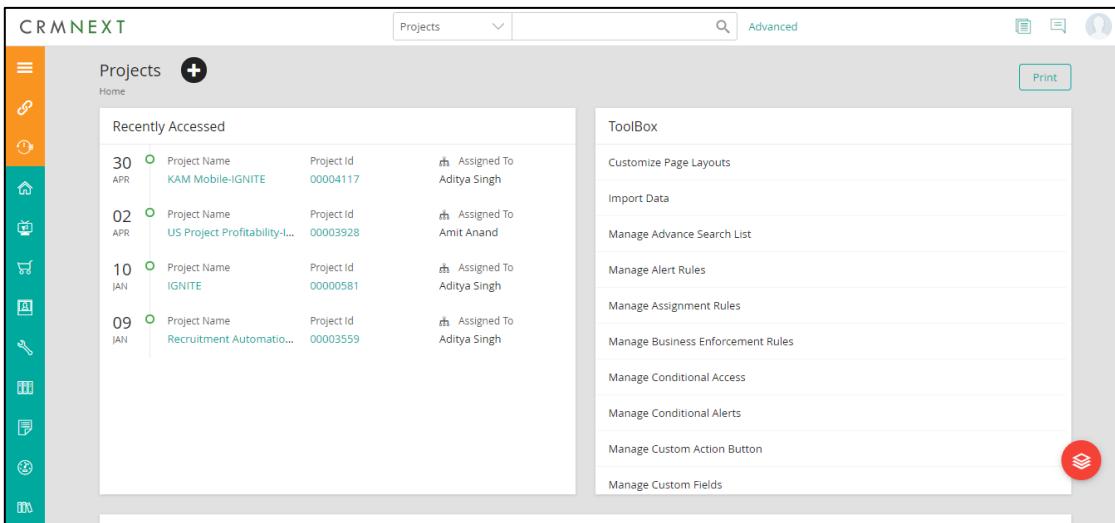


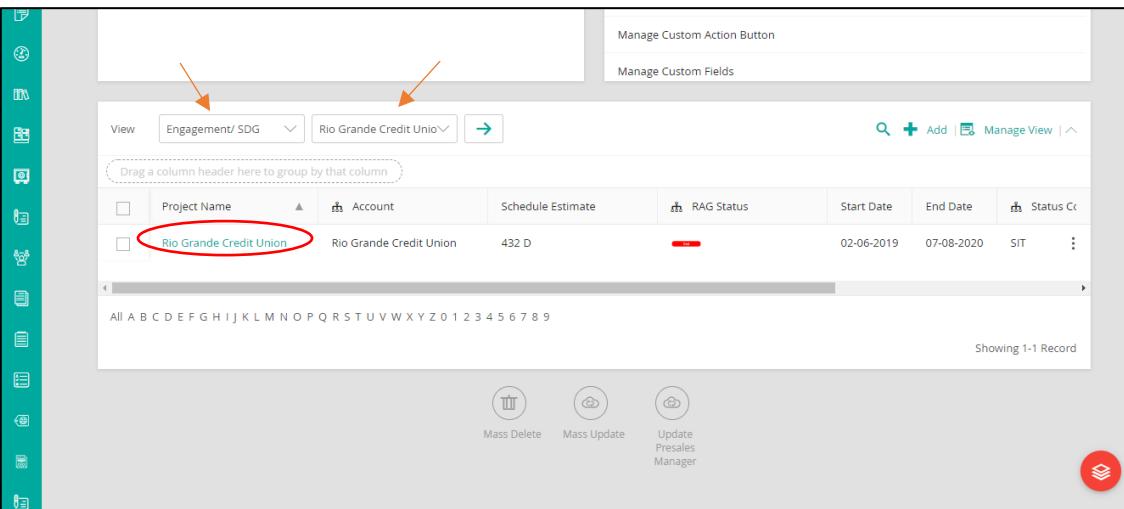
## Steps: To Add a Resource in a Project

Step 1: Go to Required Object – (i.e ‘Project’ in this case)



The screenshot shows the CRMNEXT interface for the 'Projects' object. On the left is a vertical toolbar with various icons. The main area displays a table of recently accessed projects, each with a date, name, project ID, and assigned-to information. A 'ToolBox' sidebar on the right contains links for customizing page layouts, importing data, managing search lists, and various administrative rules.

Step 2: Now Scroll down, where custom view is previewed. Select the Required view and corresponding project name in the scroll down menu respectively.



This screenshot shows a custom view for the 'Engagement/ SDG' view. It displays a single record for 'Rio Grande Credit Union'. The 'Project Name' column has a dropdown menu open, with 'Rio Grande Credit Union' highlighted. Arrows point to this dropdown and the project name in the list. The interface includes standard CRM actions like Mass Delete, Mass Update, and Update Presales Manager.

**OR**

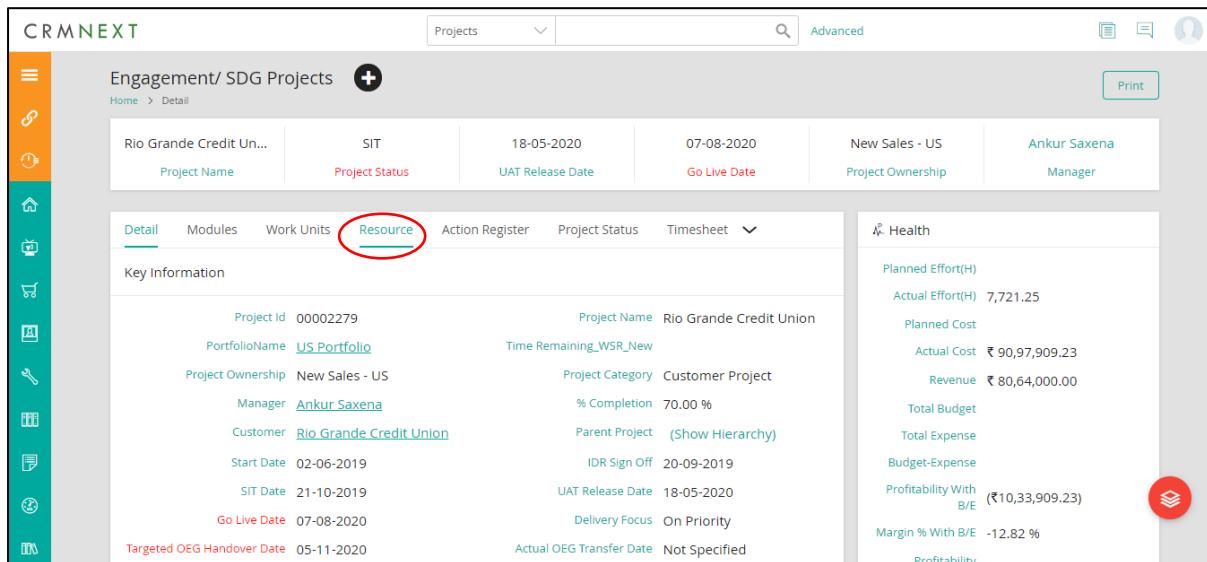
If the Project isn't visible under the view, using the 'Project ID/Name', it can be searched through the search tab at top of the Objects' home page.



This screenshot shows the 'Projects' search results for 'Revenue FY22-Unbilled>5 Lakhs'. The search bar at the top contains the ID '6930'. The results table shows one row with the message 'No Record Found'.

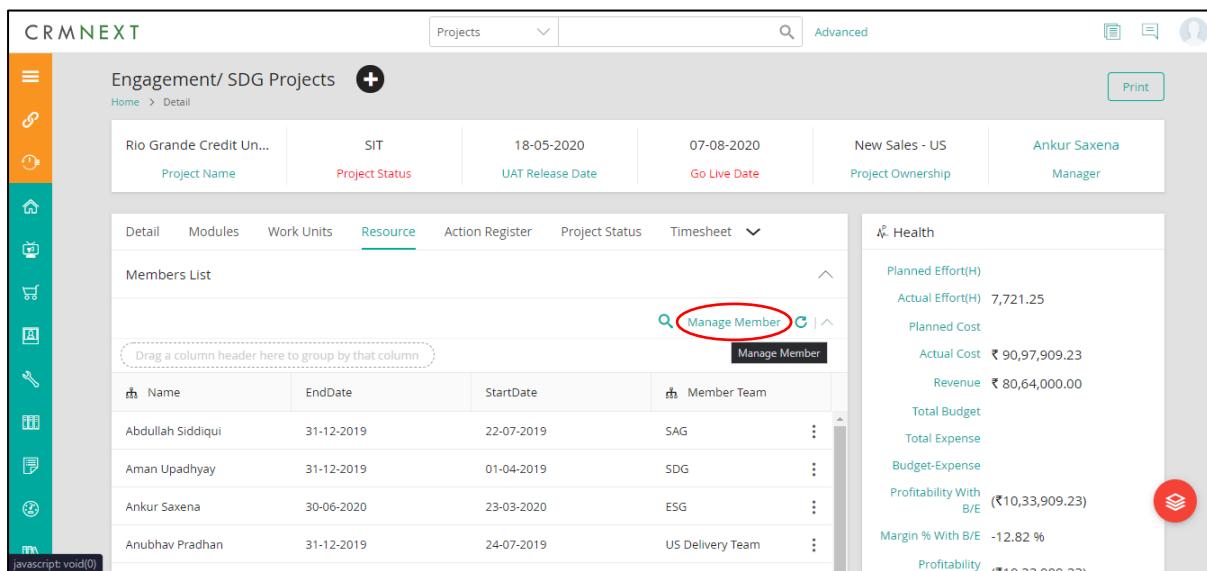
**Step 3:** List of related Projects would be listed down below. Click on the desired project you want to go to. (as showcased I have selected **Rio Grande Credit Union** as my Project)

**Step 4:** On clicking the Project name it will direct to the Project's corresponding Detail page. Locate the **Resource** tab and click on it.



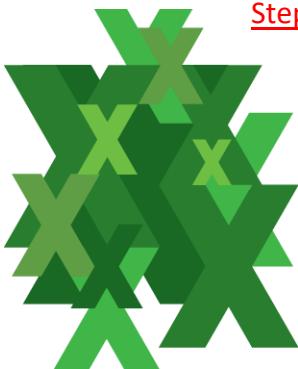
The screenshot shows the CRM NEXT interface for the 'Engagement/ SDG Projects' module. The main header displays the project details: Project Name (Rio Grande Credit Un...), Project Status (SIT), UAT Release Date (18-05-2020), Go Live Date (07-08-2020), Project Ownership (New Sales - US), and Manager (Ankur Saxena). Below the header, there is a navigation bar with tabs: Detail, Modules, Work Units, and Resource (which is circled in red). The 'Key Information' section contains various project details such as Project ID, Portfolio Name, Project Ownership, Start Date, SIT Date, Go Live Date, and Targeted OEG Handover Date. To the right, there is a 'Health' section with financial and performance metrics. A red circle also highlights the 'Manage Member' button in the top right corner of the header.

**Step 5:** On Clicking the Resource Tab it will redirect to a Resource page where members list is defined. Now to Add a new member, go to **Manage Member** in the right corner of the header list.



This screenshot shows the same CRM NEXT interface as above, but with the 'Resource' tab active. The 'Members List' table is displayed, showing four rows of member information: Abdullah Siddiqui, Aman Upadhyay, Ankur Saxena, and Anubhav Pradhan. Each row includes columns for Name, EndDate, StartDate, and Member Team. A red circle highlights the 'Manage Member' button located at the bottom right of the table. The rest of the interface, including the 'Health' section on the right, remains the same.

**Step 6:** On clicking Manage member, it will open a new window, where one has to specify the criteria for members to be added. For instance, let's select the column criteria as 'first name'. Operation as 'like', now enter the first name of the member to be added in the Value field.



Member Listing

Specify the Criteria for Members [New Filter](#)

Column	Operation	Value
First Name	Like	Prithwin
or <a href="#"></a> <a href="#"></a>		
<a href="#">-Select-</a>		
<a href="#">-Select-</a>		

[Go](#)

Member Listing

	Member	Member Name	Object Type
<input type="checkbox"/>	220565	Prithwin Sunag	User

[Add](#) [Close](#)

Generated in 0.28 s

**Step 7:** On clicking ‘GO’ button after providing the criteria. It will provide number of members related to provided criteria.

**Step 8:** Select the desired member by clicking on the check box provided in the left side corresponding to individual listing.

Member List - Google Chrome

https://my.crmnext.com/crmnext/member/addmemberlist.aspx?x=mur5mcel4rvgrgj5yzkul4m27...

-Select-
-Select-

[Go](#)

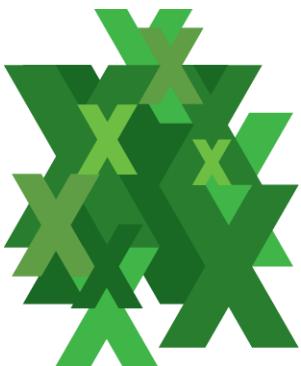
Member Listing

	Member	Member Name	Object Type
<input checked="" type="checkbox"/>	220565	Prithwin Sunag	User

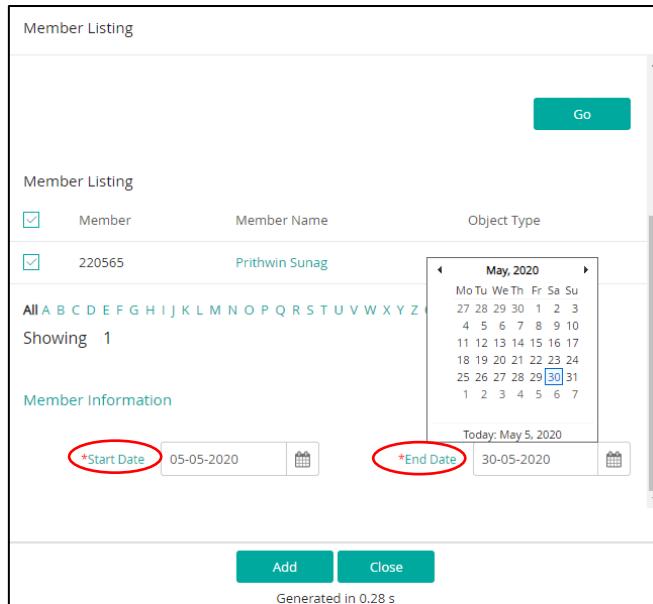
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

Showing 1

**Step 9:** Now after selecting the member, select the Start Date and End Date in the calendar pop up menu. After Selecting the dates, click on ‘Add’ button to finally get the desired



member added to corresponding Project.



The screenshot shows a 'Member Listing' interface. At the top right is a teal 'Go' button. Below it is a 'Member Listing' table with columns: Member (checkbox), Member Name, and Object Type. A row is selected for 'Member Name' Prithwin Sunag. To the right of the table is a calendar for May 2020, showing the date range from May 5 to May 30. The date 'May 5, 2020' is highlighted in blue. Below the calendar are two date input fields: 'Start Date' (05-05-2020) and 'End Date' (30-05-2020), both with calendar icons. Red circles with a red outline highlight the labels for 'Start Date' and 'End Date'. At the bottom are 'Add' and 'Close' buttons, and the text 'Generated in 0.28 s'.

**Step 10:** The respective project name is now visible in the timesheet of the corresponding member & hence the added user will now be able to see the same in their timesheet.

