Crowe Horwath.

Smart decisions. Lasting value.™

Crowe Project Management

For Microsoft Dynamics® CRM

CERTIFIED FOR Microsoft Dynamics

Table of Contents

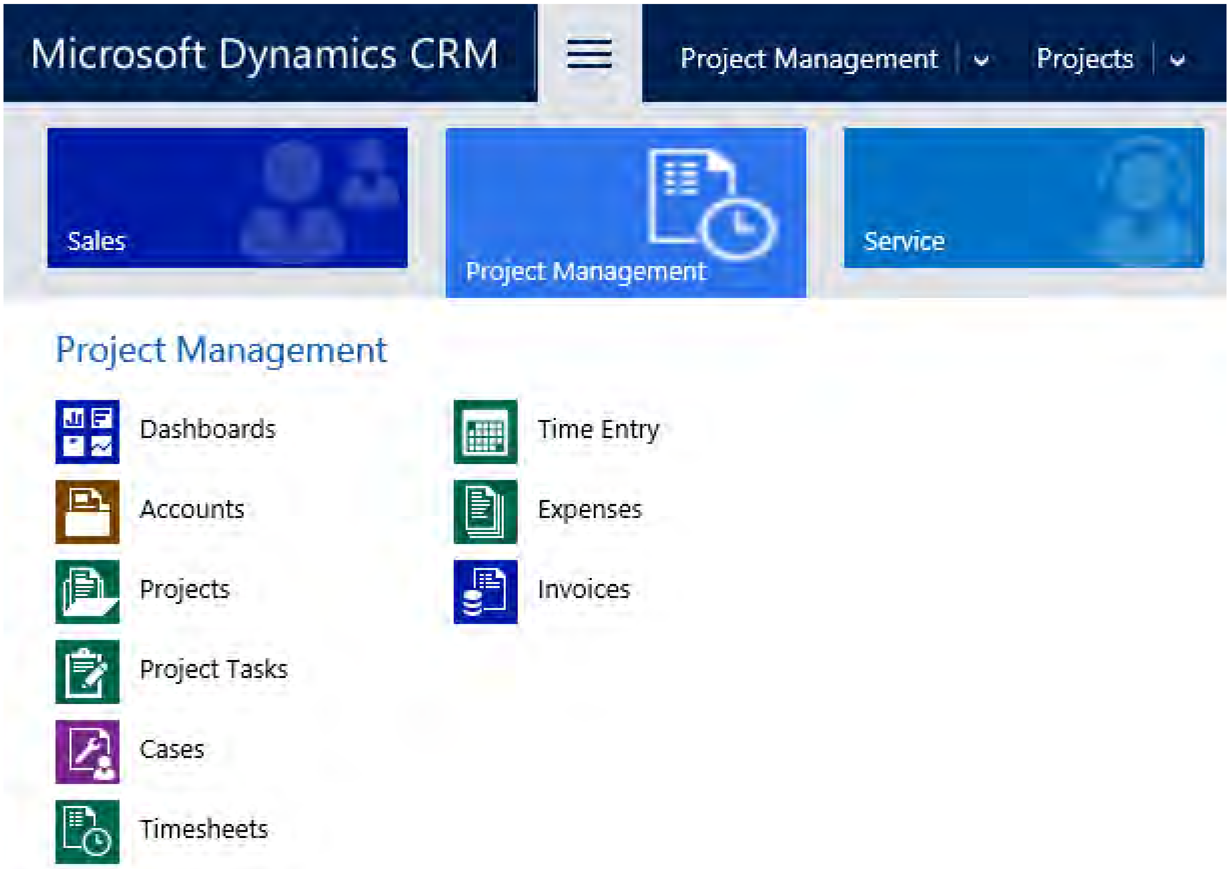
Overview

Crowe Project Management is an easy-to-use, flexible and comprehensive add-on solution for Microsoft Dynamics® CRM. It helps you define and manage projects, associate project tasks for real-time collaboration, and achieve greater team visibility. Crowe Project Management can help you set milestones that allow you to measure actual versus estimated time and costs, to keep your project on schedule and under budget.

Crowe Project Management delivers:

- End-to-end project management for any professional services firm
- Workflow automation of routine project task assignments, alerts, and status changes
- Real-time dashboards showing time spent and costs
- Associated relationships of project tasks against milestones for better visibility of resources and scope
- Accurate timekeeping at resource, project, milestone and task levels
- Templates for quick and easy project setup and consistency across all projects

Main Menu – End User Navigation



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

Projects

Creating a New Project

There are three ways to create a new Project.

Creates a new Project record.

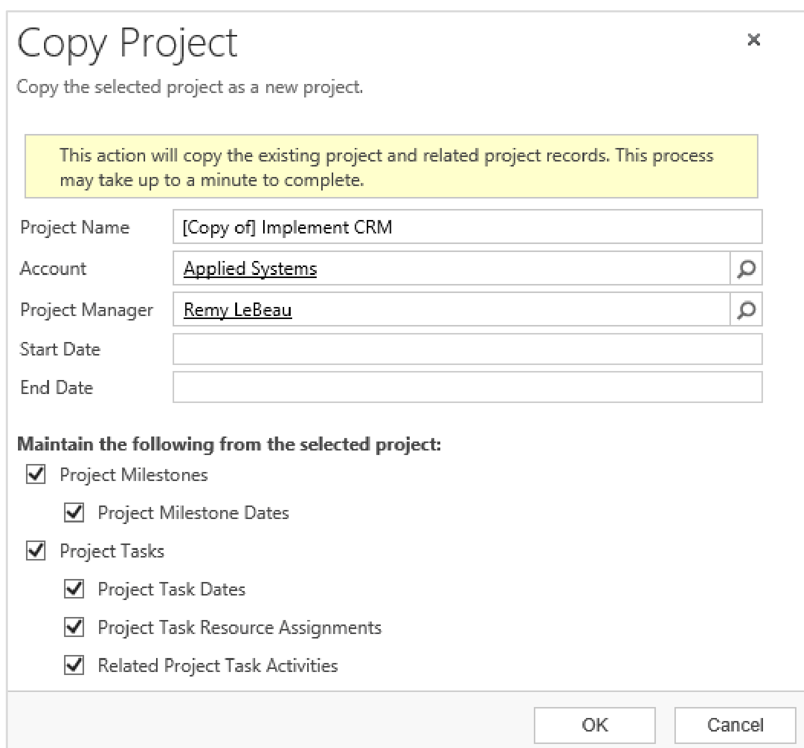
Creates a new Project record by copying an existing Project record.

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.

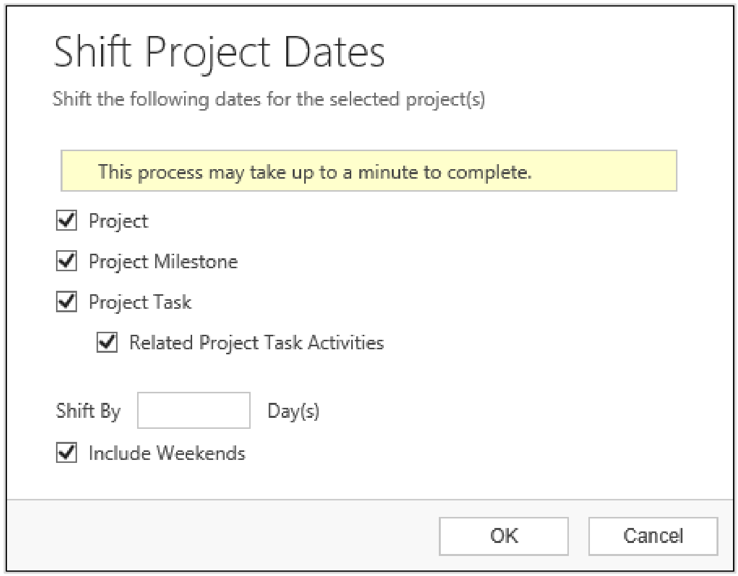
Copy Project

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.



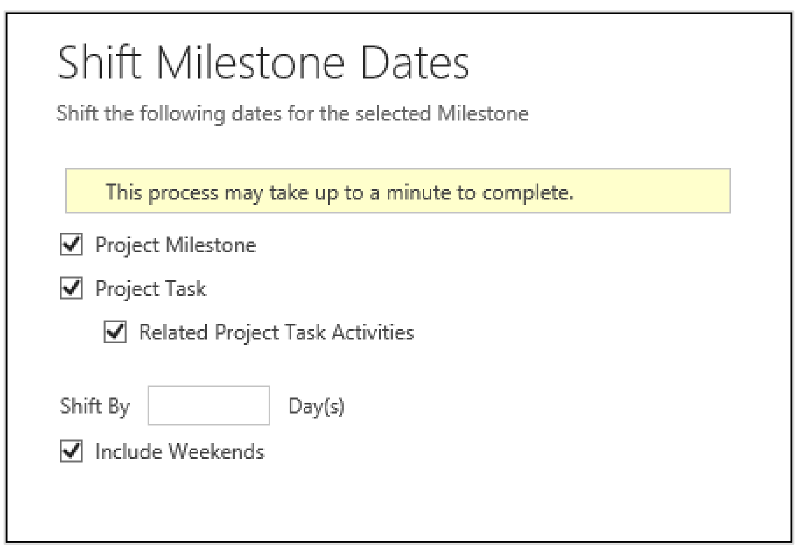
Shift Project

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



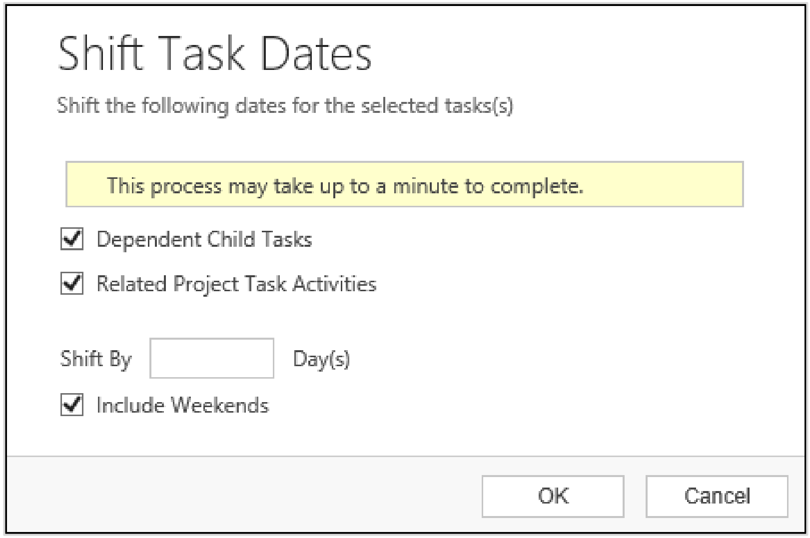
Shift Milestone

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

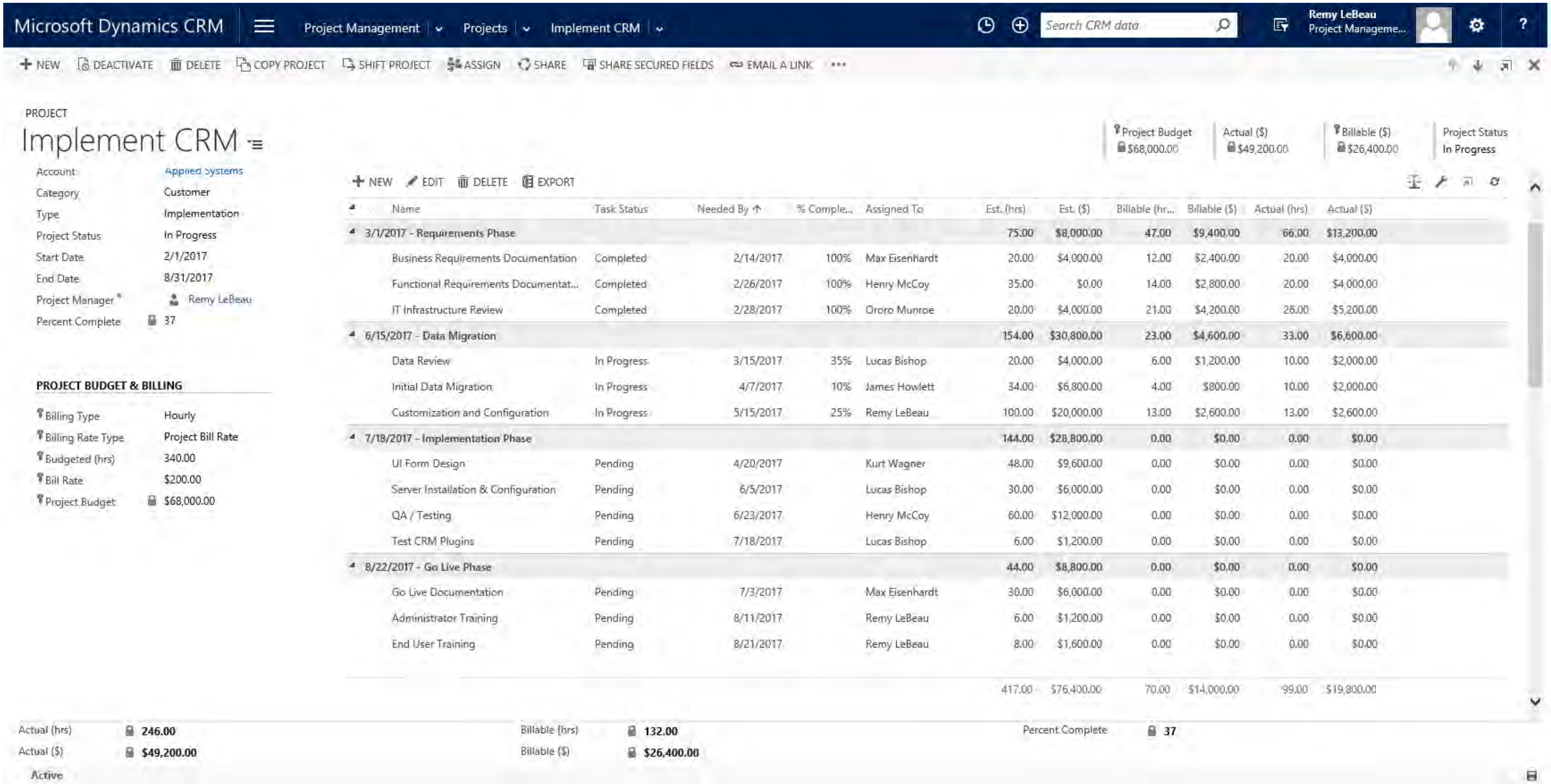


Shift Project Task

SHIFT 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



Project Form Layout



Microsoft Dynamics CRM | Project Management | Projects | Implement CRM | Search CRM data | Remy LeBeau Project Manageme...

NEW | DEACTIVATE | DELETE | COPY PROJECT | SHIFT PROJECT | ASSIGN | SHARE | SHARE SECURED FIELDS | EMAIL A LINK | ...

PROJECT

Implement CRM

Account	Applied Systems
Category	Customer
Type	Implementation
Project Status	In Progress
Start Date	2/1/2017
End Date	8/31/2017
Project Manager*	Remy LeBeau
Percent Complete	37

Project Budget	Actual ($)	Billable ($)	Project Status
$68,000.00	$49,200.00	$26,400.00	In Progress

PROJECT BUDGET & BILLING

Billing Type	Hourly
Billing Rate Type	Project Bill Rate
Budgeted (hrs)	340.00
Bill Rate	$200.00
Project Budget	$68,000.00

NEW | EDIT | DELETE | EXPORT

Name	Task Status	Needed By	% Comple...	Assigned To	Est. (hrs)	Est. ($)	Billable (hr...	Billable ($)	Actual (hrs)	Actual ($)
3/1/2017 - Requirements Phase					75.00	$8,000.00	47.00	$9,400.00	66.00	$13,200.00
Business Requirements Documentation	Completed	2/14/2017	100%	Max Eisenhardt	20.00	$4,000.00	12.00	$2,400.00	20.00	$4,000.00
Functional Requirements Documentat...	Completed	2/26/2017	100%	Henry McCoy	35.00	$0.00	14.00	$2,800.00	20.00	$4,000.00
IT Infrastructure Review	Completed	2/28/2017	100%	Ororo Munroe	20.00	$4,000.00	21.00	$4,200.00	26.00	$5,200.00
6/15/2017 - Data Migration					154.00	$30,800.00	23.00	$4,600.00	33.00	$6,600.00
Data Review	In Progress	3/15/2017	35%	Lucas Bishop	20.00	$4,000.00	6.00	$1,200.00	10.00	$2,000.00
Initial Data Migration	In Progress	4/7/2017	10%	James Howlett	34.00	$6,800.00	4.00	$800.00	10.00	$2,000.00
Customization and Configuration	In Progress	5/15/2017	25%	Remy LeBeau	100.00	$20,000.00	13.00	$2,600.00	13.00	$2,600.00
7/19/2017 - Implementation Phase					144.00	$28,800.00	0.00	$0.00	0.00	$0.00
UI Form Design	Pending	4/20/2017		Kurt Wagner	48.00	$9,600.00	0.00	$0.00	0.00	$0.00
Server Installation & Configuration	Pending	6/5/2017		Lucas Bishop	30.00	$6,000.00	0.00	$0.00	0.00	$0.00
QA / Testing	Pending	6/23/2017		Henry McCoy	60.00	$12,000.00	0.00	$0.00	0.00	$0.00
Test CRM Plugins	Pending	7/18/2017		Lucas Bishop	6.00	$1,200.00	0.00	$0.00	0.00	$0.00
8/22/2017 - Go Live Phase					44.00	$8,800.00	0.00	$0.00	0.00	$0.00
Go Live Documentation	Pending	7/3/2017		Max Eisenhardt	30.00	$6,000.00	0.00	$0.00	0.00	$0.00
Administrator Training	Pending	8/11/2017		Remy LeBeau	6.00	$1,200.00	0.00	$0.00	0.00	$0.00
End User Training	Pending	8/21/2017		Remy LeBeau	8.00	$1,600.00	0.00	$0.00	0.00	$0.00
					417.00	$76,400.00	70.00	$14,000.00	99.00	$19,800.00

Actual (hrs)	246.00	Billable (hrs)	132.00	Percent Complete	37
Actual ($)	$49,200.00	Billable ($)	$26,400.00		

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.

Project Task Summary – Inline Edit Mode

Required fields can be configured to be outlined in red

SAVE CHANGES   CANCEL CHANGES

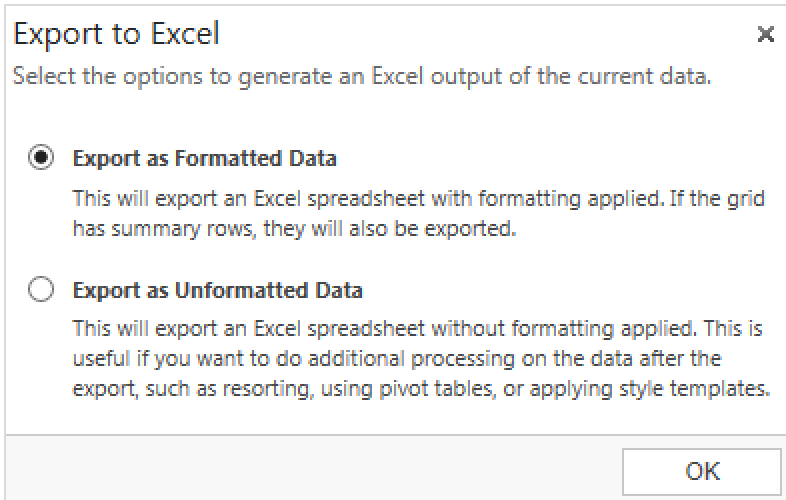
Name	Task Status	Needed By	% Comple...	Assigned To	Est. (hrs)	Est. ($)	Billable (hr...	Billable ($)	Actual (hrs)	Actual ($)
3/1/2017 - Requirements Phase					**75.00**	**$8,000.00**	**47.00**	**$9,400.00**	**66.00**	**$13,200.00**
Business Requirements Documentation	Completed	2/14/2017	100	Max Eisenhardt	20.00	$4,000.00	12.00	$2,400.00	20.00	$4,000.00
Functional Requirements Documentat...	Completed	2/26/2017	100%	Henry McCoy	35.00	$0.00	14.00	$2,800.00	20.00	$4,000.00
IT Infrastructure Review	Completed	2/28/2017	100%	Ororo Munroe	20.00	$4,000.00	21.00	$4,200.00	26.00	$5,200.00
6/15/2017 - Data Migration					**154.00**	**$30,800.00**	**23.00**	**$4,600.00**	**33.00**	**$6,600.00**
Data Review	In Progress	3/15/2017	35	Lucas Bishop	20.00	$4,000.00	6.00	$1,200.00	10.00	$2,000.00
Initial Data Migration	In Progress	7	10%	James Howlett	34.00	$6,800.00	4.00	$800.00	10.00	$2,000.00
Customization and Configuration	In Progress	7	25%	Remy LeBeau	100.00	$20,000.00	13.00	$2,600.00	13.00	$2,600.00
7/18/2017 - Implementation Phase					**144.00**	**$28,800.00**	**0.00**	**$0.00**	**0.00**	**$0.00**
UI Form Design	Pending	7		Kurt Wagner	48.00	$9,600.00	0.00	$0.00	0.00	$0.00
Server Installation & Configuration	Pending			Lucas Bishop	30.00	$6,000.00	0.00	$0.00	0.00	$0.00
QA / Testing	Pending	7		Henry McCoy	60.00	$12,000.00	0.00	$0.00	0.00	$0.00
Test CRM Plugins	Pending	7		Lucas Bishop	6.00	$1,200.00	0.00	$0.00	0.00	$0.00
8/22/2017 - Go Live Phase					**44.00**	**$8,800.00**	**0.00**	**$0.00**	**0.00**	**$0.00**
Go Live Documentation	Pending	7/3/2017		Max Eisenhardt	30.00	$6,000.00	0.00	$0.00	0.00	$0.00
Administrator Training	Pending	8/11/2017		Remy LeBeau	6.00	$1,200.00	0.00	$0.00	0.00	$0.00
End User Training	Pending	8/21/2017		Remy LeBeau	8.00	$1,600.00	0.00	$0.00	0.00	$0.00
					417.00	$76,400.00	70.00	$14,000.00	99.00	$19,800.00

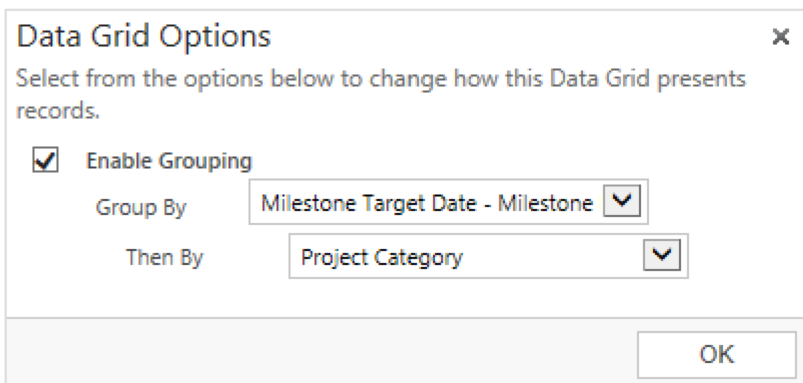
March 2017

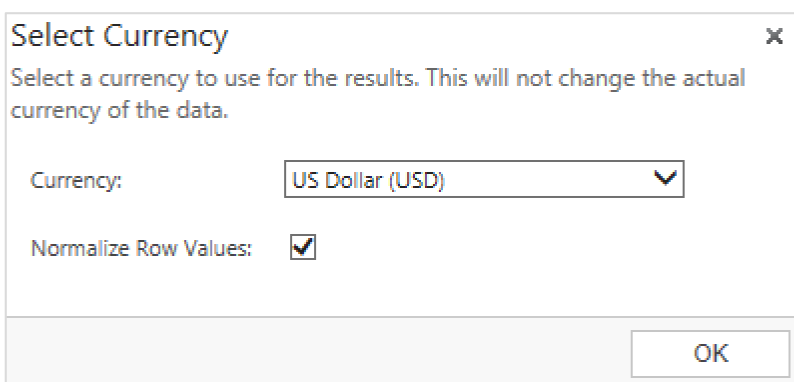
Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: 2/8/2017

Project Task Summary Options



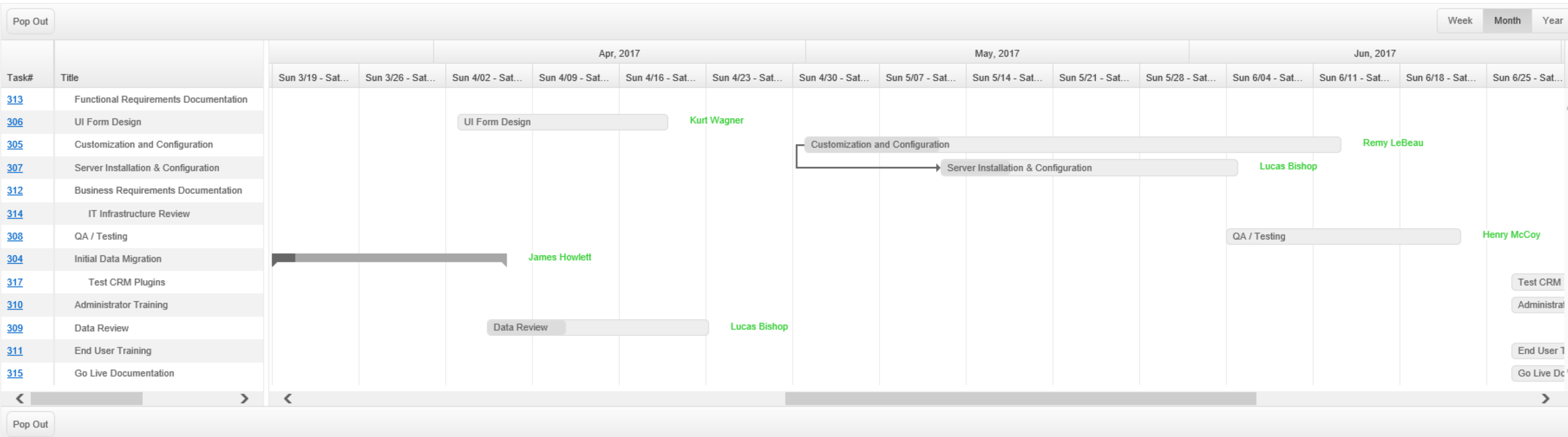




Tip: **Export to Excel**
Data can be exported with or without formatting. The formatted option is useful for internal or external project status updates. The unformatted version can be used to create pivot tables, additional reports or utilized for data imports.

Gantt Chart

Gantt Chart

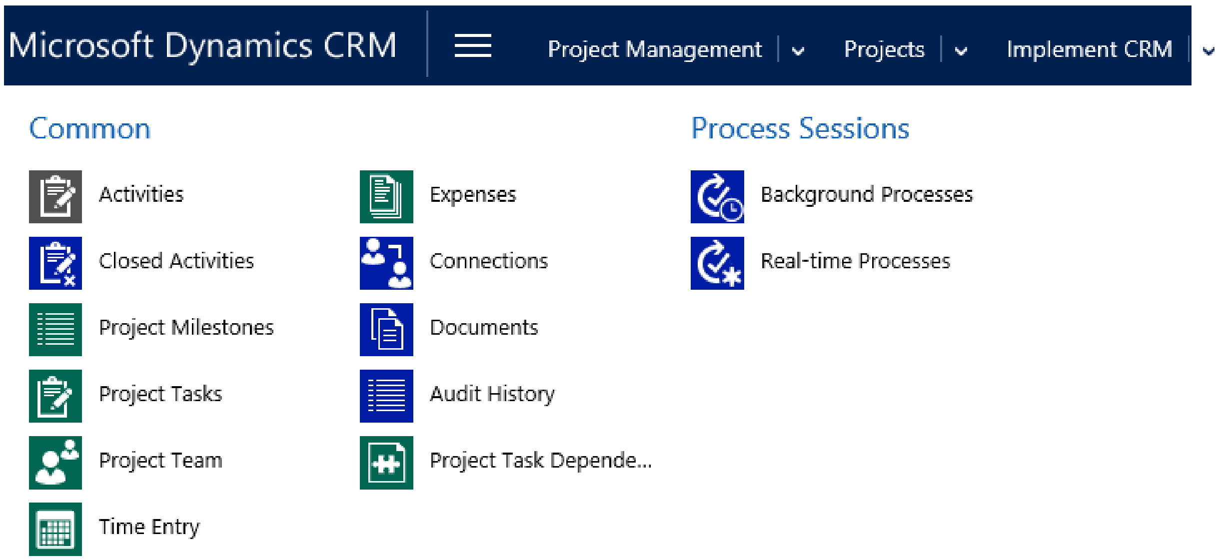


Gantt Chart The Gantt Chart provides a timeline view of Project Task Start and Needed By dates. Project Milestones are also displayed.

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.

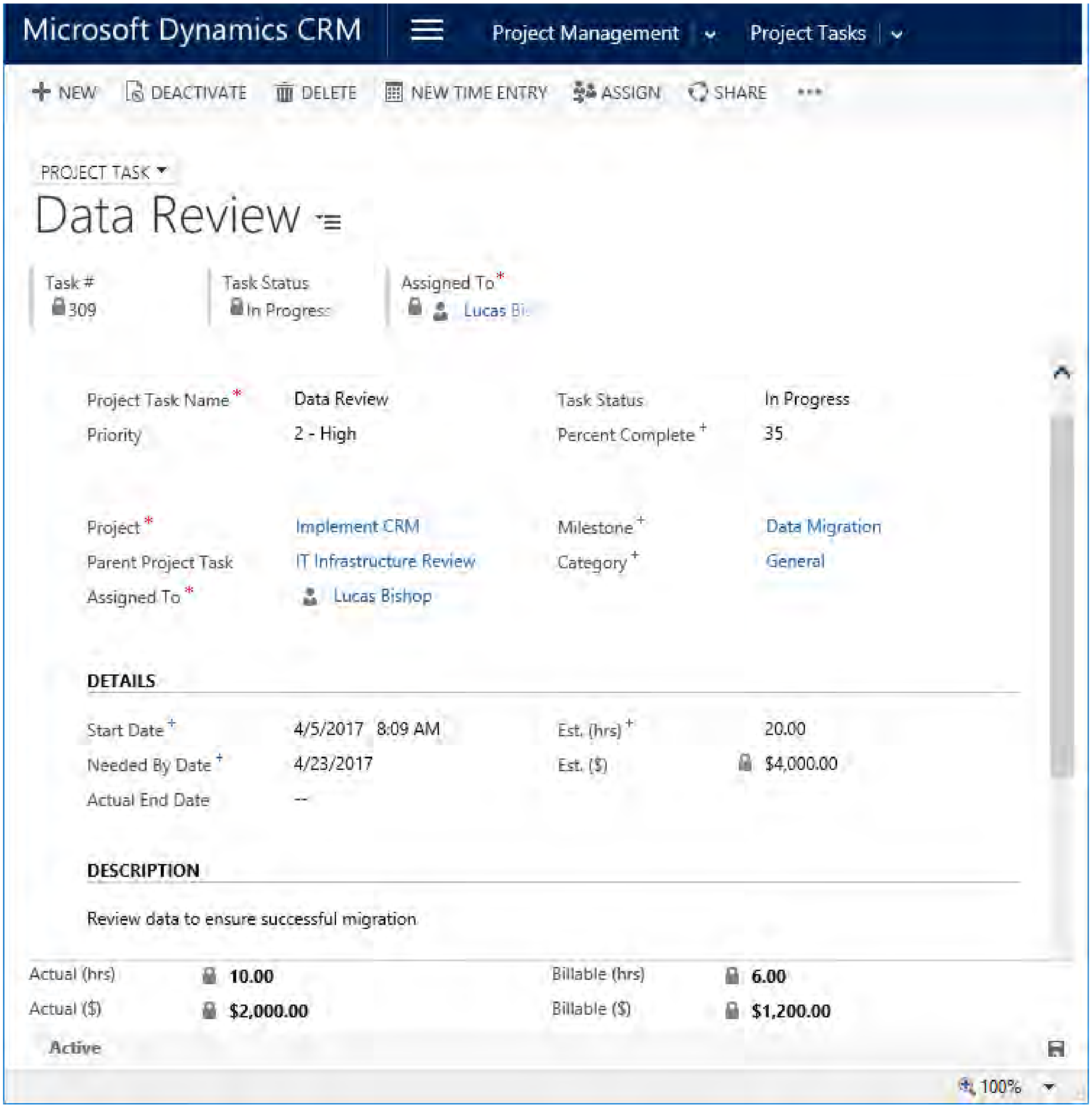
Edit the Start and Needed By dates for a Project Task by simply dragging or expanding the Project Task marker within the Gantt Chart.

Project Form – Associated Relationships



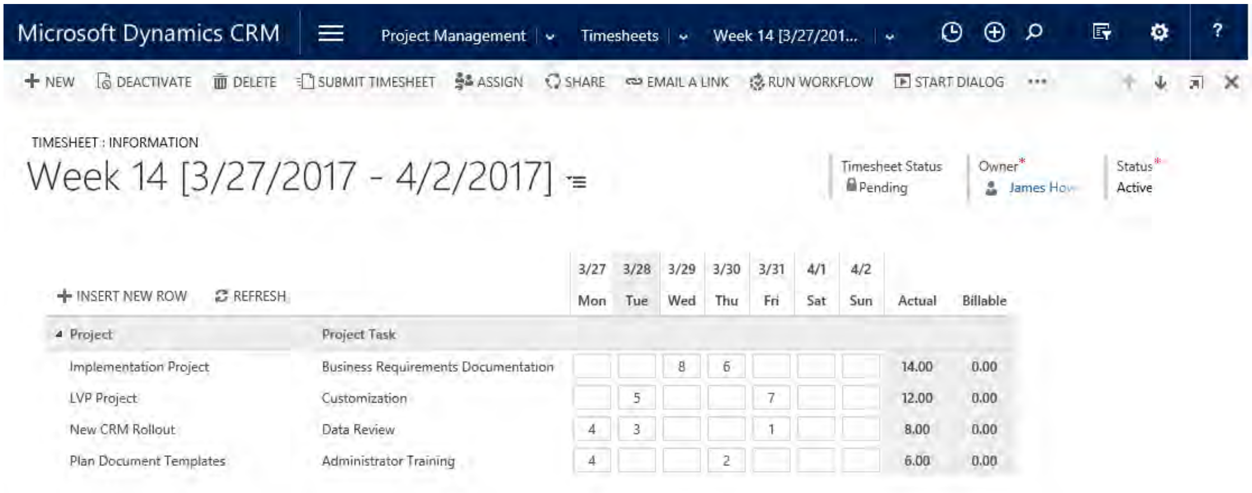
Project Milestones	View or create Project Milestones for the current Project.
Project Tasks	View or create Project Tasks for the current Project.
Project Team	View or create Project Team resources and the roles they will play on the Project.
Time Entry	View or create time entry for the current Project. 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.
Expenses	View or create Project Expenses for the current Project.

Project Task Form Layout

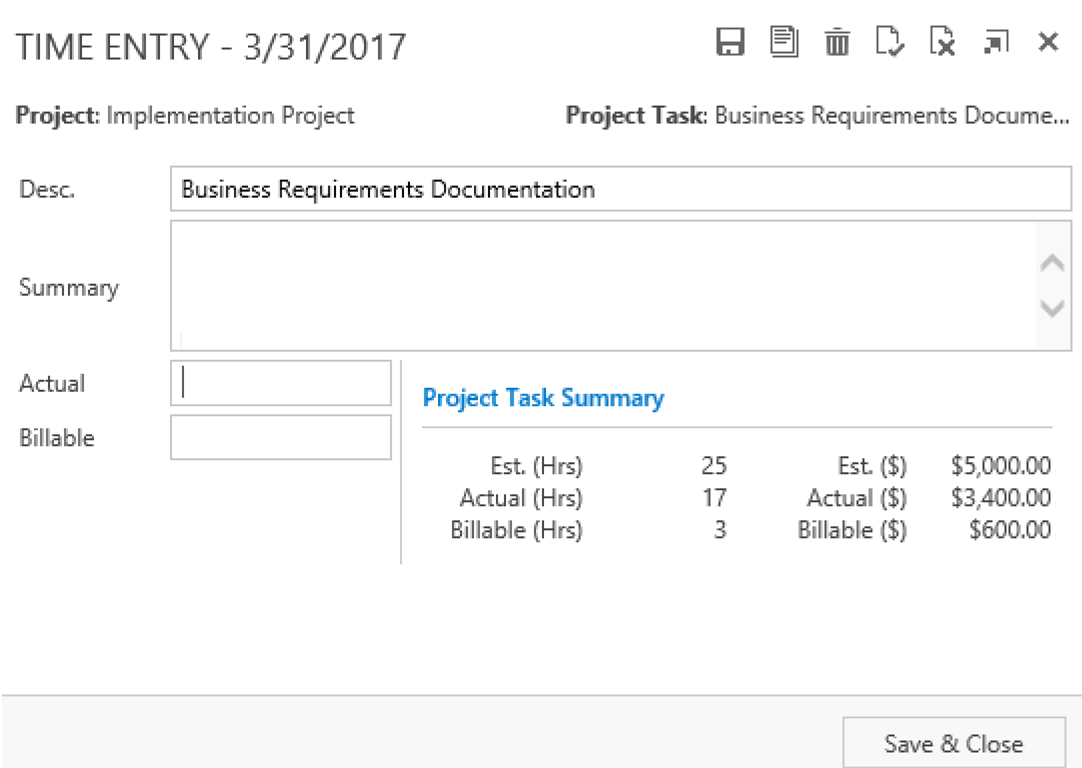


Tip: **Project Task Dependencies**
On the Project Task form, there is a field that allows you to designate a Parent Project Task. This comes in handy when you have tasks that need to be completed before others begin.

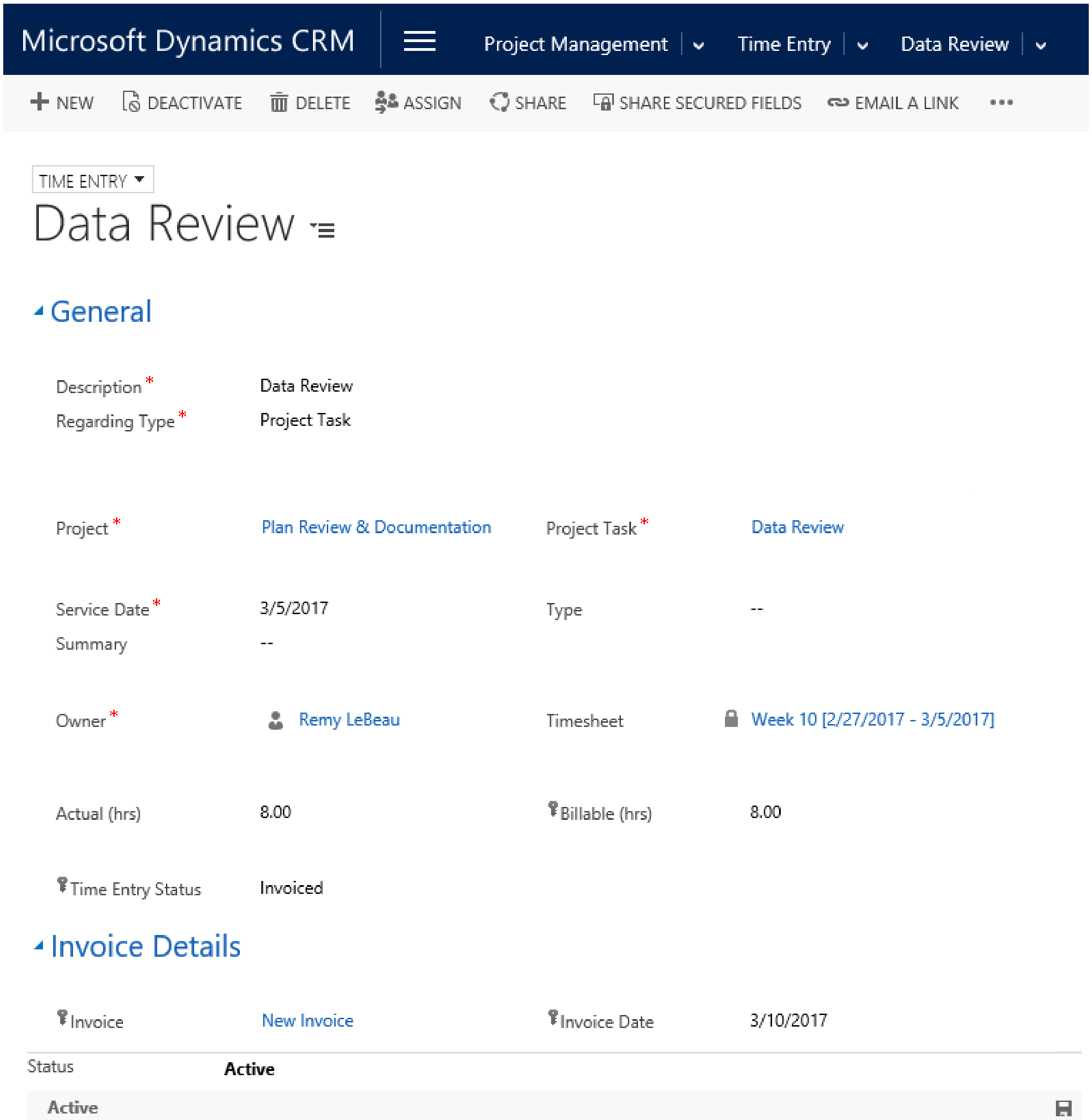
Timesheet Form Layout



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



Time Entry Form Layout



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.

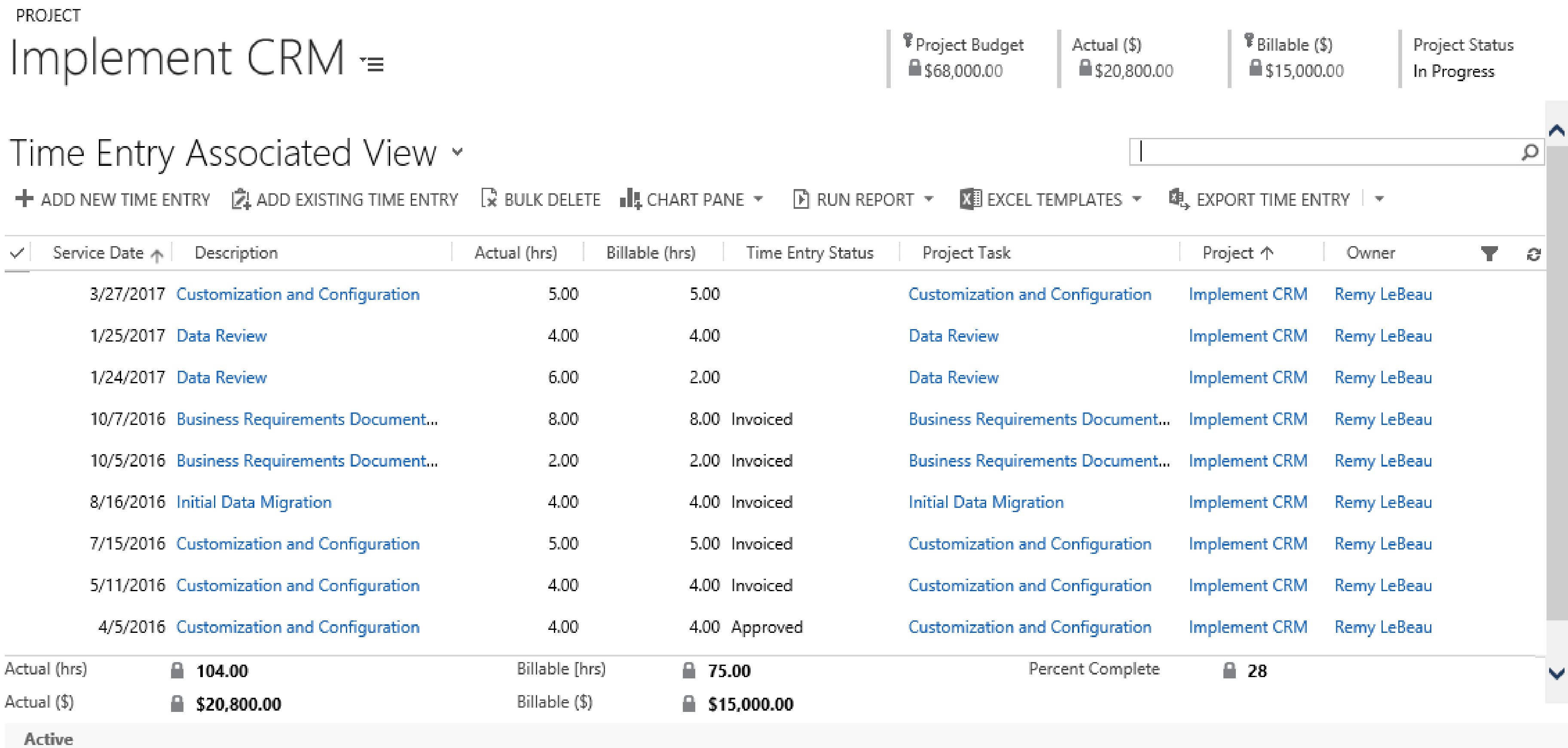
Time Entry can be associated with an Invoice for direct billing within Microsoft Dynamics CRM. Or it can be integrated with Microsoft Dynamics GP or another ERP / Accounting package.

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

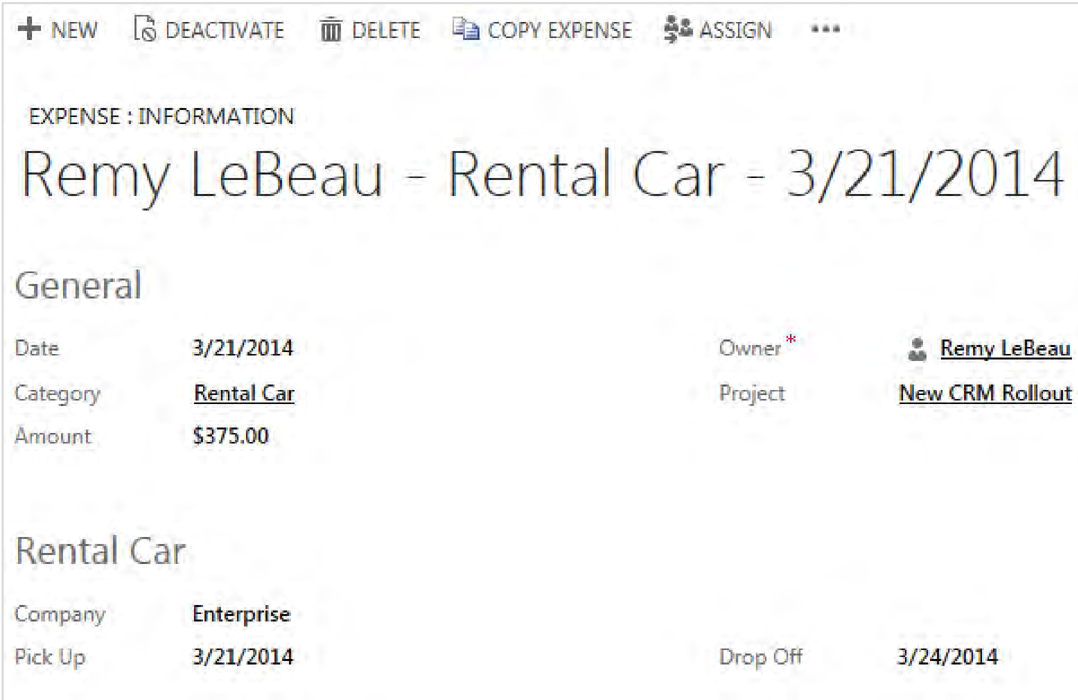


Service Date	Description	Actual (hrs)	Billable (hrs)	Time Entry Status	Project Task	Project	Owner
3/27/2017	Customization and Configuration	5.00	5.00		Customization and Configuration	Implement CRM	Remy LeBeau
1/25/2017	Data Review	4.00	4.00		Data Review	Implement CRM	Remy LeBeau
1/24/2017	Data Review	6.00	2.00		Data Review	Implement CRM	Remy LeBeau
10/7/2016	Business Requirements Document...	8.00	8.00	Invoiced	Business Requirements Document...	Implement CRM	Remy LeBeau
10/5/2016	Business Requirements Document...	2.00	2.00	Invoiced	Business Requirements Document...	Implement CRM	Remy LeBeau
8/16/2016	Initial Data Migration	4.00	4.00	Invoiced	Initial Data Migration	Implement CRM	Remy LeBeau
7/15/2016	Customization and Configuration	5.00	5.00	Invoiced	Customization and Configuration	Implement CRM	Remy LeBeau
5/11/2016	Customization and Configuration	4.00	4.00	Invoiced	Customization and Configuration	Implement CRM	Remy LeBeau
4/5/2016	Customization and Configuration	4.00	4.00	Approved	Customization and Configuration	Implement CRM	Remy LeBeau

Actual (hrs)	104.00	Billable (hrs)	75.00	Percent Complete	28
Actual ($)	$20,800.00	Billable ($)	$15,000.00		

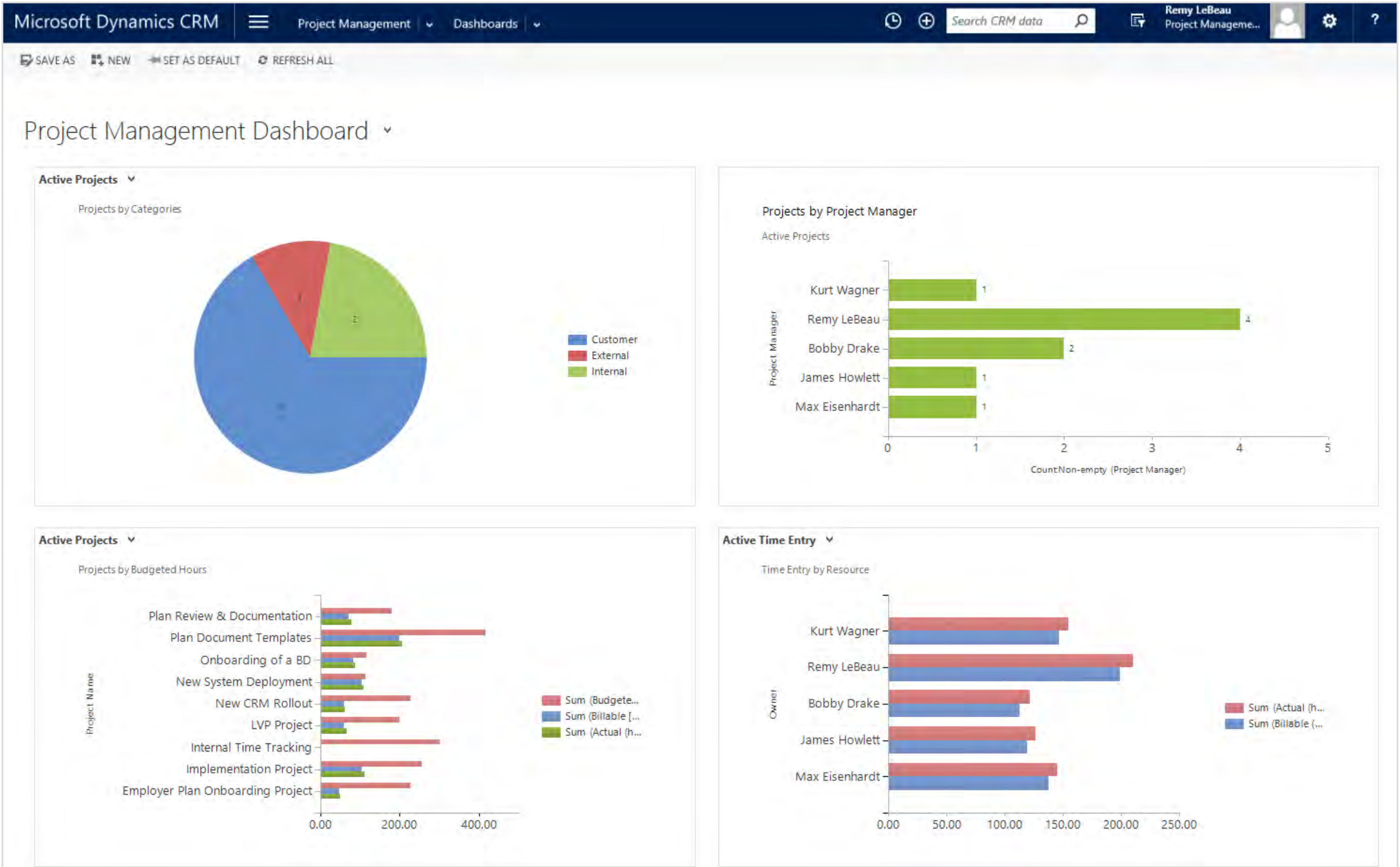
Active

Expense Form Layout



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

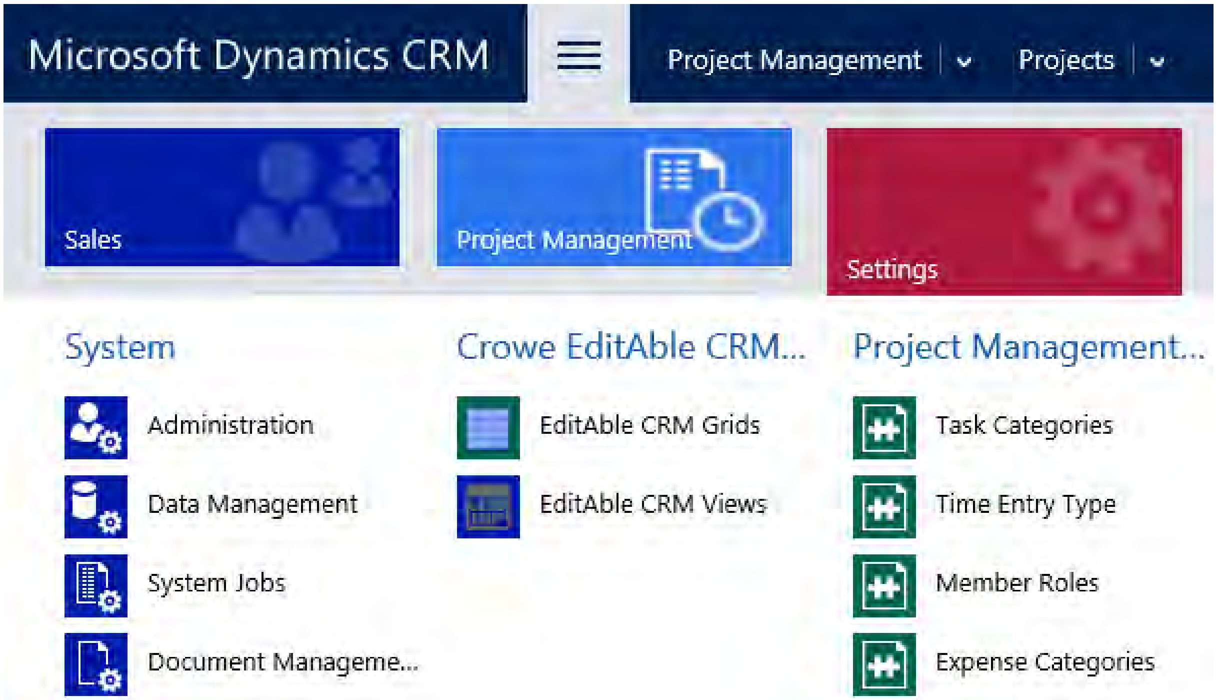
Project Hours By Resource

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

Project Summary by Project Category

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

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.

Task Categories	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.
Time Entry Type	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.
Member Roles	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.
Expense Categories	Provides a list of Categories that can be assigned to an Expense record.

About Crowe Horwath LLP

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.