Manage your Microsoft Dynamics CRM Online subscription guide

Version 8.0

Microsoft Dynamics CRM Online 2016 Update

Microsoft Dynamics CRM

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Manage your Microsoft Dynamics CRM Online subscription

If you're an administrator who performs tasks associated with your organization's subscription to Microsoft Dynamics CRM Online, this documentation is designed for you. Plus, it can also help other users to ramp up with CRM Online.

If you don't have CRM Online, sign up for a free 30-day trial.

The topic is a roadmap of key administrative and deployment tasks, from adding and registering users through preparing the system for first use, and sending email to users inviting them to access the online service. There are links to step-by-step instructions for every task.



Note

This documentation doesn't include information about a federated deployment that allows single sign-on (SSO). For more information about identity federation and SSO with the Microsoft Online Services environment, see Prepare for single sign-on.

If you subscribe through Microsoft Online Services, you can also read about how Microsoft Dynamics CRM Online interacts with Microsoft Office 365. You will learn how this subscription provides you with a single location to manage your subscription to CRM Online and other Office 365 services.

More information:

- **Product support**
- Billing and subscription support

To get a print version of this document, download Microsoft Dynamics CRM Online deployment, administration, and migration documentation.

In This Section

Release history

Manage Microsoft Dynamics CRM Online updates

Get started administering Microsoft Dynamics CRM Online

Manage subscriptions, licenses, and user accounts

Manage Microsoft Dynamics CRM Online instances

Manage email notifications

Add Office 365 Online services

Add interoperation features to Microsoft Dynamics CRM Online

Migrate Microsoft Dynamics CRM Online to Microsoft Dynamics CRM on-premises

Accessibility in Microsoft Dynamics CRM

Help and additional resources for Microsoft Dynamics CRM Online

Troubleshooting: Unblock URLs required for CRM Online

Release history

This is the release history page for the <u>Manage your Microsoft Dynamics CRM Online</u> <u>subscription</u> documentation

In This Topic

December 2015

August 2015

July 2015

May 2015

March 2015

September 2014

May 2014

December 2013

October 2013

September 2013

May 2013

August 2012

December 2015

| New and updated topics | Description of changes |
|--|--|
| Add interoperation features to Microsoft | Added the following new topics: |
| Dynamics CRM Online | Deploy CRM App for Outlook (lightweight app) |
| | Enable OneNote integration |
| | Enable OneDrive for Business |
| | Enable Office Delve |
| Manage Microsoft Dynamics CRM Online | Added the following new topics: |
| <u>instances</u> | Switch an instance |
| | Delete an instance |
| | Updated content for changes to storage and |
| | instance health. |
| | Manage storage for Microsoft Dynamics |

| New and updated topics | Description of changes |
|--|--|
| | CRM Online |
| | How do I check my online service health? |
| Manage Microsoft Dynamics CRM Online | New and updated content. |
| <u>updates</u> | |
| Multiple online instances or tenants | Sandbox instance limit increased to 75. |
| Policies and Communications for CRM Online | New and updated content. |
| Deploy CRM App for Outlook (lightweight app) | Added requirement: Synchronization of appointments, contacts, and tasks through server-side synchronization. |

August 2015

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|--|-----------------------------------|
| For partners: the Delegated Administrator | Added a new topic. |
| Deploy CRM App for Outlook (lightweight app) | Updated requirements information. |

July 2015

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|--|---|
| How do I check my online service health? | Added a new topic. |
| Deploy CRM App for Outlook (lightweight app) | Updated requirements information. |
| Manage Microsoft Dynamics CRM Online updates | Changed In-product alert from "No" to "Yes" for 7 days before update if Admin approved. |
| Reset a user's password | Added a new topic. |
| Set up CRM Online to use Exchange Online | Updated to for user interface changes. |
| Set up CRM Online to use Skype or Skype for Business | Updated for Skype and user interface changes. |
| What is Office 365 and how does it relate to | Added Terminology section. |

| New and updated topics | Description of changes |
|--------------------------------------|---|
| CRM Online? | |
| Multiple online instances or tenants | Changed the Sandbox instance limit from 10 to 75. |

May 2015

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|---|---|
| Get started administering Microsoft Dynamics CRM Online | Added the following new topics: What is Office 365 and how does it relate to CRM Online? What's an Office 365 user ID and why do CRM Online users need one? |
| | What's the Office 365 admin center and how does it relate to CRM Online? |
| Deploy Office 365 Groups | Added a new topic. |
| Deploy CRM App for Outlook (lightweight app) | Added a new topic. |

March 2015

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|--|--|
| Manage Microsoft Dynamics CRM Online updates | Added the following sections: • Update scenarios • Recent versions of CRM Online • Deciphering the update information |
| Microsoft Dynamics CRM Online Government | Added a new topic. |
| New datacenter regions for CRM Online | Added a new topic. |

September 2014

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|--|---|
| Create and edit multiregional instances | Added a new topic. |
| Manage Microsoft Dynamics CRM Online updates | Updated with information for the new CRM Online update process. |
| Sign in to CRM Online services | Added a new topic. |

May 2014

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|---|--|
| Licensing plans for Microsoft Dynamics CRM Online | Added information about new Entreprise licensing plan. |
| Manage Microsoft Dynamics CRM Online instances | Updated several topics in this section that describe how CRM Online instances are now managed in the CRM Online Administration Center. |
| Add Office 365 Online services | Added this new section that covers how to integrate key Office 365 Online services with CRM Online. |

December 2013

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|--|--|
| Verify new areas are available in the navigation bar | Added a note about using zoom out to see the entire contents of the SubArea table. |

October 2013

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|--------------------------------------|---|
| Manage Microsoft Dynamics CRM Online | Added a new section "Verify new areas are |
| <u>updates</u> | available in the navigation bar." |

| New and updated topics | Description of changes |
|--|--|
| Verify new areas are available in the navigation bar | Added this topic to describe a new step that was added to the Post-upgrade steps for servers topic. |

September 2013

The following table lists the significant changes made to this version of the document.

| New and updated topics | Description of changes |
|---|------------------------|
| Manage Microsoft Dynamics CRM Online updates | Added new topic. |
| Licensing plans for Microsoft Dynamics CRM Online | Added new topic. |
| Manage email notifications | Added new topic. |

May 2013

Minor updates.

August 2012

Initial release

See Also

Manage your Microsoft Dynamics CRM Online subscription

Manage Microsoft Dynamics CRM Online updates

You have options for when you update your Microsoft Dynamics CRM Online and to what version you update. To prepare for a smooth process, use the information in this topic.

You, as a CRM system administrator, decide when to install Microsoft Dynamics CRM Online service updates for your organization. To update to the latest release of CRM Online, complete these two steps:

- 1. Review the information on the <u>Manage Your CRM Online instances</u> page (in the CRM Online Administration Center) to find out what instances are ready to update, and the schedule.
- 2. Approve the update.

Important

Your instance will not be updated unless you approve it. This means your organization will go without the latest features and functionality until you explicitly give approval for the update to happen. Keep in mind, we do have an update policy that will make some updates mandatory, with no approval required. Please see Update policy below for further details.

You'll receive an email before the service update is available with a scheduled update date. This email will also include instructions about how to reschedule the update, if you choose. You'll receive reminders 90, 30, 15, and 7 days before the update begins. The service update will happen during a 12-hour window, and during that time your organization might be unavailable for several hours. Most updates typically take 2-4 hours. We'll let you know when your organization is updated and ready to use. For more information, see the Schedule for update communications later in this topic.



If you're a Microsoft Dynamics CRM Online customer who is in the process of transitioning billing to the Microsoft Online Services environment, note that a CRM Online service update is not the same as the subscription billing transition. The billing transition is a one-time occurrence that affects your billing platform. Service updates are recurring releases that affect the features and capabilities that you receive in CRM Online.

In this topic

Update policy

Update scenarios

Recent versions of CRM Online

How will I know my organization is ready to update?

Deciphering the update information

Approve an update

Reschedule an update

Send email notifications to multiple recipients

What happens after an update is approved?

Prepare your CRM organization for the update

Checklist for the CRM Online update

After the update

Schedule for update communications

Request service

Update policy

Microsoft delivers new features and improvements to the CRM Online service twice a year through service updates. To ensure our customers always get the best possible value, we advise customers to run the latest version of the service. However, we also realize that in certain circumstances, some customers are unable to update their solutions with the frequency of our service updates.

In early 2015 we enhanced the customer experience by giving customers the ability to provide consent prior to updating their organization. Customers today have a wide choice of days to choose from to best suit their business, and we will continue to provide that flexibility for service updates. In Fall of 2015, customers will have the choice to take the two updates as they become available, or take only one update per year. If a customer chooses to take only one update per year, this update becomes mandatory and the customer will be required to take the update during the available dates for that release.

In other words, at any given point a customer must be on the current version (n) or a version prior (n-1). For example, if you are on CRM Online Spring '14 (n-2) and chose not to take the available CRM Online 2015 Update (n-1), then you would need to take CRM Online 2015 Update 1 (n) as a mandatory update. This policy is intended to provide the latest and greatest features and platform experience to our customers to ultimately suit their business needs.

Update scenarios

Your CRM Online update process depends on what version (<u>Recent versions of CRM Online</u>) you have and how you'd like to update. Consider the following scenarios.



- For information on the update process, see <u>Manage Microsoft Dynamics CRM Online</u> updates
- For information on CRM Online instances, see <u>Manage Microsoft Dynamics CRM Online</u> instances

Microsoft Dynamics CRM Online 2015 Update – Approach One (recommended)

This scenario applies to those who have Production and Sandbox instances of CRM Online 2015 Update.

For version information, see: Recent versions of CRM Online

Recommended update approach

- 1. Update your CRM Online 2015 Update Sandbox instance to CRM Online 2015 Update 1.
 - a. Select your CRM Online 2015 Update Sandbox instance and approve the update to target version CRM Online 2015 Update 1.
 - b. Once your Sandbox instance has been updated to Microsoft Dynamics CRM Online 2015 Update 1, test the update for your solutions and customizations.

If the update is unsuccessful, reset the Sandbox instance and reschedule the update until any issues are resolved.

- 2. Update your CRM Online 2015 Update Sandbox instance to CRM Online 2015 Update 1.
 - a. When the CRM Online 2015 Update 1 update becomes available, select your CRM Online 2015 Update Sandbox instance and approve the update to target version CRM Online 2015 Update 1.
 - b. Once your Sandbox instance has been updated to CRM Online 2015 Update 1, test the update for your solutions and customizations.
 - If the update is unsuccessful, reset the Sandbox instance and reschedule the update until any issues are resolved.
 - c. Prepare a plan to train your users for the changes in CRM Online 2015 Update 1.
- 3. Update your CRM Online 2015 Update Production instance to Microsoft Dynamics CRM Online 2016 Update, skipping CRM Online 2015 Update 1.
 - a. Do not approve the CRM Online 2015 Update 1 update.



Note

If you have already approved the update, you can change the scheduled date to coincide with the availability of CRM Online 2016 Update.

- b. When the CRM Online 2016 Update update becomes available, select your CRM Online 2015 Update Production instance and approve the update to target version CRM Online 2016 Update.
- c. Once your Production instance has been updated to CRM Online 2016 Update, confirm the update for your solutions and customizations.
 - If the update is unsuccessful, reset the Sandbox instance and reschedule the update until any issues are resolved.
- d. Train your users for the changes in CRM Online 2016 Update.

Microsoft Dynamics CRM Online 2015 Update – Approach Two

This scenario applies to those who have Production and Sandbox instances of CRM Online 2015 Update.

For version information, see: Recent versions of CRM Online

Recommended update approach

- 1. Update your CRM Online 2015 Update Sandbox instance to CRM Online 2015 Update 1.
 - a. Select your CRM Online 2015 Update Sandbox instance and approve the update to target version CRM Online 2015 Update 1.
 - b. Once your Sandbox instance has been updated to CRM Online 2015 Update 1, test the update for your solutions and customizations.
 - If the update is unsuccessful, reset the Sandbox instance and reschedule the update until any issues are resolved.

- 2. Update your CRM Online 2015 Update Sandbox instance to CRM Online 2015 Update 1.
 - a. Select your CRM Online 2015 Update Sandbox instance and approve the update to target version CRM Online 2015 Update 1.
 - b. Once your Production instance has been updated to CRM Online 2015 Update 1, apply what you learned from the Sandbox instance update and confirm your Production instance update.
- 3. Update your CRM Online 2015 Update 1 Sandbox instance to CRM Online 2016 Update.
 - a. When the CRM Online 2016 Update update becomes available, select your CRM Online 2015 Update 1 Sandbox instance and approve the update to target version CRM Online 2016 Update.
 - b. Once your Sandbox instance has been updated to CRM Online 2016 Update, test the update for your solutions and customizations.
 - If the update is unsuccessful, reset the Sandbox instance and reschedule the update until any issues are resolved.
 - c. Prepare a plan to train your users for the changes in CRM Online 2016 Update.
- 4. Update your CRM Online 2015 Update 1 Production instance to CRM Online 2016 Update.
 - a. When the CRM Online 2016 Update update becomes available, select your CRM Online 2015 Update 1 Production instance and approve the update to target version CRM Online 2016 Update.
 - b. Once your Production instance has been updated to CRM Online 2016 Update, apply what you learned from the Sandbox instance update and confirm your Production instance update.
 - c. Train your users for the changes in CRM Online 2016 Update.

CRM Online 2015 Update 1

This scenario applies to those who have Production and Sandbox instances of CRM Online 2015 Update 1.

For version information, see: Recent versions of CRM Online

Recommended update approach

- 1. Update your CRM Online 2015 Update 1 Sandbox instance to CRM Online 2016 Update.
 - a. When the CRM Online 2016 Update update becomes available, select your CRM Online 2015 Update 1 Sandbox instance and approve the update to target version CRM Online 2016 Update.
 - b. Once your Sandbox instance has been updated to CRM Online 2016 Update, test the update for your solutions and customizations.
 - If the update is unsuccessful, reset the Sandbox instance and reschedule the update until any issues are resolved.
 - c. Prepare a plan to train your users for the changes in CRM Online 2016 Update.
- 2. Update your CRM Online 2015 Update 1 Production instance to CRM Online 2016 Update.

- a. When the CRM Online 2016 Update update becomes available, select your CRM Online 2015 Update 1 Production instance and approve the update to target version CRM Online 2016 Update.
- Once your Production instance has been updated to CRM Online 2016 Update, apply what you learned from the Sandbox instance update and confirm your Production instance update.
- c. Train your users for the changes in CRM Online 2016 Update.

Recent versions of CRM Online

To determine your version, sign in to CRM, and in the upper-right side of the screen, click the **Settings** button **Settings** > **About**.

| Version | Availability | Information |
|----------------------------------|---------------------|--|
| CRM Online 2015 Update (7.0.0) | December 2014 | Help & Training: Get ready for the next release - Fall 2014 tab |
| CRM Online 2015 Update 1 (7.1.0) | Second quarter 2015 | What's new for administrators and customizers in Microsoft Dynamics CRM 2015 Help & Training: Get ready for the next release - Spring 2015 tab |
| CRM Online 2016 Update | December 2015 | What's new for administrators and customizers in Microsoft Dynamics CRM 2016 and CRM Online Help & Training: Get ready for the next release - Fall 2015 tab |

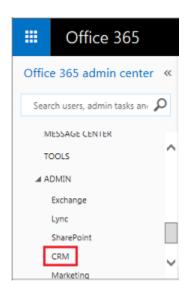
We've changed the way we name product updates. We're now using version numbers. More information: New naming conventions for Microsoft Dynamics CRM updates

How will I know my organization is ready to update?

CRM system administrators will be informed of updates to Microsoft Dynamics CRM Online in multiple ways.

Check your instances in the CRM Online Administration Center

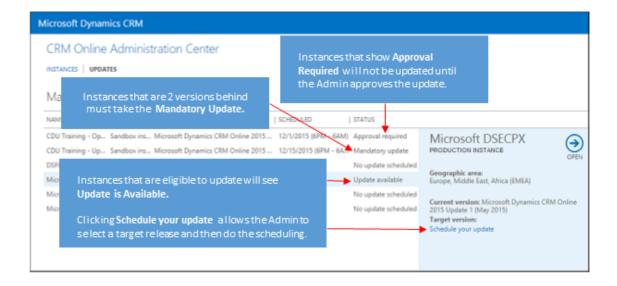
- 1. Sign in to https://portal.office.com.
- 2. In the Office 365 admin center, click Admin > CRM.



3. On the Instances page, click **Updates**, and then review the update status for your CRM Online instances.

Note the following:

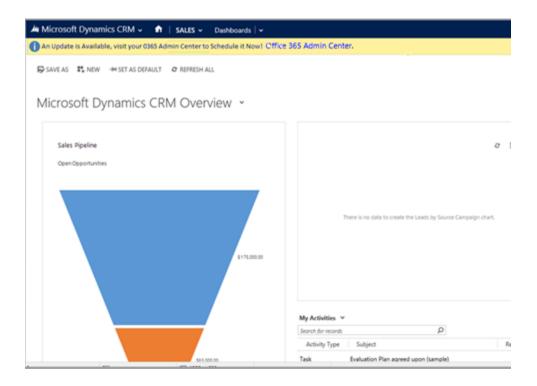
- Instances that are eligible to update will see **Update is Available**.
- Clicking Schedule your update lets the admin select a target release and then do the scheduling.



A notification appears in your CRM Online web application

1. Sign in to your CRM Online instance.

2. If an update is available, admins will see a yellow CRM message bar notifying them of an available update.

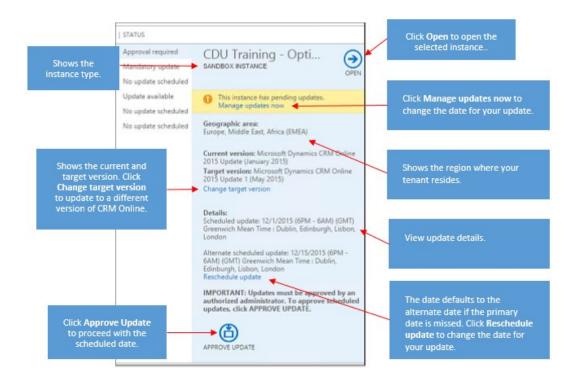


Update notification emails are sent to admins

CRM system administrators will receive an email from the Microsoft Dynamics CRM Online Team. You can use the links in the email to learn more about your update or reschedule it.

Deciphering the update information

The "Manage your Dynamics CRM updates" page is your source for useful information and actions to take regarding your update.



Note

If you are eligible to update to multiple versions of CRM Online, you'll see an option Change target version. Large companies with extensive and complex customizations to their CRM may choose to upgrade to a later release instead of the first available. So you get the most up-to-date features and fixes, we highly recommend you upgrade to the latest version when available.

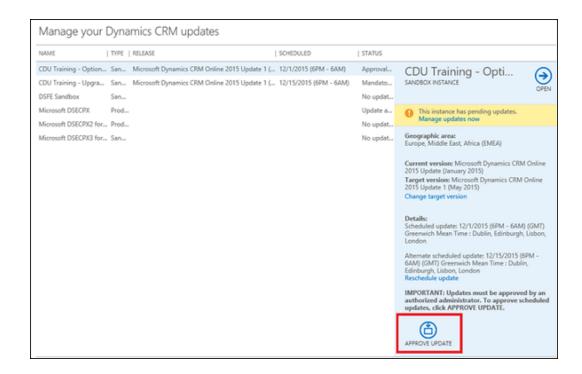
Approve an update

You must be a CRM system administrator to approve updates.

- 1. Sign in to https://portal.office.com.
- 2. In the Office 365 admin center, click Admin > CRM, and then on the Instances page click Updates.
- 3. Choose the instance to approve.
- Click Approve Update to approve and proceed with the update.



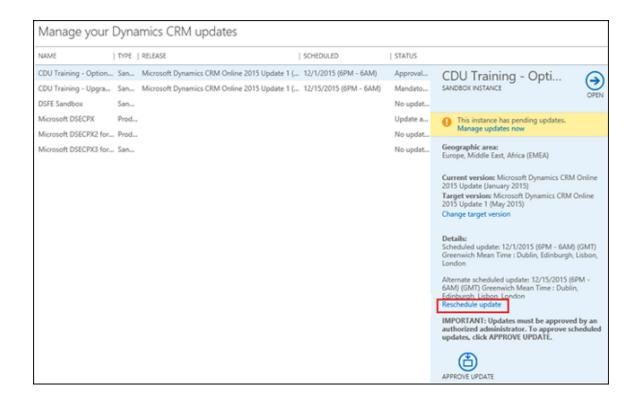
Once you approve an update, you can still reschedule it as long as the update has not started.



Reschedule an update

You must be a CRM system administrator to reschedule updates.

- 1. Sign in to https://portal.office.com.
- 2. In the Office 365 admin center, click **Admin > CRM**, and then on the Instances page click **Updates**.
- 3. Choose the instance update to reschedule, and then click **Reschedule update**.



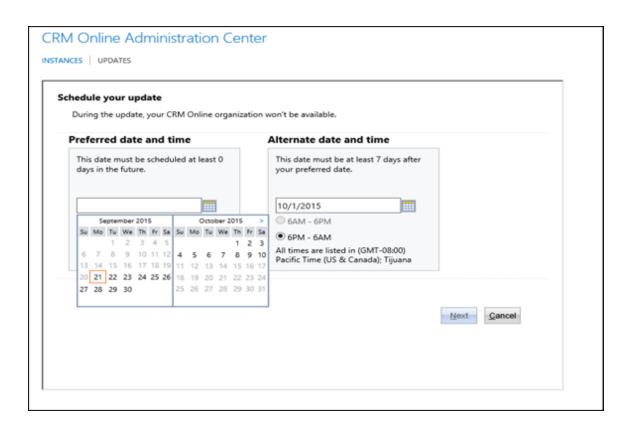
4. If you are eligible to update to multiple versions of CRM Online, you'll see a page to select a target version. Select a version, and then click Next.



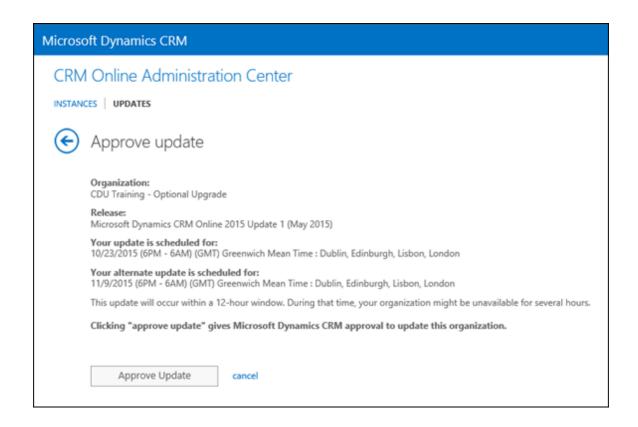
Note

Large companies with extensive and complex customizations to their CRM may choose to upgrade to a later release instead of the first available. So you get the most up-to-date features and fixes, we highly recommend you upgrade to the latest version when available. Keep in mind, if you are two versions behind the current version you will have a mandatory update. See <u>Update policy</u> for more information.

5. Select new preferred and alternate dates and times for the update, and then click Next.



6. Review the new dates and times, and then click **Approve Update**.

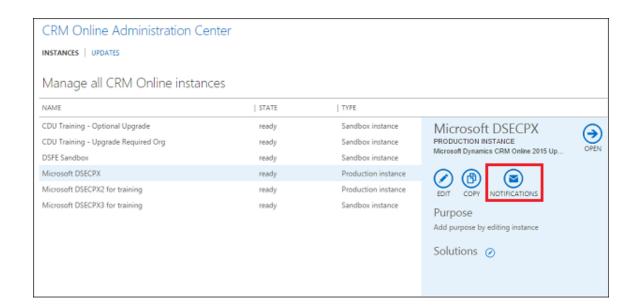


7. The Status column will indicate your update is approved.

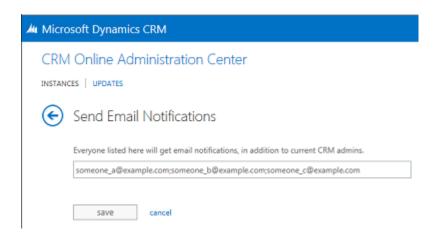
Send email notifications to multiple recipients

By default, CRM admins will receive update notifications. You can add others to receive update notifications.

- 1. Sign in to https://portal.office.com.
- 2. In the Office 365 admin center, click Admin > CRM, and then click Instances.
- 3. Choose an instance that has notifications you want to change, and then click **Notifications**.



4. Enter the email addresses of people to receive update notifications for the selected instance, and then click **Save**.



What happens after an update is approved?

When your update has started, you'll see **Update in progress** under **Status**. The **Reschedule** option will no longer be available.



When your update is done, you'll see **Updated successfully**.



Prepare your CRM organization for the update

Microsoft Dynamics CRM Online 2016 Update contains a number of exciting changes. To take advantage of new features, you need to ensure any customizations are compatible with this update.

Prepare your users

To prepare your users for the changes to CRM Online, visit <u>Get ready for the next release</u>, where you will find videos, walkthroughs, and other information that you can use to familiarize yourself with the new experience.

Checklist for the CRM Online update

Most of the update process is handled by Microsoft. However, there are a few things that you must do to prepare.

1. Know when your update is scheduled.

You will be informed of a pending update in multiple ways. See <u>How will I know my organization is ready to update?</u> in this topic.

2. Involve your Microsoft Dynamics CRM partner.

If you have a Microsoft Dynamics CRM partner of record, we strongly recommend that you contact them for guidance and assistance. If you do not have a partner, you may consult the Microsoft Dynamics Marketplace to identify a partner. Please note that there may be charges from partners for their services.

3. Watch for communications from Microsoft.

We will send you several communications about this subject to keep you informed about the update. In addition, we send email communications to users who have the System Administrator role in CRM. Please make sure the email accounts associated with those user accounts are valid and being monitored. Communications will come from crmoln@microsoft.com, or for partners, you will also receive communications from the Microsoft Dynamics CRM Partner Team: crmteam@microsoft.com.

4. Verify your customizations are compatible.

You should take the time before your update to verify that customizations are compatible using the <u>CRM Custom Code Validation Tool</u>. You should do this early enough that you have time to fix any identified issues. Additionally, Microsoft will run a number of automated tests, and if any of those tests fail in your instance, we will email the administrator a list of potential issues we have identified.

5. Create a non-production (Sandbox) instance in which you can test your customizations.

Ideally, you should test your customizations prior to update. This will also give you the opportunity to verify compatibility of any third-party customizations. If you identify any potential issues, please work with the solution provider to correct any issues that arise. More information: Manage CRM Online Sandbox instances

6. Notify your users prior to the update of CRM.

It is a best practice to notify your users that the system will be unavailable during the update. To get more resources to prepare users for the update, please visit Microsoft Dynamics CRM Help & Training.

7. Watch for Update Completion or Reschedule emails from Microsoft.

Once your organization is updated, you'll receive a notification from CRM Online indicating that your organization is ready to use.

After the update

Consider the following areas to attend to after your update.

Update Microsoft Dynamics CRM Online 2015 components

You can find more details about updating additional components, such as Microsoft Dynamics CRM for Outlook, in **Administering CRM 2015 for online and on-premises**.

Schedule for update communications

| When | Recipient | In-product alert | Email | Admin Center |
|------------------|------------|------------------|-------|--------------|
| Update scheduled | All Admins | Yes | Yes | Yes |
| 90 days before | All Admins | No | Yes | Yes |

| When | Recipient | In-product alert | Email | Admin Center |
|------------------------------|-------------------------|------------------|-------|--------------|
| update | | | | |
| 30 days before update | All Admins | No | Yes | Yes |
| 15 days before update | All Admins | No | Yes | Yes |
| 7 days before update | All Admins | Yes | Yes | Yes |
| Schedule confirmed by Admin | All Admins | No | Yes | Yes |
| Update in progress | All Admins and Users | No | No | Yes |
| Update successful | All Admins and Users | No | Yes | Yes |
| Fallback to secondary update | All Admins | No | Yes | Yes |
| Update rescheduled | All Admins | No | Yes | Yes |



Note

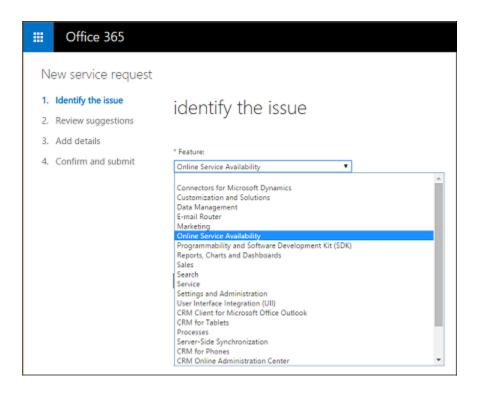
"All Admins" includes CRM system administrators and Office 365 Global administrators.

Request service

Having a problem with your CRM Online service? You can create a service request to get the issue resolved.

Create a CRM Online service request

- 1. Sign in to the Office 365 admin center.
- 2. In the left-side menu, click **Support > Overview**.
- 3. Under Create a service request, click Dynamics CRM Online. You may need to expand the list by choosing More.
- 4. Fill in the information and submit your request.



See Also

Get ready for the next release

Policies and Communications for CRM Online

Manage your Microsoft Dynamics CRM Online subscription

Manage email notifications

Policies and Communications for CRM Online

Microsoft regularly maintains and updates Microsoft Dynamics CRM Online to ensure security, performance, and availability, and to provide new features and functionality. From time to time, Microsoft also responds to service incidents. For each of these activities, the CRM admin for your organization receives email notifications. During a service incident, a CRM Online customer service representative may also call and follow up with an email.

If you're not sure who your CRM admin is, see <u>Help and Training: Find your CRM administrator or support person</u>.

If you want to change who receives email communications, see Manage email notifications.

If you're a CRM admin, you can also see the latest status of updates and incidents in the Microsoft Office 365 service health page. To learn how to get to the Office 365 service health page, see <u>View the status of your services</u>.

To learn more about each type of maintenance and update activity, as well as the communications your organization receives, click on one of the following, or scroll down:

In this topic

Planned maintenance

Unplanned maintenance

Security updates

Service updates

Service incidents

Major service incidents

Service restored

General awareness

Launch and post launch readiness communications

Post-purchase customer lifecycle communications

Planned maintenance

Planned maintenance includes updates and changes to the CRM Online service to provide increased stability, reliability, and performance. These changes can include:

- Hardware or infrastructure updates
- Integrated services, such as a new version of Office 365 or Microsoft Azure
- CRM Online service changes and software updates
- Minor service updates to CRM Online that occur about 10 times per year

How do I find out about planned maintenance?

Your organization receives a "Planned Maintenance" email five days before the planned maintenance. These emails go out to all CRM Online System Administrators in every CRM Online instance that is scheduled for the planned maintenance.

You can also see the schedule and status of planned maintenance activities on the Office 365 service health page. To learn how to get to the Office 365 service health page, see <u>View the status of your services</u>.

Unplanned maintenance

From time to time, CRM Online inevitably encounters unplanned issues that require changes to ensure availability. Microsoft strives to provide as much notification as possible during these events. Because these events can't be predicted, they are not considered planned maintenance.

How do I find out about unplanned maintenance?

Your organization receives an "Unplanned Maintenance" email. These emails go out to all CRM Online System Administrators in every CRM Online instance that is affected by the unplanned maintenance.

You can also see the status of current unplanned maintenance activities on the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

Planned and unplanned maintenance emails can be identified by the light-orange banner.



Security updates

The CRM Online team regularly performs the following to ensure the security of the system:

- Scans of the service to identify possible security vulnerabilities
- Assessments of the service to ensure that key security controls are operating effectively
- Evaluations of the service to determine exposure to any vulnerabilities identified by the Microsoft Security Response Center (MSRC), which regularly monitors external vulnerability awareness sites

The CRM Online team identifies and tracks any identified issues, and takes swift action to mitigate risks when necessary.

How do I find out about security updates?

Because the CRM Online team strives to apply risk mitigations in a way that doesn't require service downtime, CRM administrators usually don't receive emails for security updates. If a security update does require service downtime, it is considered planned maintenance.

For more information about CRM Online security, see Microsoft Dynamics CRM Trust Center.

Service updates

CRM Online typically releases two major service updates per year. Service updates provide new features and functionality to CRM Online.

Improvements in the update process put the power in your hands for scheduling your organization's service updates. You can choose from a list of available dates. Service updates are only applied after they are approved by the CRM Online admin - please review the important note below outlining the CRM online update policy. This helps you to plan well in advance for your upgrade path, while using your sandbox organization to properly test and evaluate the service updates with your existing production code.



Important

Be sure to check out Update policy for important information about updating to the latest version.

How do I find out about service updates?

The CRM Online team preschedules customers for the service update and emails CRM Online admins 90 days before the scheduled update. CRM Online admins receive additional emails at 90 days, 30 days, 15 days, 7 days, 0 or day of, and post update.

In the email, you have the opportunity to either approve the scheduled date or reschedule the update from a list of dates. All customers are updated during the defined service update release period, usually over a three-month window.

To find out more about rescheduling service updates, see <u>Manage Microsoft Dynamics CRM</u> Online updates.

To find out what's new and how to prepare for the next release, check out the following resources:

- What's new in CRM Online
- Get ready for the next release

Also be sure to watch this video about improvements to the update process:

Customer Driven Updates in CRM Online 2015 Update 1

Emails regarding the scheduling or rescheduling of your update will be sent with a light-blue banner.

Microsoft Dynamics CRM Online

Service incidents

A service incident occurs when your organization is inaccessible or you're unable to use the service or one of its components. Examples include:

- Getting a "page not found" or 404 error when you try to access CRM Online.
- All of your users are unable to sign in to your organization.
- Your users can sign in, but can't save their changes.
- Users can sign in, but see a blank screen.

How do I find out about service incidents?

If you open a case to report a service incident, a Microsoft customer support representative will call your CRM admin and follow up with an email when the service incident is resolved.

Major service incidents

A major service incident occurs when multiple organizations can't access the service.

How do I find out about major service incidents?

The Microsoft policy is to send email updates to the CRM admins of affected customers within 15 minutes of a major service incident, and a final email once the issue is considered resolved.

You can also see the status of major service incidents in your Office 365 service health page. To learn how to get to the Office 365 service health page, see <u>View the status of your services</u>.

In addition, five business days after the incident resolution, the CRM Online team publishes a post-incident report (PIR) to the Office 365 service health page. This report summarizes the following details about the incident:

- Description
- Root cause
- Customer impact
- Start date and time
- Resolution date and time
- Next steps

If the service incident breaches your <u>Service Level Agreement</u>, you can claim a billing credit according to the conditions of your <u>Service Agreement</u>. If you need help with this, see <u>Billing FAQs</u> for CRM Online.

Major service incident emails can easily be identified by the orange banner.



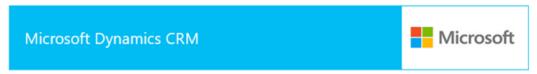
Service restored

Microsoft will send you an email when normal system services have been restored. You can easily identify these emails by the light-green banner.



General awareness

These emails are specific to managing the CRM Service, including changes with the service or feature offerings. They can be informational in nature, drive specific actions, or both. The target audience for these communications are CRM System Administrators or individuals designated to running the service. You can easily identify these by the light-blue banner.



Launch and post launch readiness communications

These communications are used to inform CRM administrators about important information prior to a major service release. Our goal is to share information about tasks that administrators may need to perform before the release and to inform customers about new or enhanced capabilities that are coming in the release. You'll see a green banner when receiving these types of communications.



Post-purchase customer lifecycle communications

Once a customer has purchased CRM Online, we send a series of helpful email communications to CRM administrators during the first year. These communications direct customers to a number of resources that will assist both administrators and users to successfully adopt and expand their use of Microsoft Dynamics CRM Online.

You can easily identify these communications by the dark-blue banner.



See Also

Manage Microsoft Dynamics CRM Online updates

CRM Online Service Blog

Manage your Microsoft Dynamics CRM Online subscription

Get started administering Microsoft Dynamics CRM Online

This section looks at the overall process of deployment and what it takes to get the service ready for users.

Microsoft Dynamics CRM Online is an online service offered by subscription through Microsoft Online Services environment. Microsoft installs the service on its servers and maintains it for you. However, as the administrator, some tasks remaining for you are: add information about your organization, create business units if needed, license and register your users, assign security roles to users, and configure user access to the service. You can then add or import your organization's data and invite users to access CRM Online.

When you manage the subscription in the Microsoft Online Services environment, the hands-on deployment takes place in two steps. The first step takes place in the Office 365 admin portal and covers the initial tasks that are necessary to set up your subscription to the CRM Online service

and to register users to be recognized by the service. You complete these initial tasks in the administrative areas of the Office 365 admin portal. You only need to do these tasks once, unless you add users to the system or purchase additional storage or services.

The second step takes place in CRM Online. Here you work on administrative tasks that include assigning users to at least one security role (a user must have at least one security role to access the system), preparing the system for first use, and importing your current CRM data. When you finish these tasks, your users can access CRM Online through email invitations sent by the Microsoft Online Services environment.

If you manage the subscription in CRM Online, you do the initial administrative tasks directly in CRM Online. You create business units, if needed, create users, and assign security roles, prepare the system for first use, and import your current CRM data. When you finish these tasks, your users can access CRM Online through email invitations.



∏ Tip

For onboarding resources, check out the Microsoft Dynamics CRM Online Onboarding Success Center.

In This Section

Sign in to CRM Online services

How do I check my online service health?

What is Office 365 and how does it relate to CRM Online?

What's an Office 365 user ID and why do CRM Online users need one?

What's the Office 365 admin center and how does it relate to CRM Online?

Microsoft Dynamics CRM Online requirements

Licensing plans for Microsoft Dynamics CRM Online

Plan for Microsoft Dynamics CRM Online deployment and administration

Import data into Microsoft Dynamics CRM Online

Customizations for Microsoft Dynamics CRM Online

Related Sections

Sign up for a free 30-day trial. No credit card information or software installation is required.

Manage subscriptions, licenses, and user accounts

Manage Microsoft Dynamics CRM Online instances

Manage Microsoft Dynamics CRM Online updates

Manage email notifications

Add interoperation features to Microsoft Dynamics CRM Online

Accessibility in Microsoft Dynamics CRM

Help and additional resources for Microsoft Dynamics CRM Online

See Also

Manage your Microsoft Dynamics CRM Online subscription

Sign in to CRM Online services

Multiple Microsoft Dynamics CRM Online services (Microsoft Social Engagement, Microsoft Dynamics Marketing, Yammer, etc.) are now available. You can sign in to these services using the Office 365 admin center or sign in directly.



Admins, be sure to share this information with your end users.

In This Topic

For admins: sign in to the Office 365 admin center

End users and https://portal.office.com

Direct sign in to CRM Online

Direct sign in to Microsoft Social Engagement

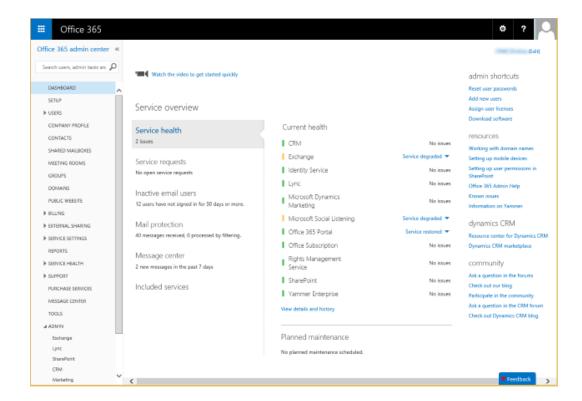
Direct sign in to Microsoft Dynamics Marketing

For admins: sign in to the Office 365 admin center

A single URL gives admins access to all the CRM Online services associated with their Microsoft Online Services environment:

https://portal.office.com

In the Office 365 admin center, you can see your service health, manage users, manage licenses, and more for all the online services associated with your account.



More information: What's the Office 365 admin center and how does it relate to CRM Online?

End users and https://portal.office.com

When end users sign in to https://portal.office.com, what they see varies based on the user account licenses:

In the table below, **X** means the user has a license for that service.

| | | | If you have these licenses | | | |
|---|---|---|----------------------------|---|---|---|
| CRM Online | x | x | x | x | | |
| Office 365 Enterprise Plan | x | X | | | x | |
| Microsoft Social Engagement or Dynamics Marketing | x | | x | | x | x |

| | | | If you have these licenses | | | |
|------------------------------|--------------------------------------|--------------------------------------|----------------------------|---------------|---|---|
| this is the page that opens: | Get started, then Outlook on the web | Get started, then Outlook on the web | CRM Online | CRM Online | Get started, then Outlook on the web | Microsoft Social Engagement or Dynamics Marketing |

For example:

- Users with only a CRM Online license will sign in to CRM Online.
- Users with an Office 365 license and any other service license will see the "Get started with Office 365" page for 30 days and then Outlook on the web after 30 days.
- Users licensed for Microsoft Social Engagement or Microsoft Dynamics Marketing will sign in to CRM Online if they have a CRM Online license and no Office 365 license.

Note: In Outlook on the web, you can use the Office 365 app launcher to open CRM Online.

Direct sign in to CRM Online

To directly sign in to the CRM Online service, use:

https://<organization>.crm.dynamics.com



For other regions, replace .crm with:

- .crm2 for South America (LATAM/SAM)
- .crm4 for Europe, Middle East, Africa (EMEA)
- .crm5 for Asia Pacific (APAC)
- .crm6 for Oceania (OCE)
- .crm7 for Japan (JPN)
- .crm9 for United States of America Government

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or you have a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

Direct sign in to Microsoft Social Engagement

To directly sign in to the Microsoft Social Engagement service, use:

https://listening.microsoft.com/app/<appID>

This URL which includes the appID is sent to the CRM administrator in an email invitation.

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or you have a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

Direct sign in to Microsoft Dynamics Marketing

To directly sign in to the Microsoft Dynamics Marketing service, use:

https://<tenant>.marketing.dynamics.com

This URL is sent to the CRM administrator in an email invitation.

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or you have a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

See Also

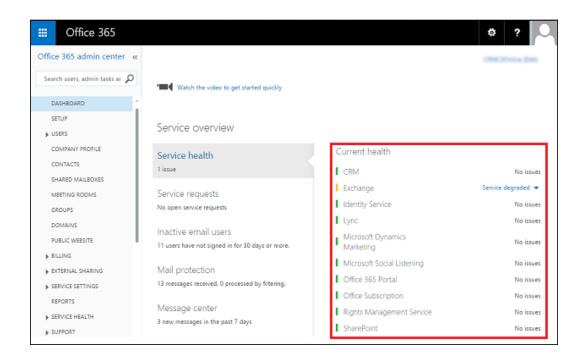
<u>Troubleshoot sign-in problems</u>
<u>Sign in to Microsoft Dynamics Marketing</u>
Social Engagement Help Center

How do I check my online service health?

You can quickly get a real-time status of your CRM Online and Office 365 services. The dashboard on the Office 365 admin center provides a comprehensive view of the service health of your online services. If users are having trouble signing in to CRM Online, check this page to see if there is a service outage.

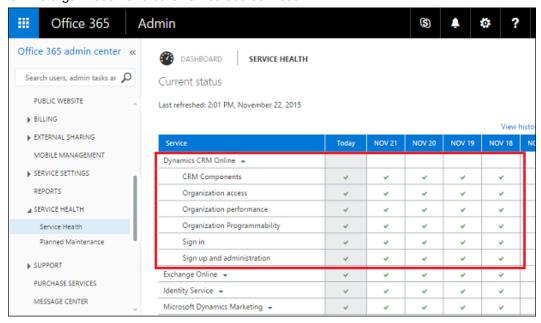
View a snapshot of service health

Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. You can see a quick snapshot of service health for all your Office 365 services. Under Current health, you can select services with issues to get more information.



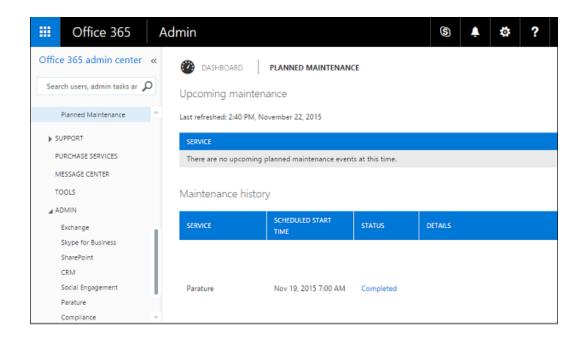
View CRM Online service health

Choose **Service Health** from the left-side menu to get detailed information about your CRM Online organization and other Office 365 services.



View planned maintenance

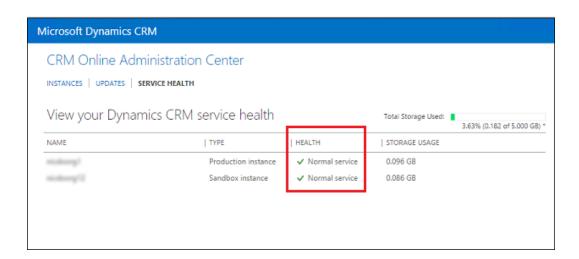
Choose Planned Maintenance to see if there are any scheduled events for your online service.



View instance service health

If your company has multiple instances of CRM Online, you can see the health status for individual CRM Online instances in the CRM Online Administration Center.

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- 3. Choose the Service Health tab.



What is Office 365 and how does it relate to CRM Online?

Office 365 is a collection of online services designed to work together to provide enterprise-grade, anywhere access to email, file sharing, and online meetings. Office 365 includes features that allow administrators to add users, manage passwords and licenses, and much more. Microsoft Dynamics CRM Online takes advantage of the Office 365 administration features to simplify user management. CRM Online users are created and managed in the Office 365 admin center.

A CRM Online subscription doesn't include Office 365 applications such as Exchange Online or SharePoint Online. You can significantly enhance your company's online, collaborative experience by integrating Office 365 applications with your CRM Online subscription. However, that requires a separate purchase. More information: Add Office 365 Online services



∏ Tip

You should also take a look at the data compilation and visualization possibilities with Power BI for Office 365. In addition, see the blog post Dynamics CRM Online in Power Query for a presentation on Power BI and Microsoft Dynamics CRM Online integration.

These videos provide a quick overview of Office 365 services for business:

- Office 365 feature selection 2:53
- Introducing Office 365 Enterprise 3:05

Terminology

| Term | Definition | |
|----------|---|--|
| Tenant | For Microsoft Dynamics CRM Online, a tenant is the account you create in the Microsoft Online Services environment when you sign up for a CRM Online subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple CRM Online instances. The tenant created for you has a domain name of <account>.onmicrosoft.com. For example,</account> | |
| Instance | contoso.onmicrosoft.com. When you sign up for a trial or purchase a Microsoft Dynamics CRM Online subscription, CRM Online production instance is created. Each additional production or non-production (Sandbox) CRM Online instance you add creates a separate and isolated Microsoft Dynamics CRM organization on the same tenant. | |

| Term | Definition |
|----------------|--|
| | An instance has the URL format: https:// <url name="">.crm.dynamics.com. For example, https://contososales.crm.dynamics.com.</url> |
| Subscription | A subscription consists of the CRM licenses and add-ons included with the trial or paid service you signed up for in your CRM Online account. CRM subscriptions can vary in license type, price, and end date. For example, a subscription might be 100 licenses of Microsoft Dynamics CRM Online Professional and 10 licenses of Microsoft Dynamics CRM Online Enterprise. |
| Identity | The user account used to sign in to CRM Online. You can also use this identity to access other Microsoft Online services, such as Office 365 or SharePoint Online. Administrators can decide if they want to federate user identity management between CRM Online and onpremises Active Directory. |
| User account | A user account assigned by an organization (work, school, non-profit) to one of their constituents (an employee, student, customer) that provides sign-in access to one or more of the organization's Microsoft cloud service subscriptions, such as Exchange Online or CRM Online. Access to an online service is controlled by the license assigned to the user account. User accounts are stored in an organization's cloud directory within Azure Active Directory, and are typically deleted when the user leaves the organization. Organizational accounts differ |
| | from Microsoft accounts in that they are created and managed by admins in the organization, not by the user. |
| Security group | If your company has multiple CRM Online instances, you can use instance security groups to control which licensed users can access a particular instance. More information: Control |

| Term | Definition | |
|------|---|--|
| | user access to instances: security groups and | |
| | licenses | |

See Also

Office 365 Service Descriptions

Compare all Office 365 for business plans

Add Office 365 Online services

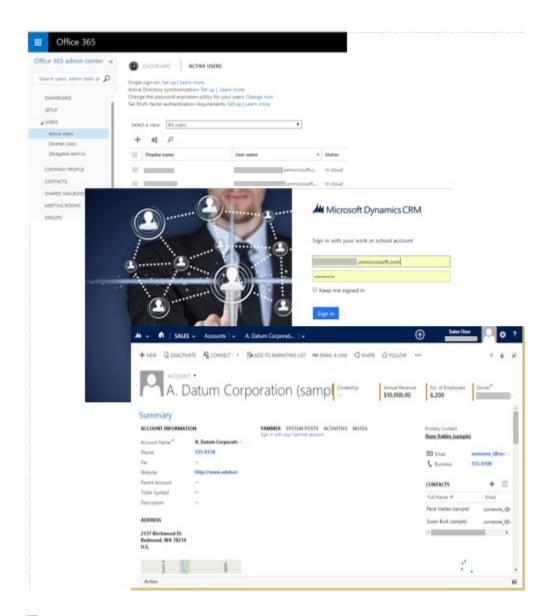
What's an Office 365 user ID and why do CRM Online users need one?

Each user signs in to Microsoft Dynamics CRM Online with an Office 365 user ID (more precisely, an Azure Active Directory user ID, see the Note later in this topic). Access to CRM Online is controlled through the Office 365 user ID.

The user ID is in this format: username@yourcompany.onmicrosoft.com. Please note that although it resembles an email address, this is a sign-in ID and not an email address. It can be used as an email address, but only if you have an Office 365 subscription with <u>Exchange Online</u>.

Many companies would like to use their own domain name, such as contoso.com, instead of onmicrosoft.com for user accounts. You can configure Office 365 to use your domain name so your CRM users can sign in with a format like *username@yourcompany.com* instead of *username@yourcompany.onmicrosoft.com*. More information: <u>Verify your domain in Office 365</u>

To manage Office 365 user IDs, sign in to the Office 365 admin center (https://portal.office.com). Here, you can do all sorts of administrative tasks such as create users, assign licenses, and maintain passwords.



Note

CRM Online uses <u>Azure Active Directory</u> as its identity provider. You access CRM Online through an Azure Active Directory user ID that's created and managed in the Office 365 admin center. For simplicity, we will refer to the Azure Active Directory user ID as the Office 365 user ID in this documentation.

If you company uses on-premises Active Directory for user identity, you have options that can simplify user management such as providing a single sign-on experience for your users. More information: <u>Manage user account synchronization</u>

See Also

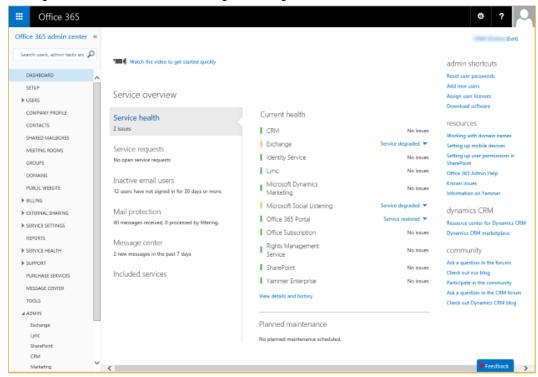
What is my user ID and why do I need it for Office 365?

What's the Office 365 admin center and how does it relate to CRM Online?

Add users, licenses, and security roles

What's the Office 365 admin center and how does it relate to CRM Online?

The Office 365 admin center is a portal site rich in features for the administrator. Microsoft Dynamics CRM Online takes advantage of the features on this site to simplify and consolidate management of user accounts, billing, licensing, and more.



Review the information in this topic to learn how to do common CRM Online administrative tasks in the Office 365 admin center.



Note

You must have the Global admin role to fully access the Office 365 admin center.

In This Topic

Open CRM and other services with the app launcher

Manage instances and updates in the CRM Online Administration Center

Check your service health

Review your messages

Request service

Manage users

Manage subscriptions

Set the password expiration

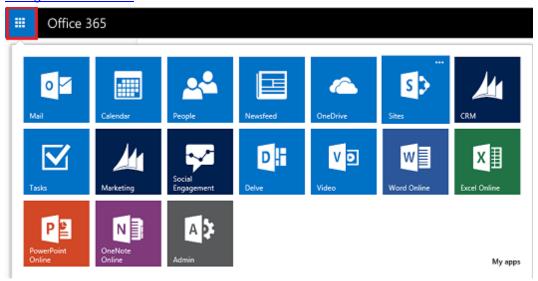
Configure self-service password reset and other settings in Microsoft Azure

Add your domain

Purchase services

Open CRM and other services with the app launcher

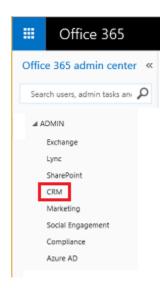
You can open CRM Online and other services such as Microsoft Dynamics Marketing and Microsoft Social Engagement from the Office 365 app launcher. Choose **Admin** to open the Office 365 admin center and **CRM** to open CRM Online. More information: Find help for the latest changes in Office 365



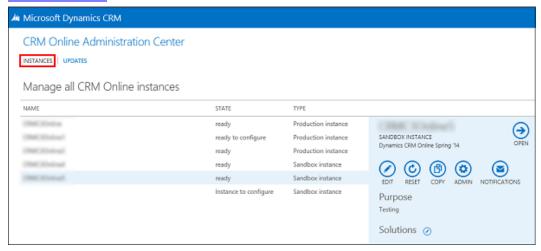
Manage instances and updates in the CRM Online Administration Center

The CRM Online Administration Center is your portal site to manage CRM Online instances and updates.

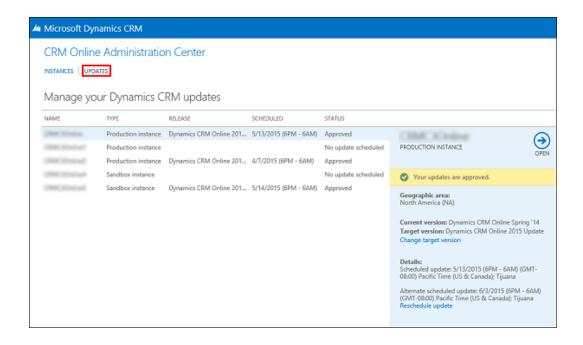
You access the portal by choosing CRM from the left-side menu in the Office 365 admin center.



Choose the **Instances** tab to edit, copy, and reset, existing instances, configure new instances, manage preferred solutions, and more. More information: <u>Manage Microsoft Dynamics CRM</u>
<u>Online instances</u>



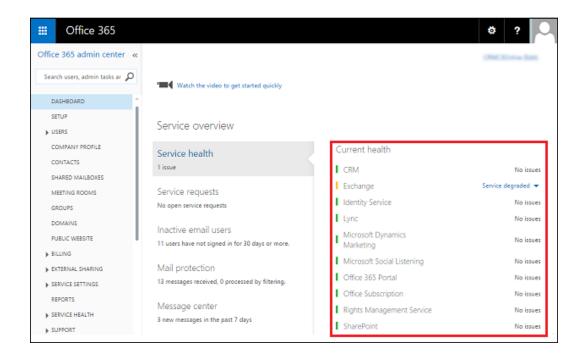
Choose the **Updates** tab to approve and schedule updates, change the update target version, and open CRM Online. More information: <u>Manage Microsoft Dynamics CRM Online updates</u>



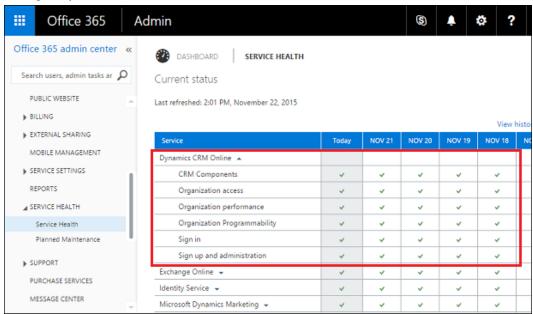
Check your service health

You can quickly get real-time status of your CRM Online and Office 365 services. The dashboard on the Office 365 admin center provides a comprehensive view of the service health of your online services. If users are having trouble signing in to CRM Online, check this page to see if there is a service outage.

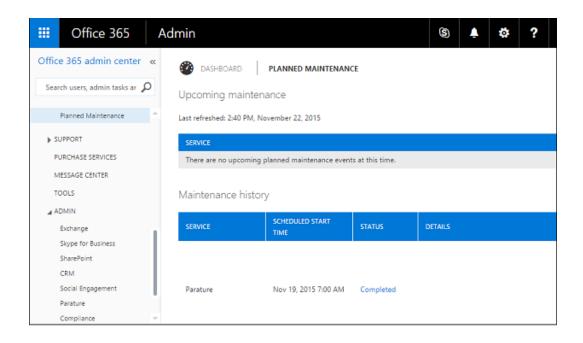
Under Current health, you can select services with issues to get more information.



Choose **Service Health** from the left-side menu to get more detailed information for each service arranged by date.

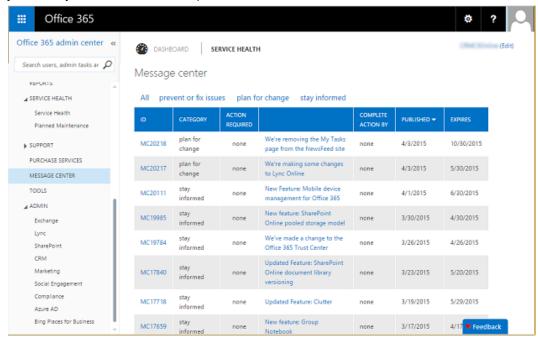


Choose Planned Maintenance to see if there are any scheduled events for your online service.



Review your messages

Check out the Message center to see how to fix or prevent issues, plan for service changes, or just to stay informed of new or updated features.

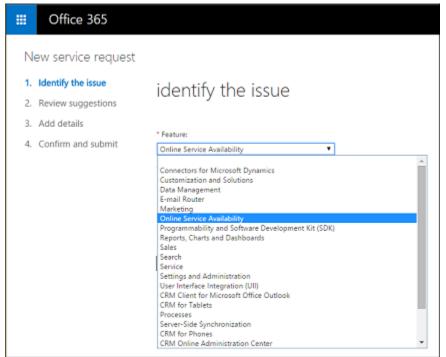


Request service

Having a problem with your CRM Online service? You can create a service request to get the issue resolved.

Create a CRM Online service request

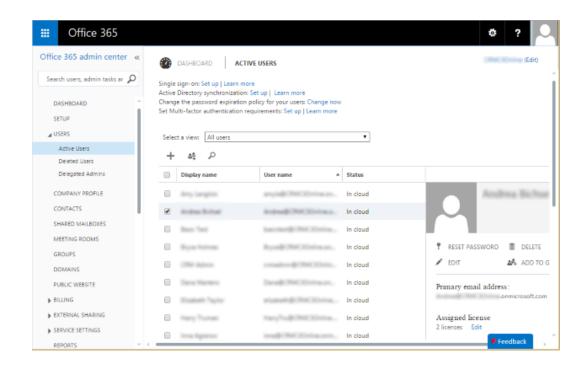
- 1. Sign in to the Office 365 admin center.
- 2. In the left-side menu, choose Support > Overview
- 3. Under **Create a service request**, choose **Dynamics CRM Online**. You may need to expand the list by choosing **More**.
- 4. Fill in the information and submit your request.



Manage users

Each user signs in to CRM Online with an Office 365 user ID (more precisely, an Azure Active Directory user ID, see the following Note). Access to CRM Online is controlled through the Office 365 user ID.

You use the Office 365 admin center to add, edit, and delete CRM Online users and to reset passwords.



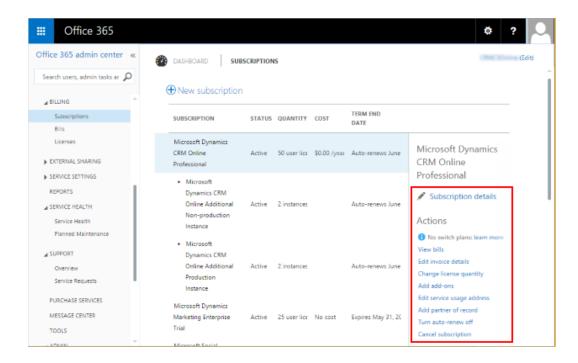
Note

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If your company uses on-premises Active Directory for user identity, you have options that can simplify user management such as providing a single sign-on experience for your users. More information: Manage user account synchronization

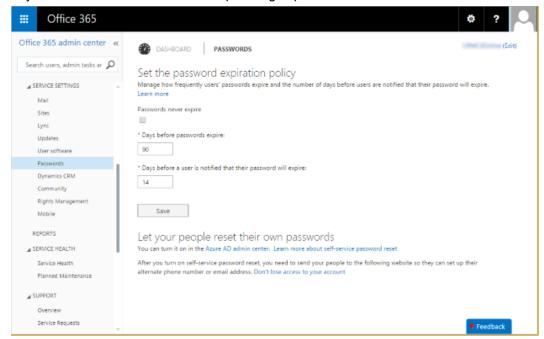
Manage subscriptions

Use the Subscriptions page to adjust licenses, view your bill, add a partner of record, and lots more.



Set the password expiration

Use the Passwords page to set how frequently a user's password expires and the number of days before a user is notified of an upcoming expiration.

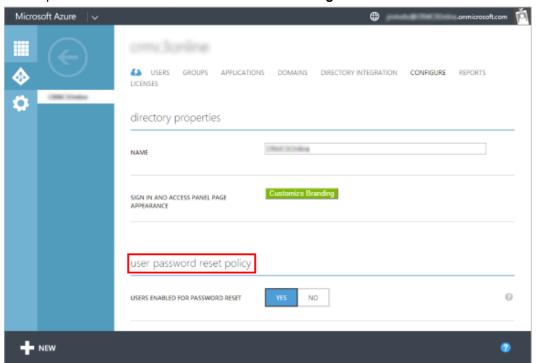




Note the information on this page about users doing their own password reset. To enable your users to be able to reset their passwords themselves, you'll need to purchase an Azure Active Directory subscription and configure it for password self-service. More information: Self-service password reset in Azure AD: how to enable, configure, and test self-service password reset

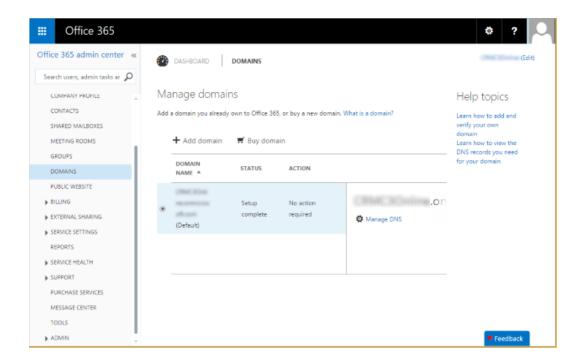
Configure self-service password reset and other settings in Microsoft Azure

If you have an Azure Active Directory Basic or Premium subscription, you can set it up so users can do their own password reset. You can access Azure Active Directory configuration from the Office 365 admin center. More information: Enable users to reset their Azure AD passwords On the left-side menu of the Office 365 admin center, choose Admin > Azure AD. Select your subscription in Microsoft Azure and then choose Configure.



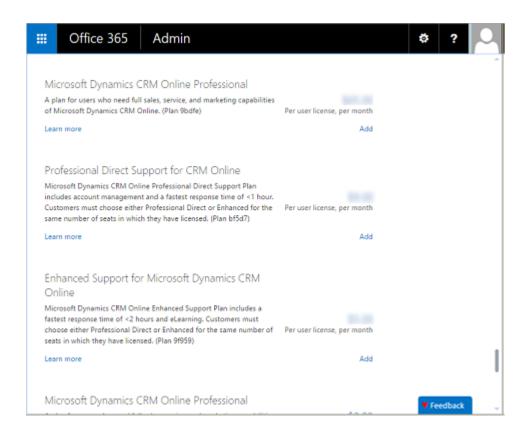
Add your domain

Use the Manage domains page to add your domain to your subscription. When you add your own domain, user sign-ins can match your company's URL. For example, instead of user@contoso.onmicrosoft.com, it could be user@contoso.com. More information: Verify your domain in Office 365



Purchase services

On the left-side menu of the Office 365 admin center, choose **Purchase Services** to add licenses or purchase new online services.



See Also

About the Office 365 admin center

Microsoft Dynamics CRM Online requirements

Microsoft Dynamics CRM Online gives you the following options to access CRM data:

- Web browser. No need to install anything to run CRM Online from a computer running a supported web browser.
- Microsoft Dynamics CRM for Outlook. An Outlook add-in that provides you with a complete set of CRM capabilities right within Microsoft Office Outlook.
- Microsoft Dynamics CRM for phones and CRM for tablets. Lightweight applications that let you access CRM data on almost any web browser running on a tablet, smartphone, or non-Windows computer.

Web browser requirements

You use a common web browser, such as Internet Explorer, Mozilla Firefox, Google Chrome or Apple Safari to view, add, or edit information stored in your organization's CRM Online database. For more information about the supported web browsers and hardware requirements, see **Microsoft Dynamics CRM web application requirements**.

Microsoft Dynamics CRM for Outlook requirements

Dynamics CRM for Outlook is a free add-in that give you access to CRM Online in the Outlook user interface. You can download the Dynamics CRM for Outlook add-in from within CRM Online by clicking **Get CRM for Outlook** on the message bar.

For information about using Dynamics CRM for Outlook, see Microsoft Dynamics CRM for Outlook hardware requirements and Microsoft Dynamics CRM for Outlook software requirements.

For complete installation and configuration instructions, see Set up CRM for Outlook.

Mobile device requirements

Users can work in CRM Online by using a supported browser on a mobile device, or by using Microsoft Dynamics CRM for phones. For more information about the mobile experience in CRM Online, see **Set up CRM for phones** and **Set up CRM for tablets**.

Microsoft Office requirements

Microsoft Dynamics CRM leverages the capabilities of on-premises versions of Microsoft Office or Microsoft Office 365 and integrates with Microsoft Office Word and Microsoft Office Excel. For more information about the supported versions of Microsoft Office, see **Supported versions of Microsoft Office**.

See Also

Get started administering Microsoft Dynamics CRM Online
Plan for Microsoft Dynamics CRM Online deployment and administration
Licensing plans for Microsoft Dynamics CRM Online

Licensing plans for Microsoft Dynamics CRM Online

Microsoft Dynamics CRM Online provides a multi-tiered licensing model. The key benefits include:

- Flexibility. You can mix and match different types of licenses to accommodate the specific needs of your business and save money in the process.
- High value. You can choose from highly competitive offerings with a low Total Cost of Ownership.
- Clarity. You acquire licenses based on the functionality you require, rather than how you access the system.
- **Parity**. You use a consistent licensing model that applies equally to online and on-premises solutions built on Microsoft Dynamics CRM.
- Mobile access. You can access CRM data with your mobile device at no additional charge.



Every CRM Online account includes one production instance and at least 5 GB of storage. You can purchase additional capacity based on available storage and your business needs.

You can choose from the following plans:

- Essential. Provides access to custom applications built on the Microsoft Dynamics CRM platform.
- **Basic**. Provides access to core entities: accounts, contacts, leads, and cases. The Basic plan also provides access to reports, dashboards, visualizations and custom applications.
- Professional. Provides access to the full range of Microsoft Dynamics CRM capabilities, including sales, marketing and customer service.
- Enterprise. Provides access to the full range of Microsoft Dynamics CRM capabilities, including sales, marketing and customer service. It also provides full access to Microsoft Social Engagement, Unified Service Desk, and Microsoft Dynamics Marketing.



One additional non-production instance is included with 25 or more paid Professional user licenses, or 25 or more paid Enterprise user licenses, or a combination of 25 or more paid Professional and Enterprise user licenses.

For every 20 paid Professional licenses, or 20 paid Enterprise licenses, or 20 paid Professional and Enterprise licenses, the storage capacity increases by 2.5 GB, up to a maximum of 50 GB at no additional charge.

For licensing information, see Microsoft Dynamics CRM pricing and licensing.

See Also

Get started administering Microsoft Dynamics CRM Online
Plan for Microsoft Dynamics CRM Online deployment and administration

Plan for Microsoft Dynamics CRM Online deployment and administration

Your Microsoft Dynamics CRM Online deployment will go more smoothly with some preliminary planning. The following table lists some of the items to consider before you start the actual deployment process.

| Item | Description | Considerations |
|-----------------------|--|--|
| Environment discovery | A detailed description of your organization's environment in terms of number of users, groups or teams, and the number and type of business units or divisions. Identify current CRM data that you | Is there enough overlap in customers and products across business units to be able to work in the same CRM data? What type of security policy does the organization already have in place? Are there any special |

| Item | Description | Considerations |
|-----------------------------|--|---|
| | would like to bring into CRM Online, and your overall data storage requirements. Include a business requirements analysis that describes your organization's expectation or requirements for a service level agreement (SLA). An SLA is an agreement between two or more parties describing the deliverables, support, and communication that each party will provide to the other. Specify your policies related to security and privacy. | requirements in this area? Is there a plan for business growth that could affect the number of users of CRM Online? Plan for enough time to do this discovery; information that comes out of this exercise can affect the way you implement the service. |
| Single sign-on | An authentication process that enables a user to access multiple systems or services through a single set of sign-on credentials. For example, implementing single sign-on for CRM Online in an organization's network environment means that after a user signs in to the network, that user does not have to enter credentials again when accessing CRM Online. Note For Office 365 subscribers, CRM Online instance must be in the same tenant as your Office 365 subscription. A user account in Active Directory can only sync with one tenant. | There are additional requirements to implement single sign-on, therefore, consider how important it is to your organization. More information: Manage user account synchronization |
| Integration with Office 365 | You can significantly enhance | More information: What is Office |
| applications | your company's online, | 365 and how does it relate to |

| Item | Description | Considerations |
|---|--|--|
| | collaborative experience by integrating Office 365 applications with your CRM Online subscription. This requires a separate purchase of an Office 365 subscription You'll have the best integration experience if your Office 365 subscription and CRM Online instance are in the same tenant. | CRM Online? |
| Administrative roles in the Microsoft Online Services environment | A number of administrative roles are available to assign to users if you manage your subscription in the Microsoft Online Services environment. Administrative roles define administrative responsibilities related to subscription management activities, for example, billing administration, password administration, and user management administration. | Consider the available administrative roles and the needs of your environment to identify the roles you want to use and the users you will choose for each role. The global administrator role is the highest level role, having all the permissions to manage any part of the subscription process. We recommend that you assign this role to more than one person so that someone is always available to manage all aspects of the subscription. |
| | | Administrative roles cover all subscription management functions within the service. These aren't the same as the security roles that you assign to users in CRM Online, which are required and govern access to resources in the CRM Online service. See "Security roles in Microsoft Dynamics CRM Online" in this |

| Item | Description | Considerations |
|---|--|---|
| | | table. |
| Security roles in Microsoft Dynamics CRM Online | CRM Online uses role-based security. The security role assigned to a user determines the tasks the user is permitted to perform and the data that the user is permitted to view. | Every user must be assigned at least one security role to access CRM Online. Note Security roles aren't the same as administrative roles in the Microsoft Online Services environment, which cover subscription management and related activities in the Office 365 admin portal. See: Administrative roles in the Microsoft Online Services environment in this table. |
| Importing data | CRM Online offers a wizard to help with importing CRM data from other applications and services. | If you import data from other systems, consider the way you'll process the data to minimize errors. More information: Import data (all record types) |
| Product updates | Some CRM Online releases will include optional product updates that you can choose to enable. | Product updates may affect existing customizations in your CRM Online instance. Review the documentation associated with each product update before you enable it in a production environment. Additionally, some product updates, such as the sales and service process forms, can't be removed or easily reverted to the previous functionality. Therefore, you should give careful consideration before you enable a product update. More information: Install |

| Item | Description | Considerations |
|------|-------------|--|
| | | product updates |
| | | If you're unsure whether you want to enable a product update in a CRM Online instance used in production, sign up for a trial subscription to evaluate the new functionality. More information: Sign up for a free trial |

See Also

Get started administering Microsoft Dynamics CRM Online

Microsoft Dynamics CRM Online Enterprise Planning Guide

Microsoft Dynamics CRM Online requirements

Grant users access to Microsoft Dynamics CRM Online as a Microsoft Online service

Import data into Microsoft Dynamics CRM Online

If you've completed a Microsoft Dynamics CRM Online free trial and are converting to a CRM Online paid subscription, you can easily remove the sample data and then import or enter your own data.

If your business data is currently located in other systems, you should import it into CRM Online. Depending on the amount and complexity of the data in other systems, there are several options for importing it.



Note

You can also import bulk data using the Data Loader cloud service (preview feature). More information: Preview feature: Import bulk data with the Data Loader.

In This Topic

Delete sample data

Import Outlook contacts into Microsoft Dynamics CRM Online

Import other types of data into Microsoft Dynamics CRM Online

Delete sample data

If you've been using the sample data in a free trial of CRM Online, you can easily delete it before adding your business data.



- 1. On the nav bar, choose **Microsoft Dynamics CRM > Settings**.
- 2. Go to **Settings** > **Data Management**. (How do I get there?)
- 3. In the **Data Management** area, click or tap **Sample Data**.
- 4. In the Sample Data dialog box, click or tap Remove Sample Data.

Import Outlook contacts into Microsoft Dynamics CRM Online

In CRM Online, contacts are people you do business with and accounts are the companies they work for. If your current Outlook contacts are the names of people that you do business with, importing the Outlook contacts is a streamlined process because the field names are the same in both systems.

After you install Dynamics CRM for Outlook, you can use the Add Contacts Wizard to add contacts directly from Outlook into CRM Online. More information: Help & Training: Import contacts.

Import other types of data into Microsoft Dynamics CRM Online

Using the CRM Online Import Data Wizard, you can import many types of customer data stored in comma-separated value (.csv) format. Many spreadsheet programs that you use to store data, such as Microsoft Office Excel, provide an option to convert the data into .csv format when you save it. Many browser-based email programs enable you to save your contacts information to a file in (.csv) format.

After the data is in a supported format, you can use the Import Data Wizard to import contact information that is stored in .csv, .txt, .xml, or .zip files.

More information: Help & Training: Import data.



When you have verified that your imported data is correct, consider running a duplicate detection job on the imported data to identify and delete duplicated data. More information: Detect duplicate data.

See Also

Import data (all record types)

Customizations for Microsoft Dynamics CRM Online Get started administering Microsoft Dynamics CRM Online

Customizations for Microsoft Dynamics CRM Online

You can tailor Microsoft Dynamics CRM Online to more closely fit your organization's industry, nomenclature, and unique business processes by customizing the service. You can implement many customizations without developer support by using tools that are part of the service. More information: **Customizing your CRM system**

The following table shows some examples of customizations.

| Customization | Definition | Reason for the customization |
|---------------|---|--|
| Entity | An item with properties that you track, such as a contact or account. For an entity you might track properties such as company name, location, products, email, and phone. | You can create or modify the name or properties of an entity that your organization wants to track. |
| Workflow | A set of rules that run on demand or are triggered to run automatically. | You can create or modify workflows to run in accordance with the way your organization works. For example, a custom workflow could automatically send an email notification to an account owner when a specific condition or combination of conditions is reached. |
| Field | A property of an entity, such as company name. | You can define entity properties that you want to track. |
| Form | A set of data-entry fields for a given entity that matches the items that your organization tracks for the entity, for example, a set of data-entry fields that track a customer's previous orders along with specific requested reorder dates. | You can create a new form based on an existing form, and then customize the form to suit your organization's needs. |
| Interface | The buttons, labels, and controls of the user interface. | If the users in your organization find the term Commit more familiar than the term Go, for example, you can |

| Customization | Definition | Reason for the customization |
|---------------|------------|-------------------------------------|
| | | change all the Go buttons to |
| | | be Commit buttons. |

See Also

Import data (all record types)

Import data into Microsoft Dynamics CRM Online

Add interoperation features to Microsoft Dynamics CRM Online

Get started administering Microsoft Dynamics CRM Online

Manage subscriptions, licenses, and user accounts

As a Microsoft Online Services environment administrator, you manage the Microsoft Dynamics CRM Online subscription, including billing and payments, user licenses, accounts and registration. You do these tasks in the Office 365 admin center.

In This Section

Manage Microsoft Dynamics CRM Online licenses

Create users and assign Microsoft Dynamics CRM Online security roles

Reset a user's password

Manage user account synchronization

Grant users access to Microsoft Dynamics CRM Online as a Microsoft Online service

Global and Service administrators can administer CRM without a license

Manage storage for Microsoft Dynamics CRM Online

Cancel your subscription to Microsoft Dynamics CRM Online

For partners: the Delegated Administrator

See Also

Manage your Microsoft Dynamics CRM Online subscription

Manage Microsoft Dynamics CRM Online instances

Manage Microsoft Dynamics CRM Online licenses

When you purchase a subscription to Microsoft Dynamics CRM Online, you receive a set of licenses to assign to users. Only licensed users are allowed access to the online service. You must assign a license to every user who will use the service.

A license conflict occurs if your organization has more users than licenses.



Get started with the following resources:

- Blog: Announcing pricing and licensing for Dynamics CRM 2015.
- Video: Microsoft Dynamics CRM Online License Management.

Running out of CRM Online licenses?

If you are running out of licenses, you have several options:

- Add licenses to your subscription and then assign licenses to users. For step-by-step instructions for adding licenses to a subscription that is managed through Microsoft Online Services, see Manage licenses.
- Remove licenses from other users. This disables the user account in CRM Online and frees up the license so that you can re-assign it.
 - For step-by-step instructions for removing a license that you manage through Microsoft Online Services, see Manage licenses.
- Remove a user account by deleting it. This disables the user account in CRM Online and frees up the license so that you can re-assign it.



Tip

Delete the user accounts of people who leave your company. This frees up the licenses so that you can re-assign them.

For step-by-step instructions about deleting a user account that you manage through Microsoft Online Services, see Delete or restore users.

If a license conflict occurs because your credit card information has become outdated in Microsoft Online Services, you can renew your subscription by updating the credit card information, for example, by updating the card's expiration date, or by adding a new credit

For step-by-step instructions for updating credit card information, see Update your credit card information.



Important

Signing out of the Office 365 admin center doesn't sign you out of CRM Online. You must do that separately.

To cancel your subscription to CRM Online for any reason, call Billing Support at the phone number listed for your country or region here: Billing Support and Phone Numbers.



Note

If you don't have access to a phone, you may submit your cancellation request as a service request. To enter the service request, sign in to your account, and then, under Support, click or tap Service Requests. In the Problem Description area, fill out the form for a new service request by choosing Cancel subscription.

Important

Save your CRM Online data to a location where you can retrieve it later, if needed.

See Also

Manage subscriptions, licenses, and user accounts Create users and assign Microsoft Dynamics CRM Online security roles

Create users and assign Microsoft Dynamics CRM Online security roles

You use the Office 365 admin center to create user accounts for every user who needs access to CRM Online. The user account registers the user with Microsoft Online Services environment. In addition to registration with the online service, the user account must be assigned a license in order for the user to have access to the service. Note that when you assign a user the global administrator or the service administrator role in the Microsoft Online Services environment, it automatically assigns the user the System Administrator security role in Microsoft Dynamics CRM. More information: Differences between the Microsoft online services environment administrative roles and CRM Online security roles

In This Topic

Create a user account Add a license to a user account Assign a security role to a user (Optional) Assign an administrator role Enable or disable users Create a non-interactive user account

Create a user account

When you create a user account in the Office 365 admin center, the system generates a user ID and temporary password for the user. You have the option to let the service send an email message to the user as clear text. Although the password is temporary, you may consider copying the information to send to the user through a more secure channel, such as from an email service that can digitally encrypt the contents. For step-by-step instructions for creating a Microsoft Online Services user account, see Create or edit users in Office 365.



Note

When you create a user and assign a license in the Office 365 admin center, the user is also created in CRM Online. The synchronization process between the Office 365 admin center and CRM Online can take a few minutes to complete.

By entering a user ID and password, a user can access the Office 365 admin center to view information about the service. However, the user will not have access to CRM Online until you assign at least one CRM Online security role to this user.



₩ Tip

To force an immediate synchronization between the Office 365 admin center and CRM Online, do the following:

- Sign out of CRM Online and the Office 365 admin center.
- Close all open browsers used for CRM Online and the Office 365 admin center.
- Sign back in to CRM Online and the Office 365 admin center.

Add a license to a user account

You can license the user when you create the user account, or you can license the user later. You must assign a license to every user account that you want to access the online service.

For step-by-step instructions, see Assign, reassign, or remove licenses.



Important

Licensed users must be assigned at least one Microsoft Dynamics CRM security role to access CRM Online.

About user licenses

- Microsoft Dynamics CRM Online uses user licenses to provide access to your organization. You need one user license per person with an active user record who logs into your organization.
- When you add a new person, the Create new user account form displays the number of user licenses available. If you reach your limit, the Create button is no longer available. You can add additional licenses by choosing Purchase Services from the left-side menu in the Office 365 admin center.
- An unaccepted invitation requires a user license until the invitation expires two weeks after it was issued.
- If you have more user licenses than you are using, contact support to reduce the number of licenses. You cannot reduce the number of licenses to less than you are currently using or less than your offer allows. Any changes are reflected in your next billing cycle.
- Each user license requires a unique Microsoft account, and every user who logs on to Microsoft Dynamics CRM needs a license. Most CRM subscriptions include a specific number of user licenses.

Assign a security role to a user

Security roles control a user's access to data through a set of access levels and permissions. The combination of access levels and permissions that are included in a specific security role sets limits on the user's view of data and on the user's interactions with that data.

Microsoft Dynamics CRM Online provides a default set of security roles. If necessary for your organization, you can create new security roles by editing one of the default security roles and then saving it under a new name.

You can assign more than one security role to a user. The effect of multiple security roles is cumulative, which means that the user has the permissions associated with all security roles assigned to the user.

Security roles are associated with business units. If you have created business units, only those security roles associated with the business unit are available for the users in the business unit. You can use this feature to limit data access to only data owned by the business unit.

For more information about the difference between Microsoft Online Services administrator roles and CRM Online security roles, see Grant users access to Microsoft Dynamics CRM Online as a Microsoft Online service.



Important

You must assign at least one security role to every CRM Online user. The service does not allow access to users who do not have at least one security role. Even if a user is a member of a team with its own security privileges, the user won't be able to see some data and may experience other problems when trying to use the system.

In CRM Online:



- 1. Go to **Settings** > **Security**. (How do I get there?)
- 2. Choose Security > Users.
- 3. In the list, select the user or users that you want to assign a security role to.
- 4. Choose Manage Roles.
 - Only the security roles available for that user's business unit are displayed.
- 5. In the Manage User Roles dialog box, select the security role or roles you want for the user or users, and then choose **OK**.

(Optional) Assign an administrator role

You can share Microsoft Online Services environment administration tasks among several people by assigning Microsoft Online Services environment administrator roles to users you select to fill each role. You might decide to assign the global administrator role to a second person in your organization for times when you are not available.

There are five Microsoft Online Services environment administrator roles with varying levels of permissions. For example, the password reset administrator role can reset user passwords only; the user management administrator role can reset user passwords as well as add, edit, or delete user accounts; and the global administrator role can add online service subscriptions for the organization and can manage all aspects of subscriptions. For detailed information about Microsoft Online Services administrator roles, see Assigning Admin Roles.

Note

Microsoft Online Services environment administrator roles are valid only for managing aspects of the online service subscription. These roles don't affect permissions within the CRM Online service.

Enable or disable users

To enable a user, assign a license to the user and add a user to the security group that is associated with an instance of CRM Online. If you enable a user that was disabled, you must send a new invitation for the user to access the system.

To disable a user, remove a license from the user or remove the user from the security group that is associated with an instance of CRM Online. Removing a user from the security group doesn't remove the user's license. If you want to make the license available to another user, you have to remove the license from the disabled user.

Note

Removing all security roles from the user prevents the user from signing into and accessing CRM Online. However, it doesn't remove the license from the user and the user remains in the list of the enabled users in CRM Online. Removing security roles from a user isn't a recommended method of removing access to CRM Online.

You must be a member of an appropriate administrator role to do these tasks. More information: Assigning Admin Roles

Enable a user by assigning a license to the user and adding a user to the security group

- 1. Browse to the Office 365 admin center and sign in.
- 2. Choose **Users** > **Active users** and select the user.
- 3. In the right-side menu, under Assigned license, choose Edit.
- 4. In Assign Licenses, check the Microsoft Dynamics CRM Online check box. Choose Save.
- 5. In the Office 365 admin center, choose **Groups**.
- 6. Choose the security group that is associated with your CRM Online organization.
- 7. In the right-side menu, under Security group, choose **Edit Members**.
- 8. Choose Add Member, enter and select the names of members to add to the security group, and then choose **Add**.

To add multiple users, see: bulk add users to Office365 groups.

Disable a user by removing a license from the user

- 1. In the Office 365 admin center, choose **Users > Active Users** and select a user.
- 2. In the right-side menu, under Assigned License, choose Edit.
- 3. Clear the Microsoft Dynamics CRM Online check box, and then choose Save.

Disable a user by removing the user from the security group that is associated with an instance of CRM Online

- 1. In the Office 365 admin center, choose **Groups**.
- 2. Choose the security group that is associated with your CRM Online organization.
- 3. In the right-side menu, under Security group, choose **Edit Members**.
- 4. Select members to remove from the security group, and then choose **Remove From Group**.

Note

You can also delete users in the Office 365 admin center. When you remove a user from your subscription, the license assigned to that user automatically becomes available to be assigned to a different user. If you want the user to still have access to other applications you manage through Office 365, for example Microsoft Exchange Online or Microsoft SharePoint, don't delete them as a user. Instead, simply remove the Microsoft Dynamics CRM license you've assigned to them.

Note

When you sign out of the Office 365 admin center, you aren't signing out of CRM. You have to do that separately.

🔐 Tip

To force an immediate synchronization between the Office 365 admin center and CRM Online, do the following:

- Sign out of CRM Online and the Office 365 admin center.
- Close all open browsers used for CRM Online and the Office 365 admin center.
- Sign back in to CRM Online and the Office 365 admin center.

Create a non-interactive user account

The non-interactive user is not a 'user' in the typical sense – it is not a person but an access mode that is created with a user account. It is used for programmatic access to and from CRM between applications. A non-interactive user account lets these applications or tools, such as a CRM to ERP connector, authenticate and access Microsoft Dynamics CRM Online, without requiring a Microsoft Dynamics CRM Online license. For each instance of Microsoft Dynamics CRM Online, you can create up to five non-interactive user accounts.

You need to have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM to create a non-interactive user. First, you'll create a user account in Office 365 and then in Microsoft Dynamics CRM Online, select the non-interactive access mode for the account.



1. Create a user account in the Office 365 admin center.

Be sure to assign a CRM Online license to the account.

- 2. Go to CRM Online.
- 3. Go to Settings > Security. (How do I get there?)
- 4. Choose **Users** > **Enabled Users**, and then click or tap a user's full name.
- 5. In the user form, scroll down to the **Client Access License (CAL) Information** section and select **Non-interactive** for Access Mode.

You then need to remove the CRM Online license from the account.

- 6. Go to the Office 365 admin center.
- 7. Select Users > Active Users.
- 8. Choose the non-interactive user account and in the right-side menu under **Assigned license**, choose **Edit**.
- 9. Clear the box for the CRM Online license and choose Save.
- 10. Go back to CRM Online and confirm that the non-interactive user account **Access Mode** is still set for **Non-interactive**.

See Also

Manage subscriptions, licenses, and user accounts
Assigning Admin Roles

Control data access

Manage Microsoft Dynamics CRM Online licenses

Add an instance to your subscription

Reset a user's password

If a user loses a password, you can reset it. To reset a user's password, you must be a Microsoft Online Services environment global administrator, user management administrator, or password administrator.

For step-by-step instructions, see Reset a User's Password.



Note

The reset password is temporary. The user must change the temporary password at the next sign in. To help users meet the requirements for creating a new password in the Microsoft Online Services environment, see <u>Set a user's password expiration policy</u>.

See Also

Manage subscriptions, licenses, and user accounts

Manage user account synchronization

Because Microsoft Dynamics CRM Online user identities are provisioned through Microsoft Online Services, you have multiple options for managing user synchronization between your online and on-premises environments.

Decide on a user management approach

There are three possible methods to manage your user accounts:

- 1. Manage user accounts in Office 365
 - This is the simplest approach but can require more long-term administrative effort. Every time you create a new user account, you will need to create the user in two locations: on-premises and in Office 365. Name and password changes will require editing the accounts in both locations.
- 2. Synchronize on-premises directory objects with Office 365 Active Directory synchronization (also referred to as DirSync) sets up a one-way synchronization relationship between your on-premises Active Directory server and Office 365. You get the benefit of easing the burden of maintaining user accounts without significantly adding to your hardware and failover requirements. However, you will still need to maintain two sets of passwords for your on-premises Active Directory accounts and your
- 3. Use Active Directory Federation Services (AD FS) to manage users
 - This approach requires careful planning for redundancy and failover and requires the most expertise and effort to deploy.
 - In this approach, users in your organization can use corporate credentials to access the services in Office 365 that your company subscribes to such as Microsoft Dynamics CRM Online. Users sign in once and don't have to sign in again to access a different service. There's a single password to manage.

Your decision on which method to choose is based largely on the size of your company and the depth and breadth of your IT resources.

Review the following resources to equip you to make the right decision for your company:

- Understanding Office 365 identity and Azure Active Directory
- What is an Azure AD directory?
- Prepare for single sign-on

Office 365 accounts.

Tip for admins: provide a single sign-on organization URL for your users

If you've deployed synchronization with single sign-on (option 3 above), you can provide a URL to your users that takes advantage of your company's Active Directory and simplifies the sign-in experience.

The URL follows this pattern:

https://<yourCRMOrganizationName>.crm.dynamics.com?whr=<yourFederationServiceIdentifier>

You can get the *<yourCRMOrganizationName>* by looking at the URL you use to access Microsoft Dynamics CRM Online. For example, in https://contoso.crm.dynamics.com, *contoso* is *<yourCRMOrganizationName>*.

Important

The following URLs would be used for subscriptions hosted in these locations.

- LATAM/SAM: https://
 yourCRMorganizationname>.crm2.dynamics.com?whr=<yourFederationServiceIdentifier>
- EMEA: https://<yourCRMorganizationname>.crm4.dynamics.com?whr=<yourFederationServiceIdentifier>
- APAC: https://
 yourCRMorganizationname>.crm5.dynamics.com?whr=<yourFederationServiceIdentifier>
- OCE: https://
 yourCRMorganizationname>.crm6.dynamics.com?whr=<yourFederationServiceIdentifier>
- JPN: https://
 yourCRMorganizationname>.crm7.dynamics.com?whr=<yourFederationServiceIdentifier>
- United States of America Government: https://
 yourCRMorganizationname>.crm9.dynamics.com?whr=<yourFederationServiceIdentifier>

You can get the Federation Service identifier for your organization by using the following steps:

- On the server that is running AD FS 2.0, click or tap Start > Administrative Tools > AD FS 2.0 Management.
- 2. In the console tree, right-click or tap **AD FS 2.0**, and then click or tap **Edit Federation Service Properties**.
- 3. Select the General tab.

Make note of your Federation Service identifier. For example: http://sts1.fabrikam.com/adfs/services/trust

Your URL should look like:

https://contoso.crm.dynamics.com?whr=http://sts1.fabrikam.com/adfs/services/trust
Send this URL to your Microsoft Dynamics CRM Online users and encourage them to bookmark it.

Grant users access to Microsoft Dynamics CRM Online as a Microsoft Online service

To have users up and running in Microsoft Dynamics CRM Online, you complete some administrative tasks in the Office 365 admin center—which you generally do only once—followed by administrative tasks in CRM Online.

CRM Online is an online service subscription. When you signed up for this service, you received a set of licenses with your subscription, one license for each user. You can purchase additional licenses if you need them.

As described in step one that follows, in the Office 365 admin center, register your users so that they are recognized in the Microsoft Online Services environment, assign a license to each user, and then assign administrative roles to the users you choose to fill those roles. More information: Assigning admin roles

In CRM Online, populate the service with your organization's data, including users and their security roles, business units, and any existing CRM data that you want to import from other applications or services. If your organization uses business units, assign users to the appropriate business unit, and then assign a security role to each user. CRM Online includes predefined security roles that aggregate a set of user permissions to simplify user security management. An organization can define additional roles or edit predefined security roles to meet its unique security needs. For more information about security roles in CRM Online, see Control data access.



Important

Users can't access CRM Online until they've been assigned at least one security role. See Step Two: Assign security roles in CRM Online .

Differences between the Microsoft Online services environment administrative roles and CRM Online security roles

Administrative roles are available to assign to users in the Office 365 admin portal. The administrative roles cover a set of rights and permissions related to managing the service subscription, such as adding users and assigning licenses. The global administrator role has rights to control every aspect of the subscription and to add subscriptions to other online services. The password administrator role has rights to reset a user's password, create service requests, and monitor the service.

Security roles are assigned within CRM Online and cover rights and permissions-related aspects, for example, permission to update records or to publish customizations.

The roles are similar in that both types contain aggregated sets of permissions that allow access to some items and not to others, and that allow some actions to be taken but not others. The roles are different in that the first one applies to the management of the subscription but not to the service itself, and the second applies only within the service.

Using roles is a powerful way to group a set of rights that are common to a job title or business unit. This way, the administrator can grant a whole set of permissions to users simply by assigning a user or group of users to a given role.

Step One: Provision users, and assign licenses and administrative roles in the Office 365 admin center

Your organization's subscription to CRM Online provides access to the Office 365 admin center through a global administrator account. The global administrator manages every aspect of the subscription and may add subscriptions to other Microsoft Online Services.

As the global administrator for your organization, one of your first tasks is to create users in the Office 365 admin center. This registers users in the system and enables users to be licensed to

use services available within the online service environment. You decide which service you want your users to have by assigning a license for that service to a user. For instructions about creating users in the Microsoft Online Services environment, see Create or edit users in Office 365. For instructions about assigning a license to a user, see Assign or remove licenses, or view a list of unlicensed users.

During your planning phase, you might have identified a set of key administrative roles that you want to fill. More information: Plan for Microsoft Dynamics CRM Online deployment and administration. Because the administrative roles provide coverage for administrative tasks when the global administrator is not available, it's a best practice to assign these roles to users, including assigning the global administrator role to a second user. More information: Assigning admin roles and Permissions in Office 365.

The online service sends an invitation to each user

After you set up a user in the Office 365 admin center, that user receives an email invitation with a link and a password for the Microsoft Online Services environment. The credentials in the invitation provide access to the portal and to documentation. However, the users who receive these invitations can't access CRM Online until you complete step two in this process.

Step Two: Assign security roles in CRM Online

Sign in to CRM Online and add business units (if your organization needs more than one business unit), and assign security roles and business units to users. The users you registered with the online service in step one are automatically added to CRM Online. After you assign at least one security role to a user, that user can click the link in the email invitation, enter credentials, and begin using CRM Online. More information: Manage users and Set up a CRM organization.



Important

Before you start adding information to CRM Online, we recommend that you turn off or disable your browser's pop-up blocker. Pop-up blockers can block data-entry dialog boxes in CRM Online. For more information about browser and other settings for improved product performance, see Key preparation and configuration tasks.

You might have CRM data located in other systems. In your planning phase, you considered how you'll import this data. Before you invite users into CRM Online, ensure that you have completed the data migration process. More information: Import data into Microsoft Dynamics CRM Online and Import data (all record types).

See Also

Get started administering Microsoft Dynamics CRM Online Plan for Microsoft Dynamics CRM Online deployment and administration Manage subscriptions, licenses, and user accounts

Import data (all record types)

Global and Service administrators can administer CRM without a license

By default, all Office 365 Global administrators and Office 365 Service administrators who do not have a Microsoft Dynamics CRM Online license are granted the following two levels of permission in CRM Online.

- System administrator security role
- Administrative access mode

The system administrator security role is typically granted to Microsoft Dynamics CRM administrators giving them unrestricted access to the administrative (Settings) areas, which are used for managing and configuring features of Microsoft Dynamics CRM.

Administrative access mode limits access to those areas of Microsoft Dynamics CRM used to configure or customize the system.

To give these administrators access to additional areas, such as the Sales, Marketing, and Service areas, a CRM Online license must be added to the Office 365 Global administrator or Office 365 Service administrator user account, by using the Office 365 admin center. Note that Administrative access mode cannot be changed on the user form in the CRM Online application.

Create a Microsoft Dynamics CRM administrator account

- 1. Sign in to the Office 365 admin center, and then choose Users > Active Users.
- 2. Select an existing user in the list. If you want to create a new administrative user, see Create or edit users and Assigning admin roles.

In the right-side menu, choose **Edit** ().

4. Choose Licenses and make sure a Microsoft Dynamics CRM Online license is not assigned to this user.



Important

Unlicensed Office 365 Global and Service administrators have access to the administrative areas of CRM Online. However, if the administrator also needs access to additional areas of CRM Online you must select a CRM Online license for the user.

- 5. Choose Roles, and then choose either Global administrator or Limited admin access > Service administrator. For more information about these roles, see Assigning admin roles.
- 6. Enter an alternate email address, and then choose Save.

See Also

Manage your Microsoft Dynamics CRM Online subscription Manage subscriptions, licenses, and user accounts

Manage storage for Microsoft Dynamics CRM Online

You can manage your organization's data storage capacity in connection with your subscription to Microsoft Dynamics CRM Online. The type of subscription you purchase determines the amount of storage initially allocated to your organization. If you run out of storage, you can add more.

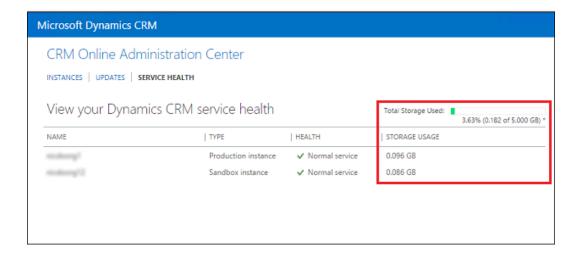
You can also gain storage by deleting certain types of unnecessary data in CRM Online. For information on deleting data, see: **Free storage space in Microsoft Dynamics CRM**.

Monitor the amount of storage your organization is using

Monitor your CRM Online storage to make sure you've got lots of capacity for growth.

If your total storage used is 80% or more of capacity, CRM admins will receive email notifications and alerts will appear on the Service Health page. If the total storage used by all your Microsoft Dynamics CRM organizations is 100% or more of your available storage, users in your organization won't be able to enter data or create records, although they will be able to view data.

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- Click Admin > CRM.
- 3. Choose the **Service Health** tab.



Add storage to CRM Online



- 1. Sign in to the Office 365 admin center with an Office 365 Global administrator account.
- 2. Choose Purchase Services.
- 3. Under your Microsoft Dynamics CRM Online subscription, choose Add more.
- 4. Under **optional add-ons**, enter the amount of storage space in gigabytes that you want, and then proceed through the order process.

If you paid for the subscription by credit card, any additional storage space that you order will be available immediately after you receive an order confirmation. If you're invoiced for subscription payments, you may be asked to complete a credit check. In this case, the additional storage will not be available until the credit check is passed.

See Also

Manage Microsoft Dynamics CRM Online instances

Free storage space in Microsoft Dynamics CRM

Manage subscriptions, licenses, and user accounts

Global and Service administrators can administer CRM without a license

Cancel your subscription to Microsoft Dynamics CRM Online

We are sorry that you are considering canceling your subscription with Microsoft Dynamics CRM. This topic contains information you'll need before you cancel your subscription. For additional details, see Section 4 of the Microsoft Dynamics CRM Online Service Agreement.

In This Topic

Before you call

Canceling your Microsoft Dynamics CRM subscription

<u>Canceling your Microsoft Dynamics CRM Online subscription as part of your migration to Microsoft Dynamics CRM (on-premises)</u>

Canceling only the Internet Marketing service

Changing your mind

Before you call

Before you call, make sure that you have the following information ready:

- Billing administrator's Microsoft account and password
- Organization URL and name
- The day that you want your subscription to Microsoft Dynamics CRM terminated

You should have also made the following decisions:

- Do you want to keep your existing data?
- Do you want to keep any Internet Marketing service campaigns running? If you aren't the
 person who signed up for the service, you must work with that person to cancel or maintain it.

Canceling your Microsoft Dynamics CRM subscription

If you have been using Microsoft Dynamics CRM for training, demonstrations, or testing and you don't want to keep any of your data, you can simply contact billing support with the information in

<u>Before you call</u>. On the <u>Help & Training: Billing and subscription support</u> page select CRM Online. If you want to save your data, you need to also do the following:

- If you want to keep the data, you can export the data. For more information, see <u>Help & Training</u>: Export Data to Excel.
- If you want to keep your Internet Marketing service campaigns running, don't delete the activities. Search engine ads will continue to run. After the Microsoft Dynamics CRM cancellation, you can cancel or manage the campaigns from Microsoft Ad Center.
- To stop the search engine ads, delete or pause all your current Internet Marketing service campaign activities. This will also stop the billing from Microsoft Ad Center with Microsoft Dynamics CRM. Sign in to Microsoft Ad Center with your Microsoft Ad Center credentials to cancel the account.

Canceling your Microsoft Dynamics CRM Online subscription as part of your migration to Microsoft Dynamics CRM (on-premises)

If you have decided to migrate to Microsoft Dynamics CRM (on-premises Edition), you first migrate your data and then cancel your Microsoft Dynamics CRM Online subscription. To begin the migration process, you will need to work with one of the following Microsoft support teams.

- If you're on the Microsoft Online Services platform for CRM Online (most customers are), contact Help & Training: Technical support.
- If you're on the Microsoft Commerce Transaction Platform, contact Billing support.
 Select the CRM Online tab on the <u>Help & Training: Billing and subscription support</u> page for help to determine which platform you are on.

Microsoft Dynamics CRM customer service will process your request, transfer your data to a secure site at the requested time, and notify your IT department that the data is available to be downloaded.

When migration is complete, you then cancel your Microsoft Dynamics CRM Online subscription. More information: <u>Help & Training: Billing FAQs for CRM Online</u>.

Canceling only the Internet Marketing service

If you're the billing administrator for an Internet Marketing service campaign used by a Microsoft Dynamics CRM Online subscription, you can cancel it even if you aren't the billing administrator of the Microsoft Dynamics CRM organization. To stop the search engine ads, delete or pause all your current Internet Marketing service campaign activities. This will also stop the billing from Microsoft Ad Center with Microsoft Dynamics CRM. Sign in to Microsoft Ad Center with your Microsoft Ad Center credentials to cancel the account.

Changing your mind

You have 30 days to reverse the cancellation and start using Microsoft Dynamics CRM again. Contact Help & Training: Billing and subscription support with the same information you used to cancel your subscription. You can't re-instate a canceled Internet Marketing service campaign, but you can sign up again. For more information, see the Service Agreement.

See Also

Manage subscriptions, licenses, and user accounts

For partners: the Delegated Administrator

Admins for CRM Online can use their Office 365 global administrator role to create and edit users, reset user passwords, manage user licenses, manage domains, and assign admin permissions to other users in their organization, among other things. However, if admins want someone else to do these administrative tasks, they can delegate this role to an authorized CRM partner. When admins authorize a partner to take on this role, the partner is referred to as a delegated admin. A delegated admin can perform routine tasks such as adding users and resetting passwords, or more complex tasks such as adding a domain. A delegated admin can have access to multiple tenants, which can simplify and consolidate tenant management.

You can see the new Delegated Admin user in Microsoft Dynamics CRM Online revisions 2040 or greater or in Microsoft Dynamics CRM Online 2015 Update 0.2. This user won't appear in standard provided views. You must create a custom view to see it.



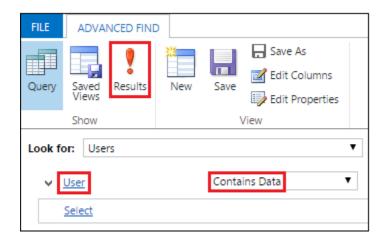
To determine your revision of Microsoft Dynamics CRM Online, in the upper-right corner of your CRM screen, choose the **Settings** gear () > **About**.

Your revision should be 2040 or above for both numbers highlighted.

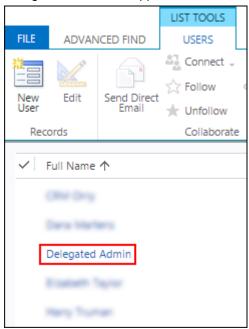


To create a simple custom view to see the delegated admin user:

- 1. Go to Settings > Security > Users.
- 2. Choose **Select a view** (♥) and then choose **Create Personal View**.
 - 3. Verify **Users** is selected in **Look for**.
 - Choose User > Contains Data, and then choose Results.



Delegated Admin will appear in the list of users.



How to get authorized as a delegated admin

CRM partners can be authorized to be delegated admins for a company in several ways:

- A partner can offer the customer to become a delegated admin for their account by sending a link to the delegated admin offer. The customer will need to accept and sign in with their Office 365/Microsoft Dynamics CRM Online credentials.
- 2. A partner can send the customer a purchase offer link with delegated admin selected as part of the offer. The customer will need to sign up for the offer and accept the delegated admin offer.

A partner can create a trial invitation link to Microsoft Dynamics CRM Online and invite the
customer to the trial via a link in email or a link on the partner's website. The trial invitation
can include delegated admin if the prospect chooses to accept.

Related information

Review the following for more information on partners and delegated admins.

- Learn how to provide technical support as a delegated admin
- Leearn how to do common partner tasks
- Learn about the Microsoft Cloud Solution Provider (CSP) program

See Also

Introducing the new Office 365 Partner admin center

<u>Partners: Offer delegated administration</u>

Partners: Add or delete a delegated admin

Manage Microsoft Dynamics CRM Online instances

You manage your Microsoft Dynamics CRM Online instances from the CRM Online Administration Center.



- 1. Browse to the Office 365 admin center and sign in using Global administrator credentials.
- 2. Choose Admin > CRM

This section provides information on how you add or edit instances of a Microsoft Dynamics CRM Online subscription and set up additional non-production (Sandbox) instances.

In This Section

Manage CRM Online Sandbox instances

Add an instance to your subscription

Switch an instance

Delete an instance

Edit properties of an instance

Copy an instance

Backup and restore instances

Multiple online instances or tenants

Create and edit multiregional instances

See Also

Manage your Microsoft Dynamics CRM Online subscription Manage Microsoft Dynamics CRM Online updates

Manage CRM Online Sandbox instances

A Sandbox instance is any non-production instance of Microsoft Dynamics CRM Online. Isolated from production, a Sandbox instance is the place to safely develop and test application changes with low risk.



Note

Customers with a combined total of 25 or more Professional or Enterprise licenses are provided with a free Sandbox instance. You can also purchase Sandbox instances. For more information, see Licensing plans for Microsoft Dynamics CRM Online.

If you already have non-production instances, they will now be identified as the Sandbox instance type.



🔐 Tip

Check out the following video: "Ask the SME" – why, when, and how to use Sandbox instances for testing and training.

In This Topic

View your Sandbox instances Reset a Sandbox instance Administration mode

View your Sandbox instances

You manage your Sandbox instances from the CRM Online Administration Center.



- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- 3. Choose the **Instances** tab.

On the Manage all CRM Online instances page, you'll see a list of all your instances.

Reset a Sandbox instance

You can reset a Sandbox instance to delete and re-provision it. Consider a reset when you want to:

Create a new project

- Free up storage space
- Remove an instance containing Personally Identifiable Information (PII) data

Note

- You can only reset Sandbox instances.
- Check out the following video: Microsoft Dynamics CRM 2013 Spring '14 Online New Features -Reset.

This video also applies to CRM Online 2015 Update 1 and Microsoft Dynamics CRM Online 2016 Update.

An example scenario

Thomas is looking at the storage consumed by the various Contoso instances and is getting concerned that they'll run out of space in one of their production instances. He'd like to free up some space so he can give the production instance some additional storage. He's also been notified that the Legal department has set a retention policy on the use of production data in the test environment.

After contacting Isaac, Thomas resets the Sales department's complete Sandbox instance. The instance is re-provisioned to factory settings and ready for future use as a Sandbox instance for a future project.

To reset an instance

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- Click Admin > CRM.
- 3. Choose the Instances tab.
- 4. On the Manage all CRM Online instances page, select a Sandbox instance and then choose Reset.
- 5. On the reset instance page, adjust the instance settings as needed and then choose
- 6. Review the language, and currency settings, and then choose **Reset**.



Warning

The Sandbox instance will be deleted and reset to factory settings. You will not be able to recover any deleted data.

7. Choose **yes** in the confirmation dialog box.

Administration mode

When you place a Sandbox instance in administration mode only users with CRM System Administrator or System Customizer security roles will be able to sign in to that instance. Administration mode is useful when you want to make operational changes and not have regular users affect your work, and not have your work affect regular users.

Note

- You can only place Sandbox instances in administration mode.
- Check out the following video: <u>Microsoft Dynamics CRM 2013 Spring '14 Online New Features -Admin Mode.</u>

This video also applies to CRM Online 2015 Update 1 and Microsoft Dynamics CRM Online 2016 Update.

On the admin settings page, you can set the following.

| Setting | Description |
|-------------------------------|---|
| Enable administration mode | Select to enable administration mode for the selected Sandbox instance. Only System Administrators or System Customizers will be able to sign in to the selected Sandbox instance. |
| Disable background operations | Select to disable all asynchronous operations (see Asynchronous Service Architecture) such as workflows and synchronization with Microsoft Exchange. Emails will not be sent and server-side synchronization for appointments, contacts, and tasks are disabled. Note Administration mode must be enabled |
| | to disable background operations. |
| Custom message for end users | Enter a message that will be displayed to all users when they attempt to sign in. |

Set administration mode

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- 3. Choose the **Instances** tab.
- 4. On the **Manage all CRM Online instances** page, select a Sandbox instance and then choose **Admin** toggle to change to the desired state.
- 5. Select **Enable administration mode** to enable it, and then choose **Save**.

See Also

Introducing Sandbox Instances in CRM Online

Switch an instance

Delete an instance

Copy an instance

Manage Microsoft Dynamics CRM Online instances

Add an instance to your subscription

You can add production and non-production (Sandbox) instances to a Microsoft Dynamics CRM Online subscription. Each new instance creates a separate organization that can be used by different departments, locations, or for non-production purposes such as development. For more information on the instance types available to you, see Microsoft Dynamics CRM pricing and licensing.

Purchase the CRM Online instance on the <u>Microsoft online services portal Purchase</u> <u>subscriptions</u> page. Additional storage and instances can be purchased by customers who have a paid Microsoft Dynamics CRM Online Professional user license subscription.

You must have the Microsoft Office 365 Global administrator to do these tasks. For more information, see Assigning administrator roles.

In This Topic

What information do I need to create an instance?

Add an additional instance

What is the effect of an additional instance on storage?

Control user access to instances: security groups and licenses

What information do I need to create an instance?

When you add an instance, you can accept the default values, or enter different values to create a CRM Online instance.

- Name. This is typically the name of your organization and is displayed in the Microsoft Dynamics CRM application.
- URL. The URL is used to construct the URL for users to sign-in to the Microsoft Dynamics
 CRM application. Therefore, we recommend that you limit the length of URL name to reduce
 the overall length of the URL.
- Purpose. This value is used to associate the instance with a specific intent and is only
 displayed in the instance picker, which is accessed through the CRM Online Administration
 Center. For example, if this instance is for exclusive use by your sales and marketing
 departments you can enter Contoso Sales and Marketing or if the instance is for development
 and for testing purposes enter a relevant name such as Contoso Development.
- **Security Group**. This value is used to determine the Microsoft Online Services security group that includes the users who will have access to this instance of CRM Online. For more information, see <u>Control user access to instances</u>: security groups and licenses.

Important

If you do not specify a security group, all users associated with the subscription who have a CRM Online license will be added to the new instance.

Country/Region. You can specify a region for the instance.



To request the ability to create Microsoft Dynamics CRM Online instances (production and non-production) in more than one geographical region, please contact your account manager or Help & Training: Technical Support.

Currency. When you add an instance, you must select a base currency before the instance is provisioned. Although you can add currencies in the Microsoft Dynamics CRM application, only the base currency will be used for reporting.



Warning

Once set, the base currency cannot be changed.

Add an additional instance

The following steps apply to customers who do not purchase using volume licensing. Volume license customers should see: Volume Licensing: Online Services.

Step 1: Purchase the additional instance

- 1. Sign in to the Office 365 admin center as an Office 365 Global administrator. In the navigation pane, choose Purchase Services.
- 2. Hover over your Microsoft Dynamics CRM Online subscription, and then choose Change license quantity.
- 3. Under optional add-ons, enter the number of instances that you want, and then proceed through the order process.

You can choose to add production or non-production (Sandbox) instances. For more information, see Microsoft Dynamics CRM pricing and licensing.



Close your CRM Online browser session and open a new session to force an update to the Manage all CRM Online instances page.

Step 2: Configure the additional instance

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- Choose the Instances tab.
- 4. Select the instance that you want to configure, and then choose **Configure**.



If the instance does not appear in the list or is in a state other than ready to configure, wait a few minutes and then try again. Or, close your CRM Online browser session and open a new session to force an update to the Manage all **CRM Online instances** page.

You cannot start a new CRM Online instance until you click or tap Configure and complete the configuration process.

CRM Online instances will not come prepared with sample data when configured by an Office 365 Global administrator who does not have a CRM Online license. Sample data may be added later, after the instance is configured and ready to use, by a CRM Online licensed user who has the Microsoft Dynamics CRM System administrator security role. For more information, see Help & Training: Add or remove sample data.

- 5. On the configure new instance page, enter your settings, and then choose Next.
- 6. On the **Confirm some details** page, verify that the country/region and currency displayed are correct. Although you can add currencies in the Microsoft Dynamics CRM application, only the base currency will be used for reporting.



Warning

After a base currency is selected it cannot be changed.

After you have verified that the base currency is correct, choose **Finish**.

7. Once your instance is set up, make note of the URL and click or tap it to launch CRM Online. Prepare the instance for users by assigning security roles, creating teams, customizing, and importing data. More information: Get started administering Microsoft <u>Dynamics CRM Online</u> and **Administering CRM 2015 for online and on-premises**.

What is the effect of an additional instance on storage?

When you add a new CRM Online instance, the new instance and any existing instances will consume the existing storage that is available to the account. Be aware that, when you reach the storage limit all CRM Online instances associated with the account will go into a read-only state. Warnings will be communicated when storage is near capacity.

Control user access to instances: security groups and licenses

If your company has multiple CRM Online instances, you can use security groups to control which licensed users can be a member of a particular instance.

Consider the following example scenario:

| Instance | Security Group | Purpose |
|-------------------|----------------|---------------------------------|
| Coho Winery Sales | Sales_SG | Provide access to the |
| | | organization that creates sales |

| Instance | Security Group | Purpose |
|-----------------------|----------------|---|
| | | opportunities, handles quotes, and closes deals. |
| Coho Winery Marketing | Marketing_SG | Provide access to the organization that drives marketing efforts through marketing campaigns and advertising. |
| Coho Winery Service | Marketing_SG | Provide access to the organization that processes customer cases. |
| Coho Winery Dev | Developer_SG | Provide access to the Sandbox instance used for development and testing. |

In this example, four security groups provide controlled access to a specific organization. Note the following about security groups:

- When users are added to the security group, they are added to the CRM instance.
- When users are removed from the group, they are disabled in the CRM instance.
- When a security group is associated with an existing instance with users, all users in the instance that are not members of the group will be disabled.
- If a CRM instance does not have an associated security group, all users with a CRM license will be created as users and enabled in the instance.
- If a security group is associated with an instance, only users with CRM licenses that are members of the instance security group will be created as users in the CRM instance.
- When you remove a security group that is associated with a CRM Online instance, either by
 editing the instance and removing the security group or by deleting the security group, CRM
 Online licensed users who were members of the security group will have the same access to
 CRM Online.

Note

All licensed users, whether or not they are members of the security groups, must be assigned Microsoft Dynamics CRM security roles to access CRM Online. You assign the Microsoft Dynamics CRM security roles in the CRM Online web application. Users can't access instances of CRM Online until they are assigned at least one security role for that instance. More information: Grant users access to Microsoft Dynamics CRM Online as a Microsoft Online service.

Create a security group and add members to the security group.

1. Sign in to the Office 365 admin center.

- 2. Choose **Groups**.
- 3. Choose Add (+).
- 4. In Create security group, add the Group name and Description. Choose Create.
- 5. Choose **Edit members** > **Add member**, type in the name of users to add to the group, and then choose **Add** > **Close**.
- 6. To remove a user from the security group, select the security group, choose **edit members**, select a user, choose **Remove from group > Yes**.

Note

If the users you want to add to the security group are not created, create the users and assign to them the CRM Online licenses.

To add multiple users, see: bulk add users to Office365 groups.

Create a user and assign license

1. In the Office 365 admin center, choose **Users > Active users > Add (+)**. Enter the user information, select licenses, and then choose **Create**.

More information: Add users individually to Office 365 - Admin Help

Associate a security group with a Microsoft Dynamics CRM instance

- 1. In the Office 365 admin center, choose **Admin > CRM**.
- 2. Choose the **Instances** tab, select an instance, and then choose **Edit**.
- 3. In **security settings**, search for a specific security group, and then choose **Save** > **Save**.

To force an immediate synchronization between the Office 365 admin portal and Microsoft Dynamics CRM Online, do the following:

- Sign out of Microsoft Dynamics CRM Online and the Office 365 admin portal.
- Close all open browsers used for Microsoft Dynamics CRM Online and the Office 365 admin portal.
- Sign back in to Microsoft Dynamics CRM Online and the Office 365 admin portal.

See Also

Edit properties of an instance

Free non-production instances and free storage in Dynamics CRM Online 2013

Manage CRM Online Sandbox instances

Grant users access to Microsoft Dynamics CRM Online as a Microsoft Online service

Manage subscriptions, licenses, and user accounts

Switch an instance

You may decide that your customization work developed and tested on a Sandbox instance is now ready to go live. If you've placed your Sandbox instance in administration mode, only users with CRM System Administrator or System Customizer security roles are able to sign in to that instance. Once you switch the instance type to Production, all your users can access your CRM organization. When you configure or edit an instance, you can switch the instance from:

- Production to Sandbox
- Sandbox to Production

Switching an instance does not change the number of your purchased licenses. Review the **License considerations** section for how switching can impact license allocation.

Switch an instance

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- Click Admin > CRM.
- 3. Choose the **Instances** tab.
- 4. Select the instance that you want, and then choose **Edit**. If this is a new instance, choose **Configure**.
- 5. Under **Instance type**, choose the instance type and then choose **Next**.
- 6. Review the settings and then choose **Save**.

License considerations

Review the following table to see how switching an instance type is impacted by your CRM Online licenses.

| Scenario | Result | Notes |
|--|--|--|
| Switch a Production instance to Sandbox. You have unused Sandbox licenses. | A Sandbox license is used. | Sandbox instances have special features such as Reset and Administration modes. See Manage CRM Online Sandbox instances. |
| Switch a Production instance to Sandbox. You do not have any unused Sandbox licenses. You have unused Production licenses. | A Production license is used. | Sandbox instances have special features such as Reset and Administration modes. See Manage CRM Online Sandbox instances. |
| Switch a Production instance to Sandbox. You do not have any unused Sandbox or | The Production instance is not changed. You need to purchase a Sandbox instance. | Sandbox instances have special features such as Reset and Administration modes. See |

| Scenario | Result | Notes |
|--|---|---|
| Production licenses. | | Manage CRM Online Sandbox instances. |
| Switch a Sandbox instance to Production. You have unused Production licenses. | A Production license is used. A Sandbox instance becomes available. | |
| Switch a Sandbox instance to Production. You do not have any unused Production licenses. | You will need to purchase a Production license. | See Add an instance to your subscription. |

See Also

Manage Microsoft Dynamics CRM Online instances Manage CRM Online Sandbox instances Add an instance to your subscription

Delete an instance

You can delete Microsoft Dynamics CRM Online Sandbox instances to recover the licenses and storage space or to prevent them from being used by mistake. In order to delete a production instance, you must first switch to a Sandbox instance and then delete the Sandbox instance.

Delete an instance

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- 3. Choose the **Instances** tab.
- 4. Select the instance that you want, and then choose **Delete**.



Warning

Your data will be lost! Be sure you've selected the correct instance.

5. Choose **Confirm** to delete the instance.

Deleting an instance doesn't change the number of your licenses purchased. For example, say you have two instances - one Sandbox and one production - and you decide to delete your Sandbox instance. After the delete has successfully completed, you'll see one production instance and one instance to configure in the Instance tab of the Manage your Dynamics CRM updates page.

See Also

Manage Microsoft Dynamics CRM Online instances Switch an instance

Edit properties of an instance

Administrators can edit properties of a Microsoft Dynamics CRM Online instance, such as the friendly name, URL, and the purpose. However, instances that are being provisioned cannot be edited, and disabled instances must be enabled before they can be edited.

Edit an instance



- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- Click Admin > CRM.
- Choose the Instances tab.
- 4. Select the instance that you want, and then choose Edit.
- 5. Select any of the following field values that you want to change.
 - Name. This is typically the name of your organization and is displayed in the Microsoft Dynamics CRM application. After you save the change, it may take up to 5 minutes for the friendly name to appear in the application.
 - URL. The URL is used to construct the URL for users to sign in to Microsoft Dynamics CRM. We recommend that you limit the length of the URL name to reduce the overall length of the URL.



Warning

There are important tasks that you must communicate to your Microsoft Dynamics CRM Online users immediately following a URL name change.

- For users of the web application, send information that includes the new URL with instructions about how to bookmark it.
- For users of Microsoft Dynamics CRM for Outlook Online, the following two tasks must be completed in the order specified here:
 - 1. Synchronize offline data. Dynamics CRM for Outlook users connected to this instance who work offline must synchronize by using the previous URL. If you run the Microsoft Dynamics CRM Configuration Wizard and change the URL before completing this step, offline data may be lost.
 - 2. Run the Configuration Wizard. After a URL name change is saved and any offline data is synchronized, users of Dynamics CRM for Outlook must run the Configuration Wizard to update the URL.

After a URL name change is saved, all users who access that instance must be notified of the change. Users will be able to access the instance for up to 24 hours by using the previous URL. After the 24-hour period has passed, the previous URL will not work.

Notice that interim URL names are discarded when there are multiple changes within 24 hours. For example, consider the following situation:

- The original URL of your instance is fourthcoffeesales.crm.dynamics.com.
- Using the instance picker, you change the URL name from fourthcoffeesales.crm.dynamics.com to fourthcoffeemktg.crm.dynamics.com.
- Within 24 hours of the URL name change, you change the URL name again, this time from fourthcoffeemktg.crm.dynamics.com to fourthcoffeesalesandmktg.crm.dynamics.com.

In this situation, the first URL name change to *fourthcoffeemktg.crm.dynamics.com* will be immediately removed from the system. The new URL,

fourthcoffeesalesandmktg.crm.dynamics.com, will become active. Additionally, the original URL, fourthcoffeesales.crm.dynamics.com, will be active for up to 24 hours.

- Purpose. This value is used to associate the instance with a specific intent and is
 only displayed in the Manage all CRM Online instances page, which is accessed
 through the CRM Online Administration Center. For example, if this instance is for
 exclusive use by your sales and marketing departments, you can enter Contoso
 Sales and Marketing or, if the instance is for development and testing, enter a
 relevant name such as Contoso Development.
- Security Group. This value is used to determine the security group that includes the
 users who will have access to this instance of Microsoft Dynamics CRM Online.
 Learn more: Add an instance



If you do not specify a security group, all users who have a Microsoft Dynamics CRM Online license will be added to this instance.

6. Choose Save.

See Also

Add an instance to your subscription

Manage CRM Online Sandbox instances

Manage your Microsoft Dynamics CRM Online subscription

Manage subscriptions, licenses, and user accounts

Manage storage for Microsoft Dynamics CRM Online

Copy an instance

You can use Copy instance in the CRM Online Administration Center to copy the CRM application and all data from any instance to a Sandbox instance. You can do either a full or minimal copy.

Check out the following video on copying an instance to a Sandbox instance: Microsoft Dynamics CRM 2013 Spring '14 Online New Features -Copy.

This video also applies to CRM Online 2015 Update 1 and Microsoft Dynamics CRM Online 2016 Update.

Full copy instance

A full copy includes all application data, users, and customizations from the source instance and is suitable for:

- User acceptance testing
- Upgrade testing
- Preview in production (TAP/EA)
- Training

An example scenario

Isaac, a business application developer, has received a request from the sales department to configure and deploy a social media integration solution from another company vendor. Isaac has never installed a solution from this vendor and is unsure what impact this would have on the production application. He'd like to import the solution into an environment that is nearly identical to, but isolated from, production to learn about the solution and make the appropriate configuration changes. Isaac submits a request to Thomas, the IT Manager for Contoso, to create a full copy Sandbox instance for him.

After the full copy is complete, Isaac receives a mail from Thomas telling him the Sandbox instance is ready. Isaac logs into the Sandbox instance and makes the necessary changes to make sure that production external services will not be impacted by the Sandbox instance. Once changes are complete, Isaac turns off administration mode and enables background services. Isaac is able to use the full copy Sandbox instance to do his testing and later manually import the solution into production.

Minimal copy instance

A Minimal copy only includes users, customizations, and schema from the source instance and is suitable for:

- Iterative team development
- Partner/ISV solutions
- · Proof of concept

An example scenario

Isaac has a large development project starting next week for the sales department. He has a team of developers ready to start on the project, some of whom are internal to Contoso and some are external vendors. The Contoso sales application contains Personally Identifiable Information (PII) that the sales manager has explicitly stated must not be made available to any external parties for privacy and legal liability reasons. Isaac requests a minimal copy Sandbox instance

that does not contain any production data or users. In addition, Isaac creates an Office 365 security group to give the development team access to the Sandbox instance.

After modifying and enabling some of the plug-ins, the developer Sandbox instance functions the same and is completely isolated from the production application. The development team works on their modifications in this instance for several weeks. They package their changes into a solution and export/import to deploy to the full copy Sandbox instance. After a successful round of testing and signoffs, the changes are manually deployed to production.

Entities copied in a Minimal copy

The following entities are copied when you do a Minimal copy:

| BusinessUnit |
|------------------------|
| ConnectionRole |
| Currency |
| DuplicateRule |
| DuplicateRuleCondition |
| EmailServerProfile |
| FieldPermission |
| FieldSecurityProfile |
| ImportMap |
| InternalAddress |
| Mailbox |
| Organization |
| Position |
| Report |
| Resource |
| ResourceGroup |
| Role |
| RollupField |
| SavedQuery |
| SLAKPIInstance |
| Solution |
| Subject |

| Team |
|--------------|
| TeamTemplate |
| Template |
| SystemUser |

To copy an instance



1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.



Note

Global administrators can copy all available instances. CRM System administrators can copy instances for which they have the System administrator role.

- 2. Click Admin > CRM.
- 3. Choose the **Instances** tab.
- 4. Select an instance, and then choose **Copy**.
- 5. On the copy instance page, select a target instance, a copy type, adjust the instance settings as needed, and then choose **Copy**.

A target instance can be a Sandbox or Preview instance; not a Production instance.



Warning

The target instance will be deleted and replaced with a copy of the data and customizations from the source instance. You won't be able to recover any deleted data.

6. Choose **yes** in the confirmation dialog box.

Once the copy process is complete, the target instance is placed in Administration mode and background operations are disabled. The next section describes recommended Administrator actions for the newly created copy (target) instance.

Next steps after copying an instance

To ensure the newly created copy (target) instance does not impact your production instance, once the copy operation is complete, two things happen:

1. The newly created copy instance is placed in administration mode. Only those with CRM System Administrator or System Customizer security roles can sign in and manage the copy instance. Regular CRM users cannot sign in and use the copy instance.

2. Background operations are disabled in the copy instance. Disabled operations include workflows and synchronization with Microsoft Exchange.

Review components

You should review the status of application components in the copy instance with external connections such as Yammer, email, plug-ins, custom workflow activities, etc. Review these and consider what action to take:

- 1. Disable the component.
- Redirect the component to another service instance such as one running Exchange or SharePoint.
- 3. Do nothing leave the component as is in the copy instance. For example, you might decide to allow Yammer posting to both the copy and production instances.

Here are some possible application components in the copy instance that could have external connections and therefore could impact services with the same connections in your production instance.

- Email. A mailbox cannot be synced with two different instances. For a full copy instance, the
 user mailboxes in the copy instance must be disabled so the mailboxes do not attempt to
 send or receive email, or track appointments, contacts, or tasks. Set synchronization for the
 following to None.
 - Incoming Email
 - Outgoing Email
 - Appointments, Contacts, Tasks

More information: Set the delivery method for incoming and outgoing email

- SharePoint. Deactivate or redirect SharePoint to a sandbox SharePoint environment to
 prevent impacting documents in Microsoft Dynamics CRM managed by SharePoint. In
 Microsoft Dynamics CRM, go to Settings > Documentation Management > SharePoint
 Sites. Select your site, and then click or tap Deactivate.
- Yammer. Disable Yammer or redirect to a separate Yammer service to prevent posts made
 in the copy instance conflicting with posts made in the production instance. In Microsoft
 Dynamics CRM, go to Settings > Administration > Yammer Configuration.
 - After creating a new Sandbox instance, workflows and system jobs might be pending execution. Apart from these jobs, if you have connected Yammer to CRM there will be Yammer activity streams posted from CRM to Yammer asynchronously. These activity streams are not visible through the system jobs. If there were any pending Yammer activity streams before the Disable Background Process is turned on, these activity steams will be posted to the current Yammer configuration once the Disable Background Process is turned back off. In the Sandbox instance, if you have your current Yammer configuration connected to the same Yammer network as your production environment, you might see duplicate activity streams. To avoid duplicate Yammer activity streams, redirect your Sandbox instance to another Yammer network (possibly a test network) before turning background processes back on.
- Platform extensibility. Consider disabling the following that could be running in the copy instance and impacting external service components.

- Server-side plug-ins.
- Workflow custom activity.
- Client extensibility. Review the following.
 - Client-side JavaScript. Take a look at your JavaScript and HTML web resources for read/write operations that could impact external services.
 - **IFRAMES**. Determine if the target of an IFRAME is a production instance.

See Also

Introducing Sandbox Instances in CRM Online Manage CRM Online Sandbox instances Manage Microsoft Dynamics CRM Online instances

Multiple online instances or tenants

Microsoft Dynamics CRM Online gives you options for segregating your CRM data and user access. For most companies, adding and using multiple instances in your subscription provides the right mix of functionality and ease of management. Enterprises with separate geographic locations might consider using multiple tenants to separate Microsoft Dynamics CRM Online licenses. Multiple instances can share users among instances; multiple tenants cannot.



The concept and operation of tenants and instances, though similar, differs between online and on-premises deployments of Microsoft Dynamics CRM. This topic is for those administering Microsoft Dynamics CRM Online deployments.

Terminology

| Term | Definition |
|----------|--|
| Tenant | For Microsoft Dynamics CRM Online, a tenant is the account you create in the Microsoft Online Services environment when you sign up for a CRM Online subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple CRM Online instances. The tenant created for you has a domain name of <account>.onmicrosoft.com. For example, contoso.onmicrosoft.com.</account> |
| Instance | When you sign up for a trial or purchase a Microsoft Dynamics CRM Online subscription, a CRM Online production instance is created. |

| Term | Definition |
|--------------|--|
| | Each additional production or non-production (Sandbox) CRM Online instance you add creates a separate and isolated Microsoft Dynamics CRM organization on the same tenant. |
| | An instance has the URL format: https:// <url name="">.crm.dynamics.com. For example, https://contososales.crm.dynamics.com.</url> |
| Subscription | A subscription consists of the CRM licenses and add-ons included with the trial or paid service you signed up for in your CRM Online account. CRM subscriptions can vary in license type, price, and end date. |
| | For example, a subscription might be 100 licenses of Microsoft Dynamics CRM Online Professional and 10 licenses of Microsoft Dynamics CRM Online Enterprise. |
| Identity | The user account used to sign in to CRM Online. You can also use this identity to access other Microsoft Online services, such as Office 365 or SharePoint Online. Administrators can decide if they want to federate user identity management between CRM Online and onpremises Active Directory. |
| User account | A user account assigned by an organization (work, school, non-profit) to one of their constituents (an employee, student, customer) that provides sign-in access to one or more of the organization's Microsoft cloud service subscriptions, such as Exchange Online or CRM Online. Access to an online service is controlled by the license assigned to the user account. |
| | User accounts are stored in an organization's cloud directory within Azure Active Directory, and are typically deleted when the user leaves the organization. Organizational accounts differ from Microsoft accounts in that they are created and managed by admins in the organization, |

| Term | Definition |
|----------------|--|
| | not by the user. |
| Security group | If your company has multiple CRM Online instances, you can use instance security groups to control which licensed users can access a particular instance. More information: Control user access to instances: security groups and licenses |

Uses for multiple instances

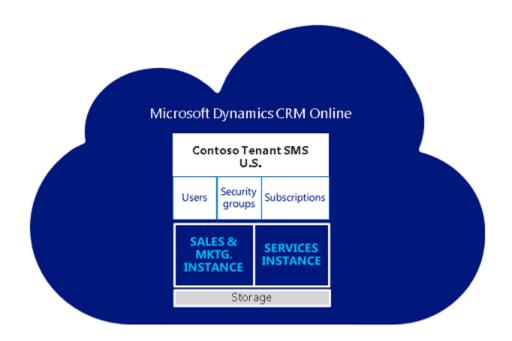
CRM Online instances are similar in concept to a high-rise business complex with floors organized according to business functions. Consider each floor within the building as an application (Sales/Service/Marketing, Vendor management, Wealth management) and consider each unit within a floor as an instance for a specific purpose such as Production, Training, Testing, and Development.



Multiple instances are needed when segregation is required of plugins, workflows, or admin resources that cannot be easily isolated by using business units in CRM.

A multi-instance deployment

A typical CRM Online deployment includes one tenant only. A tenant can include one or more CRM Online instances; however, a CRM Online instance is always associated with a single tenant.



This example uses two instances for three teams: Sales, Marketing, and Services.

Sales and Marketing share an instance so lead information can be easily accessed by both. Services has its own instance so tickets and warranties can be managed separately from campaigns and other sales related events.

You can provide access to one or both instances easily. Sales and Marketing users could be limited to their instance while Service users with extended access could update support escalations records related to accounts in both instances.

About single tenant with multiple instances:

- A tenant can include up to 50 CRM Online production instances and up to 75 non-production (Sandbox) instances.
- Each instance within the tenant receives its own SQL database.
- CRM data is not shared across instances.
- Storage is shared across the primary instance and any additional instances.
- All instances for a single customer tenant will be set up in the geography where they initially signed up for their account. Storage consumption is totaled and tracked across all the instances attached to a customer tenant.
- You can set up separate security groups for all instances.
- A licensed CRM Online user can potentially access all the CRM Online instances associated with the tenant. Access is controlled by instance security group membership.
- You can purchase additional instances through the Additional Instance Add-On. Additional
 instances can be added only to "paid" subscriptions not trials or Internal Use Rights (IUR). If
 you purchased your CRM Online subscription through Volume Licensing, you must go

- through your Large Account Reseller (LAR) to purchase the additional instance. More information: Billing and subscription support
- You can't merge existing trials or subscriptions onto an additional instance; instead, you will need to move your data and customizations.

Why use multiple instances?

The following are common use cases for multi-instance deployment. Consider these examples when you decide the deployment type that best fits your company's requirements.

Master data management

In this scenario, a "master" data set provides for change management through a central master data source. This approach requires that the central master data be synchronized to all instances so that each instance has access to the latest version of the core information. Requested changes to the information can be made directly within the master system. Alternatively, users can explicitly access the master system or capture the changes in the local instance, with those changes subsequently passed on to the master instance.

Requiring that changes be made centrally can provide for centralized change control. For example, anti-fraud checks can be performed to ensure that changes are made only by a central team and not by local teams that might otherwise benefit from a change, such as a change in credit limits. This would provide a second level of change authorization and verification that avoids the ability for a single person or a group of people who work closely together to collaborate to affect a fraud. Pushing a request to a different, independent team can provide protection against potential fraud.

Security and privacy

Differences in regional, for example European Union (EU), or national legislation can result in variations in requirements for securing data or maintaining data privacy across the different regions or countries in a deployment. In some cases, legislative/regulatory restrictions make it illegal to host data outside the borders of a country or region, and addressing this challenge is particularly critical in specific business sectors.

For example, consider healthcare sector restrictions on sharing patient information. Some EU regulations require that any health information that is collected about people residing in the EU be maintained and shared only within EU boundaries, while similar data collected about people in the United States (US) is kept within US boundaries. Also consider banking sector restrictions on sharing customer information. In Switzerland, for example, regulations make it illegal to share customer information outside of their national boundaries.

Scalability

While a single instance of Microsoft Dynamics CRM can scale up and out to support the growth of a customer's business, with very high data volumes or levels of complexity, there are additional considerations. For example, in environments with extreme volumes and/or extensive use of Service Scheduling, scaling up SQL Server can require complicated and expensive infrastructure that is prohibitively expensive or extremely difficult to manage.

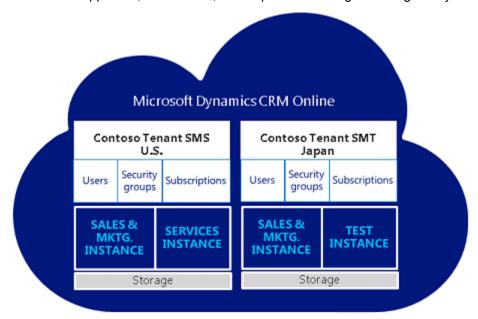
There are many scenarios in which there is a natural functional split in capability requirements. In such cases, delegating workloads by creating scale-out scenarios that are based on these functional splits can provide for higher volumes by using commodity infrastructure.

Add an instance to your subscription

For information about how to add an instance to your CRM Online subscription, see Add an instance to your subscription.

A multi-tenant deployment

Global businesses with regional or country models that differ can use tenants to account for variations in approach, market size, or compliance with legal and regulatory constraints.



This example includes a second tenant for Contoso Japan.

User accounts, identities, security groups, subscriptions, licenses, and storage cannot be shared among tenants. All tenants can have multiple instances associated with each specific tenant. CRM data is not shared across instances or tenants.

About multiple tenants:

In a multi-tenant scenario, a licensed CRM Online user associated with a tenant can only
access one or more CRM Online instances mapped to the same tenant. To access another
tenant a user would need a separate license and a unique set of sign-in credentials for that
tenant.

For example, if User A has an account to access Tenant A their license allows them to access any and all instances created within Tenant A - if they are allowed by their

- administrator. If User A needs to access instances within Tenant B, they will need an additional CRM Online license.
- Each tenant will require a tenant administrator(s) with unique sign-in credentials, and each tenant affiliate will manage its tenant separately in the administrator console.
- Multiple instances within a tenant are visible from the CRM Online interface if the administrator has access.
- You cannot reassign licenses between tenant enrollments. An enrolled affiliate can use license reduction under one enrollment and add licenses to another enrollment to facilitate this.
- On-premises Active Directory federation cannot be established with more than one tenant
 unless you have top-level domains that you need to federate with different tenants (for
 example Contoso.com and Fabricam.com).

Why use multiple tenants?

Functional localization

This scenario typically arises in organizations with overlapping but separate functional needs. Some common examples include:

- Organizations with different business divisions, each with a different market or model of operation.
- Global businesses with regional or country models that differ to account for variations in approach, market size, or compliance with legal and regulatory constraints.

In these types of business environments, an organization often will have common sets of functionality that allow specific regions, countries, or business areas with a degree of localization regarding:

- Information capture. For example, capturing the ZIP Code in the United States would correlate to capturing the Post Code in the United Kingdom.
- Forms, workflows.

Physical distribution

For business solutions that must support users that are physically distributed over large distances, particularly for global deployments, using a single instance may not be suitable because of the implications (such as WAN latency) associated with the infrastructure over which the users connect, which can significantly impact the user experience. Distributing instances to provide users with more local access can reduce or overcome WAN-related issues, as the access occurs over shorter network connections.

Add a multi-tenant deployment under volume licensing

For a multi-tenant deployment, you'll need a Multi-Tenant Amendment. A Multi-Tenant Amendment is an actual amendment to the Volume License agreement used to purchase licenses. Contact your Microsoft Sales Representative or Reseller to obtain the amendment.

Constraints of multi-tenants

Admins who want to deploy and manage multiple tenants should be aware of the following:

- User accounts, identities, security groups, subscriptions, licenses, and storage cannot be shared among tenants.
- A single domain can only be federated with one tenant.
- Each tenant must have its own namespace; UPN or SMTP namespaces cannot be shared across tenants.
- If an on-premises Exchange organization exists, you cannot split this organization across multiple tenants.
- A consolidated Global Address List will not be available, except if explicitly managed downstream from the synchronization.
- Cross-tenant collaboration will be limited to Lync Federation and Exchange Federation features.
- SharePoint access across tenants may not be possible. While this may be solved with Partner Access, the user experience is disrupted and licensing aspects apply.
- There can be no duplicate accounts across the tenants or partitions in the on-premises Active Directory.

See Also

Manage Microsoft Dynamics CRM Online instances

<u>Using multi-tenancy in Microsoft Dynamics CRM 2013 to address challenges in enterprise</u> business environments (primarily on-premises)

Dynamics CRM and multi-tenancy (on-premises)

Create and edit multiregional instances

For multinational companies with employees and customers distributed around the world, you can create and manage Microsoft Dynamics CRM Online instances specific to your global regions. You can create an instance in a different region than where your CRM Online tenant resides. Local instances can provide quicker data access for users in that region. Be sure to read A multi-instance deployment to understand the features of multiple instances.

Purchase the CRM Online instance on the <u>Microsoft online services portal Purchase</u> <u>subscriptions</u> page. You must have an active Microsoft Dynamics CRM Online account to complete the purchase. Additional storage and instances can be purchased by customers who have a paid Microsoft Dynamics CRM Online Professional or Microsoft Dynamics CRM Online Enterprise subscription.

You must have an Office 365 Global administrator or CRM Online System administrator role to do these tasks. For more information, see <u>Assigning admin roles</u>.



To request the ability to create Microsoft Dynamics CRM Online instances (production and non-production) in more than one geographical region, please contact your account manager or Help & Training: Technical Support.

In This Topic

What information do I need to create an instance?

Create a regional instance

Configure and manage a regional instance

What information do I need to create an instance?

During the initial configuration an instance, you can accept the default values, or enter different values to create a Microsoft Dynamics CRM Online instance.

Region. Choose from the following: Asia Pacific (APAC); Europe, Middle-East, Africa (EMEA); Japan (JPN); North America (NA); Oceania (OCE); South America (LATAM).



Tip

To view the current data centers for your region, see Where is my data?

- Name. This is typically the name of your organization and is displayed in the CRM Online application.
- **URL**. The URL name is used to construct the URL for users to sign-in to the Microsoft Dynamics CRM application. Therefore, we recommend that you limit the length of URL name to reduce the overall length of the URL.
- Purpose. This value is used to associate the instance with a specific intent and is only displayed in the instance picker. For example, if this instance is for exclusive use by your sales and marketing departments you can enter Contoso Sales and Marketing or if the instance is for development and for testing purposes enter a relevant name such as Contoso Development.
- Instance Security Group. This value is used to determine the Microsoft Online Services security group that includes the users who will have access to this instance of Microsoft Dynamics CRM Online. For more information, see Control user access to instances: security groups and licenses.



Important

If you do not specify a security group, all users associated with the subscription who have a Microsoft Dynamics CRM Online license will be added to the new instance.

- Organizational language. This language will be used for the Microsoft Dynamics CRM Online application.
- Base currency. When you add an instance, you must select a base currency before the instance is provisioned. Although you can add currencies in the Microsoft Dynamics CRM application, only the base currency will be used for reporting.



Warning

Once set, the base currency cannot be changed.

Create a regional instance

The following steps apply to customers who do not purchase using volume licensing. Volume license customers should see: Purchase Microsoft Dynamics CRM Through Volume Licensing.

Step 1: Purchase the additional instance

- 1. Global administrators sign in to the Office 365 admin center, and then, in the navigation pane, choose purchase services.
- 2. Under your Microsoft Dynamics CRM Online subscription, choose Add more.
- 3. Under optional add-ons, enter the number of instances that you want, and then proceed through the order process.

You can choose to add production or non-production (Sandbox) instances. For more information, see Microsoft Dynamics CRM pricing and licensing.

Step 2: Configure the additional instance for a region

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- Click Admin > CRM.
- Choose the Instances tab.
- 4. Select the instance that you want to configure, and then choose **Configure**.



Important

If the instance does not appear in the list or is in a state other than ready to **configure**, wait a few minutes and then try again.

You cannot start a new CRM Online instance until you choose Configure and complete the configuration process.

Microsoft Dynamics CRM Online instances will not come prepared with sample data when configured by a Global administrator who does not have a CRM Online license. Sample data may be added later, after the instance is configured and ready to use, by a CRM Online licensed user who has the Microsoft Dynamics CRM system administrator security role. For more information, see Add or remove sample data.

- 5. On the **configure new instance** page, select a region for the instance.
- 6. Enter the rest of your settings, including choosing a currency, and then choose Next.



Important

After a base currency is selected it cannot be changed.

Although you can add currencies in the Microsoft Dynamics CRM application, only the base currency will be used for reporting. To select a different currency, choose Change currency and select a different one or specify a custom currency.

7. On the confirmation page, verify that the settings are correct and then choose **Configure**.

8. On the Your Microsoft Dynamics CRM organization is ready page, choose Launch CRM Online to start Microsoft Dynamics CRM Online to prepare the instance for users such as assign security roles, create teams, customize, and import data. More information: Get started administering Microsoft Dynamics CRM Online and Administration Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.



Tip

Note the Microsoft Dynamics CRM Online instance URL that is displayed on the page. You can use this URL to directly access the Microsoft Dynamics CRM Online instance.

Configure and manage a regional instance

To configure and manage a regional instance, you must first select your active region to be the same as the regional instance.

Select a regional instance to configure and manage

- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- 3. Choose the **Instances** tab.
- 4. From the drop-down list, select the region of the regional instance to configure. For example, to edit an instance in Japan, select the APAC region.



Note

If you don't see the Your current region is: drop-down list, you don't have any instances outside of your current region.

5. Select the instance that you want to configure, and then choose **Configure**.

The Edit, Copy, and Reset buttons appear when you've selected a regional instance matching your active region.



- Copied instances are copied to the same region as the source instance.
- Instances that are reset are reset to the current region.

See Also

Edit properties of an instance

Free non-production instances and free storage in Dynamics CRM Online 2013

Manage CRM Online Sandbox instances

Manage Microsoft Dynamics CRM Online instances

Differences between Office 365 Administrative Roles and Dynamics CRM Online Security Roles

Grant Users Access to Microsoft Dynamics CRM Online as a Microsoft Online Service Manage subscriptions, licenses, and user accounts

Manage email notifications

The Microsoft Dynamics CRM Online service team regularly sends email notifications to the administrators in your Microsoft Dynamics CRM organization. Now, with a simple approach of mailbox rules, you have complete control over who should receive these email communications. As an administrator, you can set up mailbox rules to automatically redirect email communications from CRM Online (crmoln@microsoft.com) to additional recipients that you choose. For example, you can add to the list of recipients:

- People outside of your CRM organization, such as your partners.
- People inside and outside of your company.

All redirected emails retain the original sender context, such as CRM Online (crmoln@microsoft.com).

You can automatically redirect the email notifications in Exchange Server 2010 or later versions. You can also set up automatic email redirection in the following deployments:

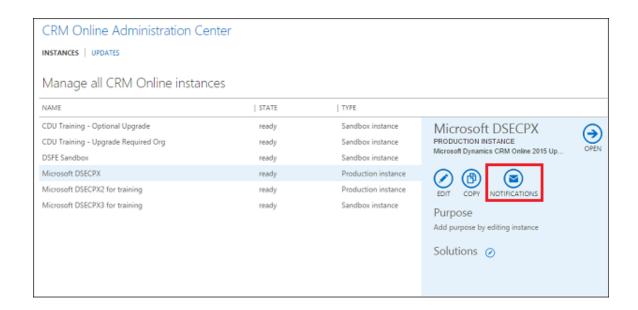
- Microsoft Exchange Server on-premises deployment
- Office 365 Exchange Online service
- Hybrid deployment: Exchange Server on-premises and Office 365 subscription with Exchange Online
- · Email deployments other than Exchange

For more information, download the whitepaper: Create your Mailbox rule

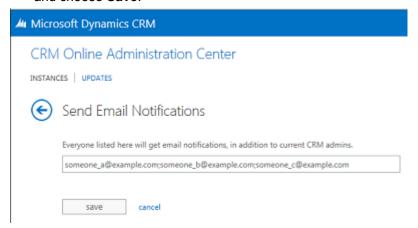
Send email notifications to multiple recipients

By default, CRM admins will receive update notifications. You can add others to receive update notifications.

- 1. Sign in to https://portal.office.com.
- On the Office 365 menu bar, choose Admin > CRM > Instances tab.
- 3. Choose an instance that has notifications you want to change.
- Choose Notifications.



5. Enter the email addresses of people to receive update notifications for the selected instance and choose **Save**.



See Also

Manage your Microsoft Dynamics CRM Online subscription

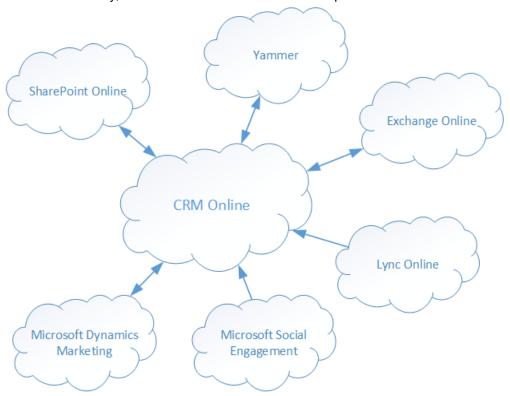
Add interoperation features to Microsoft Dynamics CRM Online

Managing Email notifications in Microsoft Dynamics CRM Online

Identifying Your Microsoft Dynamics CRM Online Administrator(s)

Add Office 365 Online services

Integrating Microsoft Office 365 with Microsoft Dynamics CRM Online is a great way to enhance your customer relationship management with the power of cloud services: easier maintenance, broader availability, and better coordination across multiple devices.



The following topics provide information on how to integrate Exchange Online, SharePoint Online, and Lync Online into Microsoft Dynamics CRM Online. More information, including how to start an Office 365 trial, how to manage user account synchronization, and how to find additional resources, can be found in the white paper Integration Guide: Microsoft Dynamics CRM Online and Office 365.

In This Section

Set up CRM Online to use Exchange Online

Set up CRM Online to use SharePoint Online

Set up CRM Online to use Skype or Skype for Business

Set up CRM Online to use Social Engagement

Set up CRM Online to use Dynamics Marketing

Set up CRM Online to use Yammer

See Also

Manage your Microsoft Dynamics CRM Online subscription

Set up CRM Online to use Exchange Online

You know how important email is to your business and what happens when email stops flowing for even a short time. You can rid yourself of much of the stress of managing an email server by letting Microsoft Office 365 host your email service with Exchange Online. Then integrate Exchange Online with Microsoft Dynamics CRM Online to take advantage of CRM Online email features.

One of the main reasons people use Microsoft Dynamics CRM is to store all customer email so anyone with the appropriate permissions can see all relevant customer communications in one place. For example, you can see all email associated with a particular contact or account, or for a particular opportunity or case.

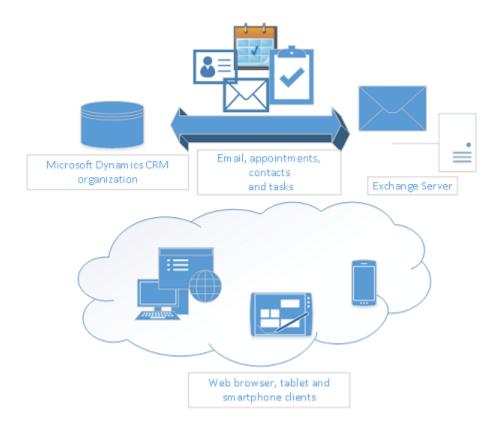
To store email and other messaging records in CRM, you need to synchronize your email system with CRM. There are three ways to do this:

- Server-side synchronization
- Microsoft Dynamics CRM for Outlook
- Microsoft Dynamics CRM Email Router

You can also use server-side synchronization together with Dynamics CRM for Outlook.

The preferred method: server-side synchronization

You can set synchronization of email messages, tasks, contacts, and appointments between CRM Online and Exchange Online. To use this functionality you don't have to install and maintain a separate application. Setup is simpler and maintenance is easier compared to other deployment scenarios. Server-side synchronization is the preferred option for organizations with users who run Microsoft Dynamics CRM in a web browser or on mobile devices, such as tablets or smartphones.



You configure and manage server-side synchronization from within CRM Online. More information: <u>Connect CRM Online to Exchange Online</u>

See Also

Integrate your email system with Microsoft Dynamics CRM

Set up server-side synchronization of email, appointments, contacts, and tasks

Exchange Online

Set up CRM Online to use SharePoint Online

When you use Microsoft SharePoint Online with Microsoft Dynamics CRM Online, you can:

- Create, upload, view, and delete documents stored in SharePoint from within Microsoft Dynamics CRM.
- Use the SharePoint document management abilities within Microsoft Dynamics CRM, such as checking the document in and out, viewing version history, and changing document properties.
- Enable non-Microsoft Dynamics CRM users, such as customers who want to review a bid, to directly access the SharePoint documents, provided they have the appropriate permissions.

Important

This topic is for organizations who wish to deploy for the first time or upgrade to server-based SharePoint integration. After you enable server-based SharePoint integration, you can't revert to the previous client-based authentication method.

For some organizations, using the Microsoft Dynamics CRM List Component solution might be a better choice. More information: Important considerations for server-based SharePoint Document Management software requirements for Microsoft Dynamics CRM.



Check out the following video: Connect CRM Online to SharePoint Online

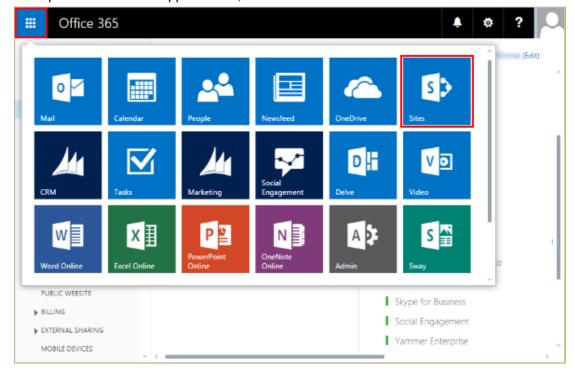
To set up CRM Online to use SharePoint Online, complete the following steps.

Assign user permissions to the Team SharePoint site

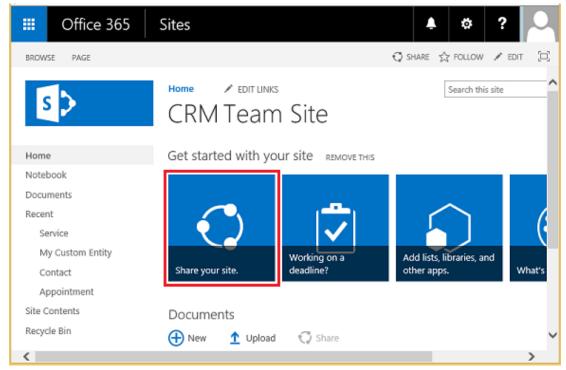
Your Microsoft Dynamics CRM Online and Microsoft Office 365 users are not automatically allowed access to your SharePoint sites. You must work within the SharePoint site to assign specific permission levels to individual users or groups.

Assign users to the Team site

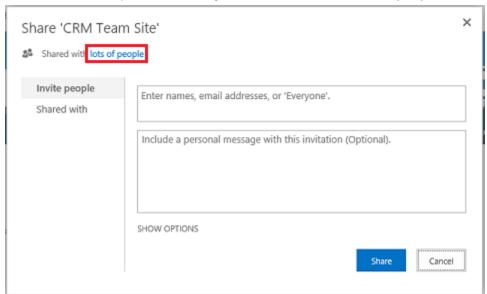
- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Open the Office 365 app launcher, and then choose Sites.



- 3. On the **Sites** page, choose **Team Site**.
- 4. On the Home page, choose Share your site.



5. To view the default permissions for your team site, choose **lots of people**.



6. By default, all users in your Microsoft Office 365 organization are able to add and edit

documents on the Team SharePoint site. To invite others, choose Invite people and add people external to your organization to share documents.

For more information about SharePoint permissions, see Introduction: Control user access with permissions

Configure CRM Online for SharePoint document management

For CRM Online organizations, Microsoft Dynamics CRM Online Spring '14 introduces a new server-based (using server-to-server authentication) SharePoint integration that removes the need to install or continue to use the Microsoft Dynamics CRM List Component solution.

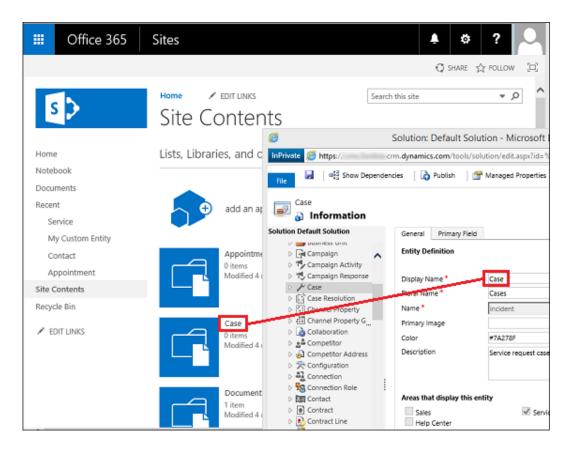
If you are a new organization and have not yet deployed document management, see Configure a new organization.

If your organization is already using document management with Microsoft Dynamics CRM List Component, you can switch to server-based SharePoint integration. More information: Switching from the list component or changing the deployment



Important

The Microsoft Dynamics CRM List Component builds the SharePoint library using the internal name of the document-enabled entity in CRM. Server-based SharePoint integration uses the entity display name. When you upgrade to server-based SharePoint integration, be sure to check that the display names in your document library on SharePoint match the entity display names in CRM. More information: "Validation Error" when you try to configure server-based SharePoint integration for Microsoft Dynamics CRM Online and SharePoint Online.



These names should match.

Configure a new organization

If your CRM organization has not deployed document management, when a CRM System Administrator logs in an alert message will be displayed to enable server-based SharePoint integration.



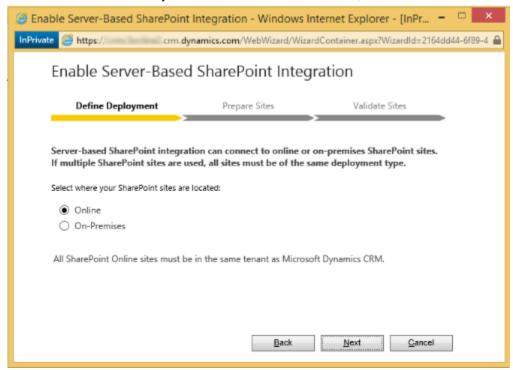
Note

If you don't see the alert and have not previously enabled server-based SharePoint integration, clear your browser cache or open CRM using Internet Explorer with InPrivate browsing to have the alert display again. Once you configure server-based integration, the alert will no longer appear.

 \triangleright

In the Enable Server-based SharePoint Integration alert click Next.

Choose Online for where your SharePoint sites are located, and then choose Next.

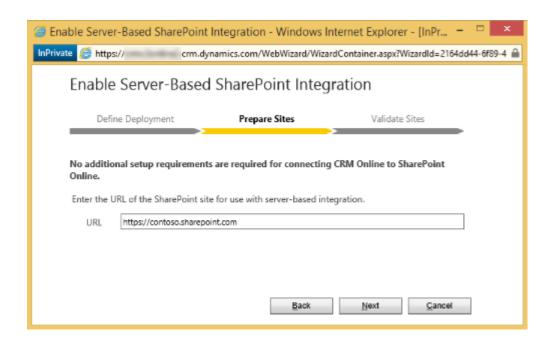


3. If your Microsoft Dynamics CRM Online is not connected to a SharePoint online site, enter the URL (for example https://contoso.sharepoint.com) of your SharePoint site that you will use for auto folder creation, and then choose Next.



∏ Tip

To see your SharePoint site collections, in the Office 365 admin center, choose Admin > SharePoint, and then choose site collections.



4. The URL will be checked for being a valid SharePoint online site and for existing in the same Office 365 tenant as your CRM organization. After enabling server-based SharePoint integration you can't go back to the previous client-side integration. Choose **Enable**.

After you enable server-based SharePoint the options to Install List Components and to enable server-based integration will no longer appear as an option in Document Management.

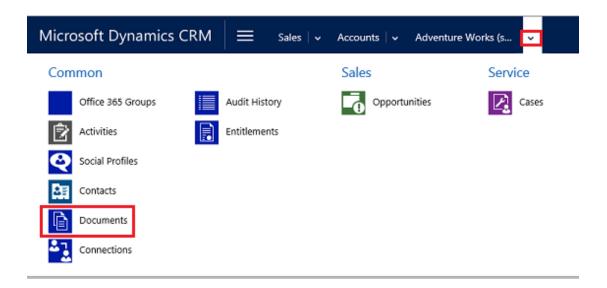
Once server-based SharePoint integration is enabled you will need to enable the entities you want available for document management integration. More information: Help & Training: Enable document management on entities

Using Document Management

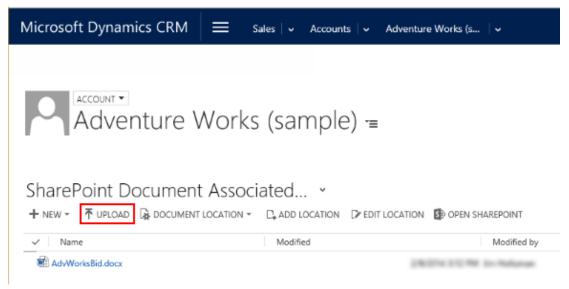
You are now ready to add document storage locations to the entities you enabled above and start managing documents. Begin by opening a document management-enabled record (for example, Contact).



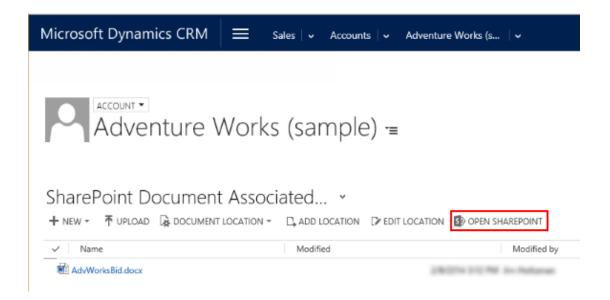
- 1. Browse to your Microsoft Dynamics CRM Online web application.
- 2. Go to Sales > Accounts. (How do I get there?)
- 3. Choose an account, such as the **Adventure Works** sample account.
- 4. On the nav bar, choose the down arrow next to the account name, and then choose **Documents**.



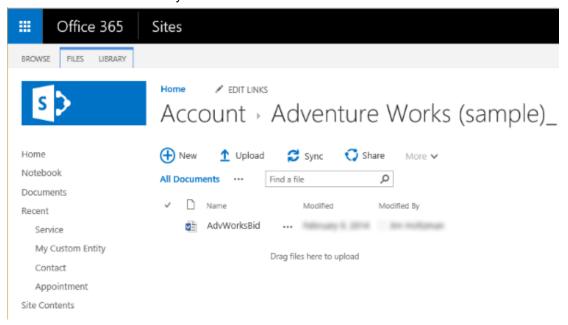
5. Choose **Upload**, and then browse to a document to upload to the new folder in your Microsoft Office 365 SharePoint Online Team site.



6. The document is now part of your Microsoft Dynamics CRM Online documents list. To see the document in your Microsoft Office 365 SharePoint Online Team site, choose **Open SharePoint**.

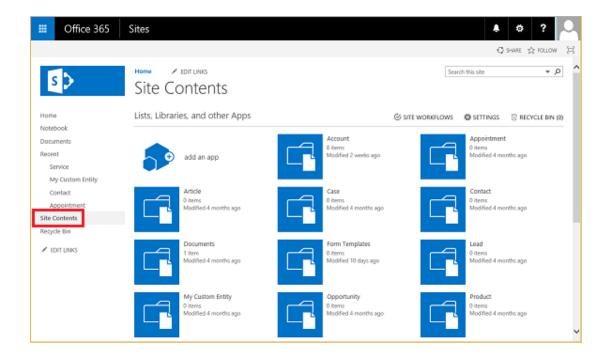


The document is now in your Microsoft Office 365 SharePoint Online Team site.



7. Choose **Site Contents** to see all the document libraries created for the managed entities you selected.

The entities you selected to be managed by Document Management appear as document libraries (for example: Account, Article, Case, Lead, Opportunity, Product, Quote, and Sales Literature).



More information: <u>Help & Training: Manage SharePoint documents from within Microsoft</u> Dynamics CRM

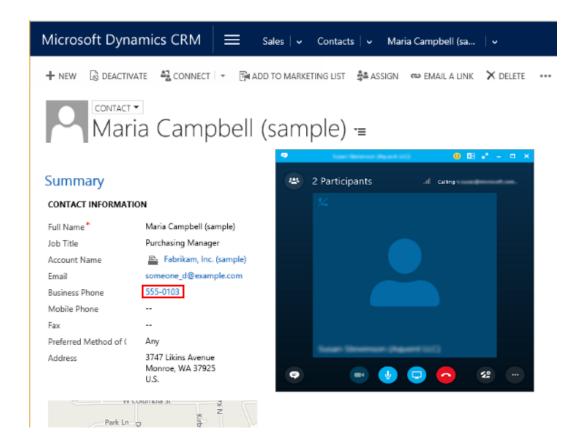
See Also

Manage your documents using SharePoint
SharePoint Online for IT pros
SharePoint and CRM

Set up CRM Online to use Skype or Skype for Business

When you use Skype for Business or Lync Online and Microsoft Dynamics CRM Online, your organization can benefit from these capabilities:

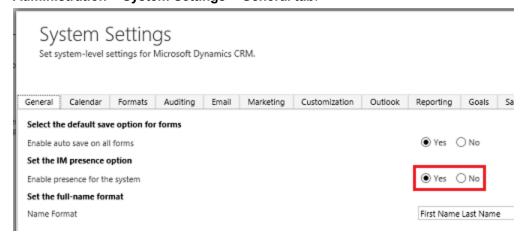
- Real-time communications with customers, colleagues, and team members without leaving Microsoft Dynamics CRM. Click or tap a person's phone number to call them.
- Track meetings as Activities in Microsoft Dynamics CRM.
- Get Presence information for members of the same email domain you are signed in with in Skype for Business or Lync.



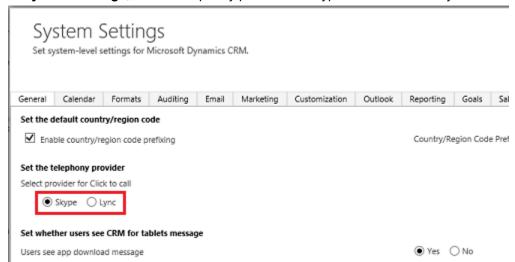
Set up Skype or Lync in Microsoft Dynamics CRM Online



1. Verify that IM presence is enabled in Microsoft Dynamics CRM. Go to **Settings** > **Administration** > **System Settings** > **General tab**.



2. In **System Settings**, set the telephony provider to Skype for Business or Lync.



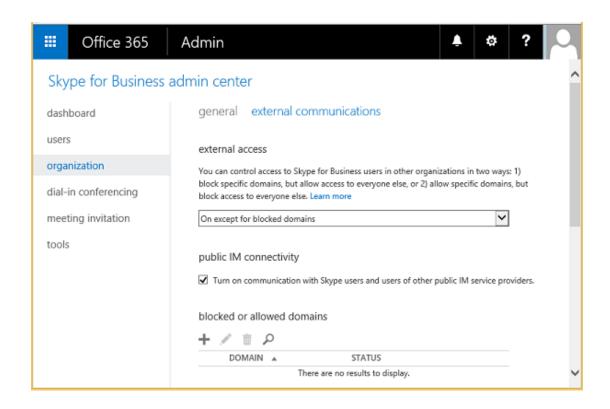
- 3. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 4. On the Office 365 admin center page, click or tap Admin > Skype for Business > organization.
- 5. Choose the **general** tab. Review and set the presence privacy mode.



Presence information is shown for members of the same email domain you are signed in to with Skype for Business or Lync. For example, if you are signed in with someone@contoso.com, you will see presence for other @contoso.com users.

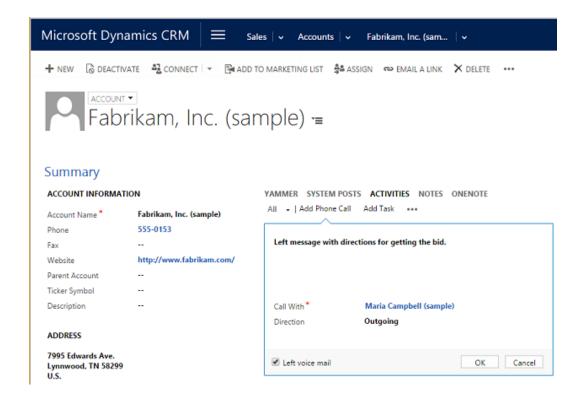
Instruct users to add the following as trusted sites in their browser:

- https://*.dynamics.com
- https://*.lync.com
- https://*.sharepoint.com
- https://login.microsoftonline.com
- 6. Choose the external communications tab. Review and set the external access and public IM connectivity settings.



Tracking Skype or Lync calls

Now that Lync is setup, your Lync calls are tracked as activities.



See Also

Set up Microsoft Dynamics CRM to make calls with Skype or Lync
Skype for Business and Skype integration with Microsoft Dynamics CRM
Set up Skype for Business Online

Set up CRM Online to use Social Engagement

In a socially connected world, engagement with customers can happen anywhere, anytime, and it is key to growing your business. Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams—helping them to gain insight into how people feel about your business and to proactively connect on social media with customers, fans, and critics.

For information on integrating Microsoft Social Engagement with CRM Online, see <u>Connect to Microsoft Social Engagement</u> and <u>Social Engagement Help Center</u>.

Set up CRM Online to use Dynamics Marketing

Microsoft Dynamics Marketing is an integrated marketing management solution for marketing operation, planning, execution, and analytics across all channels—digital, social, and traditional. Microsoft Dynamics Marketing brings together sales and marketing for effective collaboration.

Sales can have visibility into marketing activities specific to the account or contact and can provide feedback. With Microsoft Dynamics Marketing, marketers can generate analytics on campaign performance and initiatives to determine return on marketing investment.

For information about integrating Microsoft Dynamics Marketing with CRM Online, see Marketing Setup & Administration.

Set up CRM Online to use Yammer

Yammer empowers employees to be more productive and successful by enabling them to collaborate easily, make decisions faster, and self-organize into teams to take on any business challenge. It's a natural fit for Microsoft Dynamics CRM Online.



Check out the following for a quick introduction to Yammer:

- Video: CRM + Yammer Light a Fire Under Your Business.
 - About Yammer.



Note

A Yammer Enterprise subscription is required for Microsoft Dynamics CRM. A Yammer Enterprise subscription is included with Compare Office 365 for business plans.

If your Microsoft Dynamics CRM Online organization moves to a different global region (see Create and edit multiregional instances), you will need to reconfigure your Microsoft Dynamics CRM Online and Yammer connection. See Connect Microsoft Dynamics CRM Online to Yammer.

Activate Yammer in the Office 365 admin center

You begin connecting Yammer to Microsoft Dynamics CRM Online by completing the following steps in Office 365:

- 1. Add and verify your company domain with Office 365.
- 2. Assign a Global administrator to your company domain.
- 3. Activate Yammer Enterprise from the Office 365 Dashboard.

Yammer requires a company domain, such as contoso.com, to activate. Verify your domain in Office 365 is beyond the scope of a typical trial experience and thus will not be included in this guide. You can review and familiarize yourself with the process as described in the Yammer Activation Guide.

Connect Microsoft Dynamics CRM Online to Yammer

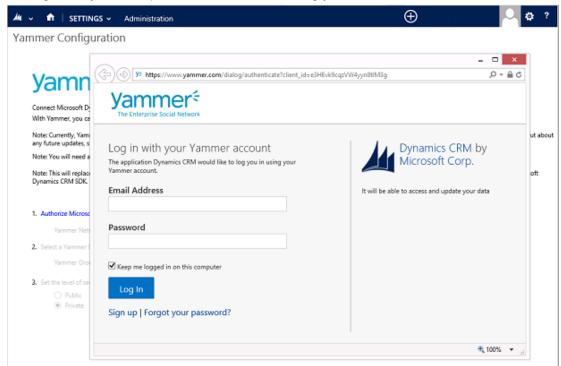
With a Yammer account created and activated, you can connect Microsoft Dynamics CRM Online to Yammer.



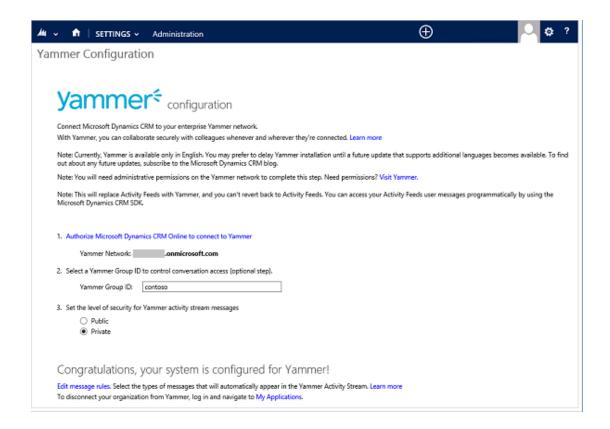
1. Browse to your Microsoft Dynamics CRM Online web application and sign in as a system

administrator.

- On the nav bar, choose Microsoft Dynamics CRM > Settings.
 Settings appears on the nav bar.
- 3. Go to Settings > Administration. (How do I get there?)
- 4. Click or tap Yammer Configuration.
- 5. Read the disclaimer, and then click or tap Continue.
- 6. On the Yammer Configuration page, click or tap **Authorize Microsoft Dynamics CRM Online to connect to Yammer**.
- 7. Sign in to your enterprise Yammer account using your administrator credentials.



8. Select your Yammer Group ID and security level.

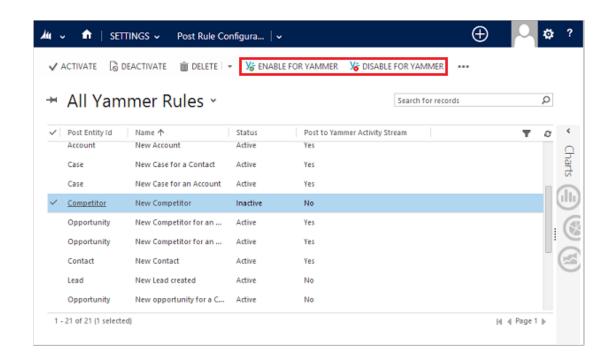


9. To enable record types and rules to automatically trigger a Yammer post, click or tap **Edit message rules**.

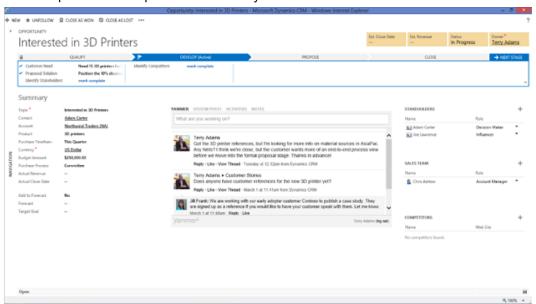
Congratulations, your system is configured for Yammer!

Edit message rules. Select the types of messages that will automatically appear in the Yammer Activity Stream. Learn more To disconnect your organization from Yammer, log in and navigate to My Applications.

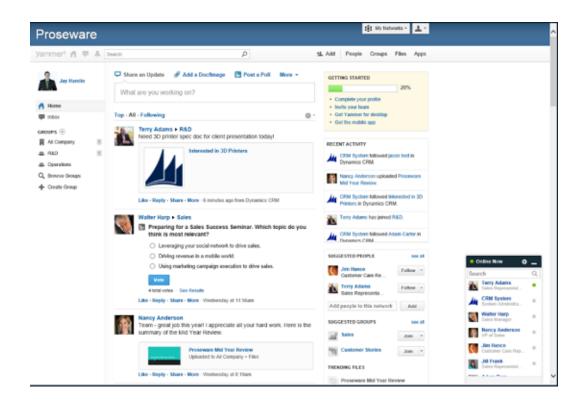
10. To trigger Yammer posts, enable or disable rules.



Yammer posts are now part of Microsoft Dynamics CRM Online.



As well as in your Yammer feed.



See Also

Connect Microsoft Dynamics CRM to Yammer

Pick your enterprise social network: Yammer or Newsfeed?

Upgrade your network to Yammer Enterprise

Add interoperation features to Microsoft Dynamics CRM Online

Microsoft Dynamics CRM Online integrates with a variety of different Microsoft Office and Microsoft Dynamics applications. This provides you with a familiar experience and can help to increase productivity

In This Section

Install Microsoft Dynamics CRM for Outlook

Deploy Office 365 Groups

Enable OneNote integration

Deploy CRM App for Outlook (lightweight app)

Enable OneDrive for Business
Enable Office Delve

Related Sections

Connecting Microsoft Dynamics AX 2012 with Microsoft Dynamics CRM

See Also

Manage your Microsoft Dynamics CRM Online subscription
Accessibility in Microsoft Dynamics CRM

Install Microsoft Dynamics CRM for Outlook

Many users find it easier and more convenient to work with Microsoft Dynamics CRM Online data through Outlook, a familiar application interface that they may already be using. This section provides information about hardware and software requirements and about installing Microsoft Dynamics CRM for Outlook on a user's computer.

CRM for Outlook Requirements

Dynamics CRM for Outlook is a free download that integrates Microsoft Dynamics CRM Online into the Outlook interface so that a user can work efficiently with both email and Microsoft Dynamics CRM Online data.

More information: Microsoft Dynamics CRM for Outlook hardware requirements and Microsoft Dynamics CRM for Outlook software requirements

Install CRM for Outlook on a user's computer

A user can download Dynamics CRM for Outlook from within Microsoft Dynamics CRM Online by clicking **Get CRM for Outlook** on the message bar.

Administrators will find detailed installation instructions in Install CRM for Outlook .



Tip

If you encounter problems installing or configuring Dynamics CRM for Outlook, see Troubleshooting and things to know about Microsoft Dynamics CRM for Outlook.

See Also

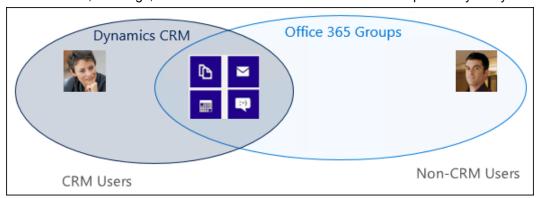
Download: Microsoft Dynamics CRM 2015 for Microsoft Office Outlook

Deploy CRM App for Outlook (lightweight app)

Add interoperation features to Microsoft Dynamics CRM Online

Deploy Office 365 Groups

Office 365 Groups, available with Dynamics CRM Online, provides a new environment for collaboration with Microsoft Office 365 users who don't use CRM. For example, use Office 365 Groups when a sales team has a major opportunity requiring input from several people who don't have access to CRM. Office 365 Groups provides a single location to share documents, conversations, meetings, and notes. You can enable Office 365 Groups for any entity.



Collaborate with people inside and outside of your CRM organization.



Share information in multiple ways.



Important

This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to CRM Online?

In This Topic

Provision Office 365 Groups
Check required privileges
Configure Office 365 Groups

Known issues

Provision Office 365 Groups

Office 365 Groups is a CRM solution you provision from your Office 365 admin portal.



Note

Users must have an Exchange Online mailbox set up to use Office 365 Groups. Exchange Online is already properly configured for Microsoft Dynamics CRM Online organizations as a part of Office 365. You also need to enable server-based SharePoint integration to see documents in an Office 365 Group; you don't have to use SharePoint integration, only set up the connection to SharePoint Online.

More information: Set up SharePoint integration



- 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.
- 2. Click Admin > CRM.
- Click the Instances tab.
- 4. Choose your instance, and then click **Solutions**.
- 5. Select Office 365 Groups and then click Install.
- 6. Review the terms of service and then click **Install**.

Once installation of the solution has completed, you can configure Office 365 Groups.



Note

When you install a solution, your CRM Online site is taken offline in maintenance mode for a short time. We recommend you install the solution when it's least disruptive to users.

Check required privileges

The security privilege, ISV Extensions, is required to use Office 365 Groups. You can add or remove this privilege from custom or default security roles to meet your business needs. If a user doesn't have this privilege, they won't be able to see the Office 365 Groups item in a record's navigation menu.



- 1. Go to **Settings** > **Security**. (How do I get there?).
- 2. Click **Security Roles**.
- Choose the security role to check and then click the Customization tab.
- 4. In the Miscellaneous Privileges section, review the ISV Extensions privilege setting. If the security role doesn't have the ISV Extensions privilege, select it to set it to Organization.

5. Click Save and Close.

Configure Office 365 Groups

Once you provision Office 365 Groups, you can enable them for any entity. Security group membership is associated with the entity. You configure Office 365 Groups in CRM Online.



1. In CRM Online, click Settings > Office 365 Groups.

On the **Office 365 Groups Settings** page, click **Add entity** and choose an entity from the drop-down list. Repeat this step for each entity you want to enable, including custom entities.

- 3. Optionally, you can click **Auto-create** for an entity to have a new group automatically created when a new record for that entity is created. However, we recommend you choose this option only for entities that typically require large groups to collaborate.
- 4. When you have added all the entities you want to enable for Office 365 Groups, click **Publish All**.

All of your pending system customizations will be published, including those you may have saved but not published in another area.

Known issues

You need to have CRM Online version CRM Online 2015 Update 1 or later, to install Office 365 Groups. If Office 365 Groups appears as an available solution in the CRM Online Administration Center, but you receive the following error when trying to install: "Solution install failed. Please try again later. If the problem persists, contact customer support," you'll need to update your instance of CRM Online before you can install Office 365 Groups.

See Also

Collaborate with your colleagues using Office 365 Groups
Set up CRM Online to use Exchange Online
Blog: It's here - Office 365 Groups in CRM Online
Office 365 Groups in CRM FAQs

Enable OneNote integration

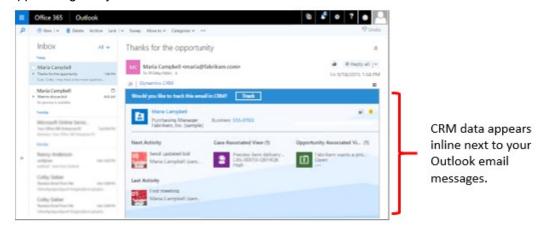
For information about Microsoft OneNote integration in Microsoft Dynamics CRM Online, see <u>Set up OneNote integration in CRM.</u>

See Also

Add Office 365 Online services
OneNote is coming to CRM

Deploy CRM App for Outlook (lightweight app)

Microsoft Dynamics CRM App for Outlook is a lightweight app you can use to view Microsoft Dynamics CRM information and track email from within Outlook. You can use Dynamics CRM App for Outlook on your desktop or phone. In Dynamics CRM App for Outlook, CRM data appears right in your Outlook Inbox.



Important

Dynamics CRM App for Outlook isn't the same thing as Dynamics CRM for Outlook. For information on Dynamics CRM for Outlook, see the <u>CRM for Outlook User's Guide</u>.

In This Topic

What Dynamics CRM App for Outlook offers

Requirements

Deploy CRM App for Outlook

Explore the User's Guide

What Dynamics CRM App for Outlook offers

With Dynamics CRM App for Outlook, your users can:

- Tap the power of CRM while working in the familiar Outlook environment.
- Track incoming and outgoing email wherever they are, as long as they have access to a browser.
- Track and access CRM data from a desktop computer or phone.
- Link incoming or outgoing email to an existing record in CRM. For example, link an email message to a specific account or opportunity.
- Convert an email message into a new CRM record.

- Find out whether an email message is already tracked, and change the regarding record (the CRM record that the message is linked to).
- Create CRM contact records for people on the From list that aren't already included in the CRM database. Users can also create new CRM records for any entity (record type), as long as the entity has been enabled for mobile and for multi-entity search.
- Preview information about contacts and leads stored in CRM. For example, find a number or company name for a contact or lead, or preview the last and next activities for a contact or lead.
- Open CRM records directly to find or enter more detailed information.

Requirements

The following are required to use Dynamics CRM App for Outlook:

- Microsoft Dynamics CRM Online 2015 Update 1 or later. At this time, Dynamics CRM App for Outlook is not available for Microsoft Dynamics CRM on-premises.
- Exchange Online
- Synchronization of incoming email through server-side synchronization. More information:
 Set up server-side synchronization
- · Required privileges as described below.

Required privileges

Microsoft Dynamics CRM provides access to Dynamics CRM App for Outlook through the **Use CRM App for Outlook** privilege. If a user doesn't have this privilege, they'll receive the following error:

Users must also have read/write privilege for the Mailbox entity.

Set the privileges for a security role

- 1. Go to Settings > Security. (How do I get there?)
- 2. Click Security Roles.
- 3. Choose a security role, and then click the **Business Management** tab.
- 4. In the **Entity** section, review the **Mailbox** privileges settings. The security role should have User or higher settings.
- 5. In the **Privacy Related Privileges** section, verify that **Use CRM App for Outlook** is set to **Organization**. If not, click **Use CRM App for Outlook**.

Supported browsers for Outlook on the web

You can use Dynamics CRM App for Outlook with Outlook on the web on the following browsers:

- Internet Explorer 10, Internet Explorer 11, or Microsoft Edge
- Google Chrome (latest version) on Windows

- Firefox (latest version) on Windows
- Apple Safari (versions 7 and 8) on Mac or on OSX

Supported operating systems for Outlook on the desktop

You can use Dynamics CRM App for Outlook on these versions of Outlook for the desktop:

- Outlook 2013 and Outlook 2016 on Windows 7, Windows 8, Windows 8.1, Windows 8.1 RT (Outlook 2013 only), or Windows 10.
- Outlook for Mac on Mac OS X Maverick, Yosemite, or El Capitan.

Supported devices

You can use Dynamics CRM App for Outlook on any of the following phones and operating systems:

- Apple iPhone devices running iOS version 7, 8, or 9.
- Android phones running Android 4.4 (KitKat) or 5.0 (Lollipop).
- Windows Phone devices running Windows 8.1.

Supported languages

Dynamics CRM App for Outlook supports the following languages:

- Bulgarian (Bulgaria) 1026
- Chinese (People's Republic of China) 2052
- Chinese (Taiwan) 1028
- Croatian (Croatia) 1050
- Czech (Czech Republic) 1029
- Danish 1030
- Dutch 1043
- English 1033
- Estonian 1061
- Finnish 1035
- French 1036
- German 1031
- Greek 1032
- Hindi (India) 1081
- Hungarian 1038
- Indonesian 1057
- Italian 1040
- Japanese 1041
- Kazakh 1087
- Korean 1042
- Latvian 1062
- Lithuanian 1063

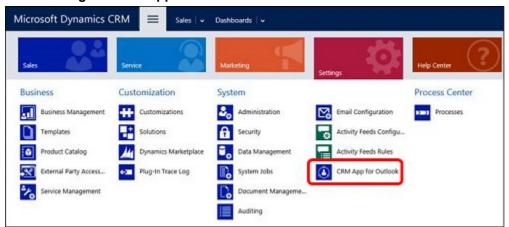
- Malaysian 1086
- Norwegian 1044
- Polish 1045
- Portuguese (Brazil) 1046
- Portuguese (Portugal) 2070
- Romanian 1048
- Russian 1049
- Serbian 2074
- Slovak 1051
- Slovenian 1060
- Spanish 3082
- Swedish 1053
- Thai 1054
- Turkish 1055
- Ukrainian 1058
- Vietnamese 1066

Deploy CRM App for Outlook

After setting up server-side synchronization and setting the required privileges, you can push Dynamics CRM App for Outlook to some or all users, or you can have users install it themselves as needed.

To push the app to users

1. Go to Settings > CRM App for Outlook.



2. In the Getting Started with CRM App for Outlook screen, under Add for Eligible

Users (you may have to click **Settings** if you're opening this screen for the second or subsequent time), select the **Automatically add the app to Outlook** check box if you want to have users get the app automatically. If a user has the required privileges and email is synchronized through server-side synchronization, you won't have to do anything more to push the app to them. For example, if you add the required privileges to the Salesperson role, and then assign this role to a new user, they'll automatically get the app.

- 3. Do one of the following:
 - To push the app to all eligible users, click **Add App for All Eligible Users**.
 - To push the app to certain users, select those users in the list, and then click Add App to Outlook.
 - Tip

If the list shows that a user is pending or hasn't been added, you can click the **Learn more** link next to the user to find more information about status.

4. When you're done click Save.

To have users install the app themselves

Users click the **Settings** button , and then click **Apps for Dynamics CRM**.

2. In the Apps for Dynamics CRM screen, under Dynamics CRM App for Outlook, users click Add app to Outlook.

Explore the User's Guide

To learn how to use Dynamics CRM App for Outlook, see the CRM App for Outlook User's Guide.

See Also

CRM App for Outlook User's Guide

Set up server-side synchronization of email, appointments, contacts, and tasks

Blog: The new Microsoft Dynamics CRM App for Outlook now available as a Preview feature

Add users, licenses, and security roles

Add interoperation features to Microsoft Dynamics CRM Online

Enable OneDrive for Business

This feature was introduced in CRM Online 2016 Update.

Users can create and manage private documents with OneDrive for Business. Those documents can be accessed in Microsoft Dynamics CRM Online after the system administrator has enabled OneDrive for Business.

Requirements

The following are required to use OneDrive for Business with CRM Online:

- Configure server-based authentication with Dynamics CRM Online and SharePoint Online.
- A OneDrive for Business license for each user. More information: What is OneDrive for Business?
- A SharePoint license for each user. Users with a SharePoint license can use OneDrive for Business. For SharePoint Online, Office 365 subscriptions come with SharePoint Online licenses.
- Before using OneDrive for Business in CRM, the CRM administrator and end users should access OneDrive for Business through the web interface example, if you're using SharePoint Online, go to https://portal.office.com > app launcher > OneDrive. The site and other information required by CRM to enable OneDrive for Business integration gets created only when the site is accessed.

Enable OneDrive for Business

You can enable OneDrive for Business as follows.

- 1. Click Settings > Document Management > Enable OneDrive for Business.
- 2. Click **Enable OneDrive for Business** to enable it, and then choose **OK**.

Controlling access to OneDrive for Business in CRM

You can toggle availability of OneDrive in CRM for end users through the **OneDrive for Business** privilege.

- 1. Click Settings > Security > Security Roles.
- 2. Select a security role, and then click the **Core Records** tab.
- 3. Under **Miscellaneous Privileges**, toggle the **OneDrive for Business** privilege to the desired availability.



See Also

<u>Use OneDrive for Business to manage your private documents</u> <u>What is OneDrive for Business?</u>

Enable Office Delve

This feature was introduced in CRM Online 2016 Update.

Office Delve is powered by the Office Graph and shows users the most relevant content based on who they work with and what they're working on. The information in Delve is tailored to each user. Delve doesn't change permissions and users will only see what they already have access to. As an admin, you can make sure that you allow your organization to access the Office Graph, and that you have set up other Office 365 services that Delve uses, for instance SharePoint Online and OneDrive for Business.

Requirements

The following are required to use Delve with CRM:

- **CRM Online**
- This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to CRM Online?
- SharePoint Online
- Enable Server-Based SharePoint Integration and have at least one active SharePoint site.

Enable Delve

System administrators can enable Delve as follows.

- 1. Click Settings > Document Management > Manage Office Graph Integration
- Click Enable Office Graph integration to enable it, and then click Next.
- 3. Click Finish.

See Also

View relevant and trending information with Office Delve

What is Office Delve?

How does Office Delve know what's relevant to me?

Office Delve for Office 365 admins

Migrate Microsoft Dynamics CRM Online to **Microsoft Dynamics CRM on-premises**

This document describes the steps needed to migrate from an instance of Microsoft Dynamics CRM Online to a Microsoft Dynamics CRM 2016 on-premises deployment. To complete the migration, follow the steps provided here in the order presented.



Important

This document assumes that you already have a deployment of Microsoft Dynamics CRM 2016 on-premises. For information about how to deploy Microsoft Dynamics CRM 2016, see Microsoft Dynamics CRM Server installation.

To migrate from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM (on-premises), you must have Microsoft Dynamics CRM 2015 or a later version.

In this topic

Feature and customization changes when you migrate from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM 2016 on-premises

Copy your CRM Online organization encryption key

Request a backup of your organization database

Restore the Microsoft Dynamics CRM Online database

Apply the latest updates to the CRM on-premises deployment

Import the CRM Online database into the CRM on-premises deployment

Feature and customization changes when you migrate from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM 2016 on-premises

Before you migrate from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM 2016 on-premises, be aware of the following behaviors or issues. These characteristics will appear after you import a Microsoft Dynamics CRM Online 2016 Update organization into a Microsoft Dynamics CRM 2016 on-premises deployment.

Managed solutions

All managed solutions that have a dependency on a feature introduced in Microsoft Dynamics CRM Online 2016 Update will be removed from the organization that is prepared for migration. For example, this applies if the solution includes one or more of the following features:

- A rollup field that uses the AVG operator or aggregates data across all activities related to a record.
- A calculated field that computes the difference between two dates by using DIFFINDAYS, DIFFINHOURS, DIFFINMINUTES, DIFFINMONTHS, DIFFINWEEKS, or DIFFINYEARS.

Additionally, you can't export record creation or update rules from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM 2016 on-premises. More information: Set up rules to automatically create or update records in CRM

Unmanaged solutions

Any field in an unmanaged solution that includes a feature introduced in Microsoft Dynamics CRM Online 2016 Update will be removed from the organization. For example, this applies if the field includes one of the following features:

 A rollup field that uses the AVG operator or aggregates data across all activities related to a record. A calculated field that computes the difference between two dates by using DIFFINDAYS. DIFFINHOURS, DIFFINMINUTES, DIFFINMONTHS, DIFFINWEEKS, or DIFFINYEARS.

Additionally, these behaviors appear:

- You can't export record creation or update rules from Microsoft Dynamics CRM Online 2016 Update to Microsoft Dynamics CRM 2016 on-premises. More information: Set up rules to automatically create or update records in CRM
- Records with date and time fields having values earlier than January 1, 1900 are considered invalid and will return an error message, such as "Invalid Date/Time The date/time format is not valid, or the value is outside the supported range." When this issue occurs you can't open forms, view lists, or process workflows from an entity record that has a date and time value that's before January 1, 1900.

Copy your CRM Online organization encryption key

During the import of the Microsoft Dynamics CRM Online database into your Microsoft Dynamics CRM (on-premises) deployment, you must provide the organization database encryption key used for your instance of Microsoft Dynamics CRM Online.

- 1. Sign in to the instance of Microsoft Dynamics CRM Online that you want to migrate as a user with the system administrator security role.
- Go to Settings > Data Management.
- Choose Data Encryption.
- 4. In the Data Encryption dialog box, select Show Encryption Key, in the Current encryption **key** box select the encryption key, and copy it to the clipboard.
- 5. Paste the encryption key in to a text editor, such as Notepad.



Warning

By default, Microsoft Dynamics CRM generates a passphrase that is a random collection of Unicode characters. Therefore, you must save the system-generated passphrase by using an application and file that supports Unicode characters. Some text editors, such as Notepad use ANSI coding by default. Before you save the passphrase using Notepad, select Save As, and then in the Encoding list, select Unicode.

6. As a best practice, save the file that contains the encryption key on a computer in a secure location on an encrypted hard drive.

Request a backup of your organization database

To request a backup of your Microsoft Dynamics CRM Online database contact Microsoft Customer Support Services for Microsoft Dynamics CRM Online. For contact information, see Contact Technical Support.

Restore the Microsoft Dynamics CRM Online database

The backup of your Microsoft Dynamics CRM Online database must be restored by using a server running the same or a later version of Microsoft SQL Server as the database you receive. You will be able to request the version you need before you receive the database.

Restore the copy of the Microsoft Dynamics CRM Online database to a computer running SQL Server in the target Microsoft Dynamics CRM (on-premises) deployment. To do this, follow the steps here.

Restore a Microsoft Dynamics CRM Online organization database to SQL Server

- 1. Open Microsoft SQL Server Management Studio, and then connect to the appropriate instance of SQL Server.
- 2. In Object Explorer, right-click **Databases**, and then click **Restore Database**.
- Type the name of a new database in the **To database** open text box. The database name must include _MSCRM in the name. For example the database name is Contoso MSCRM.
- 4. On the General page, in the Source section, click Device.
- Click the browse button in the **Device** option. This opens the **Select backup devices** window.
- In the Select backup devices window, click Add to open the Locate Backup File window.
- 7. Select the file you want to use for the restore operation, and then click **OK**.
- 8. Click **OK** to close the **Select backup device** window.
- 9. Mark the checkbox in the **Restore column next to the backup set** option.
- 10. Click **OK** to begin the restore process.

Apply the latest updates to the CRM on-premises deployment

You must apply the latest Microsoft Dynamics CRM (on-premises) updates before you import the CRM Online database. More information: <u>Microsoft Dynamics CRM 2015 Updates and Hotfixes</u>

Import the CRM Online database into the CRM on-premises deployment

How long it takes to complete the import of the organization database depends on several factors. These factors include the size of the database you are importing, the number of users, and the hardware you use to complete the import.



The procedure described here uses Microsoft Dynamics CRM Deployment Manager. Deployment Manager is an MMC snap-in that is included with Microsoft Dynamics CRM Server. Alternatively, your can run Windows PowerShell commands to complete the import. More information: Import-CrmOrganization

To import an organization, you must have the Deployment Administrator Microsoft Dynamics CRM role.

Import an organization database using Deployment Manager

- 1. On the Microsoft Windows Server running the Microsoft Dynamics CRM Server Deployment Tools server role, start **Deployment Manager** (DMSnapin.msc).
- 2. Start the Import Organization Wizard. Right-click **Organizations**, and then click **Import** Organization.



Note

You will receive a message if you attempt to import into a Microsoft Dynamics CRM (on-premises) version that allows only one organization per deployment. The message notifies you that proceeding will deactivate, but not delete, the existing organization.

- Select the SQL Server and database. In the Select SQL Server window, select the Microsoft SQL Server where the organization database is restored in the SQL Server list, and then select the organization database in the Organization database list. Click Next.
- 4. Specify the organization name. Enter the display name and name for the organization in the Specify the Organization Settings window. The Display name will appear in Microsoft Dynamics CRM applications. The Unique Database name will be used as the database name in SQL Server and will also be used to construct the URL for client applications. Notice that the values you enter don't need to match the names that you used with Microsoft Dynamics CRM Online. Click Next.
- 5. Specify the Microsoft SQL Server Reporting Services server. In the Specify Reporting Services Server window, type the Reporting Services server URL for the organization in the Report Server URL field. Click Next.
- 6. Select the method for mapping users. Map users from the Microsoft Dynamics CRM Online deployment to the Microsoft Dynamics CRM (on-premises) deployment. Users must already exist in Active Directory for the Microsoft Dynamics CRM (on-premises) deployment. The Import Organization Wizard does not create the users automatically. To complete the mappings, the user running the import operation must be mapped to a user in Microsoft Dynamics CRM. For more information about how to map users, see Import an organization.
- 7. In the System Checks window you receive the results of several environment diagnostic checks. If you receive a red alert, the issue must be resolved prior to completing the wizard. If you receive a yellow warning, you may proceed with the import. Click Next. Due to versioning differences between Microsoft Dynamics CRM Online and Microsoft Dynamics CRM (on-premises), you may receive a warning. This warning is expected and in most cases shouldn't prevent the import from completing. After you successfully complete the steps in this document, the versioning will be correct.
- 8. Begin the import. In the Ready to Import window, verify that the information is correct, and then click Import.
- 9. Complete the import. After the import is complete, the Import Organization window

appears. Click **View** the log file to view the log file that is created during the import. If the import is successful, click **Finish**.

The import log is stored in the C:\Documents and Settings\\Application Data\Microsoft\MSCRM\Logs folder.

10. Activate encryption

- a. As a user with System Administrator security role privileges, sign-in to the organization that was just imported, then go to Settings > Data Management.
- b. Choose Data Encryption.
- c. In the **Activate Encryption Key** box enter the encryption key that you copied earlier, and then select **Activate**.
- d. Select **OK** in the confirmation message and then choose **Close** to exit the Data Encryption page.
- e. We recommend that you copy the key to a safe place.

See Also

Manage your Microsoft Dynamics CRM Online subscription

Add interoperation features to Microsoft Dynamics CRM Online

Accessibility in Microsoft Dynamics CRM

Administrators and users who have administrative responsibilities typically use the Settings area of the Microsoft Dynamics CRM web application to manage Microsoft Dynamics CRM Online. A mouse and keyboard are the typical devices that administrators use to interact with the application.

Users who don't use a mouse can use a keyboard to navigate the user interface and complete actions. The ability to use the keyboard in this way is a result of support for keyboard interactions that a browser provides.

For more information, see the following Microsoft Dynamics CRM web application accessibility topics:

- Keyboard shortcuts
- Accessibility for people with disabilities

Administrators and other users who have administrative responsibilities for on-premises deployments of Microsoft Dynamics CRM also use Microsoft Dynamics CRM Deployment Manager, a Microsoft Management Console (MMC) application, to manage on-premises deployments of Microsoft Dynamics CRM Server.

For more information, see the following Microsoft Management Console (MMC) accessibility topics:

- Navigation in MMC Using the Keyboard and Mouse
- MMC Keyboard Shortcuts

Accessibility features in browsers

The following table contains links to documentation about web browser accessibility.

| Browser | Documentation |
|-------------------|---------------------------------------|
| Internet Explorer | Accessibility in Internet Explorer |
| | |
| Mozilla Firefox | Accessibility features in Firefox |
| Apple Safari | Safari |
| Google Chrome | Accessibility Technical Documentation |

See Also

Microsoft Accessibility Resource Center

Manage Your Microsoft Dynamics CRM Online Subscription

Help and additional resources for Microsoft Dynamics CRM Online

Help and additional resources for Microsoft Dynamics CRM Online

There are several resources available to you covering planning, operating, and using Microsoft Dynamics CRM Online.

In This Topic

Service description

Security and service continuity

Microsoft Dynamics CRM Online Trust Center

Microsoft Dynamics CRM Online Security and Compliance Planning Guide

Integration Guide: Microsoft Dynamics CRM Online and Office 365

Support and service status

Help for administrators

More self-service help resources

Service description

<u>Microsoft Dynamics CRM Online Service Description</u> describes the service, its capabilities, and requirements. This white paper is intended for business customers who are considering adopting a CRM solution.

Security and service continuity

When a business allows an external service provider to store and manage its data, key considerations must include security, data protection, privacy, and data ownership. Microsoft takes these concerns seriously and has applied its years of cloud and on-premises experience with security and privacy to delivery of the Microsoft Dynamics CRM Online service. This focus is highlighted by the 99.9% uptime provision of the service-level agreement (SLA).

Microsoft Dynamics CRM Online Trust Center

<u>The Microsoft Dynamics CRM Online Trust Center</u> describes the trust principles concerning security, privacy, service transparency, and compliance in CRM Online.

Microsoft Dynamics CRM Online Security and Compliance Planning Guide

The <u>Microsoft Dynamics CRM Online Enterprise Planning Guide</u> is designed to help readers understand the key compliance and security considerations associated with planning for a deployment of CRM Online in environments that may include enterprise directory integration services such as directory synchronization and single sign-on.

Integration Guide: Microsoft Dynamics CRM Online and Office 365

The <u>Integration Guide: Microsoft Dynamics CRM Online and Office 365</u> demonstrates how to set up and use the interoperation between Office 365 and CRM Online to improve office collaboration, staff productivity, and make your organization more agile.

Support and service status

Office 365 admin portal

The Office 365 admin portal provides tools and resources that can assist you with key Office 365 online service information and tasks such as:

Open a new or review current service requests

Review the current service health of Office 365 instances including Microsoft Dynamics CRM Online

Review planned maintenance

Microsoft Dynamics CRM Online Service Blog

Find service status information specifically about the CRM Online service.

Microsoft Dynamics CRM Online Service Blog

Help for administrators

The following are useful resources for administering Microsoft Dynamics CRM Online:

Manage your Microsoft Dynamics CRM Online subscription

Administering CRM 2016

Microsoft Dynamics CRM IT Pro Center

CRM Admin Best Bets

Billing Support

More self-service help resources

- Troubleshooting Microsoft Dynamics CRM for Outlook installation, configuration, and upgrade
- View the Office 365 Service Health Dashboard
- Search the Support Blog and Community Forum
- Search the Microsoft Knowledge Base

See Also

Manage your Microsoft Dynamics CRM Online subscription Add interoperation features to Microsoft Dynamics CRM Online Accessibility in Microsoft Dynamics CRM

Troubleshooting: Unblock URLs required for CRM **Online**

Microsoft Dynamics CRM Online uses several Microsoft URLs to help provide security, services, and features. However, your computer or your organization's computer network may block access to some of these URLs. Blocking any of the required URLs will cause Microsoft Dynamics CRM Online to operate incorrectly or not at all.

You may see a network or server error message if your computer or your organization's network blocks the URLs you need. The error message might look like one of these:

- "The specified Microsoft Dynamics CRM Server address (URL) is not responding. Ask your administrator to verify that the server is turned on, and then try again."
- "There is a problem communicating with the Microsoft Dynamics CRM Server. The server might be unavailable."

You can unblock these URLs on your computer by adding them to a list of approved sites in your browser.

Important

If the following procedure doesn't unblock the URLs required for Microsoft Dynamics CRM, ask your system administrator to unblock the URLs on the organization's network.

Unblock CRM URLs in Internet Explorer

1. On the Explorer bar, click or tap the **Tools** icon (the white gear shape), and then click or

tap Internet options.

- 2. Click or tap the **Security** tab > **Trusted sites** > **Sites**.
- 3. In **Add this website to the zone**, type the URL for your CRM Online organization. For example, https://contoso.crm.dynamics.com
- 4. Click or tap Add > Close > OK.

For a list of other URLs you may need to add to unblock, see <u>Internet accessible URLs required</u> for Microsoft Dynamics CRM 2011 or 2013 and connectivity

See Also

Manage your Microsoft Dynamics CRM Online subscription

Send us your comments about this document subscription guide]

If you have a question or comment about this document, click to send an email message to the Microsoft Dynamics CRM content team.

If your question is about Microsoft Dynamics CRM products, and not about the content of this book, search the Microsoft Help and Support Center or the Microsoft Knowledge Base.