

# **User Guide**

## Wrike for Dynamics - A MICROSOFT DYNAMICS 365 SOLUTION

BY



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## Contents

Contents
Wrike for Dynamics3
Download Wrike for Dynamics:
Wrike for Dynamics Roles:
Assign Wrike for Dynamics Role4
Dynamics 365 Apps6
Welcome Screen
Configuration7
Setup:
Copy Wrike API key:7
Paste Wrike API key:
Wrike Integration Settings:
Create a new Folder:14
Add Folder or Project:
Change Folder or Project:
Create a new Project:
Create a new Task:
Update a Task:
Delete a Task:
Uninstall:



Wrike for Dynamics is an integration of Wrike (Project Management tool) and Dynamics 365. This integration will enable you to manage tasks within Dynamics CRM. You can Get full visibility into the status of work being done for your clients. This makes collaboration between sales or other customer-facing teams and teams using Wrike easier, faster, and more transparent.

Once the integration is set up, you can check task status from within Dynamics 365. Any object in Dynamics 365 can be linked to a Wrike project or folder so you can work in Wrike and any changes that you make are instantly reflected in Dynamics 365.

## Download Wrike for Dynamics:

Please follow the following steps in order to start using Wrike for Dynamics.

Download Wrike for Dynamics from Microsoft Appsource .

#### Wrike for Dynamics Roles:

There are three type of roles here:

• Wrike for Dynamics Admin:

User with "Wrike for Dynamics Admin" role will have all permissions of Wrike for Dynamics entities.

- Wrike for Dynamics Read: User with "Wrike for Dynamics Read" role will only be allowed to read entities of Wrike for Dynamics except registration.
- Wrike for Dynamics Service:

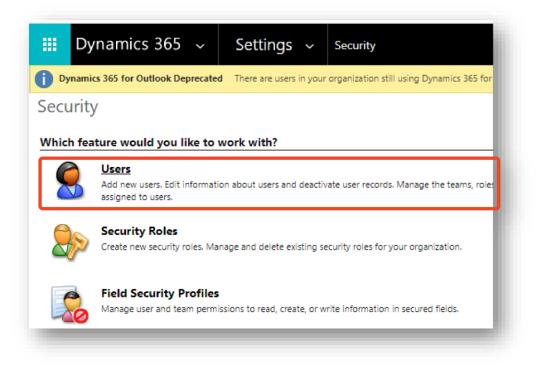
"Wrike for Dynamics Service" role should be assigned to the user for the connections and configurations. This role will be automatically assigned to the App User when you setup the profile.



## Assign Wrike for Dynamics Role

To assign roles to the users go to **Settings > Security > Users** 

🗰 Dynamics 365 🗸	Settings ~ jolutio	ons >
Settings		
Business	Customization	System
Business Manageme	Customizations	🎝 Administration 🔀 Ema
Templates	Solutions	Security 🔂 Activ
Product Catalog	Microsoft AppSource	Security: Add users, plus access settings f
A		



Select the user to assign role and click Mange Role.



Dyr	namics	365	Setting	s 🗸	Security			
<b>₩</b> NEW	🖋 edit	💐 APPRO	VE EMAIL	™ <sub>×</sub> Rejec	T EMAIL	Ar PROMOTE T	O ADMIN	MANAGE ROLES
-¤ E	Enable	d User	S ¥					
	Full N	Jame ↑				Site		Business Unit
		į.						org074d49cb

## Assign role to the user

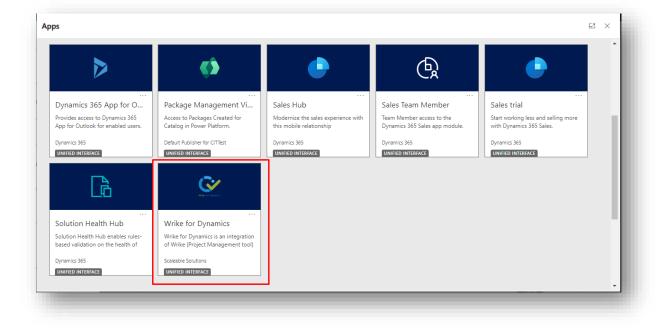
What roles would you like to a		
Role Name	Business Unit	
Vice President of Sales	orgf7af2987	
Viva Sales Administrator	orgf7af2987	
Viva Sales User	orgf7af2987	
Wrike for Dynamics Admin	orgf7af2987	
Wrike for Dynamics Read	orgf7af2987	
Wrike for Dynamics Service	orgf7af2987	•
	ОК	Cancel

After selecting the desired role, Click on **Ok**.



## Dynamics 365 Apps

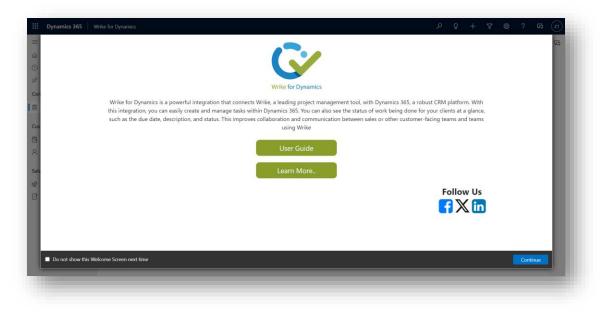
On Dynamics 365 apps you will find the Wrike for Dynamics Application.



Click on Wrike for Dynamics.

#### Welcome Screen

Welcome screen will appear. You can Download the User Guide and Learn More about the app and get access to our social Links from this page.





## Configuration

Login to your wrike account. If you don't have an account on wrike <u>create</u> one.

#### Setup:

Give app permissions to allow Wrike for Dynamics to access the Common Data Service as an organization user and then click on Setup Profile.

<ul> <li>Please give app permission to enable setup profile!</li> <li>Allow the App to access Common Data Service as organization user.</li> <li>Give App permission</li> <li>Setup Profile to create application user and assign Scaleable application role to app user. Make sure you have given application permissions first.</li> </ul>	Setup	
Allow the App to access Common Data Service as organization user. Give App permission Setup Profile to create application user and assign Scaleable application role to app user. Make sure you have given application permissions first.		ł
Give App permission Setup Profile to create application user and assign Scaleable application role to app user. Make sure you have given application permissions first.	(i) Please give app permission to enable setup profile!	l
Setup Profile to create application user and assign Scaleable application role to app user. Make sure you have given application permissions first.	Allow the App to access Common Data Service as organization user.	l
Make sure you have given application permissions first.	Give App permission	
Setup Profile	Setup Profile	

## Copy Wrike API key:

Go to Wrike.com.

Click on the **Profile Settings** and Select **Apps & Integrations** option from the dropdown.



💎 wrike	AC < Inbox	
Q Search	Ac Aenna Cris	γ
↓ Inbox	SQA	
··· More	Scaleable Solutions	
	Settings	
Space	Workspace themes	nd welcome! Here's an example task you
e First space	Recycle bin	
$\rightarrow$ Space overview	Apps & Integrations	ated. You'll get notifications $ imes$
✓ Tools	Mobile apps	
🗄 My productivity das	h Upgrade	ask or project
<ul> <li>Projects and folders</li> </ul>	Help	some new info
> 🗎 Rental App	Privacy policy	n the loop
	Log out	
	Get our mobi	le app to see all notifications directly on $~~ imes~~$

Select API from the sitemap.

🗸 wrike			
App Directory Apps access	API Apps		Wrik
API	App name	Create new	With t fit you (Folde and e
	By creating new app you accept Wrike API Terms of Services		and lii
	API Hammad API App	Configure	<u>OAutł</u> <u>Chan</u> g
		_	_

Enter your **App name** and click on **Create New**.



App name Wrike for Dynamics	Create new
by creating new app you accept <u>Wrike API Terms of Services</u>	
API Hammad API App	Configure

Scroll down and click on **Create token** to get a permanent access token.

		hould comply with OAuth2 standard tps://localhost" for local development.	
http://localho	st		
Add Redirect	URI		
HTTP access of	control (CORS)		
You can add one	e or more domains to make cross	-domain requests. Read more about CORS.	
Add domain			
In the API we create an app yourself a tok		ion. If you'd like to simply test the API or a multi-user application, you can issue	
Save	Cancel	Delete app	

Enter your password and click on **Obtain token**.



	× Permanent Access Token	
S)	Password	
ains to make cross-(		
	Obtain token Cancel	
ess token		
•	on. If you'd like to simply test the API or multi-user application, you can issue	
heck the details		
te token		

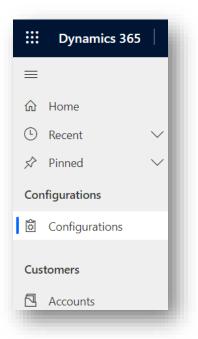
## Now click on **Copy token**.

Permanent access token In the API we use OAuth 2.0 for authorization. If create an app which is not intended to be a mu yourself a token. You can check the details in th	lti-user application, you can issue
Revoke token	
wiclwiOlwiVVNclixclnNcljpbXCJXXClsXCJGXCl XClsXCJEXClsXCJNXClsXCJBXClsXCJMXClsXCJ liwiaWF0ljoxNjq1MDE1Njk2fQ.e56ctvQ9PEkR	QXCJdLFwielwiOltdLFwidFwiOjB9
Careful! This token won't be shown again Copy token	
Save Cancel	Delete app
Save Cancel	Delete app



## Paste Wrike API key:

Click on **Configurations** from site map.



Paste the Wrike Bearer Token in **Bearer Token** field of Wrike Integrations and Click on **Save** button.

🞺 Wrike Integrati	on		
Bearer Token: *			
	N		

Your wrike account will be successfully connected with Wrike for Dynamics.



### Wrike Integration Settings:

You can select any of the objects from the list so that these objects will contain Wrike Task Widget within their respective records.

Vrike Integration S	Journa			^
🛹 Wrike Inte	gration Settings			
Object	Types			
	RM object types that will on add the widget to the particular to t		ter enabling, you can edit the layout for c	orresponding
		Destination folder or project		
	Account	Select Folder	~	
	Contact	Select Folder	~	
	Lead	Select Folder	*	
	Opportunity	Select Folder	~	
Widge	t Settings			
Allow u	sers to change folders fr	om Wrike Tasks widget		

You can select a folder from the dropdown under the heading **Destination folder or project**. This will allow you to create tasks within the selected folder in Wrike.

Vrike Integration	n Settings				
Object Type	s				
Select CRM obj		ontain Wrike Task widgets. Af ges.	ter enabling, you ca	n edit the layout for corresp	onding
		Destination folder or project			
C	Account	Select Folder	~		
C	Contact	Select Folder	~		
C	Lead	Select Folder	~		
C	Opportunity	Select Folder	~		
Widget Setti	ngs	L		1	
Allow users to	change folders fr	om Wrike Tasks widget			



The check box in the **Widget Settings** will allow you to change the projects or folders from the Wrike Tasks Widget.

	Sciect Folder	÷		
Settings				
ers to change folders fr	om Wrike Tasks widget			
				Save
	Settings		Settings	Settings

If this is **checked**, the widget will display as below:

🗐 🖬 Save 🛱 Save & Close 🕂 New 🖧 Open	org chart 🔀 Deactivate 🧏 Connect   🗸 🚎	🖡 Add to Marketing List 🛛 🐥 Assign 🗄 🖻 🖄 🖻 🖄
Trey Research - Saved Account		Rs300,000.00 20 Vumber of Employees Owner
ummary <b>Wrike</b> Details Files Related \(\)		
Add Folder Or Project OR Create New Folder	Wrike	New Project     New Task
(i) Please Create Project Or Task to see in the table.		×

If this is **unchecked**, the widget will display as below:

R Trey Research - Saved		300,000.00         20           nual Revenue         Number of Employees	$\sim$
mmary <b>Wrike</b> Details Files Related $\vee$			
Create New Folder	Wrike	New Project     New Task	
(i) Please Create Project Or Task to see in the table.		,	<

After that click on the **Save** button to save the integration settings.



	Account	Rental App	~	
	Contact	Rental App	~	
	Lead	Select Folder	~	
	Opportunity	Select Folder	~	
Wi	dget Settings			
Allo	w users to change folders from W	rike Tasks widget		
				Save
(				

#### Create a new Folder:

Creating a new folder will create a folder for the record in Wrike with the name of the record.

To create a new folder, open a contact, account or lead record for which you want to create a new folder.

← 🗄 🗗 🔚 Save	📄 Start Meeting 🛛 🛱 Save a	& Close 🕂 New 据 Open org chart
Alex Baker - Sa Contact Summary Wrike Deta		
CONTACT INFORMATION		Timeline
First Name	Alex	<ul> <li>Search timeline</li> <li>Enter a note</li> </ul>
Last Name	Baker	Loading timeline
Job Title	Cafeteria Manager	
Account Name	Trey Research	
Email	alex@treyresearch 🖙	
Mobile Phone	619-555-0129 🕓	



Select the Wrike tab from the top.

□     □     □     Save     Start Mee       Alex Baker     - Saved       Contact			Add to Marketing List :	wner
ımmary Wrike Details Files F	Related $\vee$			
Add Folder Or Project OR Create	New Folder	Wrike	New Project	New Task
(i) Please Create Project Or Task to see i	n the table.			×

Then click on the **Create New Folder** button displayed on the top of the Wrike Widget.

$\leftarrow$	Ľ	🔚 Save	房 Start Meeting	🛱 Save & Close	+ New	뤔 Open org chart	Deactivate
()	Alex	Baker - Sa	ved				
Summa			ils Files Rela	ted $\checkmark$			
Ac	ld Folder	Or Project	OR Create New	/ Folder			
						Wrike	
(i) P	lease Cre	eate Project (	Or Task to see in the	e table.			
		_			_		

The folder will be created and will be displayed as shown below.



Alex Baker - Saved Contact				ZT	Cowner
mary <b>Wrike</b> Details Files Related $\vee$					
Change Folder Or Project	Wrike			New Project	New Task
Folder: Alex Baker					
) Please Create Project Or Task to see in the table.					×
Title Description	▲ Status	<ul> <li>Start Date</li> </ul>	<ul> <li>Due Date</li> </ul>	<u>ـ</u>	
					Þ

## Add Folder or Project:

Adding a folder or a project will allow you to link an already created wrike folder or a project to your contact/account/lead record instead of creating a new folder or project.

To add a folder or a project, open a contact, account or lead record.

Related	~		Rs300,000 Annual Reve
	Timeline	+ 5.	7≣ :
	✓ Search timeline		
	Enter a note		0
	- Loading timeline		
S			
	Assistant		
	Notifications		
		<ul> <li>Search timeline</li> <li>Enter a note</li> <li>Loading timeline</li> </ul>	Timeline +   > Search timeline   > Enter a note   > Loading timeline



Select the Wrike tab from the top.

Trey Research - Saved Account	Rs300,000 Annual Reve
iummary Wrike Details Files Related	~
ACCOUNT INFORMATION	Timeline + √• ፲≣ :
Account Name*	ho Search timeline
Trey Research	🖉 Enter a note 👔
Phone	C Loading timeline
619-555-0127 🕓	
Fax	Assistant
619-555-0128	
Website	Notifications

Then click on the **Add Folder or Project** button displayed on the top left of the corner of the Wrike Widget.

← 🗄 🗗 🔚 Sa	ve 🛱 Save & Close	+ New	B Open org chart	🎝 Deactivate	<sup>ମ</sup> ୍ଭି Connect   🗸
TR Trey Resear	<b>rch</b> - Saved				
Summary Wrike [ 	Details Files Relate	ed ∨			
Add Folder Or Proje	ct OR Create New F	Folder		Wrik	e
(i) Please Create Proj	ect Or Task to see in the	table.			

After clicking on the button, you will see a dropdown list.



← 🗉 🖬 Save 🛱 Save & Close + New	Å Open org chart 🛛 Deactivate 🗞 Connect   🗸
Trey Research - Saved	
Summary <b>Wrike</b> Details Files Related $arphi$	
Select Folder	Wrike
Folder:	
(i) Please Create Project Or Task to see in the table.	

Select any folder or project from the list to link it with the opened record.

Trey Research - Save	d		
Account			
ummary <b>Wrike</b> Details F	Files Related $\vee$		
	_		
Select Folder	~	Wrik	
Select Folder		VVTIK	e
Rental App			
Alex Baker			
Login			
Cacilia Viera	in the table.		
Northwind Traders	in the table.		
Coffee Lab APJ			
Login			
Alpine Ski House			
A. Datum Corporation			
First Space			
Personal			



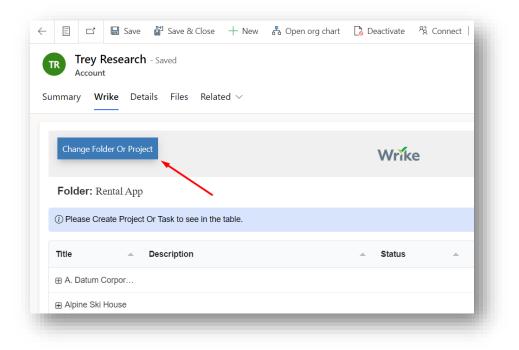
The selected folder or project will be displayed in the table on the widget as shown below.

Trey Research - Saved Account		Rs300,000.00 20 Annual Revenue Number of Employees Owner	
nmary <b>Wrike</b> Details Files Related ∨ 			
Change Folder Or Project	Wrike	New Project     Kev	v Task
Folder: Rental App	/		
<ol> <li>Please Create Project Or Task to see in the table.</li> </ol>			×
Title Description	A Status A Start Date	e 🔺 Due Date 🔺	
A. Datum Corpor			
🗄 Alpine Ski House			
Coffee Lab APJ			
Northwind Traders			
⊞ Cacilia Viera			
Alex Baker			

#### Change Folder or Project:

You can also change the already linked folder or a project.

To do so, Click on the **Change Folder or Project** button from the top of the Wrike Widget.





After that, a dropdown list will display.

- 🗉 🖾 Save 🛱 Save & Close + New 🖧	ා Open org chart 🛛 🔓 Deactivate 🕅 Connect
Trey Research - Saved Account	
Summary <b>Wrike</b> Details Files Related $\vee$	
Select Folder	Wrike
Folder: Rental App	
(i) Please Create Project Or Task to see in the table.	
Title   Description	▲ Status ▲
⊞ A. Datum Corpor	

Then select any option from the list.

Trey Research - Saved	
Account	
ımmary <b>Wrike</b> Details Files Related $arphi$	
Select Folder V	Wrike
Select Folder	VVIIKe
Rental App	
Alex Baker	
Login	
Cacilia Viera	
Northwind Traders	
Coffee Lab APJ	
Login	▲ Status ▲
Alpine Ski House	
A. Datum Corporation	
First Space	
Personal	



The selected folder or project will replace the already linked folder or project.

Note – To change a folder or project, you must have to add a folder or project or create a new folder first.

R Trey Research - Saved Account		Rs300,000.00 20 Annual Revenue Nur	nber of Employees	
mmary Wrike Details Files Related $\vee$				
Change Folder Or Project	Wrike		New Project     New	Task
	vvrike			
Folder: Cacilia Viera				
<ol> <li>Please Create Project Or Task to see in the table.</li> </ol>				×
Title   Description	▲ Status ▲	Start Date   Due Date	te 🔺	
E Login				
Create a new datab This is to create a new database	◯ Active	Monday, 25-09-2023 Wednes	day, 27-09 📋	

#### Create a new Project:

You can create a new project by simply opening a contact/account/lead record.

Trey Researd Account	<b>ch</b> - Saved etails Files Relatec	I ~		Rs300,0 Annual Re		
ACCOUNT INFORMATIC	DN		Timeline + $\nabla$	<b>ī≣</b> :	Primary Contact	
Account Name	* Trey Research		Search timeline	Û	Alex Baker	
Phone	619-555-0127	S	Enter a note     Modified on: 9/16/2023 5:57 PM	U	A Email	
Fax	619-555-0128		Meeting from: A Jeremy Johnson A, L. Closed	e, İ	Business	
Website	http://www.treyre	۲	Discussion on the Service Warranty Trey Research is Enti Cross selling a service warranty on purchase of espresso		619-555-0127	S
Parent Account			View more Opportunity: 3 Café A-100 Automatic	~	CONTACTS	:
Ticker Symbol	TRSZU	<u>^</u>	J Modified on: 9/16/2023 5:57 PM	~	Alex Baker alex@treyresearch.net	÷
ADDRESS			Meeting from: A Jeremy Johnson A, Closed Discussion on the Service Warranty Trey Research is entited to the service warranty of the service	E)	Avery Howard	:
Address 1: Street 1	789 3rd St		View more		avery@treyresearch.net	
Address 1: Street 2			Opportunity: 🕂 50 Café A-100 Automatic	$\sim$	Carla Yates carla@treyresearch.net	:



Select a Wrike tab from the top.

Trey Research - Saved Account	Related	~
ACCOUNT INFORMATION		Timeline + ∑• ፲≣
Account Name*		$\wp$ Search timeline
Trey Research		Enter a note
Phone		JJ Modified on: 6/11/2023 4:01 AM
619-555-0127	S	Meeting from: A Jeremy Johnson
Fax		Discussion on the Service Warranty Trey.
619-555-0128		Cross selling a service warranty on purc.
Website		Opportunity: 1 5 Café A-100 Automati
http://www.treyresearch.net/	$\oplus$	opportunity. E 5 Cale A-100 Automati

Now click on the **New Project** button from the top of the Wrike Widget.

Hadd to	Marketing List 오	Assign :		🖻 Share 🗸
	0,000.00 20 I Revenue Number	of Employees	T Owner	~
	_	✓ New Project	• New	r Task
t Date	▲ Due Date	*		×
_				•



Fill in the details and click on the **Add Project** button from the bottom of the form to create a new project.

Note – Make sure to add the correct details of a project otherwise you have to change it from your Wrike account as we can only change the task details from within Wrike and not the project details.

	Rs300,000.0020Annual RevenueNumber of EmployeesOwner
W	New Project     New Task
	New Project
	Parent Folder *
	Trey Research V
	Title *
Stat	Forget Password
Stat	Description *
	This is to create and implement the forget password
	Start Date *
	09/25/2023
	End Date *
	09/27/2023

The project will be created and will be displayed as below.



Change Folder Or Project	Wrike		New Project     New Task	
Folder: Trey Research				
) Please Create Project Or Task to see in the table.			×	
ītle 🔺 Description	🔺 Status 🔺 Start Dat	e 🔺 Due Date	<u>۸</u>	

#### Create a new Task:

After creating a new project, you can create a new task within that project by simply

clicking on the **New Task** button from the top right of the Wrike Widget.

🖁 Connect   🗸		🞗 Assign 🗄	🖄 Share 🗸
	Rs300,000.00 20 Annual Revenue Numb	ber of Employees	Owner
		New Project	New Task
			×
▲ Start I	Date 🔺 Due Date		
			×

Fill in the details and click on the **Add Task** button from the bottom of the form to create a new task.



		<ul> <li>New Task</li> </ul>
New Task		
Parent Folder *		
Forget Password	$\sim$	
Title *		×
Frontend		
Description *		
This is to create a front	t end for forget passwo	۱.
Start Date *		
09/26/2023		
Due Date *		
09/27/2023		
	Add Task	

The task will be created and will be displayed as shown below:

Note – Make sure to select a day between 5 working days for Start Date and Due Date and not the weekends otherwise it will automatically select the next coming weekday.

nmary Wrike Det	ails Files Related $\vee$				
Change Folder Or Proj	ect	Wrike		New Project	• New Task
Folder: Trey Resea	rch				
<ol> <li>Please Create Project</li> </ol>	Or Task to see in the table.				×
Title 🔺	Description	<ul> <li>Status</li> </ul>	▲ Start Date ▲	Due Date	
Forget Password					
- Frontend	This is to create a front end for forget password page up	OActive	Tuesday, 26-09-2023	Wednesday, 27-09	<b>t</b>



#### Update a Task:

You can change the Description, Status, Start Date and Due Date of the task from within Wrike for Dynamics but you cannot change the tittle of the task.

• To update the **Description**, click on the description field of the task from the table and enter the updated value. The description will be changed success.

Change Ford	der Or Pro			W	/rike		
Folder: Tr	ey Resea	urch					
(i) Please Cre	ate Projec	t Or Task to see in the table.					
Title		Description		.▲ Sta	atus	Start Date	
Forget Pass	sword						
Frontend		This is to create a front end for	forget password page up	dated 🔿	Active	Tuesday, 26-0	9-2023

• To update the **Status**, click on the status field of the task. A dropdown list of available status options will display. Select any option from the list. The status will be changed successfully.

Trey Researce Account	<b>:n</b> - Saved				Rs300,000. Annual Reve		ber of Employees	ZT	Owner	$\sim$
mary <b>Wrike</b> D	etails Files Related $ imes$									
Change Folder Or Pro	oject		Wrike				✓ New Pr	oject	New Task	
Folder: Trey Rese										
) Please Create Proje	ct Or Task to see in the table.								×	
ītle 🔺	Description	\$	Status	۸	Start Date	Due Dat	e 🔺			
Forget Password					/					
Frontend	This is to create a front end for forget password page	up	Active Active Completed	~	Tuesday, 26-09-2023	Wednes	day, 27-09		<b></b>	Þ



• To update the **Start Date** and **Due Date**, click on the field and select the date that you want. The Dates will be changed successfully.

Change Folder Or Proj				September 202	23 -	$\uparrow$	$\downarrow$		▲ New Project	New Task	
		Wrike		Su Mo Tu	We Th	n Fr	Sa		Thew Project	THOW HOSE	
Folder: Trey Resea	rch			27 28 29	30 31	1	2				
					6 7						
i) Please Create Projec	t Or Task to see in the table.			10 11 12 17 18 19						×	
				24 25 26							
Title 🔶	Description	<ul> <li>Status</li> </ul>	*	1 2 3				te	A		
Forget Password				Clear		То	day				
Frontend	This is to create a front end for forget password page up.	O Active		mm/dd/yyyy			ladaa	odou 0	.7-09	Ū	

Note – The changes done in wrike will also reflect in dynamics.

### Delete a Task:

To remove or delete a task, click on the bin icon displayed next to the task .

nmary <b>Wrike</b> D	etails Files Related $\vee$			
Change Folder Or Pro	oject	Wrike	New Project     New 1	āsk
Folder: Trey Rese	earch			
<ol> <li>Please Create Proje</li> </ol>	ect Or Task to see in the table.			×
Please Create Proje Title	ect Or Task to see in the table.		🔺 Start Date 🔺 Due Date 🔺	×
			Start Date Due Date	×



A confirmation dialog will display. Click on the **Ok** button to confirm deletion.

		Annua
s Relate	d 🗸	
	Confirmation Dialog $ imes$	
'n	Are you sure you want to delete this Task?	Date
- updated		iesday, 21-0
- updated		day, 22-06-2
	OK Cancel	
		_

The task will be deleted successfully.

#### Uninstall:

If you wish to uninstall Wrike for Dynamics, go to **Solutions**. Select Wrike for Dynamics and click on **Delete**.

	Dynamics 365	Settings ~	Solutions >	
All	Solutions 🖌			
* ×		🐉 🎧   🚑 🝕	More Actions 🔹	
	Name	Display Name	Version   I	nstalled On $\downarrow$
<	ScaleableWrike	Wrike for Dynamics	1.0.0.13	6/12/2023
	msdyn_SalesPremium	SalesPremiumDemoA	9.0.1.1247	6/11/2023
	madur. CalesTrialAnn	Color Trial Ann	0.0.1.1017	6 (11 (2022