Microsoft Dynamics CRM Online Deployment and Administration Guide

Contents

Microsoft Dynamics CRM Online Deployment and Administration Guide

The *Microsoft Dynamics CRM Online Deployment and Administration Guide* is designed for administrators who need to plan and implement Microsoft Dynamics CRM Online in their organizations. The guide also provides information to help users achieve a smooth startup with the system.

If you don't have Microsoft Dynamics CRM Online and would like to sign up for a free 30-day trial, click here to learn more.

The guide offers 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 guide does not discuss a federated deployment of Microsoft Dynamics CRM Online to allow single sign-on (SSO). For more information about identity federation and SSO with the Microsoft online services environment, see Prepare for single sign-on.

For administrators who subscribe through Microsoft online services, an additional goal is to describe the integration of Microsoft Dynamics CRM Online with Office 365, and how the integration works to provide a single location for effectively managing your subscription to this and to other Office 365 services that you might add in the future.

If you would like a version of this document to print, download the Microsoft Dynamics CRM Online Deployment and Administration Guide.

In This Section

Get Started Administering Microsoft Dynamics CRM Online

Manage Subscriptions, Licenses, and User Accounts

Configure Microsoft Dynamics CRM Online

Add Integration Features to Microsoft Dynamics CRM Online

Help and Additional Resources for Microsoft Dynamics CRM Online

Get Started Administering Microsoft Dynamics CRM Online

This section of the Microsoft Dynamics CRM Online Deployment and Administration Guide 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. 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 Microsoft Dynamics 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 Microsoft online services portal and covers the initial tasks that are necessary to set up your subscription to the Microsoft Dynamics CRM Online service and to register users to be recognized by the service. You complete these initial tasks in the administrative areas of the Microsoft online services portal. You only need to do these tasks once, unless you add users to the system or want to purchase additional storage or services.

The second step takes place in Microsoft Dynamics 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 Microsoft Dynamics CRM Online through email invitations sent by the Microsoft online services environment.

If you manage the subscription in Microsoft Dynamics CRM Online, you do the initial administrative tasks directly in Microsoft Dynamics 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 Microsoft Dynamics CRM Online through email invitations.

⬥ **Important**

If you have a Microsoft Dynamics CRM Online subscription through Business Productivity Online Suite (BPOS), you must wait until after your service is transitioned to the Microsoft online services environment before you can add additional services or licenses for Office 365 or other Microsoft online services offerings. As soon as transition completes, you can go to the Microsoft online services portal to add services or licenses.

In This Section

Microsoft Dynamics CRM Online Requirements

Plan for Microsoft Dynamics CRM Online Deployment and Administration

Getting Users Access to Microsoft Dynamics CRM Online as a Microsoft Online Service

See Also

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

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 Microsoft Dynamics 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.
- Mobile Express. A lightweight application that lets you access CRM data on almost any web browser running on a tablet, smartphone, or non-Windows computer.

For Microsoft Dynamics CRM for Outlook, there are links to detailed information about hardware and software requirements. If you do not plan to use Microsoft Dynamics CRM for Outlook, the section provides information about adding the email routing functionality necessary to integrate Microsoft Dynamics CRM Online with your email system.

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 Microsoft Dynamics CRM Online database. For more information about the supported web browsers and hardware requirements, see **Microsoft Dynamics CRM 2011 web application and mobile device requirements**.

Microsoft Dynamics CRM for Outlook Requirements

Microsoft Dynamics CRM for Outlook is a free add-in that integrates access to Microsoft Dynamics CRM Online into the Outlook user interface, making it possible to work in both email and Microsoft Dynamics CRM Online through the same interface.

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

You can download the Microsoft Dynamics CRM for Outlook add-in from within Microsoft Dynamics CRM Online by clicking **Get CRM for Outlook** on the message bar.

For complete installation and configuration instructions, see **Microsoft Dynamics CRM for Outlook Installation Instructions for use with Microsoft Dynamics CRM Online**.

Important

Microsoft Dynamics CRM for Outlook includes email routing functionality. If you are not using Microsoft Dynamics CRM for Outlook, there are two other options for processing email:

- Configure Microsoft Dynamics CRM Online to use the Microsoft Dynamics CRM E-mail Router for incoming and outgoing email.
- Configure Microsoft Dynamics CRM Online to use the Microsoft Dynamics CRM E-mail Router for outgoing email and a forward mailbox for incoming email.

  For more information, see **Planning email integration**.

Mobile Device Requirements

Users can work in Microsoft Dynamics CRM Online by using a supported browser on a mobile device, or by using Mobile Express for Microsoft Dynamics CRM. For more information about mobile device and browser support, see **Microsoft Dynamics CRM mobile device support**. For more information about the mobile experience in Microsoft Dynamics CRM Online, including information about Mobile Express for Microsoft Dynamics CRM, see Getting Started with CRM Mobility.

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

Plan for Microsoft Dynamics CRM Online Deployment and Administration

Deployment will go more smoothly with some preliminary planning. This topic can alert you to some of the items to consider before you start the actual deployment process.

Planning a Deployment of Microsoft Dynamics CRM Online

The following items can guide you in planning for deployment. Review the list to see which items apply to your organization and then use the Considerations column to drill into the issues.

Key Planning Items

The table identifies key items for planning the deployment of Microsoft Dynamics CRM Online.

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 would like to bring into Microsoft Dynamics 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.	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 requirements in this area? Is there a plan for business growth that could affect the number of users of Microsoft Dynamics 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 Microsoft Dynamics 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	Single sign-on is available only to customers who manage their Microsoft Dynamics CRM Online subscription through the Microsoft online services environment. There are additional requirements to implement this feature, therefore, consider how important it is to your organization. For more information about single sign-on, see Microsoft Dynamics CRM Online Enterprise Planning Guide and Prepare for single

Item	Description	Considerations
	Microsoft Dynamics CRM Online.	sign-on.
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 in the Microsoft online services environment, 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. 📝 **Note** Administrative roles cover all subscription management functions within the service. These are not the same as the security roles that you assign to users in Microsoft Dynamics CRM Online. Security roles in Microsoft Dynamics CRM Online are required and govern access to resources in the Microsoft Dynamics CRM Online service. See "Security roles in Microsoft Dynamics CRM Online" in this table.
Security roles in Microsoft Dynamics CRM Online	Microsoft Dynamics CRM Online uses role-based security. The security role assigned to a user	Every user must be assigned at least one security role in order to access Microsoft Dynamics CRM Online.

Item	Description	Considerations
	determines the tasks the user is permitted to perform and the data that the user is permitted to view.	**Note** Security roles are not the same as administrative roles in defined in the Microsoft online services environment. Administrative roles in the Microsoft online services environment cover subscription management and related activities in the Microsoft online services portal subscriptions area. See: Administrative roles in the Microsoft online services environmentin this table.
Importing data	Microsoft Dynamics CRM Online offers a wizard to help with importing CRM data from other applications and services.	If you are importing data from other systems, consider the way you will process the data to minimize errors. For more information, see, see Importing Data Overview.
Product updates	Some Microsoft Dynamics CRM Online releases will include optional product updates that you can choose to enable.	Product updates may affect existing customizations in your Microsoft Dynamics 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 new sales and service process forms, cannot be removed or easily reverted to the previous functionality. Therefore, you should give careful consideration before you enable a product update. For more information, see Installing Product Updates.

Item	Description	Considerations
		Tip If you are unsure whether you want to enable a product update in a Microsoft Dynamics CRM Online instance used in production, sign up for a Microsoft Dynamics CRM Online trial subscription to evaluate the new functionality. For more information, see [Sign up for a trial instance](#).

See Also

[Get Started Administering Microsoft Dynamics CRM Online](#)

Microsoft Dynamics CRM Online Enterprise Planning Guide

[Microsoft Dynamics CRM Online Requirements](#)

[Getting Users Access to Microsoft Dynamics CRM Online as a Microsoft Online Service](#)

Getting Users Access to Microsoft Dynamics CRM Online as a Microsoft Online Service

This topic applies only to administrators who manage a subscription to Microsoft Dynamics CRM Online through the Microsoft online services environment.

To get users up and running in Microsoft Dynamics CRM Online, you complete some administrative tasks in the Microsoft online services portal (step one)—which you generally do only once—followed by administrative tasks in Microsoft Dynamics CRM Online (step two).

Microsoft Dynamics CRM Online is an online service subscription. If you signed up for this service and manage your subscription through the Microsoft online services environment, 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 Microsoft online services portal, 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. For more information about administrative roles, see [Assigning Administrator Roles](#).

In step two, access Microsoft Dynamics CRM Online to 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. Microsoft Dynamics 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 Microsoft Dynamics CRM Online, see **Controlling Data Access**.

💠 **Important**

Users cannot access Microsoft Dynamics CRM Online until they have been assigned at least one security role in Microsoft Dynamics CRM Online. See Step Two: Assign Security Roles in Microsoft Dynamics CRM Online .

Differences between Microsoft Online Services Administrative Roles and Dynamics CRM Online Security Roles

Administrative roles are available to assign to users in the Microsoft online services 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 Microsoft Dynamics CRM Online and cover rights and permissions-related aspects and functionality of Microsoft Dynamics CRM Online, 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, Assign Licenses and Administrative Roles in the Microsoft Online Services Portal

Your organization's subscription to Microsoft Dynamics CRM Online provides access to the Microsoft online services portal through a global administrator account. The global administrator manages every aspect of the subscription and may add subscriptions to other Microsoft online services. For more information about adding subscriptions to other services, see Add Office 365 Online Services.

As the global administrator for your organization, one of your first tasks is to create users in the Microsoft online services portal. 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. For instructions about assigning a license to a user, see Assign a License to a User.

During your planning phase, you might have identified a set of key administrative roles that you want to fill (see 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 is a best practice to assign these roles to users, including assigning the global administrator role to a second user. For more information about administrative roles, see Assigning Administrative Roles. To see how various permissions are distributed in the administrative roles, see View administrator permissions by role.

The Online Service Sends an Invitation to Each User

After you set up a user in the Microsoft online services portal, that user receives an email invitation with a link to 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 cannot access Microsoft Dynamics CRM Online until you complete step two in this process.

Step Two: Assign Security Roles in Microsoft Dynamics CRM Online

Sign in to Microsoft Dynamics CRM Online and work within the service to add business units (if your organization needs more than one business unit), and to assign security roles and business units to users. The users you registered with the online service in step one are automatically added to Microsoft Dynamics CRM Online. After you assign at least one security role to a user, that user can click the link in their email invitation, enter their credentials, and begin using Microsoft Dynamics CRM Online. For instructions about assigning security roles to users, see Set Up and Assign Security Roles in Microsoft Dynamics CRM Online. For instructions about creating business units, see Create or Change the settings for a Business Unit.

⬥ Important

Before you start adding information to Microsoft Dynamics 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 Microsoft Dynamics CRM Online. For more information about browser and other settings for improved product performance, see Key preparation and configuration tasks for Microsoft Dynamics CRM Online.

You might have CRM data located in other systems. In your planning phase (see Plan for Microsoft Dynamics CRM Online Deployment and Administration) you considered how you will import this data. Before you invite users into Microsoft Dynamics CRM Online, ensure that you have completed the data migration process. For more information about importing data, see Getting Started with Importing.

See Also

Get Started Administering Microsoft Dynamics CRM Online

Plan for Microsoft Dynamics CRM Online Deployment and Administration

Manage Subscriptions, Licenses, and User Accounts

Manage Subscriptions, Licenses, and User Accounts

As a Microsoft online services administrator, you manage the subscription, including billing and payments, licenses, user registration, and storage. If your subscription is through Microsoft online services, you do these tasks in the Microsoft online services portal.

In This Section

Manage Microsoft Dynamics CRM Online Licenses

Create Users and Assign Microsoft Dynamics CRM Online Security Roles

Manage Storage for Microsoft Dynamics CRM Online

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.

Manage Licenses for Microsoft Dynamics CRM Online if You Manage the Subscription through Microsoft Online Services

If you manage your subscription through Microsoft online services and run 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 Purchase More Licenses.

- Remove licenses from other users. This disables the user account in Microsoft Dynamics 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 Remove a License from a User.

- Remove a user account by deleting it. This disables the user account in Microsoft Dynamics 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 a User to Free a License.

- 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 card.

  For step-by-step instructions for updating credit card information or renewing a subscription that you manage through Microsoft online services, see Renew Your Company's Subscription to Resolve License Conflicts and Update Credit Card Information.

To cancel your subscription to Microsoft Dynamics 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 do not 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 **Service Requests**. In the **Problem Description** area, fill out the form for a new service request by choosing **Cancel subscription**.

Important

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

Manage Licenses if You Manage the Subscription through Microsoft Dynamics CRM Online

Notice that this information applies to customers who are not using Microsoft online services but are using an earlier online service platform. Each user license requires a unique Microsoft account (formerly Windows Live ID), and every user who logs on to Microsoft Dynamics CRM Online needs a license. Most Microsoft Dynamics CRM Online subscriptions include a specific number of user licenses. You can add user licenses by using the Add User License Wizard. To reduce user licenses, contact our sales organization. You can find contact information on the Microsoft Dynamics CRM website.

> 💡 **Tip**
> If you want to register someone in your organization who does not yet have a Microsoft account, ask that person to go to the Create your Microsoft account page and create a Microsoft account. This step does not require a credit card and takes just a few minutes.

▶

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Subscription Management**.
2. Under **Resource Usage and Management**, next to **User Licenses**, click **Add Licenses**.
3. Complete the Add User License Wizard.

Changes to your subscription take a few minutes to take effect, and will be reflected in your next month's billing statement on a prorated basis.

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

If you manage your subscription to Microsoft Dynamics CRM Online through the Microsoft online services environment using the Microsoft online services portal, you create a user account for every user who needs access to Microsoft Dynamics CRM Online. The user account registers the user with Microsoft online services. In addition to registration with the online service, the user account must be licensed in order for the user to have access to the service. Assign a license to the user account to allow access to the online service. Notice that when you assign a user the global administrator role in the Microsoft online services environment it automatically assigns the user the System Administrator security role in Microsoft Dynamics CRM.

In This Section

Create a User Account if You Manage the Subscription through Microsoft Online Services

When you create a user account in the Microsoft online services portal, 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.

📝 **Note**

Users are created in Microsoft Dynamics CRM Online when a license is first assigned for the user by using the Microsoft online services portal. After a license is assigned, the synchronization process between the Microsoft online services portal and Microsoft Dynamics CRM Online can take a few minutes to complete.

By entering a user ID and password, a user can access the Microsoft online services portal to view information about the service. However, the user will not have access to Microsoft Dynamics CRM Online until you assign at least one Microsoft Dynamics CRM Online security role to this user.

For more information about the difference between administrative roles in the online service and security roles in Microsoft Dynamics CRM Online, see [Differences between Microsoft Online Services Administrative Roles and Dynamics CRM Online Security Roles](#).

For step-by-step instructions for creating a Microsoft online services user account, see [Create or Edit Users](#).

For more information about assigning Microsoft Dynamics CRM Online security roles, see [Set Up and Assign Security Roles in Microsoft Dynamics CRM Online](#).

(Optional) Assign an Administrator Role if You Manage the Subscription in Microsoft Online Services

You can share Microsoft online services administration tasks among several people by assigning Microsoft online services 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 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 Administrator Roles. For step-by-step instructions for assigning a Microsoft online services administrative role, see Assign or Remove Administrator Roles for an Existing User.

📝 **Note**

Microsoft online services administrator roles are valid only for managing aspects of the online service subscription. These roles do not affect permissions within the Microsoft Dynamics CRM Online service.

Reset a User's Password in Microsoft Online Services

If a user loses a password, you can reset it. To reset a user's password, you must be a Microsoft online services 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 the next time he signs in. To help users meet the requirements for creating a new password in the Microsoft online services environment, see Password Policy.

Add a License to a User Account in Microsoft Online Services

If you manage your Microsoft Dynamics CRM Online subscription in the Microsoft online services environment, 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 a License to a user.

💠 **Important**

Licensed users must be assigned at least one Microsoft Dynamics CRM security role to access Microsoft Dynamics CRM Online. For more information, see Set Up and Assign Security Roles in Microsoft Dynamics CRM Online.

See Also

[Manage Subscriptions, Licenses, and User Accounts](#)

[Assigning administrator roles](#)

[Microsoft Dynamics CRM: Controlling Data Access (security roles)](#)

[Manage Microsoft Dynamics CRM Online Licenses](#)

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. For more information, see [10 ways to free storage space in Microsoft Dynamics CRM Online](#).

📝 **Note**

To delete data in Microsoft Dynamics CRM Online, you must have a Microsoft Dynamics CRM Online system administrator security role.

🔷 **Important**

You cannot recover deleted data; you must ensure that your data is saved to a safe location or that you no longer need it.

Add Storage If You Manage the Subscription in Microsoft Online Services

▶

1. Sign in to your account, and then, in the left pane, under **Subscriptions**, click **Manage**. Select the subscription to add storage.

2. On the **Subscription details** page, click **Add more**, and then follow the instructions in the wizard.

   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.

Add Storage If You Manage the Subscription through Microsoft Dynamics CRM

Notice that this information applies to customers who are not using Microsoft online services but are using an earlier online service platform. You can add storage with the Add Storage wizard.

▶

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Subscription Management**.
2. Under **Resource Usage and Management**, next to **Storage**, click **Add Storage**.
3. Complete the Add Storage wizard.

   💡 **Tip**
   - Changes to your subscription take a few minutes to take effect, and will be reflected in your next month's billing statement on a prorated basis.
   - If your current offer does not allow additional storage, in the **Subscription Management** area, click **View Offers** to see if additional offers may be available to you.

See Also

Manage Subscriptions, Licenses, and User Accounts

Configure Microsoft Dynamics CRM Online

Add Office 365 Online Services

Configure Microsoft Dynamics CRM Online

Configuration and customization of Microsoft Dynamics CRM Online is completed in the Microsoft Dynamics CRM client applications. For information and instructions for setting up and configuring Microsoft Dynamics CRM Online for users, see the following topics.

In This Section

Key preparation and configuration tasks for Microsoft Dynamics CRM Online

Create Business Units in Microsoft Dynamics CRM Online

Set Up and Assign Security Roles in Microsoft Dynamics CRM Online

Import Data into Microsoft Dynamics CRM Online

Customizations for Microsoft Dynamics CRM Online

Key preparation and configuration tasks for Microsoft Dynamics CRM Online

This article describes common configuration settings and tasks that can help you keep your organization optimized so that you can focus on what is important. It is designed to improve your overall experience with Microsoft Dynamics CRM, even before your business begins to use it.

This article is intended for administrators and business users of Microsoft Dynamics CRM.

On This Page

Common configuration settings for Internet Explorer

Configuration settings for Microsoft Dynamics CRM for Outlook

Network connections settings

Antivirus or malware application settings

Important email messages from Microsoft Dynamics CRM

Available resources for Microsoft Dynamics CRM users

Technical support for Microsoft Dynamics CRM

Common configuration settings for Internet Explorer

Microsoft Dynamics CRM is a web-based application and uses Internet Explorer as the user interface to view, add, or edit information that you have stored in the Microsoft Dynamics CRM database. Make the following common Internet Explorer configuration settings to optimize your Microsoft Dynamics CRM experience.

Increase concurrent download sessions

By default, Internet Explorer 7 and earlier versions limit the number of files that you can download at a time to two. Internet Explorer 8 limits the number of files that you can download at a time to six.

The Microsoft Dynamics CRM application synchronously requests data to and from the Microsoft Dynamics CRM data center. Typically, you can easily exhaust the number of concurrent downloads when you are using Microsoft Dynamics CRM. To increase this limit, review KB article 282402: How do I configure Internet Explorer to download more than two files at one time.

To have us fix this problem, in the KB article, click **Fix it** in the **Fix it for me** section, or to fix it yourself, follow the instructions in the **Let me fix it myself** section.

Increase disk space for temporary Internet files

To make sure that Internet files for Microsoft Dynamics CRM are not being deleted, increase the disk space for temporary Internet files.

1. Open Internet Explorer, and on the **Tools** menu, click **Internet Options**.
2. On the **General** tab, in the **Browsing history** section, click **Settings**.
3. Set the **Disk space to use** field to **350**. The default value is **50**.
4. Click **OK**, and then click **OK** again.

Retain browsing history

To optimize your Microsoft Dynamics CRM experience, we recommend that you do not select the option to delete the browsing history when you exit from your browser. If you select this option, it deletes everything marked in your **Browsing history** settings, such as temporary Internet files, cookies, and history (by default, the check boxes for these options are selected). Deleting your temporary Internet files causes Internet Explorer to cache the files again, and deleting cookies signs you out of Microsoft Dynamics CRM.

1. Open Internet Explorer, and on the **Tools** menu, click **Internet Options**.
2. Click the **General** tab, and in the **Browsing history** section, make sure that the **Delete browsing history on exit** check box is cleared.

Allow pop-up windows for Microsoft Dynamics CRM URLs

Microsoft Dynamics CRM uses pop-up windows when a new record is opened or created. Your browser may be blocking these windows because of the pop-up blocker settings. You must configure the pop-up blocker settings to allow pop-up windows for the Microsoft Dynamics CRM websites.

For instructions, see **Quick tip- Resolve pop-up blocker issues**.

Configuration settings for Microsoft Dynamics CRM for Outlook

You can configure the following settings to optimize the performance of Microsoft Dynamics CRM for Outlook.

Install recent updates for Microsoft Dynamics CRM for Outlook

Microsoft periodically releases updates. Typically, these updates are to help improve performance or to ensure greater stability.

Follow these steps on the computers that have Microsoft Dynamics CRM for Outlook installed.

1. Close Outlook.
2. On the **Start** menu, click **All Programs**, and then click **Windows Update**.
3. Click **Change settings**.

4. In the **Microsoft Update** section, make sure that the **Give me updates for Microsoft products and check for new optional Microsoft software when I update Windows** check box is selected.

5. Click **OK**.

6. Click **Check for updates**.

   If you see a link **Check online for updates from Microsoft Update**, click it to check for updates from the Microsoft servers. If your updates are administered by your system administrators, you may not have this option and may have to request that they make the Microsoft Dynamics CRM updates available.

7. Click **Install updates**. To review available updates, click the <#>**important updates are available link**.

Automatic synchronization for Outlook Online and Offline modes

Enabling automatic synchronization allows Microsoft Dynamics CRM for Outlook to systematically synchronize the data from the Microsoft Dynamics CRM data center. This ensures that your local data is regularly updated. Therefore, when you go offline, the data required to synchronize locally is a manageable size.

1. Open Outlook that has Microsoft Dynamics CRM for Outlook installed.

2. If you are using Outlook 2010, on the **File** tab, click **CRM**, and then click **Options**.

   - OR -

   If you are using Outlook 2007 or Outlook 2003, on the **CRM** menu, click **Options**.

3. On the **Synchronization** tab, in the **Schedule automatic synchronization with Outlook** section, make sure that the **Synchronize the CRM items in my Outlook folders every __ minutes** check box is selected.

   - OR -

   For offline synchronization, on the **Local Data** tab, in the **Select how often to update local data** section, make sure that the **Update local data every __ minutes** check box is selected.

Synchronize only essential data for Outlook Online and Offline modes

By limiting the data that you synchronize with Microsoft Dynamics CRM for Outlook, you can reduce the network bandwidth consumed by Microsoft Dynamics CRM users, and therefore improve your overall application performance. To control which records synchronize with Outlook, edit the Outlook Filters.

1. Open Outlook that has Microsoft Dynamics CRM for Outlook installed.

2. If you are using Outlook 2010, on the **File** tab, click **CRM**. Click **Synchronize**, and then click **Outlook Filters**.

   - OR -

   If you have Outlook 2007 or Outlook 2003 installed, on the **CRM** menu, click **Outlook Filters** or **Offline Filters**.

   📝 **Note**

You can change the view between Outlook Filters and Offline Filters in the **Filter: Outlook** dialog box.

3. Select the filters that you want to disable, and on the toolbar, click the **Deactivate** button 🔘.

    - OR -

    To edit a filter, click the filter name and add to or edit the filter criteria.

Track Microsoft Dynamics CRM calendar appointments in Microsoft Dynamics CRM for Outlook

To make sure that your calendar appointments do not disappear from Microsoft Dynamics CRM after you begin to track these in Microsoft Dynamics CRM for Outlook, make sure that your user email address on the respective user record matches your email address being used for Outlook.

📝 **Note**

The email address may differ from your Microsoft account. It depends on the email addresses you are using in Outlook and on your Microsoft Dynamics CRM user record.

Network connections settings

Network connections are established based on the order that the device is listed in the **Adapters and Bindings** tab of the Network Connections window. For example, if you have enabled a Local Area Network (LAN) and a wireless connection, the order of how a device is connected to the Internet is based on its order in the **Adapter and Bindings** list. If the LAN connection is higher in the list, most network connections will be established by using the LAN adapter instead of the wireless adapter. To make sure that your network connections are optimized, organize the connections according to your network administrator's recommendation.

To change the network connection order in Windows 7

1. Press the Alt key, click **Advanced**, and then click **Advanced Settings**.

    You may be prompted for an administrator password or confirmation.

2. Click the **Adapters and Bindings** tab, and then, under **Connections**, click the connection that you want to move in the list, click the up or down arrow button, and then click **OK**.

To change the network connection order in Windows XP

1. Click **Start**, click **Run**, type **ncpa.cpl**, and then click **OK**.

    You can see the available connections in the **LAN and High-Speed Internet** section of the Network Connections window.

2. On the **Advanced** menu, click **Advanced Settings**, and then click the **Adapters and Bindings** tab.

3. In the **Connections** area, select the connection that you want to move higher in the list. Use the arrow buttons to move the connection.

4. Click **OK**.

Antivirus or malware application settings

Depending on your antivirus or malware application settings, virus scanning can block certain files, making them inaccessible to other applications and causing an adverse effect on Microsoft Dynamics CRM performance.

Each environment requires a thoughtful decision on what to include and exclude, and there is always a possibility that excluding files from scans could lead to unwanted consequences. Use the following list alongside your well-planned internal IT management policies:

- Check for any interference from desktop security software. Some antivirus programs include a feature known as ScriptScan that can affect the performance of Microsoft Dynamics CRM. Most programs have functionality to disable scanning on certain websites. Make sure that the Microsoft Dynamics CRM URL is added to this list. For McAfee specifically, see the following KB articles for this setting:
    - [McAfee Knowledge Base Article: KB65382](#)
    - [Microsoft Support Knowledge Base Article: KB924341](#)
- If you use other antivirus software, make sure that the URL of the Microsoft Dynamics CRM website is included in the trusted zone for the virus scanning, and disable on-access scanning for the Microsoft Dynamics CRM website. For more information, see the specific antivirus application documentation.

Important email messages from Microsoft Dynamics CRM

Microsoft occasionally sends out email messages to Microsoft Dynamics CRM users or administrators. These messages provide information about how to use Microsoft Dynamics CRM and also contain important billing or upgrade details.

Make sure that the following email addresses are added to the allowed list for your email application:

- **crmoln@microsoft.com**. This email alias sends general Microsoft Dynamics CRM alerts or information.
- **billing@microsoft.com**. This email alias sends information about Microsoft Dynamics CRM billing.
- **msonlineservicesteam@microsoftonline.com**. This email alias sends informational email messages when you sign up for Microsoft Dynamics CRM.

Available resources for Microsoft Dynamics CRM users

We want you and your organization to take full advantage of the extensive content and materials available that can help your business be more successful while you are using Microsoft Dynamics

CRM. For a list of available resources, including training materials and information about how to support your online organization, see the Additional Resources section of the Resource Center article **Frequently asked questions from Microsoft Dynamics CRM customers (On Prem)**.

Technical support for Microsoft Dynamics CRM

If you cannot find the answers you need in the resources discussed earlier, you can submit a technical support request to Microsoft Customer Support Services . Technical support incidents provide reactive support that focuses on a specific problem, error message, or functionality that is not working as intended.

1. Sign in to your Microsoft Dynamics CRM organization.
2. In the Navigation Pane, click **Resource Center**.
3. In the **Support** section, click **Technical Support Request**.

Maximize your Technical Support experience

When you request help for technical issues or questions, it is important that you have as much information available as possible. Here are common questions that you may be asked when you request technical support:

- What part of the application are you having issues with?

  For example, installation issues with Microsoft Dynamics CRM for Outlook.

- What is the exact error or problem that you are experiencing?

  Provide detailed information, including the exact error message that you are seeing. Include a screen capture if you can.

- What were you doing in Microsoft Dynamics CRM when the error occurred?

  Provide the exact steps that you are performing to reproduce the error. This lets the Support team better analyze why you may be experiencing it.

- What are the details of the environment you are experiencing the issue on?

  Provide the version of the operating system, browser, and if applicable, the version of Microsoft Office on the computers where the issue is occurring.

- Does the issue affect all users or a certain type of Microsoft Dynamics CRM security role or only certain users?

When possible, provide log files (if you know how to find them). This applies to applications such as Microsoft Dynamics CRM for Outlook or Microsoft Dynamics CRM E-mail Router. The following table lists the location of the log or trace files for these applications.

Logs or Traces	Log File Location
Microsoft Dynamics CRM for Outlook logs	%Userprofile%\Local Settings\Application Data\Microsoft\MSCRM\Logs

Microsoft Dynamics CRM for Outlook Trace files	%Userprofile%\Local Settings\Application Data\Microsoft\MSCRM\Traces
Microsoft Dynamics CRM E-mail Router logs	%Userprofile%\AppData\Roaming\Microsoft\MSCRM\Logs

Create Business Units in Microsoft Dynamics CRM Online

If your organization is structured around departments or divisions that have separate products, customers, and marketing lists, it might be useful to implement business units.

Business units are mapped to an organization's departments or divisions. They provide a way for Microsoft Dynamics CRM Online users to securely access data in their own business records without the ability to access data owned by another business unit in the same organization.

Microsoft Dynamics CRM Online security roles and users are associated with a business unit. Only the security roles in the business unit are available to be assigned to users in the business unit. This is how users are restricted to accessing only the data owned by their business unit.

Business units, security roles, and users are linked together in a way that conforms to the Microsoft Dynamics CRM Online role-based security model. For more information about the role-based security model, see **The Security Model of Microsoft Dynamics CRM**.

For more information about working with business units, including step-by-step instructions for creating business units, see Work with Business Units.

See Also

Configure Microsoft Dynamics CRM Online

Key preparation and configuration tasks for Microsoft Dynamics CRM Online

Set Up and Assign Security Roles in Microsoft Dynamics CRM Online

Set Up and Assign Security Roles in Microsoft Dynamics CRM Online

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.

⬥ **Important**
> You must assign at least one security role to every Microsoft Dynamics CRM Online user; the service does not allow access to users who do not have at least one security role.

For step-by-step instructions for creating or editing security roles, see Create or Edit a Security Role

For more information about security roles, see **Security Role and Privilege Reference**.

For more information about role-based security and the Microsoft Dynamics CRM Online security model, see **The Security Model of Microsoft Dynamics CRM**.

Assign Security Roles to Users

Users must have at least one security role assigned to them to access Microsoft Dynamics CRM Online.

For step-by-step instructions about assigning security roles, see Assign a Security Role to a User.

For more information about the difference between Microsoft online services administrator roles and Microsoft Dynamics CRM Online security roles, see Differences between Microsoft Online Services Administrative Roles and Dynamics CRM Online Security Roles.

See Also

Configure Microsoft Dynamics CRM Online

Create Business Units in Microsoft Dynamics CRM Online

Import Data into Microsoft Dynamics CRM Online

Import Data into Microsoft Dynamics CRM Online

If you have completed a Microsoft Dynamics CRM Online free trial and are converting to a Microsoft Dynamics 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 Microsoft Dynamics CRM Online. Depending on the amount and complexity of the data in other systems, there are several options for importing it.

Delete Sample Data

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

1. In Microsoft Dynamics CRM Online, in the Navigation Pane, click **Settings**, expand **System**, and then click **Data Management**.
2. In the **Data Management** area, click **Sample Data**.
3. In the **Sample Data** dialog box, click **Remove Sample Data**.

Import Outlook Contacts into Microsoft Dynamics CRM Online

In Microsoft Dynamics 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 Microsoft Dynamics CRM for Outlook, you can use the Add Contacts Wizard in Microsoft Dynamics CRM for Outlook to add contacts directly from Outlook into Microsoft Dynamics CRM Online. For step-by-step instructions for installing Microsoft Dynamics CRM for Outlook, see **Installing on a computer that does not have Microsoft Dynamics CRM for Outlook installed**.

For step-by-step instructions for using the Microsoft Dynamics CRM Online Add Contacts Wizard to add contact information to Microsoft Dynamics CRM Online, see **Adding Outlook contacts to Microsoft Dynamics CRM with the Add Contacts wizard**.

Import Other Types of Data into Microsoft Dynamics CRM Online

Using the Microsoft Dynamics 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.

For step-by-step instructions for using the Import Data Wizard, see **Update records using the Import Data Wizard**.

Run Duplicate Detection on the Imported 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. For more information about enabling duplicate detection, see **Enable and Disable Duplicate Detection**.

See Also

Configure Microsoft Dynamics CRM Online

Set Up and Assign Security Roles in Microsoft Dynamics CRM Online

Customizations for 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.

Microsoft Dynamics CRM Online is highly customizable; to review the types of customization that you can implement, see Customization Capabilities.

The following table shows some examples of customizations.

Customization	Definition	Value of 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.

Customization	Definition	Value of Customization
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, 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*, you can change all the **Go** buttons to be **Commit** buttons.

See Also

Configure Microsoft Dynamics CRM Online

Import Data into Microsoft Dynamics CRM Online

Add Integration Features to Microsoft Dynamics CRM Online

Add Integration Features to Microsoft Dynamics CRM Online

Microsoft Dynamics CRM Online integrates with a variety of different Microsoft Office and Microsoft Dynamics applications that provides a familiar experience and helps increase productivity.

In This Section

Install Microsoft Dynamics CRM for Outlook

Microsoft Dynamics CRM Online provides access to customer information through a familiar Microsoft Outlook experience to help ensure rapid user adoption and fast

results.

Add Office 365 applications, such as SharePoint Online or Lync Online.

Move customer information, inventory and pricing data and sales orders between Microsoft Dynamics CRM (either on-premises or online) and Microsoft Dynamics AX.

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 every day. This section provides information about hardware and software requirements and about installing Microsoft Dynamics CRM for Outlook on a user's computer.

Microsoft Dynamics CRM for Outlook Requirements

Microsoft 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 in Microsoft Dynamics CRM Online data.

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

Install Microsoft Dynamics CRM for Outlook on a User's Computer

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

Administrators will find detailed installation instructions in **Installing on a computer that does not have Microsoft Dynamics CRM for Outlook installed**.

💡 **Tip**

If you encounter problems installing or configuring Microsoft Dynamics CRM for Outlook, see [Microsoft Dynamics CRM for Outlook Configuration Troubleshooting Wizard](#).

See Also

[Download: Microsoft Dynamics CRM 2011 for Microsoft Office Outlook](#)

[Add Integration Features to Microsoft Dynamics CRM Online](#)

[Add Office 365 Online Services](#)

Add Office 365 Online Services

A benefit of having an online service subscription through Microsoft online services is that adding services is easy. After you have registered your users in the Microsoft online services portal for one service, those users are eligible for subscriptions to any available online service, for example, Microsoft Exchange Online or Microsoft SharePoint Online. All you need to do is buy the subscription to the new service by completing the purchasing wizard, and then assign a license for the new service to each user that you want to have the service. For more information about buying subscriptions, see [Buy subscriptions for your company](#).

📝 **Note**

Single sign-on is supported in subscriptions to Microsoft online services. This feature provides authentication by mapping the user's corporate credentials to the user's online service credentials. This streamlines the sign-in process so that the user does not have to manage multiple sets of credentials.

If your organization has already set up single sign-on for the Microsoft online services environment, any new Microsoft online services product that you add accepts single sign-on. There is no additional work to implement single sign-on for a new subscription that you purchase.

For more information about implementing single sign-on, see [Prepare for single sign-on](#).

For step-by-step instructions for buying subscriptions for additional online services, see [Buy additional subscriptions](#).

For step-by-step instructions for adding a license to an existing user, see [Assign a license to a user](#).

See Also

[Add Integration Features to Microsoft Dynamics CRM Online](#)

[Manage Storage for Microsoft Dynamics CRM Online](#)

[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](#)

[The Microsoft Dynamics CRM Online Trust Center](#)

[Microsoft Dynamics CRM Online Enterprise Planning Guide](#)

[Microsoft Dynamics CRM Online and Office 365 Trial Guide](#)

[Support and Service Status](#)

[Help for Administrators](#)

[More Self-Service Help Resources](#)

Service Description

[Microsoft Dynamics CRM Online Service Description](#) 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).

For a complete description of the security, continuity, and compliance policies and controls for the Microsoft Dynamics CRM Online service, see **Microsoft Dynamics CRM Online Security and Service Continuity Guide**.

The Microsoft Dynamics CRM Online Trust Center

[The Microsoft Dynamics CRM Online Trust Center](#) describes the trust principles concerning security, privacy, service transparency, and compliance in Microsoft Dynamics CRM Online.

Microsoft Dynamics CRM Online Enterprise Planning Guide

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

Microsoft Dynamics CRM Online and Office 365 Trial Guide

The [Microsoft Dynamics CRM Online and Office 365 Trial Guide](#) demonstrates how to set up and leverage the integration between Office 365 and Microsoft Dynamics CRM Online to improve office collaboration, staff productivity, and make your organization more agile.

Support and Service Status

Microsoft online services portal

The Microsoft online services 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 Microsoft Dynamics CRM Online service.

[Microsoft Dynamics CRM Online Service Blog](#)

Help for Administrators

[Administering Microsoft Dynamics CRM Online](#) provides information for users with System Administrator and System Customizer security roles:

Tasks that must be done when you first set up Microsoft Dynamics CRM Online

Modifications that can be done at any time

Ongoing maintenance

As the main point of contact for their organization, the system administrator may need to [submit and manage a service request](#) to assist other employees within their organization.

The system administrator should also bookmark these useful resources:

- [Frequently asked questions about Microsoft Dynamics CRM Online billing](#)
- [Frequently asked questions about technical support for Microsoft Dynamics CRM customers](#)

- [Microsoft Dynamics CRM Online system requirements and maintenance schedule](#)

Finally, the system administrator may want to consult these resources as necessary:

- The [Microsoft Dynamics CRM Online Resource Center](#) provides articles, diagrams, and videos to help you work smarter. For example, the Resource Center contains resources to help you get started using Microsoft Dynamics CRM Online, including a go-live checklist, first steps for administrators, and an introduction to solutions.

- The [Microsoft Knowledge Base](#) is a database of technical articles about Microsoft Dynamics CRM features and technologies. Content ranges from "How to" articles that describe how to complete a specific task to "Bug" articles that document known issues with the service.

More Self-Service Help Resources

- **In-product help**. For context-specific help while using Microsoft Dynamics CRM Online, use the help icon 🕐 in the upper-right corner of each page. For example, clicking the help icon on a Contact report opens instructions for working with contacts, as well as related information about things you can do with contacts.

  - **Community support**. Microsoft Dynamics CRM Online users are encouraged to access [CRM forums](#) and [blogs](#), moderated by support engineers and product group team members. The Microsoft Dynamics CRM Online Community is a world-wide community and is the best place to begin if you have questions about usage and configuration. The community allows users to ask or respond to questions; other users in the community who have experienced the same issues can help you resolve the issues.

  - **Quick tips**. The [quick tips](#) page offers useful hints for working more efficiently, such as how to sort records by multiple columns and how to open Microsoft Dynamics CRM windows in a new tab rather than a new window.

See Also

[Microsoft Dynamics CRM Online Deployment and Administration Guide](#)

[Add Integration Features to Microsoft Dynamics CRM Online](#)

[Accessibility in Microsoft Dynamics CRM](#)

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:

- Use Keyboard Shortcuts
- Accessibility for People with Disabilities

Administrators and other users who have administrative responsibilities for on-premises deployments of Microsoft Dynamics CRM 2011 also use Microsoft Dynamics CRM Deployment Manager, a Microsoft Management Console (MMC) application, to manage on-premises deployments of Microsoft Dynamics CRM Server 2011.

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	Microsoft Accessiblity Language Support and Accessibility Features
Mozilla Firefox	Accessibility features in Firefox
Apple Safari	Safari
Google Chrome	Accessibility Technical Documentation

See Also

Microsoft Accessibility Resource Center