

# Automated Transition Planning Guide

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# Automated Transition Planning Guide

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## Introduction

Microsoft Dynamics CRM Online is a cloud based customer relationship management (CRM) offering from Microsoft. Since the initial launch of Microsoft Dynamics CRM Online in 2007, Microsoft has expanded its cloud based service portfolio most notably with the introduction of Office 365, a suite of productivity applications. Microsoft's increased focus on the cloud has resulted in the development of new infrastructure that Microsoft Dynamics CRM Online can now take advantage of for the benefit of its customers.

On July 19, 2012, Microsoft Dynamics CRM Online on-boarded to a new administrative portal and billing platform, referred to as the **Microsoft online services environment**. This environment is designed to streamline and improve the customer experience across all Microsoft online services. It enables customers to manage their Microsoft Dynamics CRM Online and Office 365 subscriptions from one location and also delivers enhanced regulatory and industry compliance.

Prior to the introduction of this environment, customers who created a subscription using Microsoft Dynamics CRM Online used a different administration portal and billing platform. For the purposes of this document, this Legacy Platform will be referred to as Commerce Transaction Platform (CTP).

CTP will be decommissioned in Q1 of calendar year 2014, and customers will be transitioned to the Microsoft online services environment. Every attempt will be made to minimize the burden on customers throughout this transition. It is also important to note that the move of Microsoft Dynamics CRM Online to a new administration environment is unprecedented and highly unlikely to re-occur. The transition is being driven by a broader alignment of Microsoft to the cloud. Microsoft sincerely appreciates your understanding as we work with you to make the necessary changes to better serve our customers across all of your services and devices needs.

We have carefully designed a transition process to help ensure that your transition to the Microsoft online services environment is seamless and easy. This guide is intended to help walk you through your transition and help to answer any questions you might have about the Microsoft online services environment.

## Benefits of transitioning to the new environment

The new environment represents a significant investment from Microsoft designed to streamline and improve the customer experience across all Microsoft online services. It is in direct response to the increasing importance that our customers are placing on cloud based services. Along with the ability to merge the administration environments of both Microsoft Dynamics CRM Online and Office 365 subscriptions, a number of other benefits are obtained by transitioning to the new environment.

## **Benefits for a customer after transition**

- Customers can oversee purchases and perform account management functions of Microsoft Dynamics CRM Online and Office 365 service subscriptions from one location.
- The new platform delivers compliance with the following privacy and data security industry standards: SAS 70 (SSAE 16) Type II, HIPAA, and EU Safe Harbor.
- Customers will change from using Live ID user authentication credentials (e.g. name@example.com) to using cloud managed credentials based on the Microsoft Dynamics CRM Online Organization ID, or their own IDs federated from an enterprise Active Directory.
- Customers using federated IDs will benefit from single sign-on access to Microsoft Dynamics CRM Online.
- Customers will receive a single bill when Microsoft online services are purchased together.
- New commercial offers related to Microsoft online services environment will be made available on the new platform exclusively.
- Microsoft Dynamics CRM Online Trust Center coverage will be provided, offering in-depth information about the privacy and security practices followed by Microsoft Dynamics CRM Online services.

## **Benefits for administrators after transition**

- The new portal makes it easier to manage all Microsoft online service subscriptions from one location, and gain access to new cloud capabilities by providing a unified and simplified experience.
- Ability to provision Microsoft Dynamics CRM Online and Office 365 from a single portal.
- Ability to combine multiple Microsoft Dynamics CRM organizations into a single subscription.
- Access to billing for all Microsoft online services from a single portal.
- Access to the Service Health Dashboard.

## **Benefits for users after transition**

- Users can sign on to Microsoft Dynamics CRM seamlessly using their corporate user names and passwords (or identity).

## **Who should read this guide**

This guide is intended for:

- Microsoft Dynamics CRM Online administrators currently managing an active Microsoft Dynamics CRM Online subscription using Live IDs.
- End users and developers who may also be impacted by the transition.

## **What is in this guide**

Here is a quick overview of the sections you will find in this guide:

- Transition Overview
- Transition Responsibilities

- Subscription and Licensing Implications
- Transition Steps
- Operating in the Microsoft Online Services Environment
- Appendices

## Transition Guide versions and feedback

This guide is subject to change as Microsoft makes improvements and enhancements to the transition process. Before starting work based on the advice in this document, it is important that you check for updated versions of this guide on the Transition Center at <http://go.microsoft.com/fwlink/?LinkID=294177>.

Your feedback is important to us so readers are encouraged to submit feedback about this guide and the transition process to [CRMOLTransition@microsoft.com](mailto:CRMOLTransition@microsoft.com).

## Transition Overview

This guide specifically describes the Microsoft Dynamics CRM Online Automated Transition to the Microsoft online services environment. Prior to your transition, you will receive a notification via email on your upcoming transition. In addition, instructions on how to begin your transition will appear on your Microsoft Dynamics CRM administrative homepage. Once you agree to the transition by accepting the use rights described in the [Microsoft Online Subscription Agreement \(MOSA\)](#), your transition will proceed as scheduled and you will receive additional notifications and reminders leading up to your transition date.

Once your transition is complete, all of your Microsoft Dynamics CRM Online users will receive new login user names and temporary passwords to access Microsoft Dynamics CRM Online. It is important that your users understand this change.

The transition is a backend process. As such, it has been designed to minimize the impact to you, and even more so, to the end users of your CRM Online application. **The following are some key facts about the transition that you should be aware of:**

- Microsoft has designed this transition to avoid disruptions in service. At no time during the transition does Microsoft physically move your application and data. Your Microsoft Dynamics CRM organization remains on the same physical infrastructure (e.g. scale group) before and after the transition. The transition is focused exclusively on the implementation of a new authentication mechanism and administration portal. To help ensure continuity, both new and legacy user names and temporary passwords will function during and following your transition.
- There are no changes to service availability or application functions. This transition is not an upgrade to the application functionality of your Microsoft Dynamics CRM Online application or to the physical infrastructure that your organization runs on. Therefore, you can expect the same levels of service availability and functionality in the pre and post transition states.
- Your Microsoft Dynamics CRM Online access link will not change as a result of your transition. The URL (e.g. <https://contoso.crm.dynamics.com>) you use to access your Microsoft Dynamics CRM organization will remain the same after your transition.

In addition, it is important that you read the [Legal Disclaimers](#) and the [Checklist](#), to help ensure you are prepared for the key changes your organization will experience as a result of your transition.



**Note**

A *transition* of your subscription to the Microsoft online services environment is not the same as a Microsoft Dynamics CRM Online service *update*. The subscription 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. For information about service updates, see [Get Ready for the Next Release](#).

## Transition Responsibilities

### Customer

In order to help ensure a smooth transition, you should carefully review this guide to understand the transition and what it means for your organization. In addition, you should:

- Learn more about your transition by reviewing the [Legal Disclaimers](#) and the Transition's [Frequently Asked Questions \(FAQ\)](#).
- Review the [Pre-Transition and Post-Transition Checklists](#). Carefully reviewing these lists is important to achieve a successful transition and avoid feature degradation.
- Accept the [Microsoft Online Services Agreement](#) (MOSA).
- Communicate with your end users to ensure that they understand what this transition means for them.
- Validate the success of your transition by working through the [Pre-Transition and Post-Transition Checklists](#).

### Microsoft

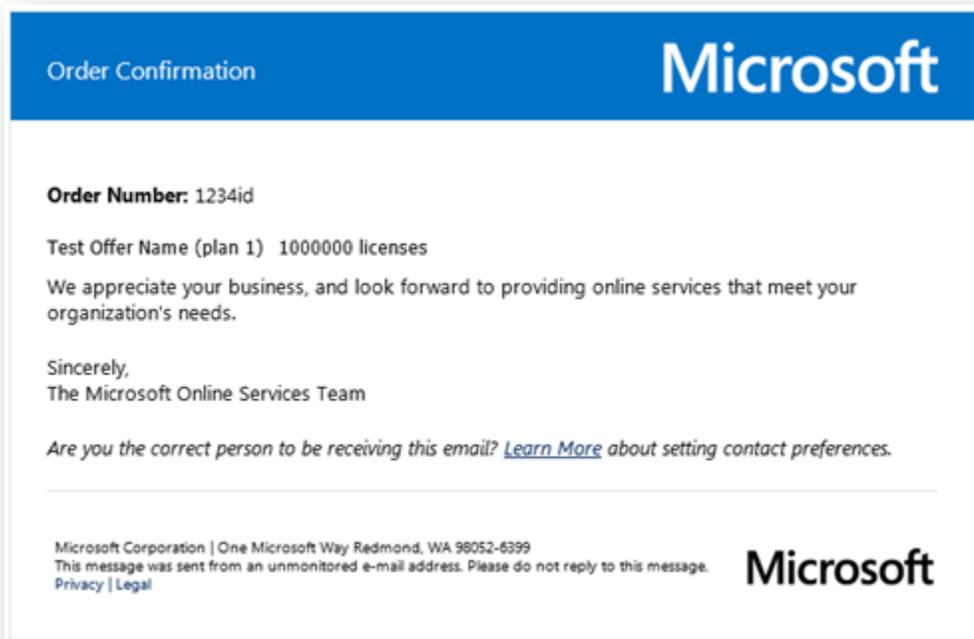
Microsoft is responsible for scheduling and executing your transition. Specifically, Microsoft will:

- Set up your subscription on the Microsoft online services environment with your existing licensing, billing, and user information.
- Notify you of your transition schedule and provide you with details about your transition and updates on your transition status.
- Provide you with a template email to send to your end users to inform them about this transition.
- Provide users with new sign-in user names and temporary passwords and relevant notifications.
- Provide notification to your partner of record about your transition status and transition your partner of record information to your subscription in the Microsoft online services environment.

## Subscription and Licensing Implications

As part of the transition, your licensing subscription will be converted and become active on the Microsoft online services environment. In certain cases, based on the type of subscription you have, some subscription details will be changed as part of the conversion. Below is a list of subscription and licensing changes that may occur as a result of this transition.

1. Once you have completed your transition, you will receive a New Subscription Created email from Office 365 indicating that your subscription has been created on the Microsoft online services environment.



An example of a New Subscription Email sent from Office 365

2. Following the creation of your subscription on the Microsoft online services environment, your Microsoft Dynamics CRM Online organization on CTP will be cancelled.
3. Microsoft will automatically set the pricing terms on your new subscription to be the same as your current subscription. There are certain instances when you may experience changes in your billing due to additional storage, value added tax changes, or differences in exchange rate calculations. See the [Legal Disclaimers](#) for a complete list of possible billing changes that might occur once you transition.
4. Microsoft will transition your billing information to the Microsoft online services environment, and you will continue to have access to your billing history. You can access historical billing information for billing periods *before* you transitioned at: <https://commerce.microsoft.com>. To

access your billing history for any period *after* your transition date, select “billing” from the Licensing page on the Office 365 administrative center.

5. The timing of your billing cycle may be different once transitioned to the Microsoft online services environment. On CTP, billing is performed *in arrears*, but on the Microsoft online services environment, billing is *in advance*. As a result, you may receive two invoices following your transition - your final invoice from CTP for the *previous* month's subscription and your first invoice from the Microsoft online services environment for the *current* month's subscription. While these two invoices may occur in close succession, you will not be billed twice for the same month. If you believe an error in your billing has occurred as a result of your transition please contact [Microsoft Office 365 Billing Support](#).
6. The cost of add-ons, such as additional storage, will *not* change as a result of the transition. In the case of additional storage specifically, you may not have been charged for it due to the technical limitations of CTP. On the Microsoft online services environment, Microsoft will be correctly billing for all add-ons including additional storage.

If you have further questions about your subscription, licensing, or billing, you can contact the [Microsoft Dynamics CRM Online Support](#). Additional billing information is also available in the [Transition FAQs](#) and in the [Legal Disclaimers](#).

## Transition Steps

### Transition overview

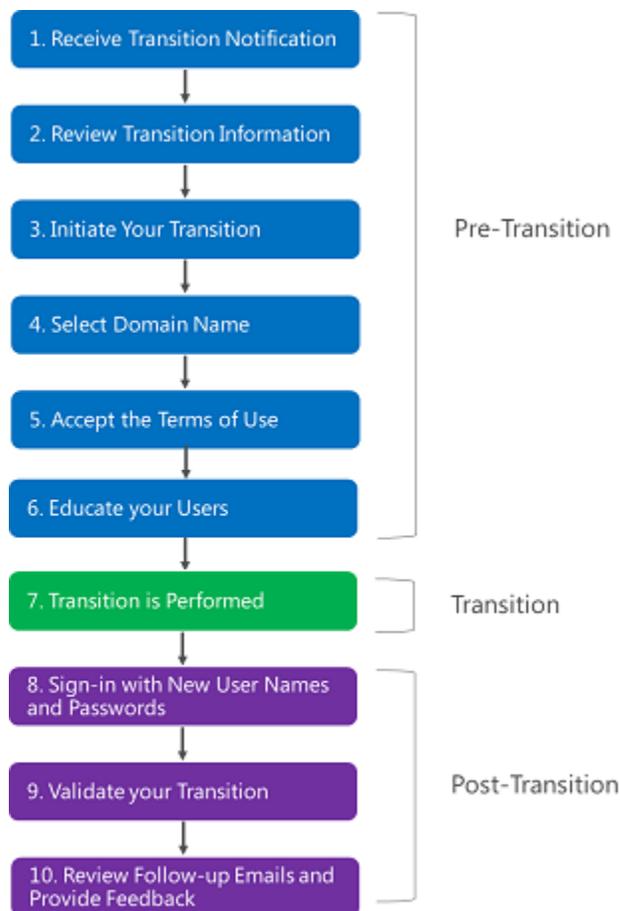
This section provides an overview of the steps of the transition. Each of these steps is described in the following sections.

1. **Receive transition notification** – Microsoft will send notifications to your Microsoft Dynamics CRM Online administrators alerting them to the upcoming transition.
2. **Review the transition material** – Understand the transition process and the Microsoft online services environment by reviewing the material in this guide and on the [Transition Center](#) including the [Pre-Transition and Post-Transition Checklists](#). Carefully reviewing the checklists is important to achieve a successful transition and avoid feature degradation.
3. **Initiate your transition** – The Billing Administrator will initiate the transition by running the Transition Wizard. The Transition Wizard is available after you've been notified to log into Microsoft Dynamics CRM Online.
4. **Select a domain name** – Your Domain Name is one of the ways you are identified on the Microsoft online services environment, and it is incorporated into all of your user names. As a step in the Transition Wizard, Microsoft will suggest a Domain Name for your organization, but you can also choose to create your own.
5. **Accept Terms of Use** – Before transitioning, the Billing Administrator will need to accept the Microsoft Online Services Agreement (MOSA) as a step in the Transition Wizard. The MOSA is the agreement between you and Microsoft that describes your rights to use Microsoft online services and software.

6. **Educate your users** - It is important that you inform your end users about your transition and that your users understand how they will be affected. Users will need to sign in with new user names and passwords after the transition.
7. **Transition** – On your scheduled date, Microsoft will transition your subscription to the Microsoft online services environment. Microsoft will send reminder and completion notices.
8. **Sign-in with new user and administrative user names and passwords** – Once your subscription has been transitioned, your users should sign in using new user names and temporary passwords.
9. **Validate your transition** – As a final step, you should validate your transition by working through the [Post-Transition Checklist](#) on the [Transition Center](#).
10. **Review follow-up emails and provide feedback** – Following your transition, you will receive follow-up emails from Microsoft with important reminders and requests for your feedback.

## Transition flowchart

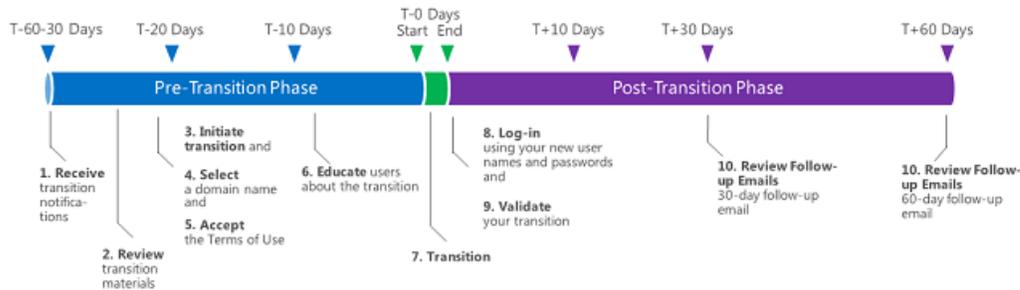
The transition flowchart below outlines the steps that you need to complete to help ensure a smooth transition to the Microsoft online services environment.



## Transition flowchart

### Transition timeline

You will receive your initial transition notification at approximately 30 to 60 days before your scheduled transition. Once you receive your transition schedule, Microsoft's automated transition tool (the Transition Wizard) will walk you through the steps you will need to complete to help ensure that your transition is successful. These steps are detailed in the "Transition Steps" section of this guide. The figure below is an example schedule that outlines pre and post transition steps you will need to complete.



An example of a transition timeline



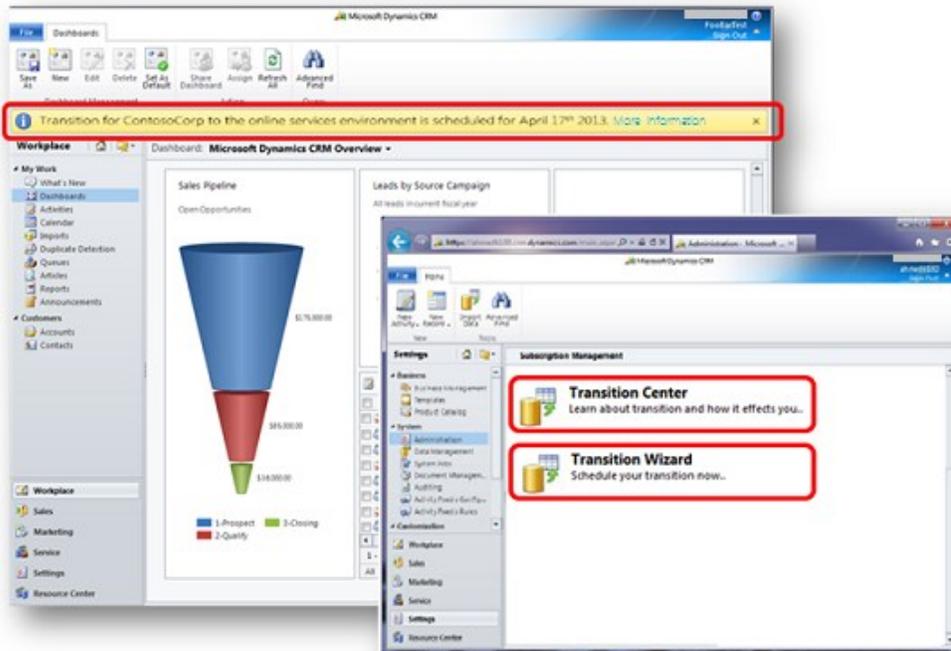
#### Note

Microsoft will attempt to separate the schedule for your transition from the schedule for your Fall '13 Update. Please contact [Microsoft Dynamics CRM Online Support](#) if you have any questions about your scheduling.

### Transition steps – Detailed descriptions

#### 1. Transition notification

When it is time to begin your transition, Microsoft will send you an email notification about your transition schedule. Your partner of record will receive notification of your transition schedule. In addition, an alert will appear on your administrator's Microsoft Dynamics CRM Online homepage and within the "manage subscriptions" menu of your administrative settings dashboard.



Examples of in-product transition notifications sent to administrators



**Note**

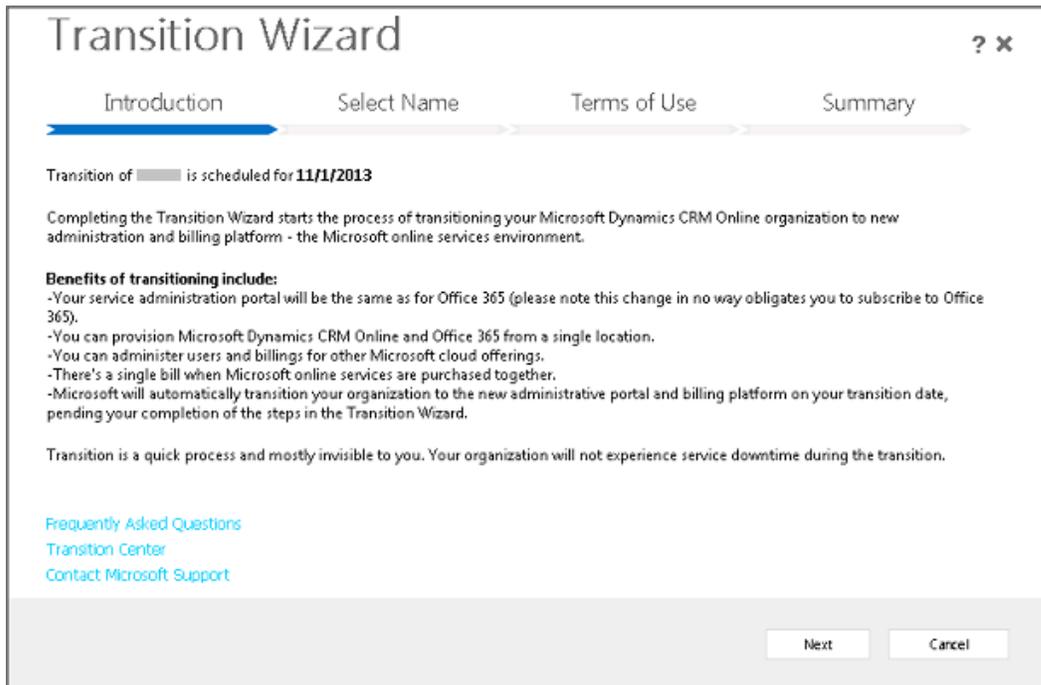
If your organization recently updated to Microsoft Dynamics CRM Online Fall '13, refer to [Appendix E – Transition Wizard in CRM Online Fall '13](#) for a depiction of the Transition Wizard's location in the interface.

**2. Review transition materials**

In the notices you will receive, there will be links to the Transition Center. At this time, review the information on the Transition Center including the Transition Guide, Frequently Asked Questions and Pre-Transition and Post-Transition Checklists. It is important review the [Pre and Post Transition Checklist](#) to identify what changes may be required for your Microsoft Dynamics CRM Online organization to achieve a successful transition. We recommend you review these checklists carefully to avoid feature degradation.

**3. Initiate transition**

By selecting the link within the transition notifications, you will have access to the Transition Wizard (shown below). The Transition Wizard will guide you through your transition. You can also access additional information about your transition via the Transition Wizard.



## Transition Wizard: Introduction



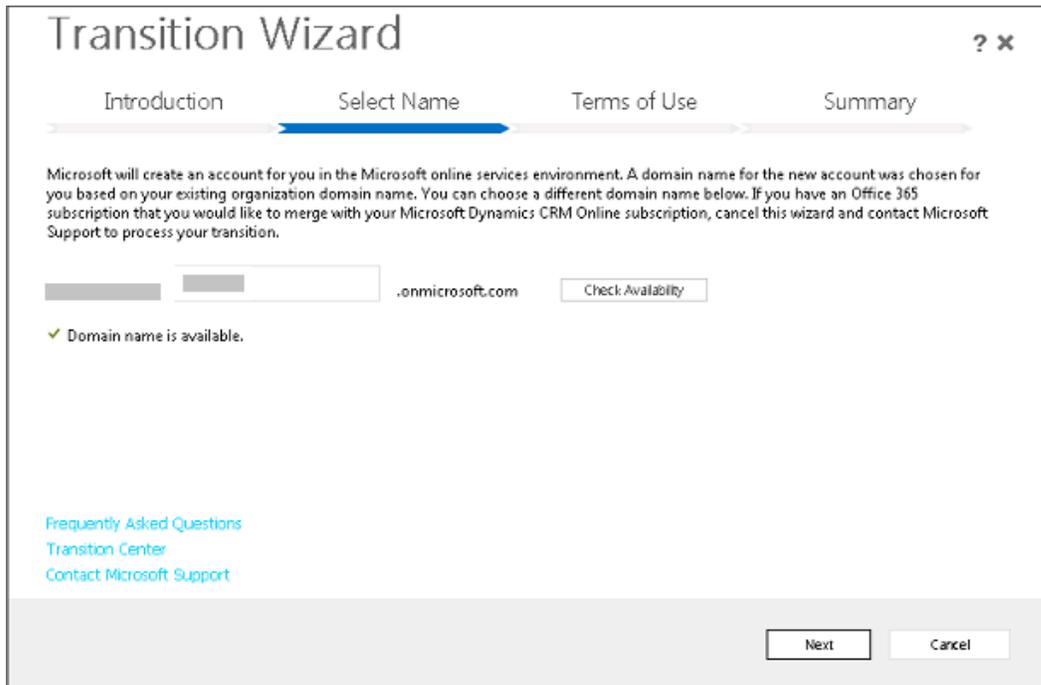
### Note

After selecting your domain name, you may be asked to validate the address and phone number information for your account. If the address and phone information is displayed, you will be asked to update the highlighted fields in order to proceed to the next step of the Transition Wizard.

## 4. Select domain name

Your domain name is the unique identifier for your organization within the Microsoft online services environment. Your domain name is incorporated into your user names. It is often related to your organization's name. For example, if your company is "The Contoso Corporation" and your domain name is "Contosocorp", then the user names for your organization on the Microsoft online services environment will have the form: `username@contosocorp.onmicrosoft.com`.

As part of your transition to the Microsoft online services environment, you will need to select a domain name for your organization. To help you with your selection, Microsoft will suggest an available domain name as part of the Select Domain Name Step of the Transition Wizard. You can accept the suggested domain name or enter a domain name of your choosing. The Transition Wizard will automatically check the availability of a domain name you create.

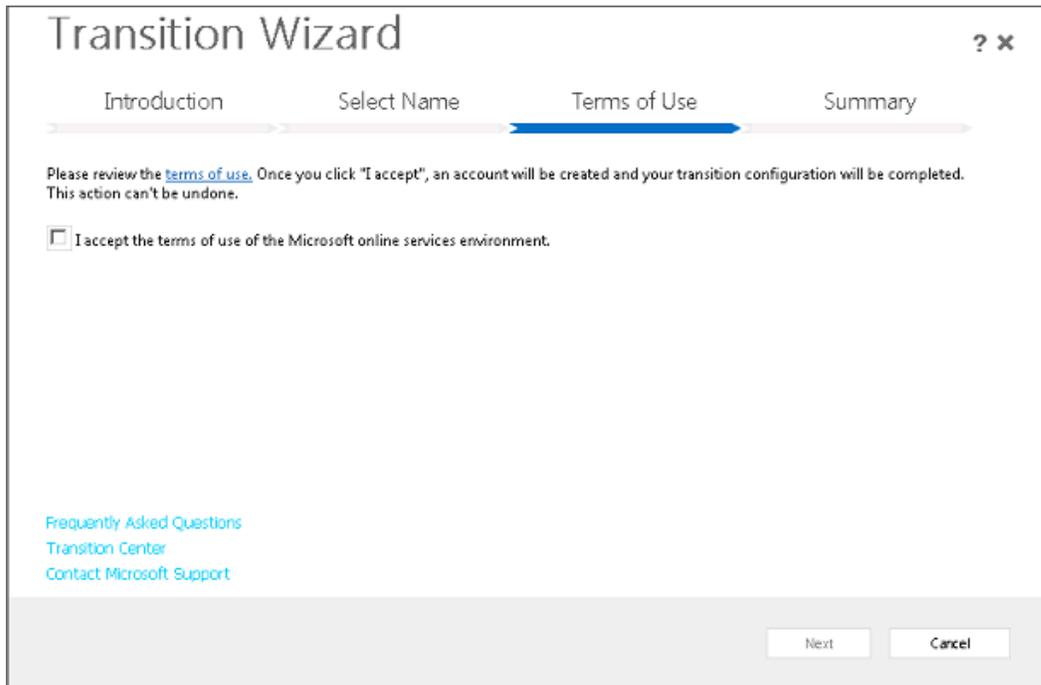


Transition Wizard: selecting a domain name

## 5. Accept the Terms of Use

Before you can transition to the Microsoft online services environment, you will need to accept the terms of use described in the [Microsoft Online Services Agreement](#) (MOSA).

Only your Billing Administrator can accept the MOSA through the Transition Wizard. Once the MOSA has been accepted, all of your organization's Microsoft Dynamics CRM Online administrators and your Partner of Record will receive an email notification that the MOSA has been accepted.

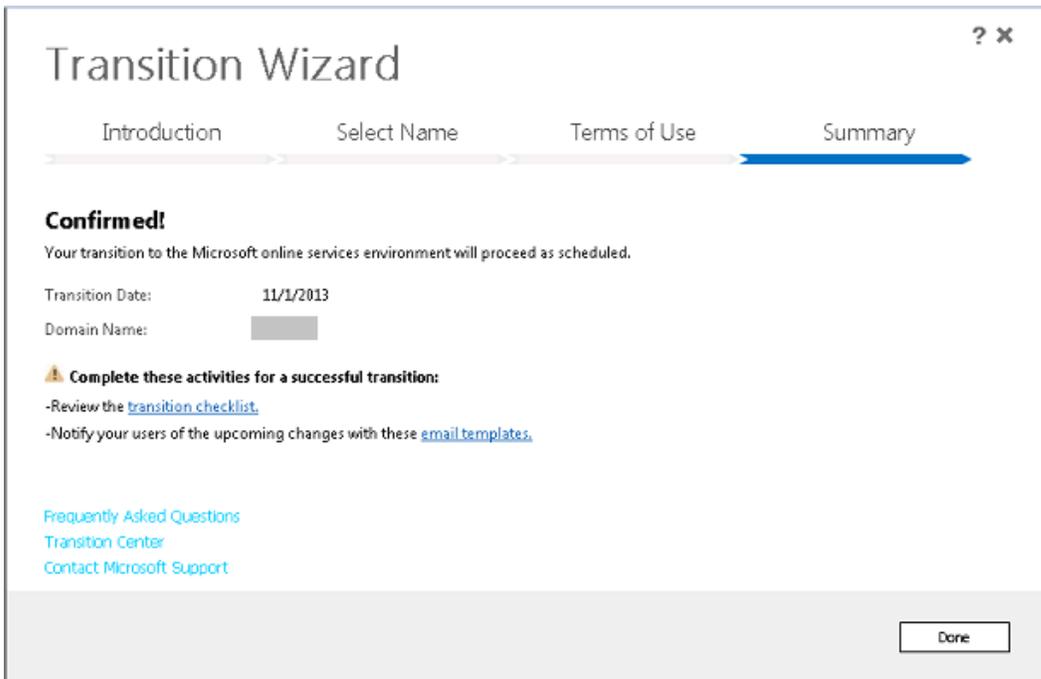


Transition Wizard: accepting the MOSA

## 6. Educate your users

It is important that you notify your end users about this transition. While users should not notice any impact to their Microsoft Dynamics CRM Online subscription during or after your transition, all users will receive new log-in user names and temporary passwords following the transition. In addition to new user names and passwords, users will notice a change in the log-in interface for Microsoft Dynamics CRM Online. New user and administrative log-in experiences are detailed in the "Sign in with New User Names and Passwords" and the "Sign in with New Administrative User Names and Passwords" sections of this guide.

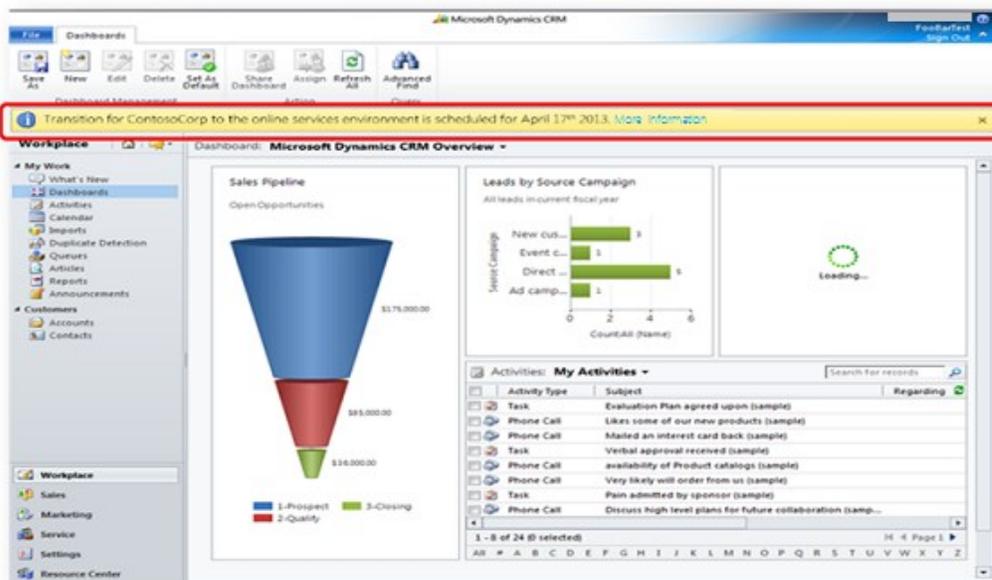
In order to help you educate your users, we have provided you with an email template that describes the changes users will experience as a result of the transition. This e-mail template can be downloaded from the Summary Page of the Transition Wizard. It is also found in "Appendix D: User Notification Template" of this guide.



Transition Wizard: Summary

## 7. Transition

Following your initial notice of transition, system administrators will continue to receive an in-product reminder notice of your transition schedule.



An example of an in-product reminder notification for system administrators



**Note**

If your organization recently updated to Microsoft Dynamics CRM Online Fall '13, then your Microsoft Dynamics CRM Online screens may look different from those shown here.

Five days before your transition, system administrators will receive an additional reminder email that your Microsoft Dynamics CRM Online subscription is about to be transitioned to the Microsoft online services environment.

The actual transition is executed by Microsoft. In most cases, the transition will take less than two hours. During the transition, users will continue to have full access to Microsoft Dynamics CRM Online and they should not notice any change in service. Some administrative functions however will not be permitted during your transition.



**Note**

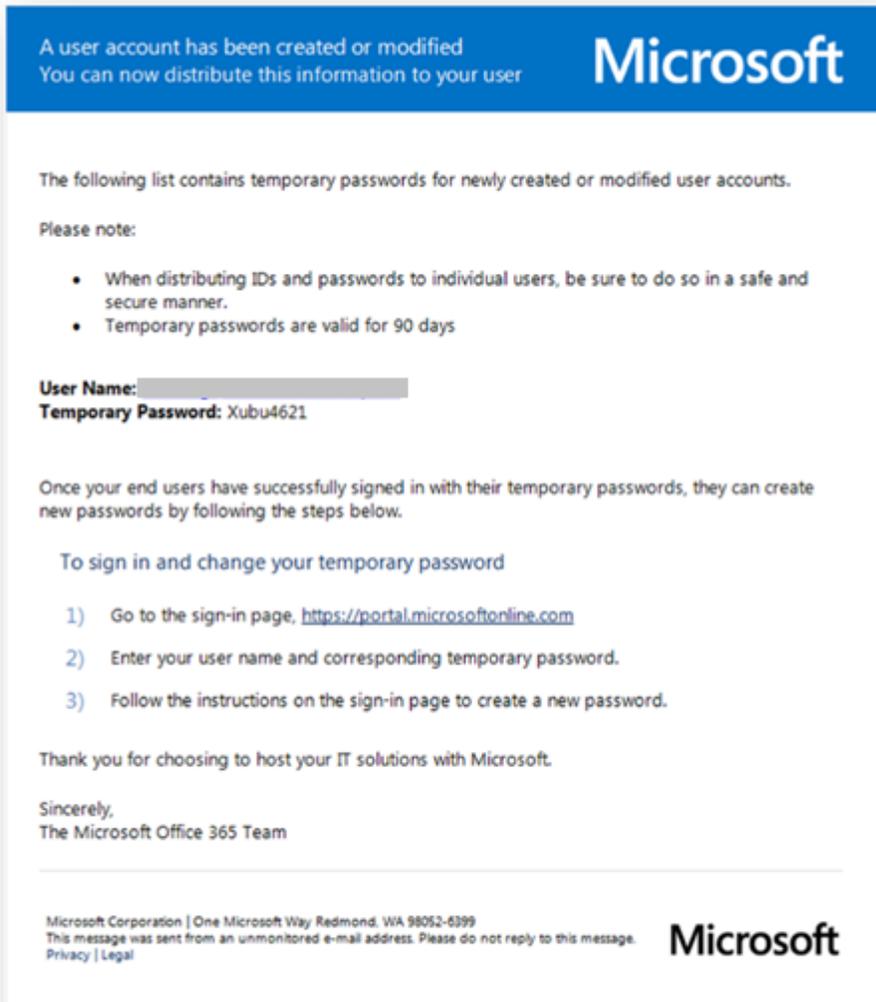
You will not be permitted to add users, change your subscription terms, or make changes to the payment instrument on the day of your transition. If your payment instrument has expired, please update the payment instrument information as soon as possible.

Once your subscription has been transitioned to the Microsoft online services environment, all users will receive their new login user names and temporary passwords (see the “Sign in with New User Names and Temporary Passwords” section).

Following your transition, your subscription on CTP will be cancelled.

### **8a. Sign in with new user name and password**

Once your transition is complete, your users will be assigned new log-in user names and temporary passwords to access their Microsoft Dynamics CRM online accounts. These new user names and temporary passwords will be sent to your users by Microsoft.



An example of New User Name Notification sent to system administrators

Using their new user names and temporary passwords, your users will be able to access their Microsoft Dynamics CRM Online accounts through the Microsoft online services environment.



An example sign-in page following your transition

The first time your users will access their accounts using their new user names, they will be required to change their temporary passwords. If Microsoft Dynamics CRM for Outlook or Microsoft Dynamics CRM for tablets are used to access CRM, the following additional steps are needed to reset a user's password, before signing in.

1. Go to <https://portal.microsoftonline.com>.
  2. Enter the user name and temporary password, sent in a separate mail from Microsoft, and sign in.
  3. Enter a new password in the next step. A password of the user's preference can be entered.
- Once a new password is set, the new user name and password need to be used to sign in to CRM for Outlook and CRM for tablets.

Office 365

### Update password

You must update your password because this is the first time that you've signed in or your password has expired.

User ID:  
[redacted]@contoso corp.onmicrosoft.com

\* Old password:

\* New password:

We recommend at least 8 characters. A mix of letters, numbers, and symbols is best.

**strong**

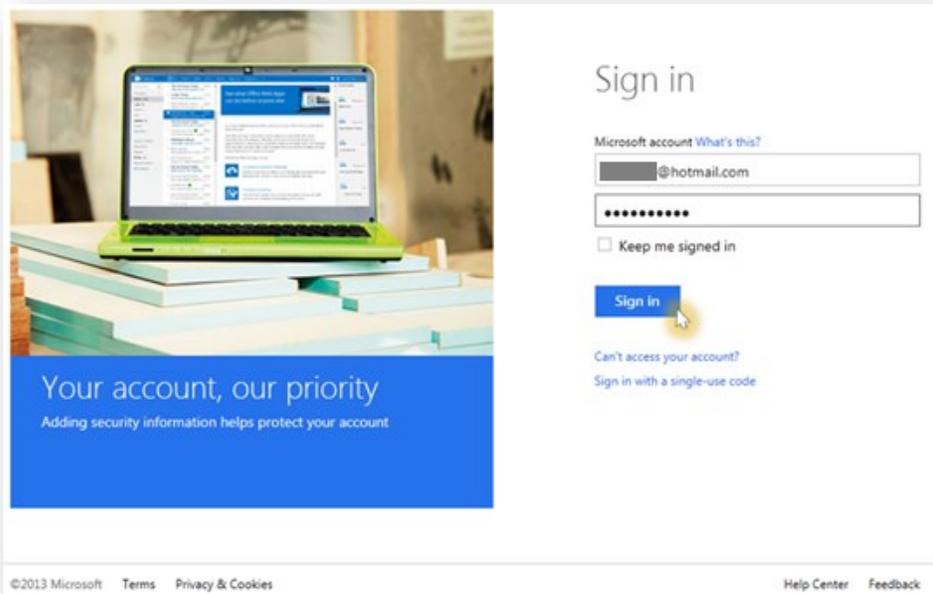
\* Confirm new password:

[save](#)

For users signing in for the first time: Microsoft Online Services will be contacting you with tips and advice for using our products and services. In regions where permitted, we will also contact you with surveys and promotions. You can unsubscribe at any time. For more information on communication options, please see our [Privacy Notice](#).

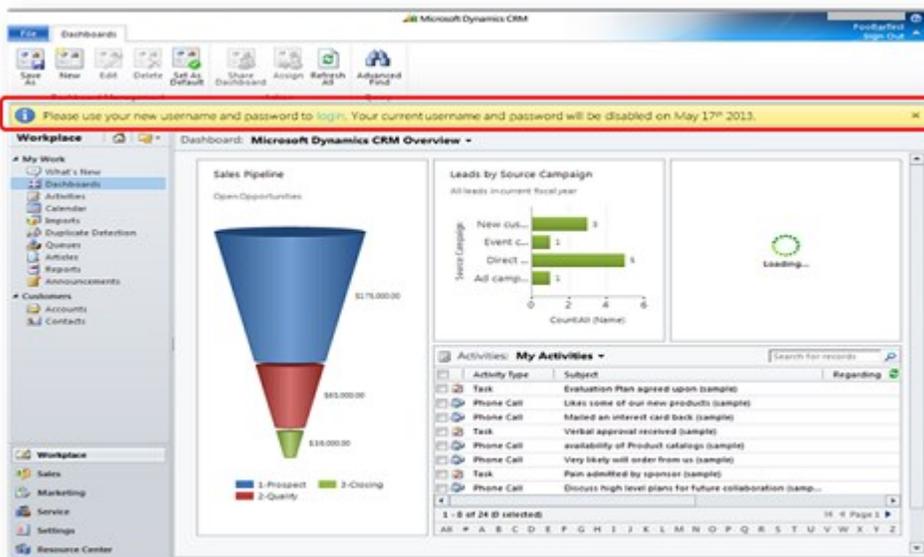
Microsoft ©2013 Microsoft Corporation Legal | Privacy

An example of resetting a password after an initial sign in with a new user name



An example of signing in as a pre-transition user

If a user accesses their account using their pre-transition user name and password, they will receive a notification within their Microsoft Dynamics CRM Online account as a reminder to use their new user name and password.



An example of in-product reminder notification for users who sign in using their pre-transition user name and password



#### Note

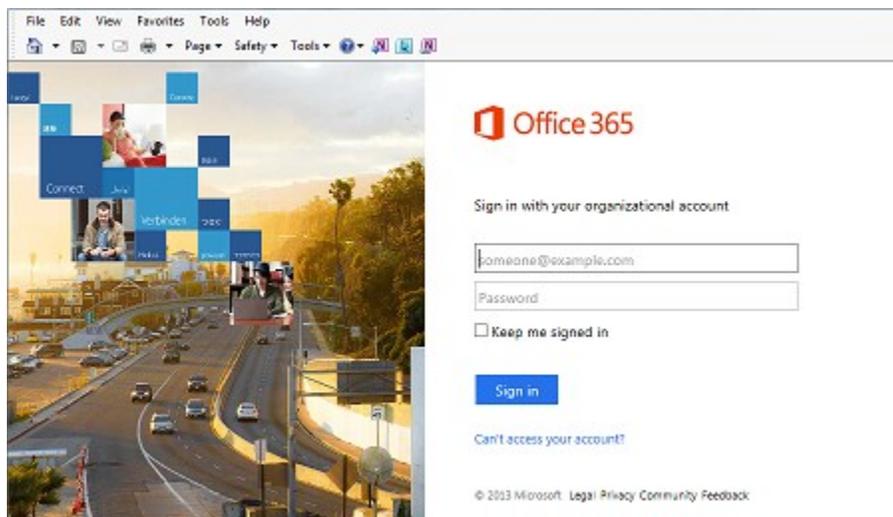
If your organization recently updated to Microsoft Dynamics CRM Online Fall '13, then your Microsoft Dynamics CRM Online screens may look different from those shown here.

Information on resetting user names and passwords can be found in the “Operating in the Microsoft online services environment” section.

### 8b. Sign in with new administrative user name and password

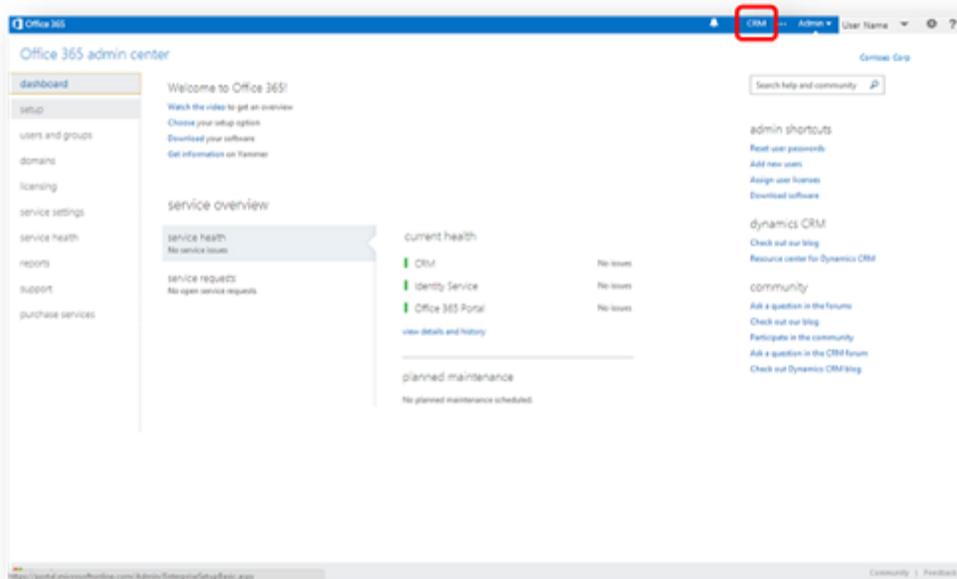
Once your transition is complete, you will need to use your new sign-in user name and password to access your Microsoft Dynamics CRM Online administrative account. Following the same steps as your users you can sign-in using your new user name and password, at which point you will have full access to the administrative functions available on the Microsoft online services environment.

Following your transition, you will have access to the Microsoft online services portal (MOP) also known as the Office 365 administrative center. This is the administrative engine for the Microsoft online services environment. You can access MOP by signing in with your new user name and password at: <https://portal.microsoftonline.com>.



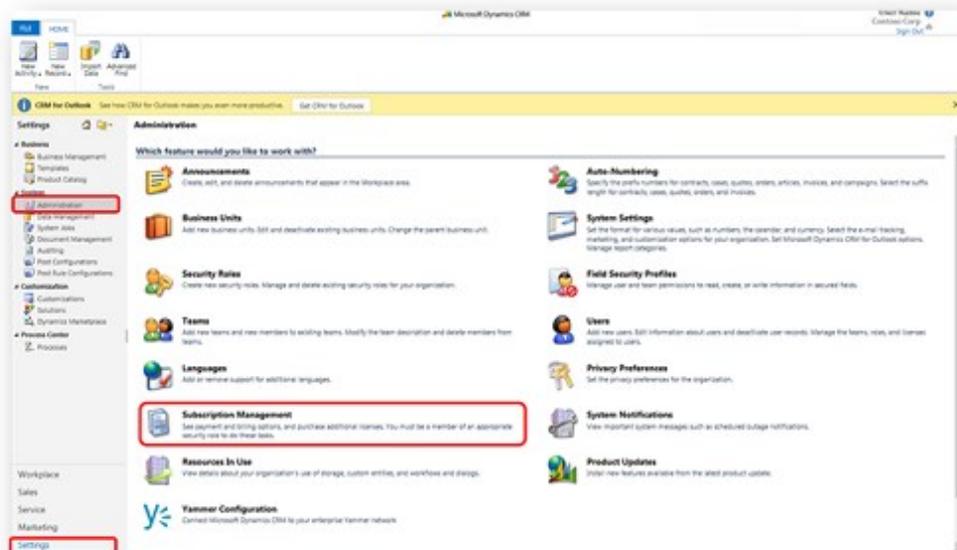
An example of Microsoft online services portal sign in screen for system administrators

Once you have logged in, you will be taken to the Office 365 administrative center. Select CRM from the title banner in order to access Microsoft Dynamics CRM from the Office 365 administrative center.



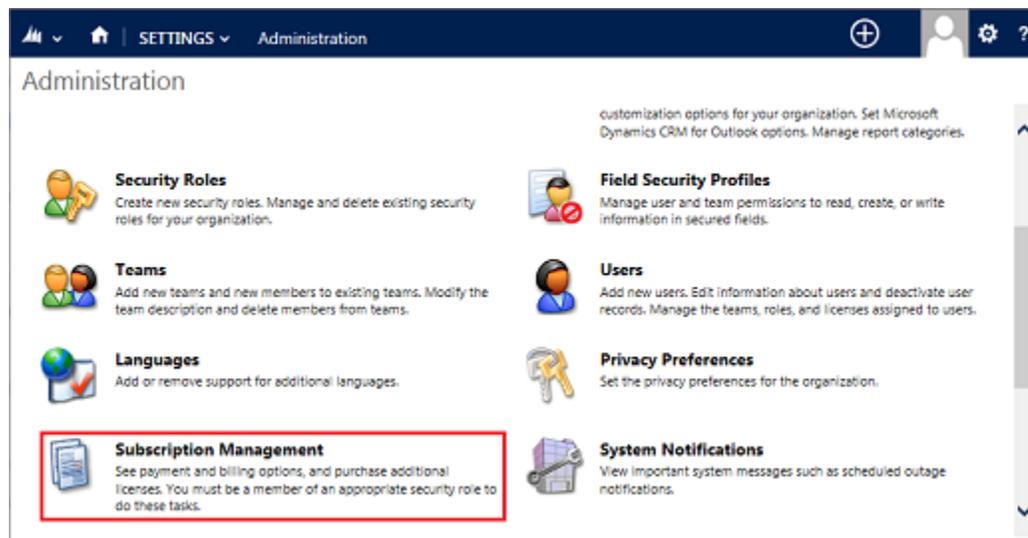
An example of accessing Microsoft Dynamics CRM Online through the Office 365 administrative center

As an administrator, you can also access the Office 365 administrative center through your Microsoft Dynamics CRM Online account by selecting “Subscription Management” from the administrative dashboard.



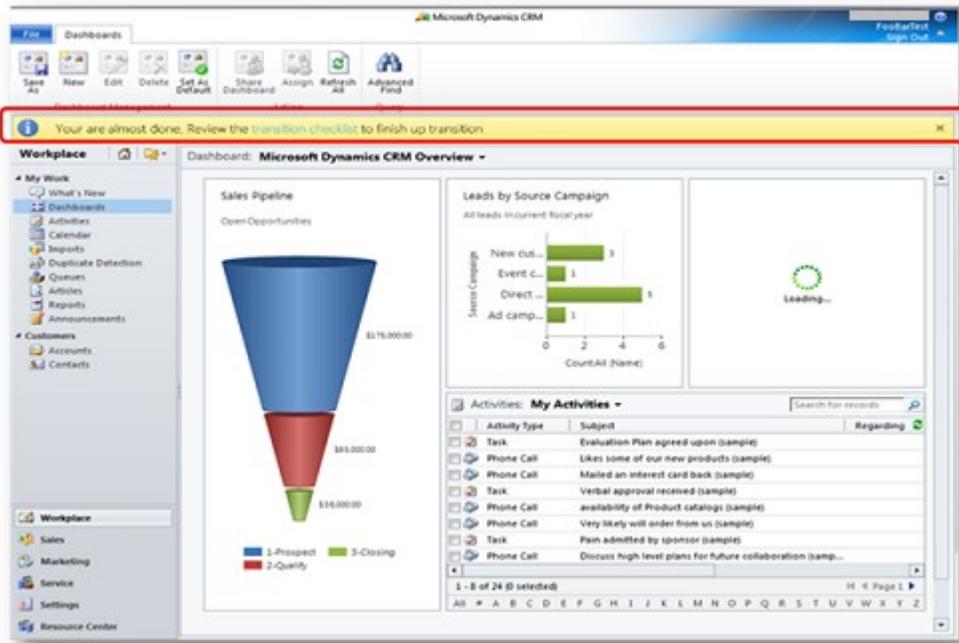
An example of accessing the Office 365 administrative center through the Microsoft Dynamics CRM Online administrative dashboard - Microsoft Dynamics CRM 2011

If your organization has updated to CRM Online Fall '13, you can access the Office 365 administrative center by clicking or tapping: **Microsoft Dynamics CRM > Settings > Administration > Subscription Management.**



## 9. Validate your transition

Once you have successfully completed your first login on the Microsoft online services environment as a system administrator, you will receive an in-product notification directing you to complete the final step of your transition and validate that your solution has transitioned successfully by working through the [Pre-Transition and Post-Transition Checklists](#) on the [Transition Center](#). A careful review of these checklists is recommended to ensure a successful transition and avoid feature degradation.



An example post-transition notification directing system administrators to validate the transition



**Note**

If your organization recently updated to CRM Online Fall '13, then your Microsoft Dynamics CRM Online screens may look different from those shown here.

By completing the [Post-Transition Checklist](#) following your transition you will help to ensure that your Microsoft Dynamics CRM Online subscription will not see any disruptions as a result of the transition to the Microsoft online services environment.

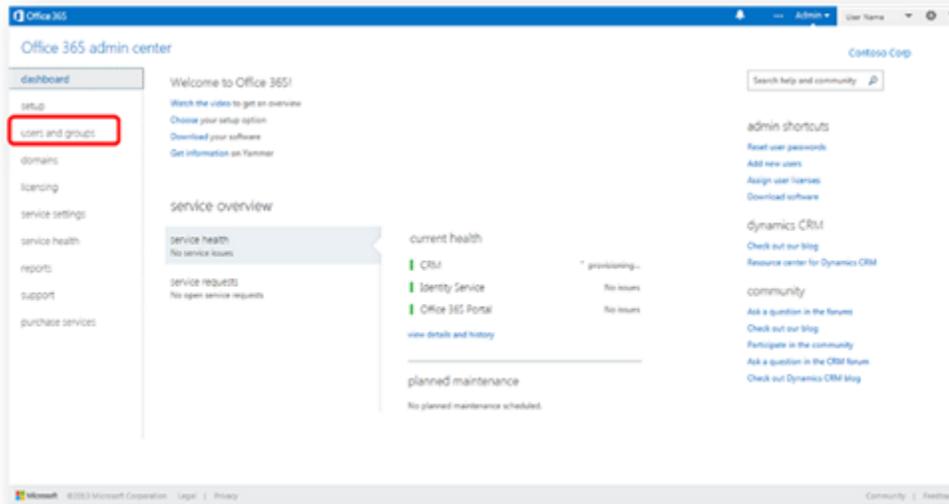
Details for completing each item in the Transition Checklist can be found in "Appendix B: Transition Checklist Items".

If you have a partner of record, we also recommend that you contact your partner of record following your transition to ensure that they are properly attached to your solution on the Microsoft online services environment.

# Operating in the Microsoft Online Services Environment

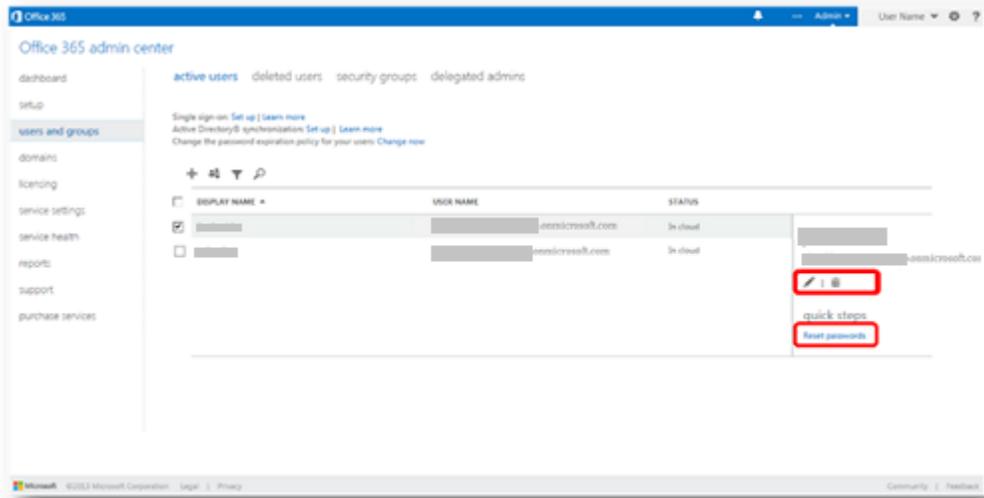
## Accessing user names and resetting user passwords

You can access all of your users' credentials and reset their temporary password through the Microsoft online services environment through the Users and Groups tab on the administrative page of your Microsoft Dynamics CRM Online account.



An example of accessing user information through the Office 365 administrative center

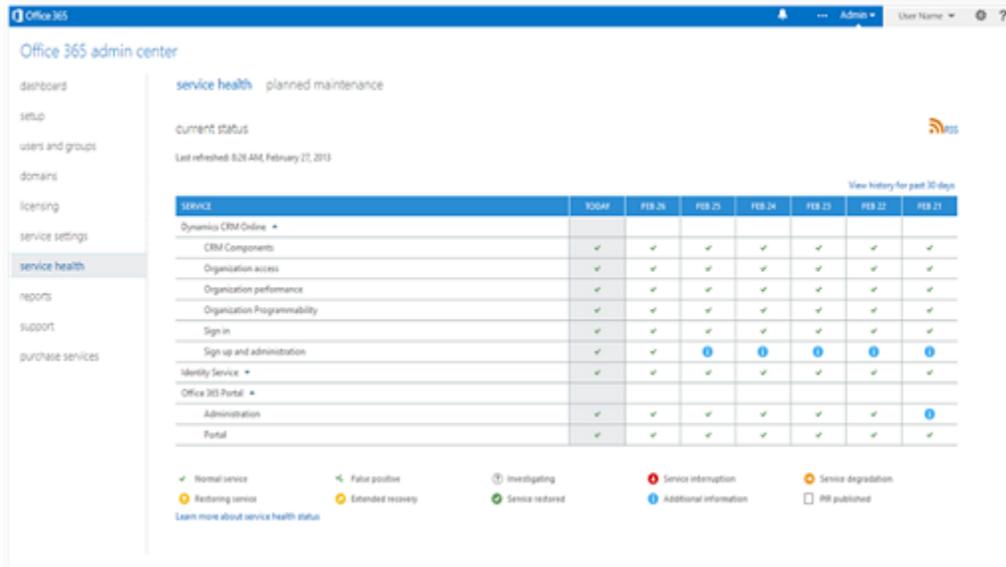
Once on the Users and Groups page, select individual users in order to access their account information or reset their passwords.



An example of resetting user passwords through the Office 365 administrative center

## Differences in administrative practices after transitioning

1. New Microsoft Dynamics CRM Online users need to be created in the Office 365 administrative center.  
If you navigate to the Settings>Administration>User screen in Microsoft Dynamics CRM Online to perform user administration (e.g. creating a new user), it will now take you to the Office 365 administrative center.
2. After you have transitioned to the Microsoft online services environment, only administrators can contact support. Administrators can access both the Service Health Dashboard and issue services requests within the Office 365 administrative center.



An example of the Service Health Dashboard within the Office 365 administrative center

## How the transition will affect your users

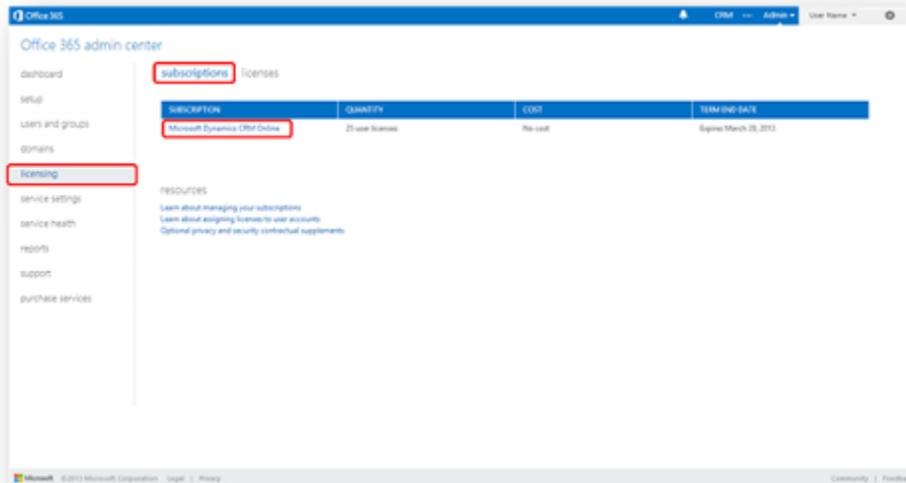
1. Once transitioned, users will need to input their new user name and password when logging on to Microsoft Dynamics CRM Online. You should ensure each user understands this change.
2. If your users access Microsoft Dynamics CRM Online using the Outlook client and experience logon difficulties even after inputting their new user name and password they may need to run the Outlook Configuration wizard to set the Server URL to “CRM Online.” See Appendix B - Transition Checklist Items.

## How the transition affects the configurations and customizations you have deployed to your Microsoft Dynamics CRM Online organization

The [Pre-Transition and Post-Transition Checklists](#) provided in the Appendix B - Transition Checklist Items provides details on the items to be checked to ensure that your Microsoft Dynamics CRM Online implementation is not impacted by the transition. Microsoft recommends that periodic checks of the items on the Transition Checklist be conducted immediately following the transition by personnel (internal IT or a Microsoft Dynamics CRM certified partner) who are experienced in the configuration and customization of your Microsoft Dynamics CRM organization.

## Changing licenses or storage space for your subscription

As an administrator, you can increase or reduce the number of licenses or the amount of storage space for your Microsoft Dynamics CRM Online subscription from the Office 365 administrative center. Changing your licenses or storage can be done by selecting “Licensing” through the Office 365 administrative center. Once on the Licensing page, select “Subscriptions” and click on the subscription name.



Accessing the Licensing Wizard to add licenses or storage through the Office 365 administrative center

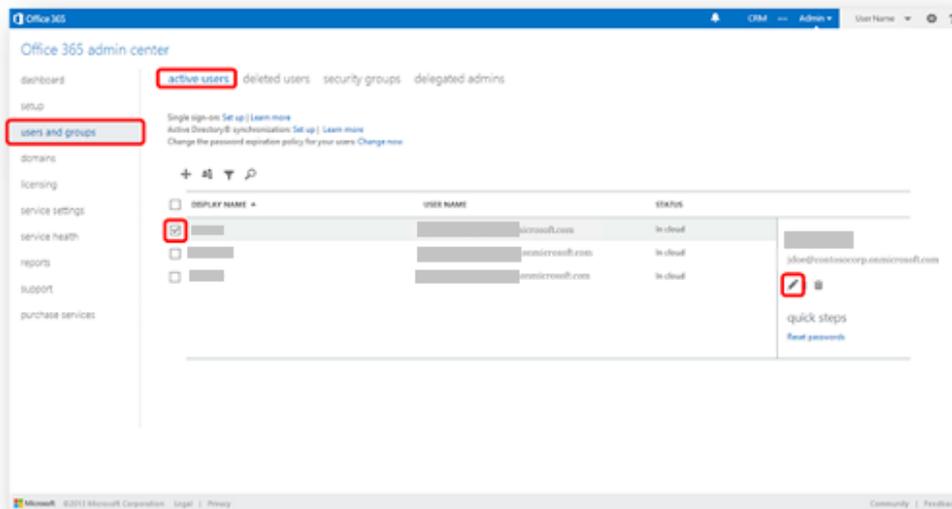
From the Subscription details page, click “Add more” and follow the steps in the Add Licenses Wizard to complete your order. You will have to use the same payment method used when you acquired the original licenses (the cost is pro-rated for the subscription term).

If you paid for the subscription by credit card, any new licenses or storage space that you order is 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 new licenses will not be available until the credit check is complete.

## Assign or remove a license for a user

Global administrators and user management administrators can assign or remove a user’s license to use Microsoft online services (including Microsoft Dynamics CRM Online and Office 365). The administrator assigns a license to the user for each service the user needs to access. In most cases, this is done when the user account is first created. For more information, see [create or edit users](#).

You can add a license to a user through “Users and Groups” on the Office 365 administrative center by selecting the user(s) you would like to assign a license. Once your users are selected click on the edit icon.



Assigning licenses to users through the Office 365 administrative center

Selecting the edit icon will bring you to the “Assign Licenses” page; once there check the box for the license that you want to assign to the user, and then click “Save.”

Note that you can assign licenses for multiple users at once by selecting each user on the User and Groups page (shown above) and selecting edit icon. The bulk assign wizard will walk you through the steps for assigning multiple users at once.

## Appendices

### Appendix A – Glossary of terms

**Account:** The administrative entity for your Microsoft Dynamics CRM Online subscription. Within the Microsoft online services portal, your account is where your subscription, users and licenses are managed.

**Billing Administrator:** The individual within your organization who can acquire Microsoft online services subscriptions and/or manage certain administrative functions.

**Commerce Transaction Platform (CTP):** The current administrative portal and billing platform. This platform will be transitioned to the new Microsoft online service environment.

**Domain Name:** A unique identifier for your organization within the Microsoft online services environment. Your Domain Name is incorporated into your usernames.

**Global Administrator:** The individual in your organization who can act as both the Billing Administrator and Service Administrator.

**Identity federation:** Identity federation provides a true single sign-on (SSO) experience for users to access both on-premises applications within your enterprise and Microsoft Dynamics CRM Online with a single user name and password.

**Microsoft Online Services Agreement (MOSA):** The agreement between Microsoft and a customer which governs customer's use rights and access to Microsoft online services environment. This agreement contains the applicable references to the: (i) Acceptable Use Policy; (ii) Online Service Use Rights; and (iii) Service Level Agreement.

**Microsoft online services environment:** The administration portal and billing platform used by Microsoft online services, including Microsoft Dynamics CRM Online and Office 365.

**Microsoft online services portal (MOP):** The web portal that customers use to try or buy Microsoft online services such as Microsoft Dynamics CRM Online or Office 365, manage active subscriptions, and/or manage user accounts and other service capabilities included in their subscriptions. This portal is also referred to as the Office 365 administrative center.

**Office 365 administrative center:** (see Microsoft online services portal). A term used interchangeably with Microsoft online services portal.

**Organization:** An organization is the Microsoft Dynamics CRM system provisioned in Microsoft Dynamics CRM Online environment. An organization contains the users, application, and data for a customer.

**Partner of Record:** The customer selected partner tied to a specific customer subscription. The partner of record is the partner recognized for selling a customer an Office 365 subscription and will be providing that customer with value added services using Office 365.

**Subscription:** The arrangement to pay for and acquire access and use of the Microsoft Dynamics CRM Online for a specified period of time.

## Appendix B – Transition checklist items

### Review Pre-Transition Action Items

This section provides a checklist of technical items for administrators and configuration managers to work through to identify what changes may be required for your Microsoft Dynamics CRM Online organization to achieve a successful transition. Your partner may be a helpful resource in completing this step. Review the [Pre-Transition and Post-Transition Checklists](#) to identify what changes may be required for your Microsoft Dynamics CRM Online organization to achieve a successful transition and avoid feature degradation.

#### Pre-Transition Action Items Summary Table

No.	Checklist Item	Actions in Pre-Transition
1	Outlook Client Configuration	Verify whether Outlook Clients

No.	Checklist Item	Actions in Pre-Transition
	(only required with the 2011 version of the Outlook client)	have the new sign-in components that will be required post-transition.
2	Email Router Configuration (only required with the 2011 version of the Email Router)	Verify whether the Email Router has the new sign in component that will be required post transition.
3	JavaScript, Plug-Ins, Silverlight and ISV Solutions**	<p>Perform a code inspection of any JavaScript, Plugins, Silverlight, and ISV Solution that use Live ID user names and passwords for authentication.</p> <p>These user names and passwords must be changed in the post-transition phase.</p> <p>Code inspection should also be performed for authentication API. The CRM SDK contains examples on how to authenticate to the CRM endpoints.</p> <p>If you subscribe to any 3rd party services that read or write data from your CRM organization you should contact those providers to ensure they have also made efforts to perform the same code verification.</p>
4	Discovery Service for accessing Microsoft Dynamics CRM instance**	If your organization has customizations that use CRM Online Discovery Service endpoints, those references will need to be updated post transition as the URLs will change.
5	Legacy 2007 Web Service Endpoint**	If your organization has customizations that use the legacy 2007 web service endpoint, those customizations will need to be modified to use

No.	Checklist Item	Actions in Pre-Transition
		the 2011 endpoint.

\*\*These steps will only apply if your CRM organization includes custom code or 3rd party solutions/integrations.

### Pre-Transition Action Items

#### 1. Outlook Client Configuration

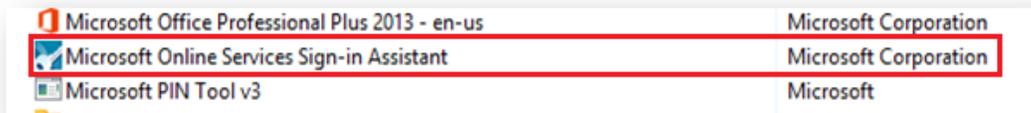
Users accessing Microsoft Dynamics CRM using the Outlook Client will need to have the Microsoft Online Services Sign-in Assistant installed on their client computer.

To check if you have the correct Sign-in Assistant installed go to Control Panel, Programs, Programs and Features and look for “Microsoft Online Services Sign-in Assistant”. If it is visible then the client environment is correctly configured.



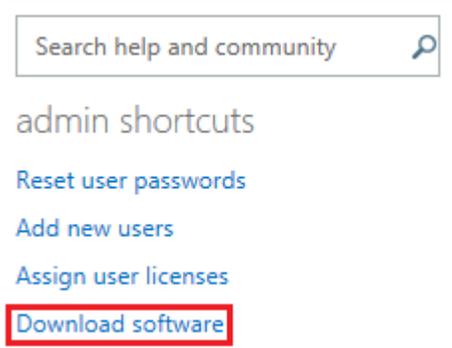
#### Note

This step is not necessary for users that have the Microsoft Dynamics CRM 2013 Outlook Client, as the sign-in component is installed automatically.



If the “Microsoft Online Services Sign-in Assistant” is not visible, it can be installed by clicking one of the following links, as appropriate for your situation:

- 32-bit version - <http://g.microsoftonline.com/0BX00en/500>
- 64-bit version - <http://g.microsoftonline.com/0BX00en/501>



#### 2. Email Router Configuration

If your Organization uses the Microsoft Dynamics CRM Email Router, it will need to be updated to use the new user name and password that you will receive post transition. You will also need to verify that the required sign in components are installed for the Email Router.



**Note**

This step is not necessary if you are using the Microsoft Dynamics CRM 2013 Email Router, as the sign in component is installed automatically.

Refer back to **Step 1** for how to verify this.

Once the transition has occurred, you will need to run the Email Router Configuration Manager and update the Deployment properties to use the new discovery service and input the new user name and password.

For more information on configuring the Microsoft Dynamics CRM Email Router, see <http://technet.microsoft.com/en-us/library/hh699786.aspx>.

**3. JavaScript, Plug-Ins, Silverlight and ISV Solutions**

If your organization includes customizations in JavaScript, Silverlight, Web Resources, or an ISV solution that authenticates to Microsoft Dynamics CRM Online using Live ID user names and passwords, these functions must be updated to use the new user names and passwords. To determine if Live ID user names and passwords are being used, a code inspection may be necessary. If your application includes any ISV solutions, Microsoft recommends contacting your ISV.

More information on coding approaches can be found at:

- <http://technet.microsoft.com/en-us/library/hh771584.aspx> (JavaScript)
- <http://technet.microsoft.com/en-us/library/gg334279.aspx> (REST Endpoint)

**4. Discovery Service for accessing Microsoft Dynamics CRM instance**

You should check if your organization uses the correct discovery service for accessing your Microsoft Dynamics CRM instance after transition to Microsoft online services. The following table lists the Web service URLs for the worldwide Microsoft Dynamics CRM Online data centers.

Location	Discovery Web service URL	Identity Provider
North America	<a href="https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc">https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc</a>	Microsoft online services
EMEA	<a href="https://disco.crm4.dynamics.com/XRMServices/2011/Discovery.svc">https://disco.crm4.dynamics.com/XRMServices/2011/Discovery.svc</a>	Microsoft online services
APAC	<a href="https://disco.crm5.dynamics.com/XRMServices/2011/Discovery.svc">https://disco.crm5.dynamics.com/XRMServices/2011/Discovery.svc</a>	Microsoft online services

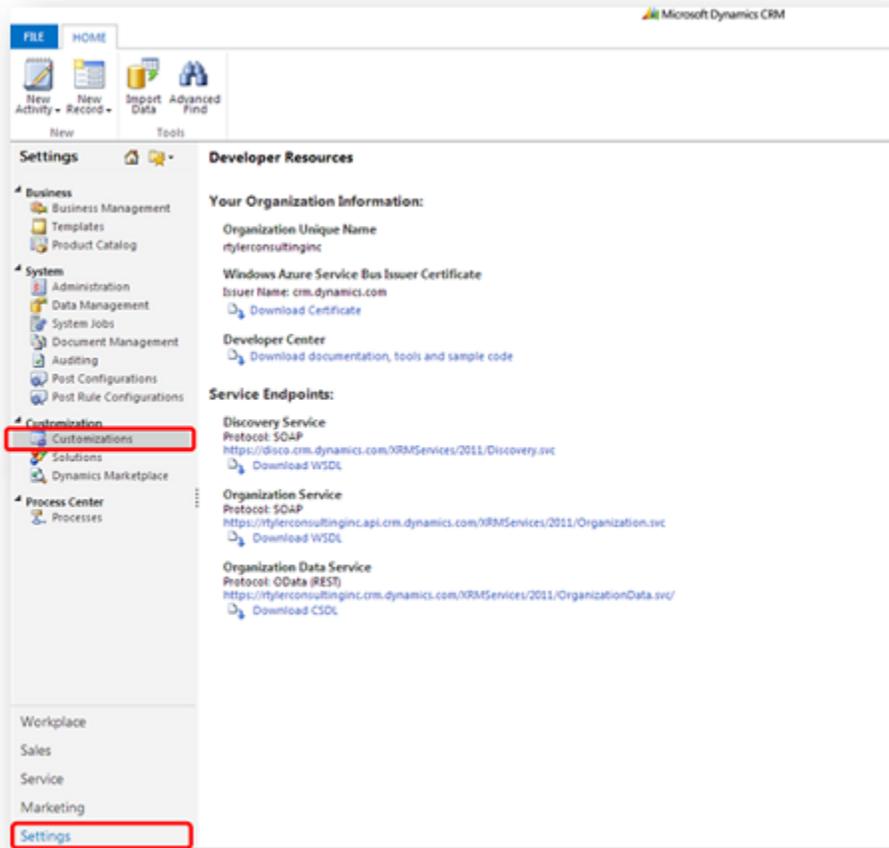
To determine if the right discovery service is being used, a code inspection may be necessary. If your application includes any ISV solutions, Microsoft recommends contacting your ISV to determine if the solution supports authentication using cloud managed user names and passwords.

More information on the Discovery service can be found in the Microsoft Dynamics CRM SDK: <http://msdn.microsoft.com/en-us/library/gg328127.aspx>.

#### 5. Legacy 2007 Web Service Endpoint

Check if your application uses the correct Web service endpoint for your Microsoft Dynamics CRM instance after transition to the Microsoft online services environment. The 2007 Web service endpoint is not supported by the Microsoft online services environment and organizations must be converted to the 2011 endpoint.

To determine if the correct endpoint is being used, a code inspection may be necessary. If your application includes any ISV solutions, Microsoft recommends contacting your ISV to determine if the solution supports the 2011 endpoint. More information on Service Endpoints can be found in the Administration screens of your organization by navigating to **Settings > Customizations > Developer Resources**.



## Perform Post-Transition Action Items

Following notification that your organization has been successfully transitioned, you should complete the post-transition activities shown in the table below.



### Note

Microsoft recommends that you follow these steps carefully to achieve a successful transition and avoid feature degradation.

### Post-Transition Action Items Summary Table



### Tip

Your partner may be a helpful resource in completing this step.

No.	Checklist Item	Actions in Post-Transition
1	Test your new user names and	Conduct tests to ensure you can

No.	Checklist Item	Actions in Post-Transition
	passwords.	logon to your CRM Online organization using new user names and passwords.
2	Inform your users.	Inform your users of how they should logon to the transitioned Microsoft Dynamics CRM Online organization using the new cloud managed or federated ID user names and passwords.
3	Access CRM using the Outlook Client.	Test and validate connection of the CRM Outlook Client.  Note: You must use the “CRM Online” connection string when running the CRM Client for Outlook Configuration Wizard.
4	E-Mail Router Configuration	Update the Email Router Configuration (Deployment Tab) with the new discovery service URL and your new user names and passwords.  Test and validate.
5	Updates to JavaScript, Plug-Ins, Silverlight and ISV solutions	Deploy solution updates (for areas that need to use the new user names and passwords, new discovery service URL and web service endpoints).  Test and validate.

**Post-Transition Action Items**

**1. Test your new user names and passwords**

To test the new user names and passwords with your web browser, log into your organization using the direct URL or by accessing <http://crm.dynamics.com>

Select **CRM Customer Sign In** near the top of the page.

**2. Inform your users**

Update your users with new their new cloud managed or federated user names and passwords required for accessing CRM post-transition.

**3. Access CRM using the Outlook Client**

Test and validate connectivity for the CRM Client for Outlook using your new user names and passwords.

If you use Microsoft Dynamics CRM for Outlook to access CRM and you have not changed your temporary password, you will need to follow the following additional steps to reset your password, before signing in.

- a. Go to <https://portal.microsoftonline.com>.
- b. Enter your user name and temporary password (above) and sign in.
- c. You will be asked to enter a new password in the next step. Please enter a password of your preference.
- d. Once a new password is set, please use your new user name and password to sign in into CRM for Outlook to access CRM.

If you are having issues accessing CRM via Outlook, please refer to the [Microsoft Dynamics CRM for Outlook Configuration Troubleshooting Wizard](#).

#### 4. E-Mail Router Configuration

Update the Email Router Configuration (Deployment Tab) with the new Microsoft CRM Server Discovery Service URL and your new user names and passwords.

#### 5. Updates to JavaScript, Plug-Ins, Silverlight and ISV solutions

Deploy solution updates (for areas that need to use the new user names and passwords, new discovery service URL and web service endpoints).

## Appendix C – Key contacts and resources

No.	Purpose	Contact / Information Source
1	To submit feedback about this guide and the transition process.	<a href="mailto:CRMOLTransition@microsoft.com">CRMOLTransition@microsoft.com</a>
2	Request for a Microsoft assisted transition.	<a href="mailto:CRMOLTransitionReq@microsoft.com">CRMOLTransitionReq@microsoft.com</a>
3	Microsoft Dynamics CRM Online Customer Center.	<a href="http://rc.crm.dynamics.com/rc/2011/en-us/default.aspx?ver=5.1">http://rc.crm.dynamics.com/rc/2011/en-us/default.aspx?ver=5.1</a>
4	Microsoft Dynamics CRM Online Support.	<a href="http://go.microsoft.com/fwlink/?LinkID=242313">http://go.microsoft.com/fwlink/?LinkID=242313</a>
5	Microsoft Office 365 Billing Support	<a href="http://go.microsoft.com/fwlink/?LinkID=278814">http://go.microsoft.com/fwlink/?LinkID=278814</a>
6	Current version of this guide.	<a href="http://go.microsoft.com/fwlink/?LinkID=29097">http://go.microsoft.com/fwlink/?LinkID=29097</a>

No.	Purpose	Contact / Information Source
7	Information on configuring the Microsoft Dynamics CRM Email Router.	<a href="http://www.microsoft.com/en-us/download/details.aspx?id=3621">http://www.microsoft.com/en-us/download/details.aspx?id=3621</a>
8	Information on coding approaches for authentication end points.	<a href="http://technet.microsoft.com/en-us/library/hh771584.aspx">http://technet.microsoft.com/en-us/library/hh771584.aspx</a> (JavaScript) <a href="http://technet.microsoft.com/en-us/library/gg334279.aspx">http://technet.microsoft.com/en-us/library/gg334279.aspx</a> (REST Endpoint)
9	Information on the Discovery service in the Microsoft Dynamics CRM SDK.	<a href="http://msdn.microsoft.com/en-us/library/gg328127.aspx">http://msdn.microsoft.com/en-us/library/gg328127.aspx</a>
10	Information on how to configure identity federation.	<a href="http://technet.microsoft.com/en-us/library/hh967643.aspx">http://technet.microsoft.com/en-us/library/hh967643.aspx</a>

## Appendix D – Notification to users template

Once you understand the transition process and have initiated your transition by accepting the MOSA and selecting a domain name, it is important that you reach out to your end users so they understand what this transition will mean for them. Below is an email template to help you inform your users. This template is available in the “Summary” step of the Transition Wizard.

Hello [end user],

In the coming days, we will be transitioning to a new billing and administrative platform for Microsoft Dynamics CRM Online. This transition will not have an impact on the performance of your account, and you will be able to use Microsoft Dynamics CRM Online throughout the transition.

One change you will notice as a result of this transition is that you will need to start using a new sign-in user name and password for Microsoft Dynamics CRM Online. Once we have transitioned, Microsoft will send you a new user name and temporary password. Please start using these credentials to access your account. You will be prompted to change your temporary password when you first sign in.

If you use Microsoft Dynamics CRM for Outlook or Microsoft Dynamics CRM for tablets to access CRM, you will need to follow the following additional steps to reset your password, before signing in.

1. Go to <https://portal.microsoftonline.com>.
2. Enter the temporary user name and password, sent to you in a separate mail from Microsoft, and sign in.
3. You will be asked to enter a new password in the next step. Please enter a password of your preference.
4. Once a new password is set, please use your new user name and password to sign in to CRM for Outlook and CRM for tablets.

You will also notice a new screen to sign in to your Microsoft Dynamics CRM Online organization.

If you have any problems accessing your account or if you have any questions about this transition, please let me know.

Thank you,

[System Administrator]

An example notification to users

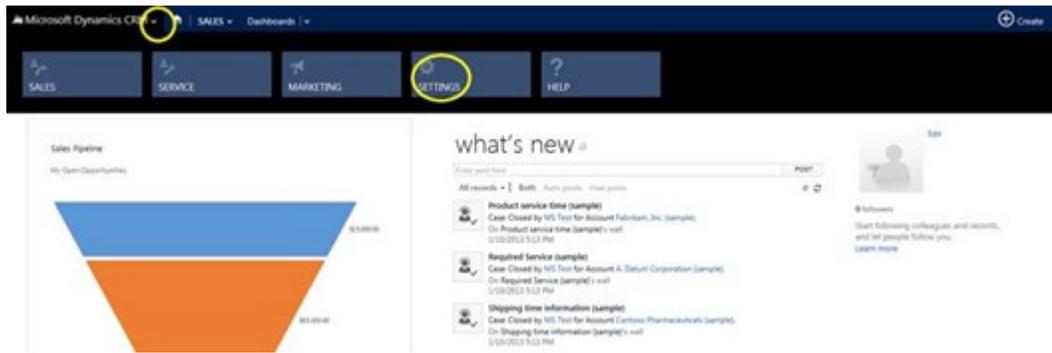
## Appendix E – Transition Wizard in CRM Online Fall ‘13

If your organization recently updated to Microsoft Dynamics CRM Online Fall ‘13, then your Microsoft Dynamics CRM Online screens may look different from those in the guide.

To access the Transition Wizard within Microsoft Dynamics CRM Online Fall ‘13, do the following:



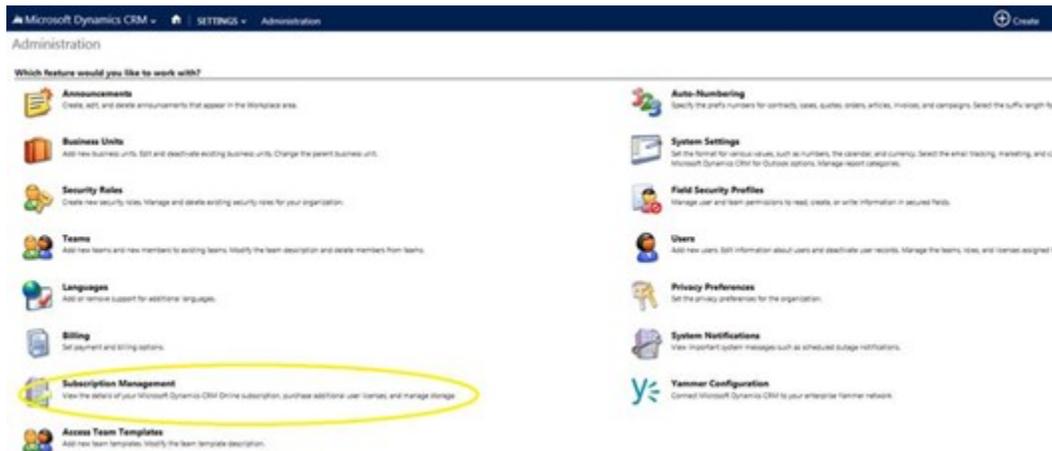
1. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.



2. Click or tap **Settings > Administration**.



3. Click or tap **Subscription Management** to see the Transition Wizard and Transition Center icons.



**Note**

The Transition Wizard icon will only be displayed if your organization has been scheduled for transition.