

Crowe EditAble CRM Grid

For Microsoft Dynamics® CRM



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Crowe EditAble CRM Grid overview

The Crowe EditAble CRM Grid from Crowe 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 CRM
- Available for on-premises, hosted (internet-facing deployment), and CRM Online
- Microsoft Dynamics CRM Managed Solution

Key features

- Highly configurable with intuitive EditAble CRM grid configuration module
- Supports system and custom entities
- Follows CRM style guidelines for seamless look and feel
- Inline editing and form-based editing
- Inline editing for multiple rows at the same time
- EditAble CRM views
- Localized language and multi-currency support
- Supports most standard CRM field controls
- Enforces CRM 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

The screenshot displays the Microsoft Dynamics CRM interface for an account named "Crowe Properties". The top navigation bar includes "Sales", "Accounts", and "Crowe Properties". The user is identified as "Remy LeBeau" with the role "EditAble CRM Grid". The main content area is divided into sections: "General", "Address", and "Buildings".

General Information:

- 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 Information:

- Address Type: Primary
- Street: 14 West Main Street
- Street 2: Unit 1
- City: Boston
- State/Province: MA
- ZIP/Postal Code: 02110

Buildings Grid:

The grid displays a list of buildings with columns for Building, Unit, Price Per SqFt, SqFt, Yearly Lease, Monthly Lease, Lease Expiration, Occupancy, Tenant, and Status. It includes summary rows for "1105 Great Road" and "Washington Plaza".

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 CRM 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
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	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 Filter Refresh Print Reset 										
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					

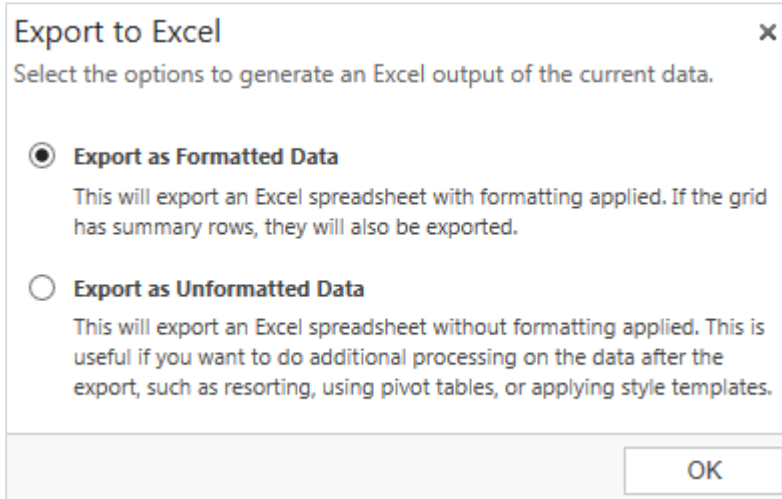
7 rows loaded

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



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 | 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

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)				
	<input type="text" value="Sink issue"/>	<input type="text" value="Building 1"/>	<input type="text" value="Unit D"/>	<input type="text" value="Bobby Drake"/>	<input type="text" value="6/3/2017"/>
	<input type="text" value="Temp too cold"/>	<input type="text" value="Building 2"/>	<input type="text" value="Unit B"/>	<input type="text" value="Kurt Wagner"/>	<input type="text" value="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
	<input type="text" value="No Heat"/>	<input type="text" value="Building 2"/>	<input type="text" value="Unit B"/>	<input type="text" value="Henry McCoy"/>	<input type="text" value="3/11/2017"/>
	Disposal Jammed	Building 2	Unit A	Remy LeBeau	5/13/2017
	<input type="text" value="Alarm Beeping"/> <input checked="" type="checkbox"/>	<input type="text" value="Building 1"/>	<input type="text" value="Unit C"/>	<input type="text" value="Max Eisenhardt"/>	<input type="text" value="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 CRM 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			
<input type="text" value="Bars"/>	<input type="text" value="\$770.00"/>	<input type="text" value="250.00"/>	<input type="text" value="\$192,500.00"/>
<input type="text" value="Coins"/>	<input type="text" value="\$775.00"/>	<input type="text" value="405.00"/>	<input type="text" value="\$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

The screenshot shows the Microsoft Dynamics CRM interface for an Opportunity View. The top navigation bar includes 'Microsoft Dynamics CRM', a menu icon, 'Sales', and 'Opportunity View'. Below the navigation bar are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main area contains a table of opportunity records. A dropdown menu is open over the 'Users' column, listing users such as Bobby Drake, Cain Marko, Erik Lensherr, Henry McCoy, James Howlett, Kurt Wagner, Lucas Bishop, Max Eisenhardt (highlighted), Ororo Munroe, Remy LeBeau, System Administrator, and Warren Worthington. Below the user list are 'Teams' like 'EditAble CRM Grid' and 'Sales - West'. The table columns are: Name, Topic, User, Close Date, Est. Revenue, and Next Steps. Several cells in the table are highlighted with red boxes, including 'FBC Associates', 'Misc Supplies', 'Integrated Systems', 'Markers', 'Hotel Cortez', 'Pilot Project', 'ARC Systems', 'Folders', and 'Redstone Associates', 'Paper'. The table footer shows '11 rows loaded' and 'Page 1'.

Name	Topic	User	Close Date	Est. Revenue	Next Steps
1 - Identify					
\$40,000.00					
✓ FBC Associates	Misc Supplies	Max Eisenhardt	10/31/2017	\$40,000.00	Send email to Bob
2 - Budget					
\$210,000.00					
CHP Diagnostics	Dry Erase Boards		7/16/2017	\$30,000.00	Identify budget range
ZPG Resource Group	Printers				
3 - Proposal					
\$54,000.00					
✓ 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					
\$502,000.00					
✓ 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					
\$120,000.00					
Firestar Software	Pencils	Remy LeBeau	2/28/2017	\$120,000.00	Send thank you email
				\$926,000.00	

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						
+ 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		

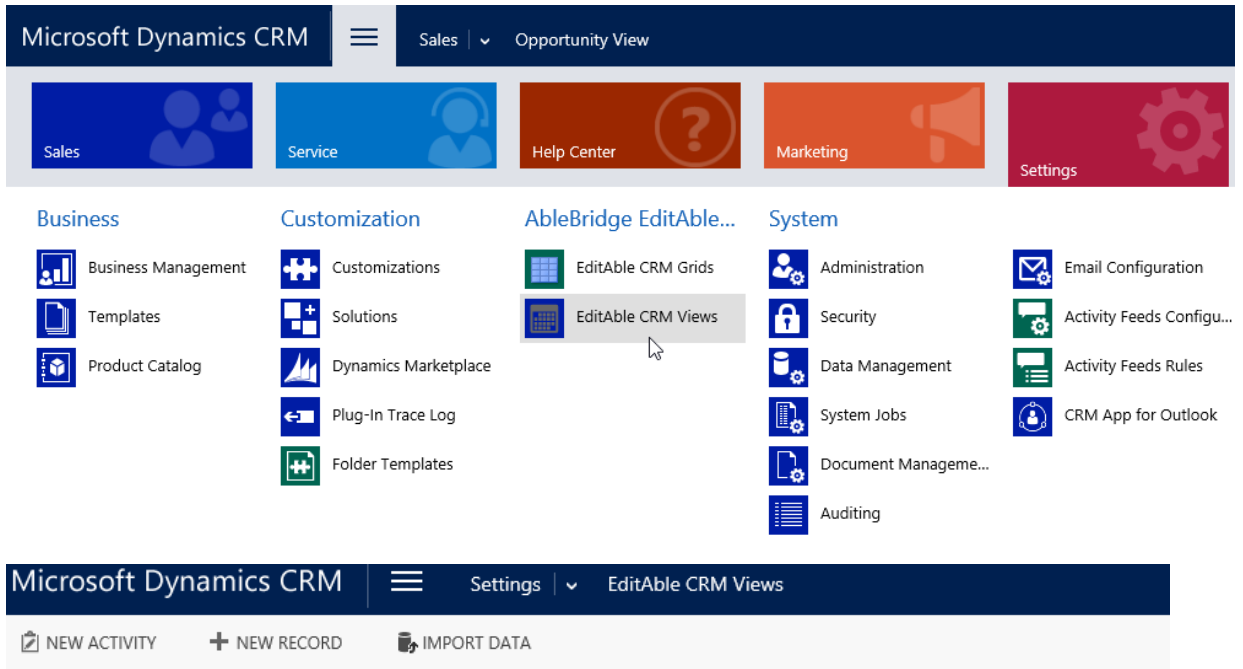
11 rows loaded Page 1

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



Editable CRM Views

Select a view to open in an Editable CRM Grid

Entity: View:

SAVE CHANGES CANCEL CHANGES

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	Su Mo Tu We Th Fr Sa	\$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:

Reference: An Editable CRM grid configured to normalize currency values to Euros

+ NEW ✎ EDIT 🗑 DELETE 📄 EXPORT <input type="text"/> 🔍							⚖️ ✎ 🗑 🔄
✓	Potential Customer	Topic	Sales Stage	Est. Close Date ↑	Est. Revenue	Next Steps	
4	Bobby Drake				€19,000.00		
	Crowe Properties	Paper Goods	3 - Proposal	5/6/2017	€19,000.00	Schedule a call	
4	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	
4	Kurt Wagner				€22,800.00		
	CHP Diagnostics	Dry Erase Boards	2 - Budget	7/16/2017	€22,800.00	Identify budget range	
4	Lucas Bishop				€136,800.00		
	ZPG Resource Group	Printers	2 - Budget	10/31/2017	€136,800.00	Call Tom on Monday	
4	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	
4	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 CRM

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

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 in the foreground, 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 containing 'EditAble CRM Grid Name'.
- Entity***: A dropdown menu.
- Mode**: A dropdown menu with 'Editable' selected.

The background shows the 'EDITABLE CRM GRID : CONFIGURATION' page with a sidebar containing 'General', 'ROW FUNCTIONALITY', and 'DISPLAY OPTIONS' sections. The 'Name', 'Entity', and 'Last Published On' fields are visible at the top of the configuration page.

EditAble CRM grids are configured through a familiar CRM record interface

The screenshot shows the configuration interface for an Editable CRM Grid titled "Metals Inventory". The interface is divided into several sections:

- General:** Includes fields for Name (Metals Inventory), Entity (abdgs_metalsinventory), Criteria Type (Show Related Records), Parent Entity Name (Account), and Parent Entity Key (abdgs_Accountid).
- ROW FUNCTIONALITY:** Options for New Rows (Create Inline), Edit Rows (Edit Inline), Delete Rows (Use Toolbar Button), Double Click Action (Edit Inline), New Row Location (Bottom), and Row Multi-Select (Enabled).
- DISPLAY OPTIONS:** A table of options for Row Checkboxes, Header, and Footer, with settings for Hidden, Border, Yes, and Status Bar.
- Grouping:** Options for Enable Grouping (checked), Group Behavior (Collapsible, Expanded By Default), and Summary Rows (unchecked).
- Additional Options:** A table of features like Quick Copy, Quick Filter, Save and New, Currency Conversion, and Multi-Currency Support, with settings for Disabled, Enabled, Pop Out, Paging, Required Fields, and Show Actual Currencies.
- ADVANCED OPTIONS & OVERRIDES:** Options for Auto Publish, Privilege Handling, Keyboard Shortcuts, Custom Events, and Transaction Mode.
- FILTER PANEL:** A checkbox for Show.
- COLUMNS:** A table listing columns with their names, labels, types, data types, widths, visibility, and alignment. Columns include Product Category, Price Per Ounce, Ounces, Value (\$), Metal, and Total Ounces.
- GROUP 1:** Configuration for a group named "Metal", including Sort Order (Ascending) and Summary Row options.
- FILTERS:** A section for defining filters, currently showing "No records are available."
- CUSTOM EVENTS:** A table for defining custom events, including Name, Type, Grid Event, Data Grid Column, Web Resource, and Function.

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.

About Crowe

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 CRM.

Crowe has worked with Microsoft Dynamics CRM 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.

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