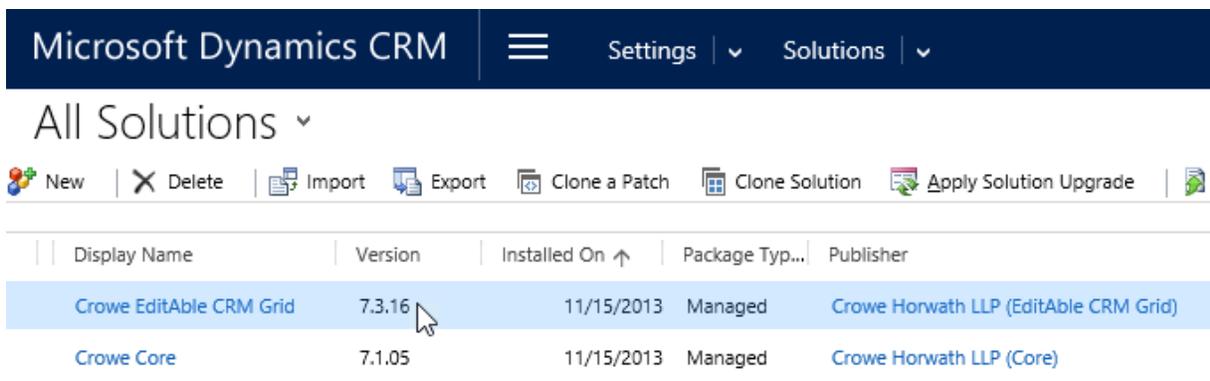
# Application Setup

## Accepting the EULA

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



2. Open the EditAble CRM Grid Solution



## Accept the Agreement

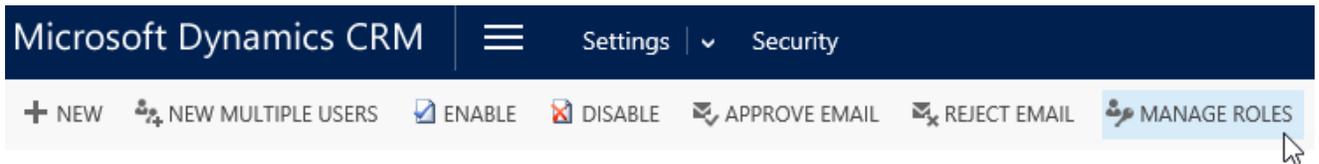
The screenshot shows the 'Crowe Editable CRM Grid Configuration' window. The title bar includes 'File', 'Close', 'Actions', and 'Help'. The main content area is titled 'Crowe Editable CRM Grid Configuration' with the subtitle 'Manage your license and global settings'. A yellow warning banner at the top states: 'You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.' The left sidebar shows a tree view of solution components, with 'Configuration' selected. The main content area displays the 'EDITABLE CRM GRID SOFTWARE LICENSE AGREEMENT'. The agreement text includes: 'IMPORTANT: PLEASE READ THIS LICENSE AGREEMENT CAREFULLY. THIS AGREEMENT TO LICENSE EDITABLE CRM GRID FOR MICROSOFT DYNAMICS CRM IS MADE BETWEEN CROWE HORWATH LLP HAVING A PLACE OF BUSINESS AT ONE MID AMERICA PLAZA, SUITE 700, OAK BROOK, ILLINOIS 60181, AND ANY OF ITS ASSIGNS OR SUCCESSORS IN INTEREST ("CROWE" OR "LICENSOR") AND THE ENTITY WHOSE BEHALF YOU ARE EXECUTING THIS AGREEMENT ("YOU" OR "LICENSEE") EACH A "PARTY" AND TOGETHER THE "PARTIES." ACCESS TO THE LICENSED WORKS WILL BE PROVIDED VIA A WEBSITE ("WEBSITE"). YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND LICENSEE TO THE TERMS OF THIS AGREEMENT. BY CLICKING THE "I ACCEPT" BUTTON OR ACCESSING, USING OR INSTALLING ANY PART OF THE EDITABLE CRM GRID FOR MICROSOFT DYNAMICS CRM, LICENSEE EXPRESSLY AGREES TO AND CONSENTS TO BE BOUND BY ALL OF THE TERMS OF THIS LICENSE, WHICH GOVERNS LICENSEE'S USE OF THE SOFTWARE. IF LICENSEE DOES NOT HAVE THE AUTHORITY OR AGREE TO ALL OF THE TERMS OF THIS AGREEMENT, THE BUTTON INDICATING "REJECT THE LICENSE AGREEMENT" MUST BE SELECTED. IF LICENSEE DOES NOT ACCEPT THE LICENSE AS INDICATED ABOVE, LICENSEE MAY NOT ACCESS, USE OR INSTALL ANY PART OF THE SOFTWARE. THIS AGREEMENT IS EFFECTIVE UPON CLICKING THE "I ACCEPT" BUTTON AFTER SIGNING INTO EDITABLE CRM GRID FOR MICROSOFT DYNAMICS CRM ("EFFECTIVE DATE"). IF YOU ARE USING THE APPLICATION AS PART OF A FREE TRIAL, THIS AGREEMENT ALSO GOVERNS THE FREE TRIAL. 1. Application. This Agreement constitutes a license from Crowe Horwath LLP for You to use the following software application: Editable CRM Grid for Microsoft Dynamics CRM (the "Application") subject to the license grant in Paragraph 3.' At the bottom right, there is an 'Accept' button with a mouse cursor hovering over it. The status bar at the bottom left indicates 'Status: Existing'.

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.

The screenshot shows the 'Crowe Editable CRM Grid Configuration' window, specifically the 'License' tab. The title bar and subtitle are the same as in the previous screenshot. The 'License' tab is selected, and the 'Update License' section is active. It contains a text area with the placeholder text 'Paste new license here and click update...'. Below the text area is an 'Update License' button with a mouse cursor hovering over it. The 'Current License' section is collapsed, and the 'Upgrade Actions' tab is visible in the background.

## 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

### Manage User Roles



What roles would you like to apply to the 12 Users you have selected?

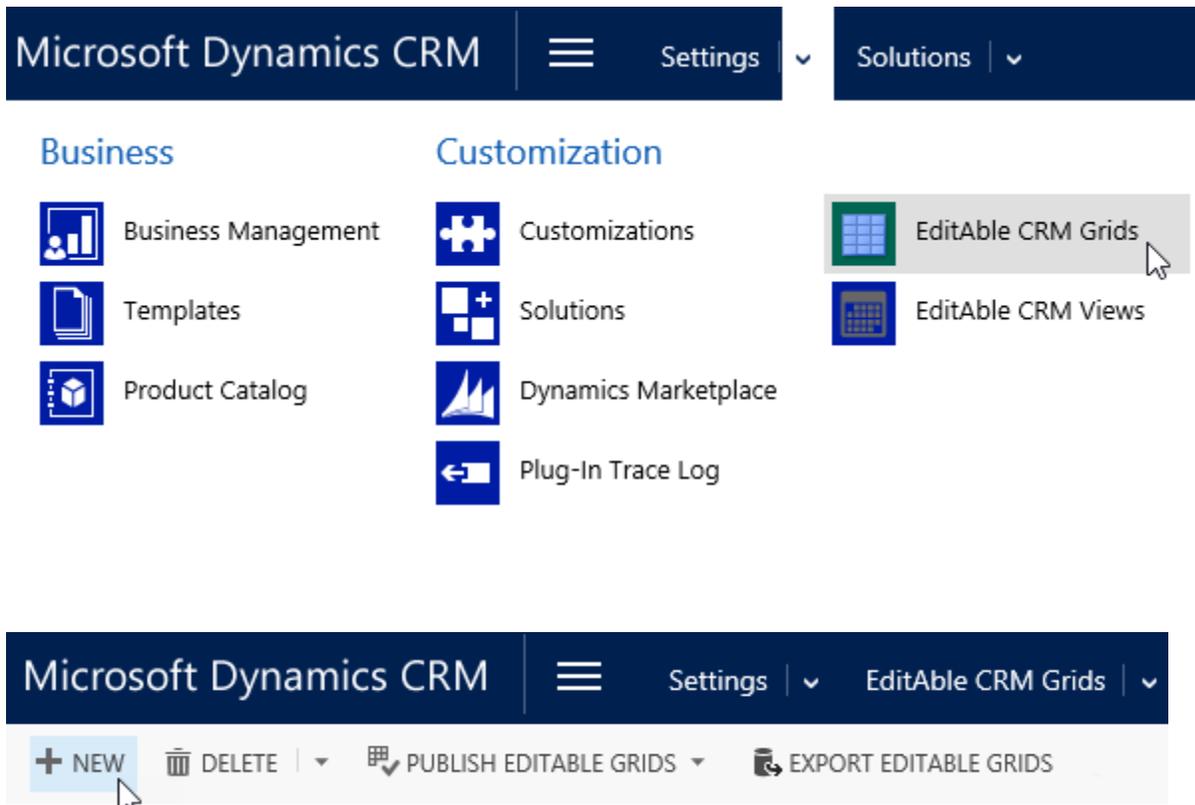
Role Name	Business Unit
<input checked="" type="checkbox"/> Crowe EditAble CRM Grid Administrator	EditAble CRM Grid
<input checked="" type="checkbox"/> Crowe EditAble CRM Grid User	EditAble CRM Grid
<input type="checkbox"/> CSR Manager	EditAble CRM Grid
<input type="checkbox"/> Customer Service Representative	EditAble CRM Grid
<input type="checkbox"/> Delegate	EditAble CRM Grid

OK

Cancel

# 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

