

Crowe Document Management

For Microsoft Dynamics® CRM



Overview

Crowe Document Management from Crowe is an adaptable add-on solution to Microsoft Dynamics® CRM that gives you power over information by making it simpler and more efficient to organize, store, and recall your files, folders, and libraries. It provides a familiar interface with an intuitive, graphical tree view of your document hierarchy.

Crowe Document Management interface

A familiar folder tree provides an easy way of organizing and keeping track of your files related to a CRM record.

The screenshot shows the Microsoft Dynamics CRM interface with the Crowe Document Management add-on. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'Adventure Works'. The user is logged in as 'Remy LeBeau'. Below the navigation bar, there are several action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. The main content area is titled 'ACCOUNT Adventure Works' and displays key metrics: Annual Revenue (\$60,000.00), No. of Employees (4,300), and Owner (Bobby Drake). Below this, the 'Documents' section is visible, showing a folder tree on the left and a table of documents on the right.

| File Name | Title | Date Modified | Size | Modified by |
|-------------------------|-------------------------|--------------------|-------|-------------|
| Master Price Sheet.xlsx | Master Price Sheet.xlsx | 8/20/2014 12:00 AM | 8 KB | Remy LeBeau |
| Master Contract.pdf | Master Contract.pdf | 8/20/2014 12:00 AM | 81 KB | Remy LeBeau |
| Contract 3.docx | Contract 3.docx | 8/20/2014 12:00 AM | 11 KB | Remy LeBeau |
| Contract 2.docx | Contract 2.docx | 8/20/2014 12:00 AM | 11 KB | Remy LeBeau |
| Contract 1.docx | Contract 1.docx | 8/20/2014 12:00 AM | 11 KB | Remy LeBeau |

Tip: Documents tab

By default, Crowe Document Management is available on the following CRM entities: Account, Contact, Opportunity, Lead, Case and Contract.

Crowe Document Management can also be made available on other standard CRM entities and on custom entities.

If you aren't using SharePoint®, it's a good idea to remove documents from the associated view of each CRM form. This may help avoid confusion.

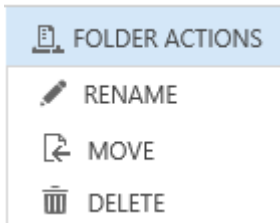
Toolbar options

Organize your files with the Crowe Document Management toolbar.



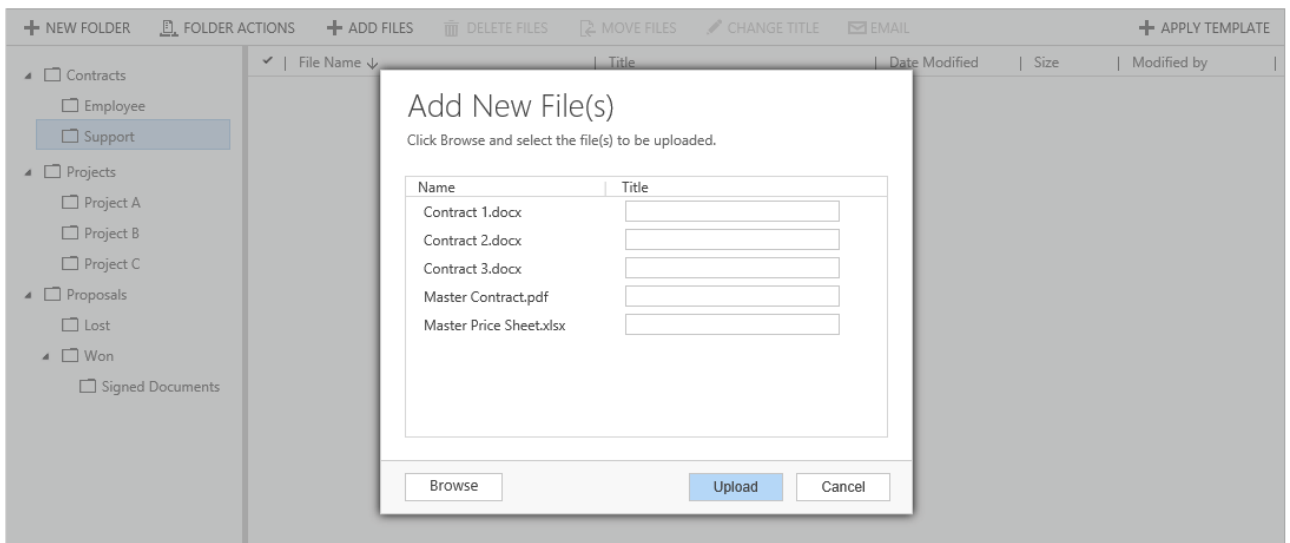
New Folder creates a new root folder or a subfolder under the selected parent folder.

Folder Actions allows you to rename or delete the selected folder, or move it into another parent folder.

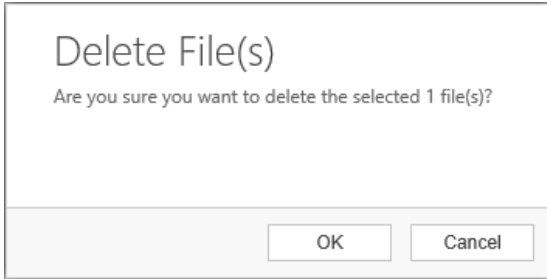


Add Files allows you to browse to the location of a file you want to upload to the selected folder.

Documents

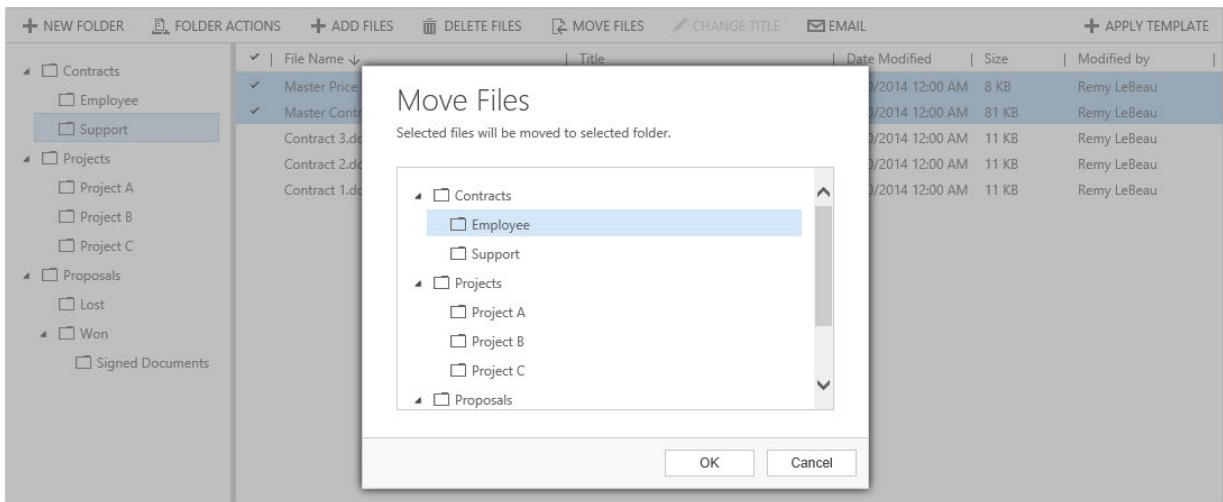


Delete File(s) deletes selected files from this environment. A prompt asks you to confirm.

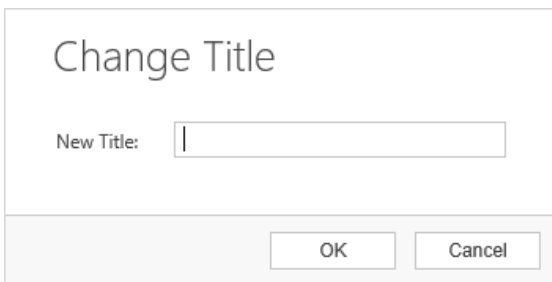


Move Files transfers selected file(s) from one folder to another.

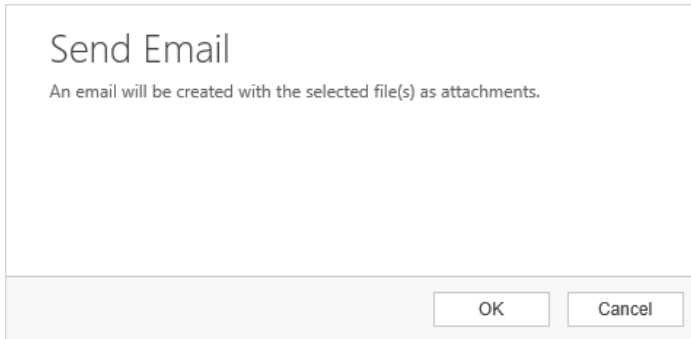
Documents



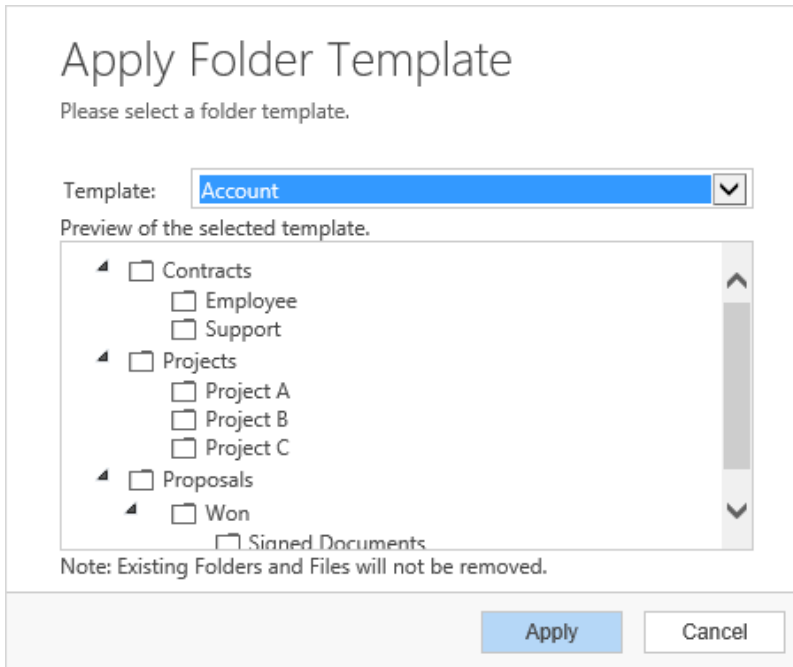
Change Title lets you modify the imported file name.



Email lets you send a CRM email with selected files attached.



Apply Folder Template allows you to apply a pre-defined folder structure to the current record only. To apply a template across all records in the entity, go to Settings: Folder Templates.



Creating a Folder Template

To create a folder template, go to Settings: Folder Templates. Click New.

FOLDER TEMPLATE : INFORMATION

New Folder Template

General

Name --

Entity Name --

Template

New Template

Name:

Entity:

Template

+ NEW FOLDER DELETE FOLDER MOVE FOLDER RENAME FOLDER

- Contracts
 - Employee
 - Support
- Projects
 - Project A
 - Project B
 - Project C
- Proposals
 - Lost
 - Won
- Signed Documents

Tip: Folder Templates

Unique folder templates can be defined for each entity. For example, you may want to create a unique set of folders for all Account records (for example, Customer Contracts) and a different set of folders for Case records (for example, Error Screen Shots).

Applying a folder template is optional but can be a great time saver. Folder templates can also be modified after they are applied.

About Crowe

At Crowe, our mission is to help you make smart decisions today, for lasting value tomorrow. We can show you how to streamline business operations and increase business success with Microsoft Dynamics CRM and Crowe Document Management.

Our approach is unique.

We view Microsoft Dynamics CRM as a flexible business platform rather than just a “front office” application. Any organization, in any industry, can use it to define and manage information about its relationships.

Our clients are from a wide industry spectrum: wealth managers, Christmas tree brokers, insurance agents, coffee manufacturers, non-profit education providers, biotechnology research and development companies; all with relationships and the need to manage information about people, money, products, services, and things unique to their organizations.

Our experience is delivering CRM project success.

Crowe has been implementing customer relationship management (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 have helped hundreds of companies streamline sales, marketing and service operations with CRM technology solutions.

We know Microsoft Dynamics CRM.

Crowe has worked with Microsoft CRM since before its release in 2003 through its growth into the market-leading CRM platform it is today. In 2006 Crowe made the strategic decision to focus solely on Microsoft Dynamics CRM and we've never looked back. Its flexibility, familiar user interface, interoperability with the Microsoft® Office platform – including Outlook® – and its top-flight functionality make it a sound investment in CRM strategy.

Crowe is focused on your 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 your success.

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