

May 22, 2015



## Action needed: Test your forms to ensure compatibility with Microsoft Dynamics CRM Online 2015 Update 1

Hello {{organization.Name}},

Today we have some important information that we'd like you to read through as you plan your update to Dynamics CRM Online 2015 Update 1. Based on customer feedback we've included a new form rendering engine to further improve performance when loading forms.

While the new form rendering will be fully compatible for all supported APIs, unsupported scripts are likely to fail. To ensure full compatibility and minimal downtime, you can find more information about the new forms rendering engine on the [What's new for administrators and customizers page](#). We're also including specific steps below that you can follow to test your forms.

### For Partners, Developers, and IT Pros:

There are two main improvements that we're introducing with the new rendering engine – how we load the form and how we handle the cache. Previously, forms used to load in an iframe that was discarded and then reloaded each time the form was accessed, the downside of this approach is that it caused performance issues. Going forward, we keep the iframe and the necessary resources intact while loading custom and entity-specific scripts. Where custom scripts are implemented, they are now loaded in a separate iframe and discarded when the iframe is closed.

This approach will deliver better performance that is visible to your users; however, it will also cause unsupported customizations, including DOM manipulations, accessing internal iframe URLs, accessing unsupported APIs, or other window-related assumptions, to fail to work properly.

### Here are the steps we recommend that you take to prevent impact:

1. **Review important details about the new rendering engine.** Read the changes made in the [blog](#).
2. **Get prepared.** Test your environment thoroughly in a sandbox instance before the update to detect issues.
  - a. Test all your forms. If something is not loading or shows script errors, then there may be unsupported customizations.
  - b. Go to **Settings>Administration>System Settings**. To retest your forms, select the **Use legacy form rendering** check box.
  - c. If the issues go away, then there are likely unsupported customizations that are failing.
  - d. Capture the error information and repro steps to share with the partner or internal developer who implemented the customizations so they can correct for proper compatibility. If needed, engage Microsoft Support for assistance.
3. **Fix unsupported customizations.** You can use the [Custom Code Validation Tool](#) as one way of catching potential issues. You may also reach out to the original solution providers to get up-to-date solutions.

4. **Engage.** Your partner and Microsoft teams are here to help you be successful.

We are excited for you to explore Dynamics CRM Online. We are committed to your success and will work with you during updates. Please continue to share your [feedback](#).

Sincerely,  
The Microsoft Dynamics CRM Online Team



April 15, 2015



## Scheduling Your Organization for Microsoft Dynamics CRM Online 2015 Update 1

Hello {{organization.Name}},

With Dynamics CRM Online 2015, we put you in control to schedule your update at a date and time that was best for your business. We will continue this approach for updating to Dynamics CRM Online 2015 Update 1.

Today, we have some important information to share that will help you more effectively choose your update path.

Customers often ask for guidance on the best approach to updating their instance based on the version of CRM Online that they are currently running. To help answer this common question, we've created some new documentation located in our [Manage your Microsoft Dynamics CRM Online updates](#) topic on TechNet that can help you determine which update scenario is right for your organization.

In addition to the update topic, you can learn more about the enhancements we have made to the CRM Online Update process in this [short video](#).

### Get yourself ready for the update in five steps

- **Get familiar.** Read the [CRM 2015 Update 1 Release Preview Guide](#) for the complete list of capabilities.
- **Get prepared.** Read about [managing Microsoft Dynamics CRM Online updates](#).
- **Stay up to date.** Bookmark the [Get Ready](#) page and visit regularly to stay informed.
- **Plan.** [Test the new release](#), train your users, and communicate the update before deploying to production.
- **Engage.** Your partner and Microsoft team are here to help you take advantage of the new capabilities.

We are excited for you to explore Dynamics CRM Online. We are committed to your success and will work with you during updates. Please continue to share your [feedback](#).

Sincerely,  
The Microsoft Dynamics CRM Online Team



April 7, 2015



## Prepare your users: Microsoft Dynamics CRM Online 2015 Update 1

Hello {{organization.Name}},

Today we'd like to share some information about the CRM Online user interface (UI) enhancements that are coming as part of the 2015 Update 1 release, so that you can prepare your team as you plan your rollout.

**Navigation** changes will enable your team to move around the CRM UI more quickly. Enhancements in this area include:

- The Sales, Service, Marketing, and Settings work areas are easier to move between.
- Work items are now displayed beneath the work area selected, enabling faster discovery of things like dashboards, accounts, and cases.
- The new shortcuts to recent work lets you quickly see the records and views you most recently accessed so that you can jump directly to those items as needed.

For a quick tour of these new navigation enhancements, check out this [short video](#). For more details, see [how to get around in CRM](#).

**Theming** allows you to personalize your Dynamics CRM Online deployment more than ever before. Theming enhancements include:

- Add logos to make the experience feel more personal for your users and align to your company branding.
- Change accent colors for the main navigation, hover, and selections to match your company style.
- Color changes are available for all entities. You can find the configuration in the entity metadata.
- Administrators can easily preview themes before publishing and also export and import themes for reuse.

Need more information about Theming? To learn more about how to change the color scheme or add a logo to match your organization's brand, watch this [video](#).

**Forms** are significantly improved for rendering in the UI. Things to know include:

- A newly built form rendering engine provides extremely fast form load while maintaining compatibility.

- These form changes will not impact end users, because they have the same features, interface, and behaviors as the legacy rendering engine. Some of the areas we've changed include how the page is constructed, how data loads, and how scripts are managed.
- Unsupported customizations will likely break in the improved form engine. We encourage everyone to test your customizations, solutions, and scripts to ensure proper functionality with the improved form engine.

For more information about whether the scripts that you use will work with all supported browsers, see [Use JavaScript with Microsoft Dynamics CRM](#). And, to ensure your forms customization follow the recommended practices, check out [creating and designing forms](#).

**Get yourself ready** for the update in five steps:

1. **Get familiar.** Read the [Release Preview Guide](#) for the complete list of capabilities.
2. **Get prepared.** Read about [managing Microsoft Dynamics CRM Online updates](#).
3. **Stay up to date.** Bookmark the [Get Ready](#) page and visit regularly to stay informed.
4. **Plan. Test.** train your users, and socialize the update before deploying to production.
5. **Engage.** Your partner and Microsoft teams are here to help you be successful.

We are excited for you to explore Dynamics CRM Online. We are committed to your success and will work with you during updates. Please continue to [share your feedback](#).

Sincerely,

The Microsoft Dynamics CRM Online Team



February 13, 2015



## Scheduling Your Organization for a Microsoft Dynamics CRM Online Update

Hello {{organization.Name}},

We are reaching out to share more on the enhancements made to the way you can drive the updates to your organization. This is important information that will help you to effectively plan for a successful update to Dynamics CRM Online. We are excited to provide you with the solutions that will enable sellers and marketers to deliver amazing customer experiences together.

### What's new with the customer-driven update process?

- **More accessible scheduling:** With CRM Online, you will receive an assigned date 90 days before Microsoft performs the update to your instance(s). If that date doesn't work for your business, you have the ability to select alternate dates. For more information about this process, including detailed steps, please read [Manage Microsoft Dynamics CRM Online updates](#).
- **More flexible choices:** With CRM Online, we will offer updates on Saturdays. These days are limited and will be available on a first come, first serve basis.
- **More control:** You must provide consent prior to the update occurring. This is an action that an administrator must take. For more information about how this works, read [Manage Microsoft Dynamics CRM Online updates](#).
- **More testing:** Administrators will be able to schedule updates to sandbox instances first, prior to production updates. You can easily see the Sandbox and Production update schedules in a single view within the CRM Online Administration Center.
- **More people "in the know":** Administrators will have the ability to add more recipients to receive communications. Keeping your partner informed during the manage updates process is key to your success and the best way to do this is to add them to the notifications for each of your instances. The recipient does not have to be an administrator to receive notifications and no additional licenses are required. [Learn more about managing email notifications](#).

**Important:** Features from previous updates may also be enabled during updates.

### Get yourself ready for the update in five steps

- **Get familiar.** Read the [Release Preview Guide](#) for the complete list of capabilities.
- **Get prepared.** Read about [managing Microsoft Dynamics CRM Online updates](#).
- **Stay up to date.** Bookmark the [Get Ready](#) page and visit regularly to stay informed.
- **Plan.** [Test the new release](#), train your users, and communicate the update before deploying to production.
- **Engage.** Your partner and Microsoft team are here to help you take advantage of the new capabilities.

### Prepare your test environment

The sandbox environments we launched with the spring update will now help you update to CRM Online. We recommend that you use a sandbox environment to test your customizations prior to upgrading your production environment. [Learn More](#)

We are excited for you to explore Dynamics CRM Online. We are committed to your success and will work with you during updates. Stay tuned to the [Get Ready](#) page and please feel free to reach out to your Partner/Microsoft Account team if you have any questions.

Sincerely,

The Microsoft Dynamics CRM Online Team

