

# Project Management

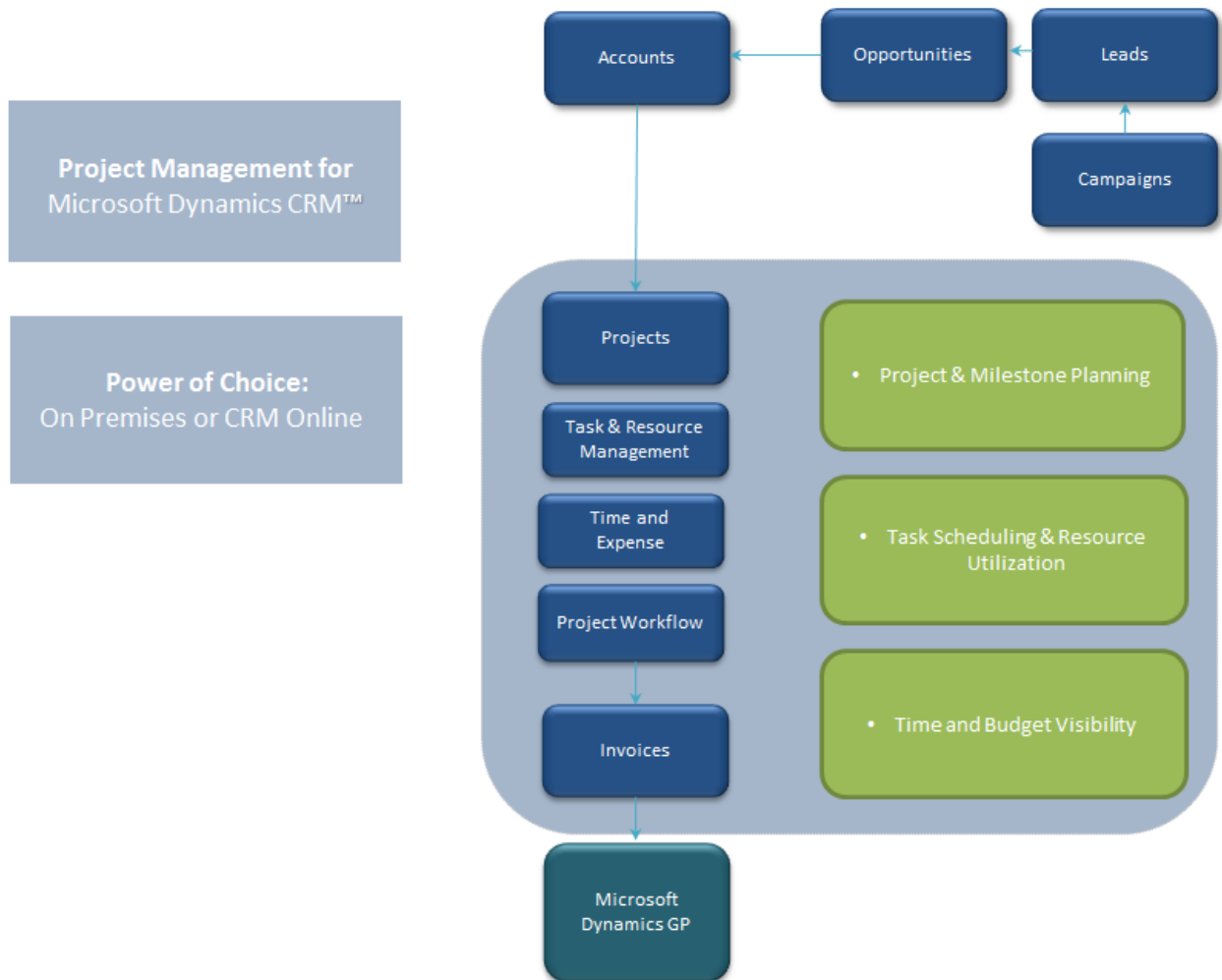
## For Microsoft Dynamics CRM



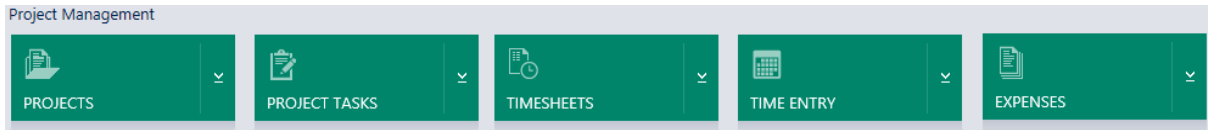
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## Solution Relationships



## Main Menu – End User Navigation






<b>Projects</b>	Provides a list of Projects across Customer Accounts
<b>Project Tasks</b>	Provides a list of Project Tasks across Projects and Resources
<b>Timesheets</b>	Provides a list of Timesheets by Calendar Week and Resource
<b>Time Entry</b>	Provides a list of individual Time Entries by Project Tasks, Cases and Resources
<b>Expenses</b>	Provides a list of Expenses by Projects and Resources

## Projects

### Creating a New Project

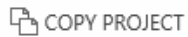
There are three ways to create a new Project.

 <b>NEW</b>	Creates a new Project record.
 <b>COPY PROJECT</b>	Creates a new Project record by copying an existing Project record.
 <b>CONVERT TO PROJECT</b>	Creates a new Project record by converting an existing sales Opportunity record. When converting a sales Opportunity to a Project the user also has the option of copying an existing Project record.

#### Tip: Copy Projects

*Reduce the administrative effort needed to create new project records and maintain consistency across similarly structured Projects by creating standard project “templates” which new projects can be copied from. The structure of all project information is maintained.*

## Copy Project



Creates a duplicate of a Project and allows you to change the PM and associated account. You also have the option to keep Project Milestones, Project Tasks and their related items.

### Copy Project

Copy the selected project as a new project.

This action will copy the existing project and related project records. This process may take up to a minute to complete.

Project Name

Account

Project Manager

Start Date

End Date

**Maintain the following from the selected project:**

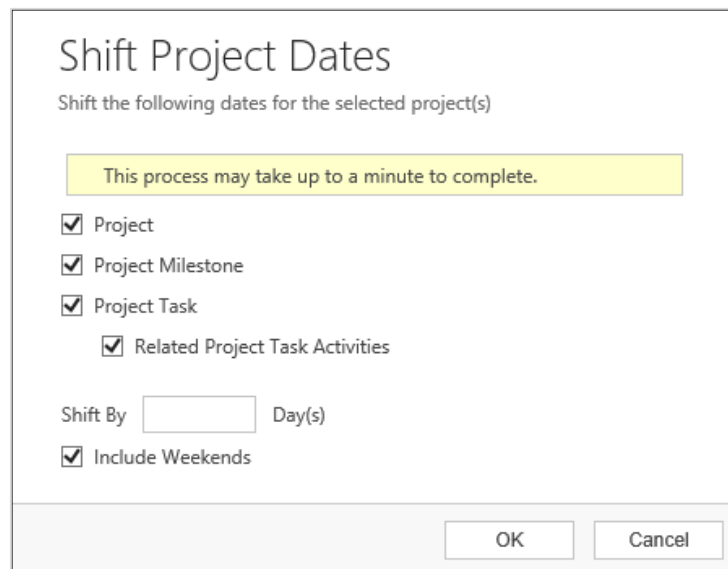
- ☒ Project Milestones
  - ☒ Project Milestone Dates
- ☒ Project Tasks
  - ☒ Project Task Dates
  - ☒ Project Task Resource Assignments
  - ☒ Related Project Task Activities

OK Cancel

## Shift Project



Allows you to move a Project, Project Milestones, Project Tasks or Related Project Task Activities by a specified number of days



Shift Project Dates

Shift the following dates for the selected project(s)

This process may take up to a minute to complete.

- ☒ Project
- ☒ Project Milestone
- ☒ Project Task
- ☒ Related Project Task Activities

Shift By  Day(s)

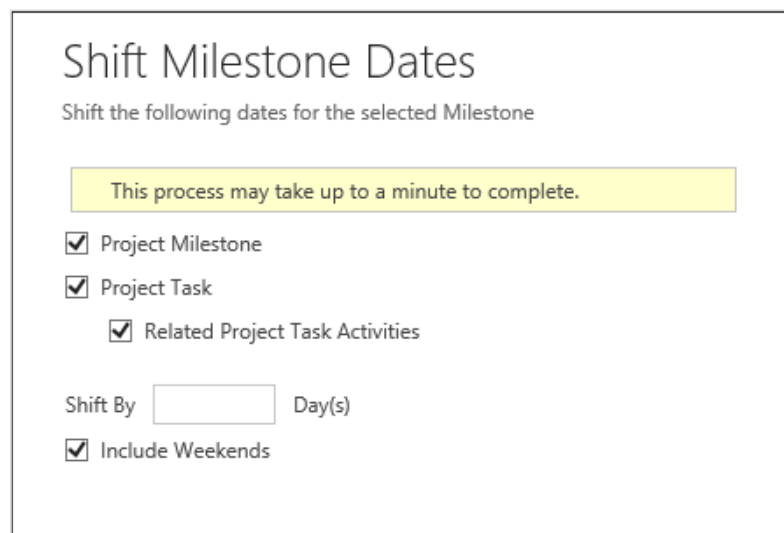
☒ Include Weekends

OK Cancel

## Shift Milestone



Allows you to move a Project Milestone, Related Project Tasks and/or its related Project Task Activities by a specified number of days



Shift Milestone Dates

Shift the following dates for the selected Milestone

This process may take up to a minute to complete.

- ☒ Project Milestone
- ☒ Project Task
- ☒ Related Project Task Activities

Shift By  Day(s)

☒ Include Weekends

## Shift Project Task



Allows you to move a Project Task, its Dependent Child Project Tasks and/or its related Project Task Activities by a specified number of days

### Shift Task Dates

Shift the following dates for the selected tasks(s)

This process may take up to a minute to complete.

☒ Dependent Child Tasks

☒ Related Project Task Activities

Shift By  Day(s)

☒ Include Weekends

OK

Cancel

## Project Form Layout

Microsoft Dynamics CRM

PROJECT MANAGE...

Projects

New CRM Rollout

Create

Remy LeBeau  
AbleBridge Demo

?

NEW

DEACTIVATE

DELETE

COPY PROJECT

SHIFT PROJECT

ASSIGN

SHARE

...

PROJECT

New CRM Rollout

Project Budget

\$48,000.00

Actual (\$)

\$13,300.00

Billable (\$)

\$10,800.00

Project Status

In Progress

General

Project Name\*

New CRM Rollout

Account

Lithium Energy

Category

Internal

Type

Implementation

Project Status

In Progress

Start Date

1/6/2014

End Date

8/29/2014

Project Manager\*

Remy LeBeau

Percent Complete

75

Project Budget & Billing

Billing Type

Hourly

Billing Rate Type

Project Bill Rate

Budgeted (hrs)

240.00

Bill Rate

\$200.00

Project Budget

\$48,000.00

Project Task Summary

NEW

EDIT

DELETE

EXPORT

Name	Task Status	Needed By ↑	% Comple...	Assigned To	Est. (hrs)	Est. (\$)	Billable (hr...	Billable (\$)	Actual (hrs)	Actual (\$)
2/3/2014 - Requirements Phase					50.00	\$10,000.00	8.00	\$1,600.00	8.00	\$1,600.00
Business Requirements Documentation	Completed	1/17/2014 9:00 AM	100%	Remy LeBeau	10.00	\$2,000.00	0.00	\$0.00	0.00	\$0.00
Functional Requirements Documentat...	Completed	1/22/2014 9:00 AM	100%	Remy LeBeau	32.00	\$6,400.00	0.00	\$0.00	0.00	\$0.00
IT Infrastructure Review	Completed	1/31/2014 9:00 AM	100%	Bobby Drake	8.00	\$1,600.00	8.00	\$1,600.00	8.00	\$1,600.00
2/21/2014 - Data Migration					70.00	\$14,000.00	12.00	\$2,400.00	12.50	\$2,500.00
Data Review	Completed	2/7/2014 9:00 AM	100%	Kurt Wagner	12.00	\$2,400.00	12.00	\$2,400.00	12.50	\$2,500.00
Initial Data Migration	Completed	2/15/2014 12:00 AM	100%	Kurt Wagner	18.00	\$3,600.00	0.00	\$0.00	0.00	\$0.00
Customization and Configuration	Completed	2/20/2014 9:00 AM	100%	James Howlett	40.00	\$8,000.00	0.00	\$0.00	0.00	\$0.00
7/21/2014 - Implementation Phase					76.00	\$15,200.00	34.00	\$6,800.00	35.00	\$7,000.00
Server Installation & Configuration	Completed	4/10/2014 9:00 AM	100%	Remy LeBeau	40.00	\$8,000.00	34.00	\$6,800.00	35.00	\$7,000.00
UI Form Design	In Progress	5/8/2014 9:00 AM	40%	Max Eisenhardt	24.00	\$4,800.00	0.00	\$0.00	0.00	\$0.00
QA / Testing	In Progress	6/5/2014 9:00 AM	15%	James Howlett	12.00	\$2,400.00	0.00	\$0.00	0.00	\$0.00
8/25/2014 - Go Live Phase					32.00	\$6,400.00	0.00	\$0.00	11.00	\$2,200.00
Go Live Documentation	Pending	7/11/2014 9:00 AM	0%	Remy LeBeau	20.00	\$4,000.00	0.00	\$0.00	11.00	\$2,200.00
Actual (hrs)	66.50	Billable (hrs)	54.00	Percent Complete	75					
Actual (\$)	13,300.00	Billable (\$)	10,800.00							

Active



**Form Header**

The header area provides quick visibility into the overall Project Budget, Project Status, Actual and Billable Hours to date. Actual and Billable Hours for the Project are automatically calculated from the Time Entry related to the Project Tasks associated to the Project.

**General Tab**

The General tab is where you define and view basic Project information.

The Project Budget and Billing section defines the Project budget and the method in which billing is accounted for. The Project Billing Rate Type field provides the option of using the bill rate defined for the Project or using bill rates defined for each resource based on the role they play on the Project. Default resource role bill rates are defined in Administrative Settings but can also be changed from the Project Team menu for each individual Project.

**Project Task Summary**

The Project Task Summary section provides an organized view of the Project's related Project Tasks.

Inline editing makes it easy for users to quickly edit a Project Task without leaving the Project Task Summary tab. A hyperlink on the Project Task Name allows the users to click through the Project Task form for more detailed reviews and updates.

Dynamic grouping options can be enabled from the Project Task Summary toolbar. Project Tasks can be grouped by Milestone, Milestone and Target Date, Task Category, Resource or Status. Primary and secondary grouping can provide multiple ways of summarizing a Project for better visibility across the entire Project.

**Details Tab**

The Details tab is where you can include a brief summary of the Project and define Project Milestones.

The Milestones section signifies the project timeline against key target dates. Milestones can also be used to group Project Tasks related to a specific Milestone. The % Complete column represents the summary of completeness for each Project Task assigned to a specific Milestone.

**Tip: Export to Excel**

Data can be exported with or without formatting. The formatted option is useful for internal or external project status updates. The unformatted version can be used to create pivot tables, additional reports or utilized for data imports.

## Project Task Summary – Inline Edit Mode

Required fields can be configured to be outlined in red

<div><div> SAVE CHANGES</div><div> CANCEL CHANGES</div></div>											
✓ Name		Needed By ↑	% Comple...	Resource	Est. (hrs)	Est. (\$)	Billable (hr...	Billable (\$)...	Actual (hrs...	Actual (\$)...	
2/3/2014 - Requirements Phase					50.00	\$10,000.00	50.00	\$10,000.00	50.00	\$10,000.00	
✓ Business Requirements Documentation	<div><div>Pending</div><div>In Progress</div><div>Completed</div><div>Ongoing</div></div>	1/17/2014 9:00 AM	100	Remy LeBeau	10.00	\$2,000.00	10.00	\$2,000.00	10.00	\$2,000.00	
Functional Requirements Documentati...	Completed	1/22/2014 9:00 AM	100%	Remy LeBeau	32.00	\$6,400.00	32.00	\$6,400.00	32.00	\$6,400.00	
IT Infrastructure Review	Completed	1/31/2014 9:00 AM	100%	Bobby Drake	8.00	\$1,600.00	8.00	\$1,600.00	8.00	\$1,600.00	
2/21/2014 - Data Migration					70.00	\$14,000.00	70.00	\$14,000.00	76.00	\$15,200.00	
✓ Data Review	Completed	2/7/2014 9:00 AM	100	Kurt Wagner	12.00	\$2,400.00	12.00	\$2,400.00	12.00	\$2,400.00	
Initial Data Migration	Completed	<div><div>February 2014</div><div><div>Su</div><div>Mo</div><div>Tu</div><div>We</div><div>Th</div><div>Fr</div><div>Sa</div></div><div>2627282930311</div><div>2345678</div></div>	100%	Kurt Wagner	18.00	\$3,600.00	18.00	\$3,600.00	20.00	\$4,000.00	
Customization and Configuration	Completed		100%	James Howlett	40.00	\$8,000.00	40.00	\$8,000.00	44.00	\$8,800.00	
7/21/2014 - Implementation Phase					76.00	\$15,200.00	52.00	\$10,400.00	52.50	\$10,500.00	
Server Installation & Configuration	Completed	9 10 11 12 13 14 15	100%	Remy LeBeau	40.00	\$8,000.00	40.00	\$8,000.00	40.00	\$8,000.00	
✓ UI Form Design	In Progress	16 17 18 19 20 21 22	40	Max Eisenhardt	24.00	\$4,800.00	10.00	\$2,000.00	10.50	\$2,100.00	
QA / Testing	In Progress	23 24 25 26 27 28 1	15%	James Howlett	12.00	\$2,400.00	2.00	\$400.00	2.00	\$400.00	
8/25/2014 - Go Live Phase		Today: 11/25/2013			32.00	\$6,400.00	0.00	\$0.00	0.00	\$0.00	
Go Live Documentation	Pending	7/11/2014 9:00 AM	0%	Remy LeBeau	20.00	\$4,000.00					
Administrator Training	Pending	8/16/2014 9:00 AM	0%	Remy LeBeau	6.00	\$1,200.00					
End User Training	Pending	8/25/2014 9:00 AM	0%	Remy LeBeau	6.00	\$1,200.00					
					228.00	\$45,600.00	172.00	\$34,400.00	178.50	\$35,700.00	

## Project Task Summary 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

Data Grid Options

×

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

☒ **Enable Grouping**

Group By 

Milestone Target Date - Milestone

Then By 

Project Category

OK

Select Currency

×

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

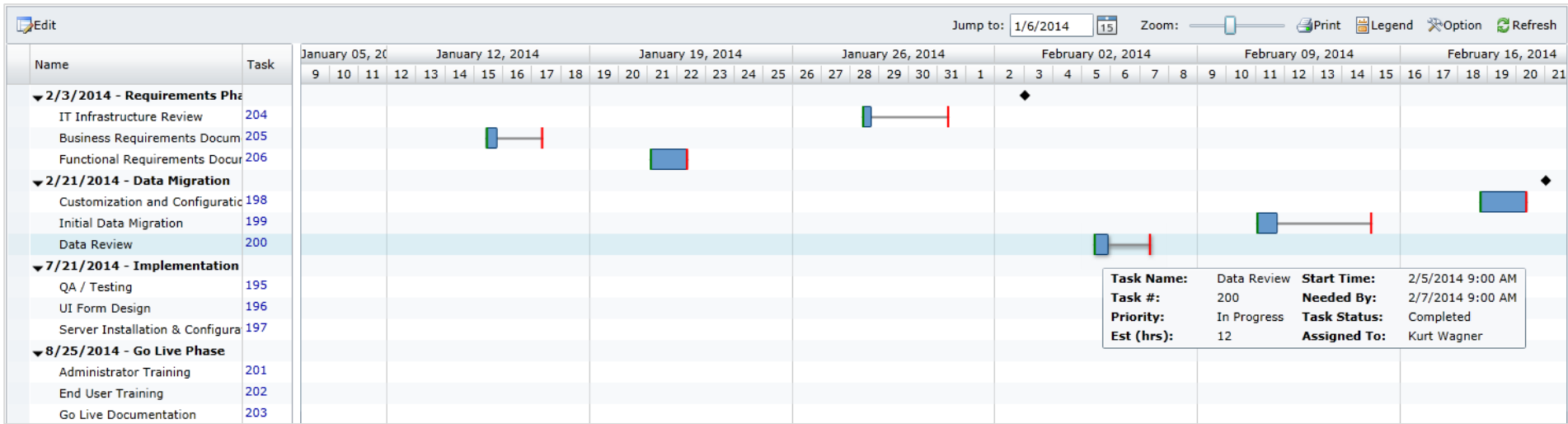
Currency: 

US Dollar (USD)

Normalize Row Values: ☒

OK

# Gantt Chart



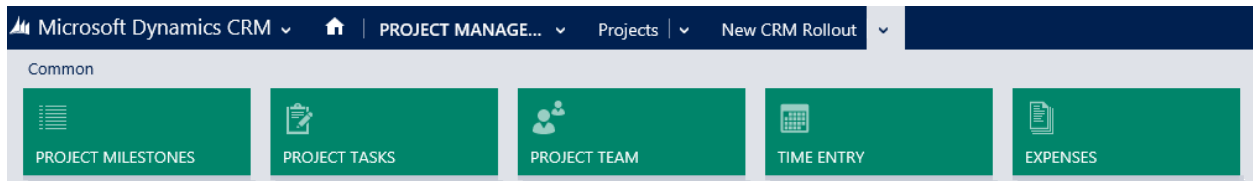
## Gantt Chart

The Gantt Chart provides a timeline view of Project Task Start and Needed By dates. Project Milestones are also displayed.

Similar to the Project Task Summary, grouping options can be applied to provide multiple ways of viewing the project timeline. For example, grouping by Resource provides a timeline view of Resources and their assigned Project Tasks.

Edit the Start and Needed By dates for a Project Task by simply dragging or expanding the Project Task marker within the Gantt Chart.

## Project Form – Associated Relationships



<b>Project Milestones</b>	View or create Project Milestones for the current Project.
<b>Project Tasks</b>	View or create Project Tasks for the current Project.
<b>Project Team</b>	View or create Project Team resources and the roles they will play on the Project.
<b>Time Entry</b>	View or create time entry for the current Project. Time entered from this menu will create a new Timesheet record if one doesn't exist for the specified time period. Alternatively, it will update an existing Timesheet record if one already exists.
<b>Expenses</b>	View or create Project Expenses for the current Project.

## Project Task Form Layout

The screenshot shows the 'Functional Requirements Documentation' project task form in Microsoft Dynamics CRM. The form is titled 'PROJECT TASK' and includes a navigation bar with 'PROJECT MANAGE...', 'Project Tasks', and 'Functional Require...'. The user 'Remy LeBeau' is logged in, and the demo is 'AbleBridge Demo'.

**Task Summary:**

- Task #: 206
- Task Status: Completed
- Assigned To: Remy LeBeau

**General Information:**

Project Task Name *	Functional Requirements Documentation	Task Status	Completed
Priority	3 - Normal	Percent Complete +	100
Project *	New CRM Rollout	Milestone +	Requirements Phase
Parent Project Task	Business Requirements Documentation	Category +	General
Assigned To *	Remy LeBeau		

**Details:**

Start Date +	1/7/2014 8:00 AM	Est. (hrs) +	32.00
Needed By Date +	1/22/2014 9:00 AM	Est. (\$) +	\$6,400.00
Actual End Date	1/17/2014 3:00 PM		

**Description:**

Gather technical requirements that will serve as a blueprint for the project

**Summary:**

Actual (hrs)	32.00	Billable (hrs)	32.00
Actual (\$)	6,400.00	Billable (\$)	6,400.00

**Active**

### Tip: Project Task Dependencies

On the Project Task form, there is a field that allows you to designate a Parent Project Task. This comes in handy when you have tasks that need to be completed before others begin.

## Timesheet Form Layout

PROJECT MANAGE... Timesheets Week 28 [7/7/2014...]

Remy LeBeau AbleBridge Demo

+ NEW DEACTIVATE DELETE SUBMIT TIMESHEET APPROVE TIMESHEET ASSIGN SHARE

TIMESHEET : INFORMATION

Week 28 [7/7/2014 - 7/13/2014]

Timesheet Status: Pending

Owner\*: Remy LeBeau

Status\*: Active

		7/7	7/8	7/9	7/10	7/11	7/12	7/13	Actual	Billable
		Mon	Tue	Wed	Thu	Fri	Sat	Sun		
<b>Project</b>	<b>Project Task</b>									
Implementation Project	End User Training				3				3.00	0.00
LVP Project	Customization	1			2				3.00	2.00
New CRM Rollout	Functional Requirements Documentation	8	8	8		8			32.00	32.00
Plan Document Templates	Data Review				2				2.00	2.00

Active

To enter time, just click inside any box to launch the time entry window:

TIME ENTRY - 7/9/2014

Project: Plan Document Templates Project Task: Data Review

Desc. Data Review

Summary

Actual

Billable

**Project Task Summary**

Est. (Hrs)	90	Est. (\$)	\$18,000.00
Actual (Hrs)	65	Actual (\$)	\$13,000.00
Billable (Hrs)	58	Billable (\$)	\$11,600.00

Save & Close

# Time Entry Form Layout

PROJECT MANAGE...Time Entry

NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

SHARE SECURED FIELDS

TIME ENTRY : INFORMATION

Data Review

General

Description\*

Data Review

Regarding Type\*

Project Task

Project\*

Plan Document Templates

Project Task\*

Data Review

Service Date\*

7/16/2014

Type

--

Summary

--

Owner\*

Remy LeBeau

Timesheet

Week 29 [7/14/2014 - 7/20/2014]

Actual (hrs)

8.00

Billable (hrs)

8.00

Time Entry Status

Invoiced

Invoice Details

Invoice

Data Review

Invoice Date

7/21/2014

Status

Active

Active

- Timesheet Form

The Timesheet form allows a user to quickly enter time in bulk on a weekly basis. Time can be entered against multiple Project Tasks or Cases.

Timesheet submissions can follow an approval process based on a company's time review and billing procedures.

Time Entry can be associated with an Invoice for direct billing within Microsoft Dynamics CRM. Or it can be integrated with Microsoft Dynamics GP or another ERP / Accounting package.
- Time Entry Form

Time can also be entered by launching a new Time Entry Form from either the Time Entry List View or from a Project Task.



## Time Entry Associated Views

From the Project form, you can view all Time Entries related to a Project

PROJECT

New CRM Rollout

Project Budget\$48,000.00

Actual (\$)\$11,100.00

Billable (\$)\$10,800.00

Project StatusIn Progress

Time Entry Associated View

Search for records

+ ADD NEW TIME ENTRY

ADD EXISTING TIME ENTRY

EDIT

✓ ACTIVATE

DEACTIVATE

...

✓	Service Dat...	Description	Actual (hrs)...	Billable (hrs)...	Time Entry Status	Project Task	Project ↑	Owner		
	4/10/2014	Server Installation & Configuration	8.00	8.00		Server Installation & Configuration	New CRM Rollout	Remy LeBeau		
	4/9/2014	Server Installation & Configuration	4.00	4.00		Server Installation & Configuration	New CRM Rollout	Remy LeBeau		
	4/8/2014	Server Installation & Configuration	9.00	8.00		Server Installation & Configuration	New CRM Rollout	Remy LeBeau		
	4/7/2014	Server Installation & Configuration	6.00	6.00		Server Installation & Configuration	New CRM Rollout	Remy LeBeau		
	4/4/2014	Server Installation & Configuration	8.00	8.00	Approved	Server Installation & Configuration	New CRM Rollout	Remy LeBeau		
	2/6/2014	Data Review	2.00	2.00	Invoiced	Data Review	New CRM Rollout	Kurt Wagner		
	2/5/2014	Data Review	4.00	4.00	Invoiced	Data Review	New CRM Rollout	Kurt Wagner		
	2/4/2014	Data Review	6.50	6.00	Invoiced	Data Review	New CRM Rollout	Kurt Wagner		
	1/30/2014	IT Infrastructure Review	3.00	3.00	Invoiced	IT Infrastructure Review	New CRM Rollout	Bobby Drake		
	1/29/2014	IT Infrastructure Review	5.00	5.00	Invoiced	IT Infrastructure Review	New CRM Rollout	Bobby Drake		

1 - 10 of 10

Page 1

All

#

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Actual (hrs)	55.50	Billable (hrs)	54.00	Percent Complete	75
Actual (\$)	11,100.00	Billable (\$)	10,800.00		

From the Case form, you can view all Time Entries related to a Case

CASE ▾

Applied Systems 2014 Support

Priority  
Normal

Created On  
11/25/2013 5:19 PM

Status  
In Progress

Owner\*  
Remy LeBeau

Identify (Active)

Research

Resolve

Next Stage

Time Entry Associated View ▾

Search for records

+ ADD NEW TIME ENTRY

ADD EXISTING TIME ENTRY

BULK DELETE

CHART PANE ▾

RUN REPORT ▾

...

✓	Service Dat...	Description	Actual (hrs)...	Billable (hrs)...	Time Entry Status	Project Task	Project ↑	Owner	⌵	↻
	4/7/2014	CRM 2013 Outlook Client Issue	1.00	1.00	Approved			Max Eisenhardt		
	3/14/2014	Help with Project Task Activities	2.50	2.00	Invoiced			Remy LeBeau		
	2/15/2014	Timesheet Calculation Error	1.50	1.50	Invoiced			James Howlett		

## Expense Form Layout

[+ NEW](#)
[DEACTIVATE](#)
[DELETE](#)
[COPY EXPENSE](#)
[ASSIGN](#)
[...](#)

EXPENSE : INFORMATION

### Remy LeBeau - Rental Car - 3/21/2014

**General**

Date	3/21/2014	Owner *	<a href="#">Remy LeBeau</a>
Category	<a href="#">Rental Car</a>	Project	<a href="#">New CRM Rollout</a>
Amount	\$375.00		

**Rental Car**

Company	Enterprise		
Pick Up	3/21/2014	Drop Off	3/24/2014

[+ NEW](#)
[DEACTIVATE](#)
[DELETE](#)
[COPY EXPENSE](#)
[ASSIGN](#)
[...](#)

EXPENSE : INFORMATION

### James Howlett - Lodging - 4/18/2014

**General**

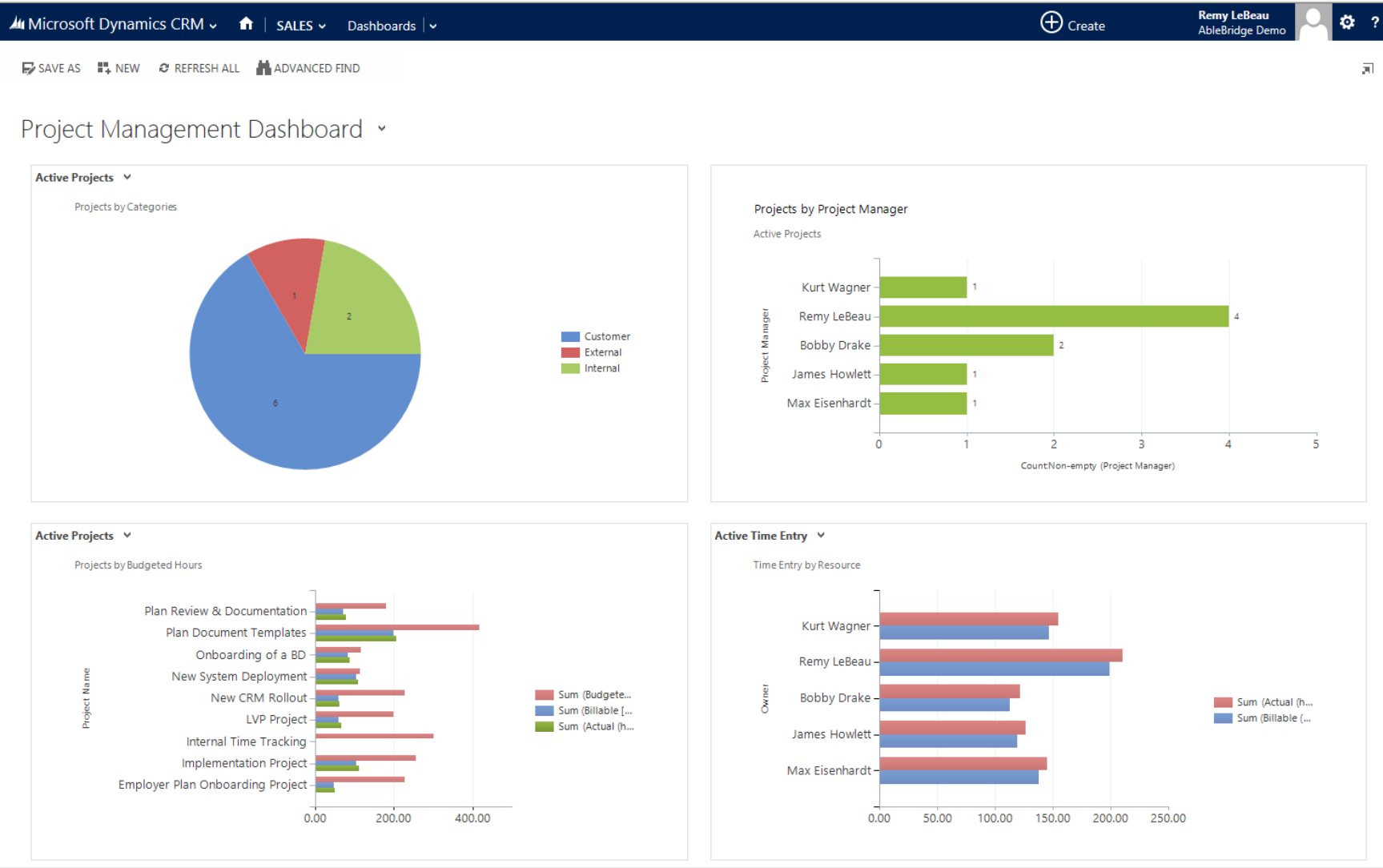
Date	4/18/2014	Owner *	<a href="#">James Howlett</a>
Category	<a href="#">Lodging</a>	Project	<a href="#">Plan Document Templates</a>
Amount	\$359.97		

**Lodging**

Hotel	InterContinental Hotel		
Check In	4/7/2014	Check Out	4/10/2014

**General Tab** The General tab is where you enter and track project expenses. Pre-defined Expense Categories dynamically display the relevant fields for each type of Expense. Expense Category and Mileage Rates are managed within the Project Management Administration menus.

# Dashboard Charts



## Reports

Pre-built Project Management reports provide quick insight into your Projects and can be found by selecting the Reports Menu.

- ▶ PM - Project Hours By Resource
- ▶ PM - Project Summary Report
- ▶ PM - Utilization By Month
- ▶ PM - Utilization By Week - Any Year
- ▶ PM - Utilization By Week - Current Year
- ▶ PM - Utilization By Week - Last Year

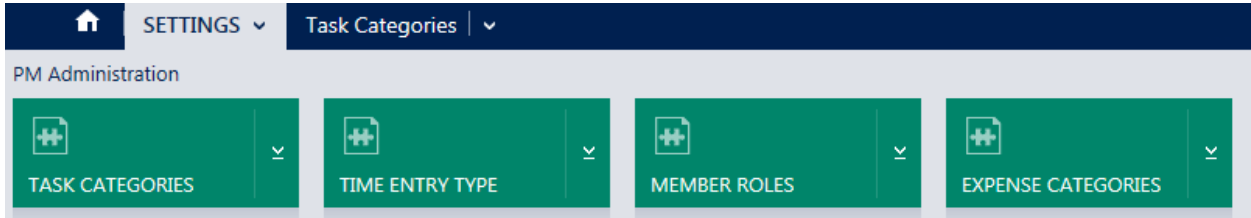
### Project Hours By Resource

Project	Status	Start Date	End Date	Actual (hrs)	Billable (hrs)
<b>Bobby Drake</b>					
<a href="#">Employer Plan Onboarding Project</a>	In Progress	11/19/2013	8/31/2014	5.00	4.00
<b>Bobby Drake Total</b>				<b>5.00</b>	<b>4.00</b>
<b>James Howlett</b>					
<a href="#">New CRM Rollout</a>	In Progress	7/1/2013	4/1/2014	2.00	2.00
<b>James Howlett Total</b>				<b>2.00</b>	<b>2.00</b>
<b>Max Eisenhardt</b>					
<a href="#">New System Deployment</a>	In Progress	11/15/2013	9/15/2014	8.50	8.50
<a href="#">New CRM Rollout</a>	In Progress	7/1/2013	4/1/2014	5.50	5.00
<a href="#">Employer Plan Onboarding Project</a>	In Progress	11/19/2013	8/31/2014	4.50	4.00
<b>Max Eisenhardt Total</b>				<b>18.50</b>	<b>17.50</b>
<b>Remy LeBeau</b>					
<a href="#">New CRM Rollout</a>	In Progress	7/1/2013	4/1/2014	45.00	45.00
<b>Remy LeBeau Total</b>				<b>45.00</b>	<b>45.00</b>
<b>Total</b>				<b>70.50</b>	<b>68.50</b>

## Project Summary by Project Category

Account	Project Name	Project Manager	Project Status	Start Date	End Date	Budgeted (hrs)	Billable (hrs)	Actual (hrs)
<b>Customer</b>								
<a href="#">Applied Systems</a>	<a href="#">New System Deployment</a>	Remy LeBeau	In Progress	11/15/2013	9/15/2014	114.00	8.50	8.50
<a href="#">Every International Partners</a>	<a href="#">Employer Plan Onboarding Project</a>	Remy LeBeau	In Progress	11/19/2013	8/31/2014	228.00	8.00	9.50
<a href="#">Advanced Systems Inc.</a>	<a href="#">Sample LVP Project</a>	Bobby Drake	Pending	3/1/2014	9/21/2014	200.00	0.00	0.00
<a href="#">Grandview Distribution</a>	<a href="#">Onboarding of a BD (Demo)</a>	Bobby Drake	Pending	4/30/2014	8/28/2014	115.00	0.00	0.00
<a href="#">Applied Systems</a>	<a href="#">Implementation Project (Demo)</a>	Remy LeBeau	Pending	5/1/2014	11/16/2014	255.00	0.00	0.00
<a href="#">Zappos Company</a>	<a href="#">Plan Review &amp; Documentation</a>	James Howlett	Pending	6/18/2014	10/30/2014	180.00	0.00	0.00
<b>Subtotal</b>						<b>1,092.00</b>	<b>16.50</b>	<b>18.00</b>
<b>External</b>								
<a href="#">Blackwater LLC</a>	<a href="#">Plan Document Templates</a>	Max Eisenhardt	Pending	2/15/2014	6/24/2014	416.00	0.00	0.00
<b>Subtotal</b>						<b>416.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Internal</b>								
<a href="#">Bridge Consulting LLC</a>	<a href="#">Internal Time Tracking</a>	Kurt Wagner	Pending	1/1/2014	12/31/2014	124.00	0.00	0.00
<a href="#">Lithium Energy</a>	<a href="#">New CRM Rollout</a>	Remy LeBeau	In Progress	7/1/2013	4/1/2014	228.00	172.00	178.50
<b>Subtotal</b>						<b>352.00</b>	<b>172.00</b>	<b>178.50</b>
<b>Total</b>						<b>1,860.00</b>	<b>188.50</b>	<b>196.50</b>

## Main Menu - Administration Navigation



Administrative settings allow each customer to define the most appropriate settings for their organization. These settings are typically reserved for a CRM Administrator.

<b>Task Categories</b>	Provides a list of the Categories that can be assigned to a Project Task within a Project record. Task Category templates can be defined so a standard set of Task Categories is applied to every Project by default. Task Categories can help an organization segment and group Project Tasks according to their scope or purpose.
<b>Time Entry Type</b>	Provides a list of Types that can be assigned to a Time Entry record. Time Entry Types can help an organization segment and group Time Entry according to their scope or purpose.
<b>Member Roles</b>	Provides a list of the Roles that can be assigned to a Project Team member within a Project record. Member Roles help an organization define the roles and responsibilities each Project Team Member will serve on a particular Project.
<b>Expense Categories</b>	Provides a list of Categories that can be assigned to an Expense record.

## About Crowe Horwath

### **Our experience is delivering CRM project success.**

We have been implementing CRM technology from the inception of contact management applications through the evolution to sales force automation and ultimately customer relationship management (CRM) systems. Our logical CRM project implementation methodology is proven and is focused on project success.

### **We know Microsoft Dynamics CRM.**

At Crowe we are focused on Microsoft Dynamics CRM and the Microsoft technology platform. Our involvement with Microsoft CRM dates back to the first release in 2003 and continues through its evolution into the market-leading CRM platform it is today. The flexibility of the platform, familiar user interface, interoperability with the Microsoft Office platform, including Outlook, and its top-flight functionality make it a smart investment choice for any organization looking to implement a CRM technology strategy.

### **Focused on success.**

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