

Marc J. Wolenik

With
expanded
coverage of
Parature,
ADX, and
FieldOne

Microsoft Dynamics® CRM 2016

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Marc Wolenik

Microsoft Dynamics® CRM 2016

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800 East 96th Street, Indianapolis, Indiana 46240 USA

Microsoft Dynamics® CRM 2016 Unleashed

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About the Author

Marc Wolenik has been involved with customer relationship management systems for more than 20 years and Microsoft Dynamics CRM since version 3.0. His experience led to the creation of Webfortis (recently merged with Avtex), one of the largest Microsoft Dynamics CRM partner firms in North America.

Dedication

This book is dedicated to the readers and to their infinite patience and understanding of how difficult it is writing a book about a product that evolves quicker than an author can physically write. (Even as this book neared completion, Microsoft released the newest version!)

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Several people helped with the completion of this book, and I'm indebted to them for their help. Deepak (Deeps) Mehta provided research and content on several topics and was invaluable in providing necessary feedback. Damian Sinay, the technical editor, worked late nights and early mornings to provide code review and additional research.

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Introduction

With the release of Microsoft Dynamics CRM 2016, Microsoft has turned its attention to a long-neglected feature of Dynamics CRM: customer engagement. To this end, Microsoft has added features such as ADX, FieldOne, Parature, and Voice of the Customer that allow users of Microsoft Dynamics CRM to directly engage with customers in ways that previously were difficult or required third party add-ons.

To be clear, Microsoft has added most of this functionality through the acquisition of various components and companies. There are too many to name, and the roadmap for them is a fully integrated suite, but at this writing, many of these features are separate add-ins. However, Microsoft's release cadence has increased, and it is expected that by the time you pick up this book, a more consolidated and streamlined Microsoft Dynamics CRM may exist.

This book shows you how to work with and configure Microsoft Dynamics CRM 2016, and it also includes information on complementary technologies, such as the following:

- ▶ SharePoint
- ▶ Azure
- ▶ SQL Server Reporting Services (SSRS)
- ▶ SQL Server
- ▶ Online versus On-Premises options
- ▶ Visual Studio and the .NET Framework

By reading and applying what you learn in this book, you'll be able to get the most from your CRM system. This book delves into how Microsoft Dynamics CRM works,

explains why you should set up certain features, and explores advanced configuration and customization options.

This book provides an excellent overview of 99% of the application; however, with the other 1%, your mileage may vary, depending on your requirements. That 1% is often the hardest, most complex, and even the most imaginative part of using Dynamics CRM. I've worked exclusively with Microsoft Dynamics CRM for more than 12 years, and I still often see organizations with situations and requirements that I never could have imagined. In addition, the application becomes more powerful all the time, delivering options that previously existed only with extensive programming and workarounds.

NOTE

If you believe that this book has omitted anything or if you would like to share the 1% that your requirements might fall into, please write to me using the contact information in the beginning of the book! Perhaps your story and feedback will be featured in my next book on CRM.

You can use Microsoft Dynamics CRM 2016 to manage almost anything within your organization (or household, or farm, or retail store, etc....!). This book shows you how.

NOTE

The majority of this book was researched and written using the prereleased version of the Dynamics CRM 2016 software, including the related technologies, such as ADX, FieldOne, and Parature. Every attempt was made to update the contents based on the final version of the software that was released to customers. However, some areas may not perform as shown here because of differences in beta and final software releases.

CHAPTER 4

CRM 2016 Online

Microsoft has made substantial investments in Microsoft Dynamics CRM Online to provide a cost-effective and full-featured experience for users. The integration with Microsoft Office 365 Online has streamlined the process and provides an opportunity for organizations to consolidate their Office 365 and Microsoft Dynamics CRM Online experiences.

NOTE

To be clear, Microsoft Office 365 is *not* Dynamics CRM. Instead, Office 365 is a suite of applications, including SharePoint, Outlook, Excel, PowerPoint, Word, and Dynamics CRM.

It is possible to buy Dynamics CRM or Office 365 without each other. So if you have an existing Office 365 subscription and you're looking for CRM but can't find it, it might be because you haven't selected it as a purchased option.

This chapter is devoted to the Online version of Microsoft Dynamics CRM 2016. In some places, this chapter explicitly notes differences between On-Premises and Online, but where it doesn't, you can assume that the text is about CRM Online.

- For more information about On-Premises installations of CRM, **SEE CHAPTER 29**, "On-Premises Deployments."

Overview of Microsoft Dynamics CRM 2016 Online

Microsoft Dynamics CRM is available in three basic installation options: On-Premises, CRM Online, and partner hosted. This chapter covers CRM Online, including

IN THIS CHAPTER

- Overview of Microsoft Dynamics CRM 2016 Online
- Why Use Microsoft Dynamics CRM 2016 Online?
- The Microsoft Dynamics CRM 2016 Online Experience
- Privacy and Certifications
- Understanding the Microsoft Dynamics CRM 2016 Licensing Options
- Signing Up for CRM 2016 Online
- Managing Your Subscription

licensing, benefits and limitations, an operational overview of the services provided by Microsoft, and a guide on how to sign up and manage a CRM Online instance.

Microsoft Dynamics CRM Online is a Microsoft-hosted service that offers tight integration with the Office 365 platform. Microsoft started offering CRM Online during the CRM 4.0 days, with close feature parity with what you would receive using an On-Premises or partner hosted implementation. With the release of CRM 2011, the Online offering was also updated, and the differences between the options narrowed, but limitations imposed because of a shared hosting environment kept some organizations from using this service offering. In 2012, Microsoft rolled out updates that further narrowed the differences and improved security, allowing CRM Online to be a true first-class citizen in the Microsoft CRM world.

Why Use Microsoft Dynamics CRM 2016 Online?

Microsoft Dynamics CRM Online is a quick gateway to the Microsoft CRM universe and an easy way to “dip your toe in the CRM waters” without diving in head first. A traditional On-Premises deployment of Microsoft CRM requires a substantial investment in both money and time, as well as an experienced administrator to keep the platform running smoothly. Microsoft CRM Online removes the barriers, providing fast entry and low initial investment to get started. In less than 20 minutes, you can have a full CRM implementation up and running and ready for data and users. Figure 4.1 shows five key reasons to use CRM Online:

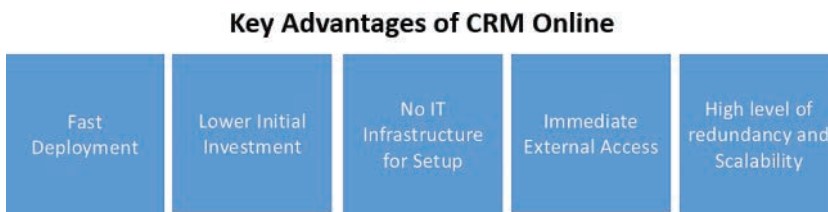


FIGURE 4.1 Key advantages of CRM Online.

- **Fast deployment**—Microsoft Dynamics CRM Online provides all the hosting hardware, software, and infrastructure support as part of the monthly costs. As you will see later in this chapter, you can “spin up” a new organization in as little as 20 minutes. There is no need to install and configure servers and the CRM server software.
- **Lower initial investment**—For many organizations, this is the key to selecting CRM Online. There are no upfront infrastructure costs or licensing costs; instead, all costs are included in the monthly licensing fee. Even a small On-Premises implementation of just 20 users could run \$20,000 to \$25,000 for servers and license costs.

- ▶ **No IT infrastructure necessary for setup and maintenance**—Because Microsoft provides all the hardware and software, there is no need for additional hardware, software, or dedicated IT resources. This means there are no ongoing IT costs related to maintenance, backups, and management of additional servers.
- ▶ **Immediate external access**—Microsoft Dynamics CRM Online is a hosted solution. Therefore, on day one it is available to any user who has an Internet connection, from a variety of devices, including iPads and mobile phones. On-Premises installations require additional steps and complexity to expose the CRM services outside a company's network.
- ▶ **High level of redundancy**—As you will see in this chapter, Microsoft provides a high level of redundancy with its Online offering. This level of redundancy would greatly increase the initial costs, maintenance expenses, and complexity of an On-Premises installation.

The Microsoft Dynamics CRM 2016 Online Experience

The average user of CRM Online would be hard pressed to know the difference between a CRM Online and CRM On-Premises installation; after all, the feature parity is very close, however in most cases, new features are available earlier with CRM Online than with CRM On-Premises.

NOTE

Regardless of whether you use Microsoft Dynamics CRM Online or On-Premises, you have the same ability to use Outlook, the web browser, and the mobile client at no additional cost.

Update Schedule

Microsoft provides two basic types of updates to the CRM platform: feature releases and update rollups (URs). Early in the development of CRM Online, the team at Microsoft targeted the release of a UR every eight weeks and a major release (what could be called a major feature release) twice per year. The early URs were arguably very stable and were automatically deployed to the CRM Online environment. Then, as the releases became increasingly complex and negative impacts grew, Microsoft rethought its schedule and began to put out releases for CRM Online and CRM On-Premises concurrently.

Late in the 2011 life cycle and based on feedback from On-Premises customers, Microsoft moved away from the concurrent release schedule. Going forward, Microsoft would still target UR releases every eight weeks, but now it would only include fixes and not new features. For CRM Online customers, there would be twice-per-year new feature releases, which were automatically deployed to the customer environment and, depending on the size, could include an optional opt-in to help with deployment timing. On-Premises gets new feature releases once per year, putting the CRM Online users in a position to receive new features twice as often.

This new approach has greatly improved the stability of releases and given organizations a chance to evaluate and decide which features to adopt. The different release schedules impact an organization's ability to move between Online and On-Premises environments, and timing and other considerations are important. Figure 4.2 visually lays out the planned release cycle for URs.

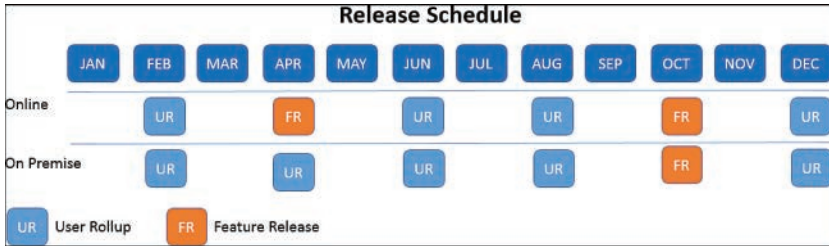


FIGURE 4.2 Microsoft CRM release schedule.

Microsoft Data Centers

Microsoft has made a serious investment in its online and cloud services, such as CRM, Office 365, and Windows Azure, as well as top websites such as Microsoft.com, MSN.com, and Bing.com. CRM Online leverages the infrastructure Microsoft has in place for these services and benefits from the investments and attention in the Microsoft organization. Microsoft depends on a centralized team called Global Foundation Services (GFS) to operate its data centers worldwide.

Global Data Centers

Microsoft offers a global data center footprint with facilities located throughout the world that are managed and operated directly by Microsoft (see Figure 4.3).



FIGURE 4.3 Microsoft global data centers worldwide.

NOTE

For an updated map and more information on Microsoft's global data centers, see <http://o365datacentermap.azurewebsites.net>.

Regional Data Redundancy

Within a region, Microsoft replicates customer data in real time between at least two data centers. This provides for failover on planned (for example, maintenance) and unplanned bases. This redundant architecture eliminates a single point of failure.

Figure 4.4 shows an example of data replication.



FIGURE 4.4 Example of U.S. data replication.

In addition to the real-time replication of data, Microsoft also performs near-real-time replication at the data center at the other side of the region for resiliency and disaster recovery.

NOTE

Each customer database is also backed up onto encrypted media for near-line backup and recovery.

Data Center Redundancy

The Microsoft Dynamics CRM Online data centers are built using “scale group” infrastructure to provide a high level of redundancy and scalability. The data center is built around the concept of pods, which are groupings of multiple server racks. Each scale group is a logical grouping of servers that share responsibility for workflow, sandbox, and other asynchronous activities. Each scale group consists of six database servers—three

local and three remote. Each customer's database (instance) is stored independent of other customers. Each customer can have one or more instances (for example, production and development instances), and each is referred to as a *tenant*.

Using this architecture, each scale group can support a large number of instances. If one instance starts consuming a large number of resources, it is automatically moved to another scale group that has more capacity. Figure 4.5 shows the scale group architecture.

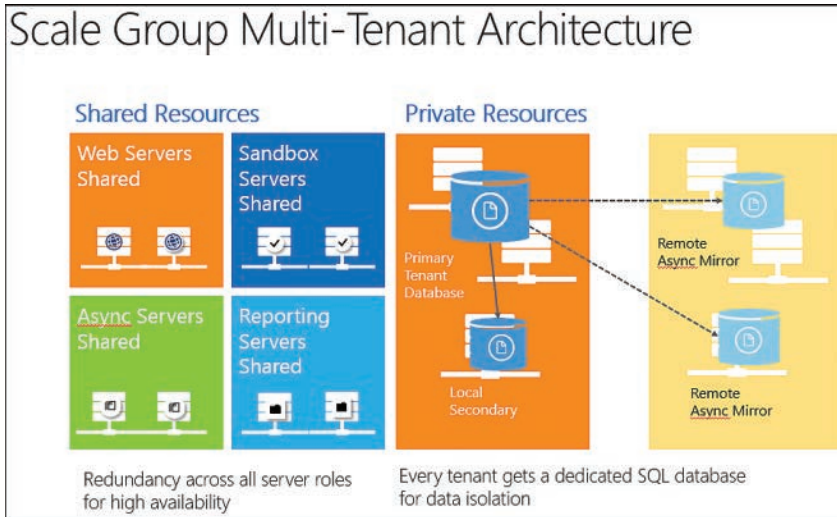


FIGURE 4.5 Example of scale group architecture.

Privacy and Certifications

Microsoft has placed a high priority on developing detailed and specific guidelines with regard to privacy and certifications, as explained in the following sections.

Privacy

Figure 4.6 highlights the three aspects of privacy that Microsoft espouses:

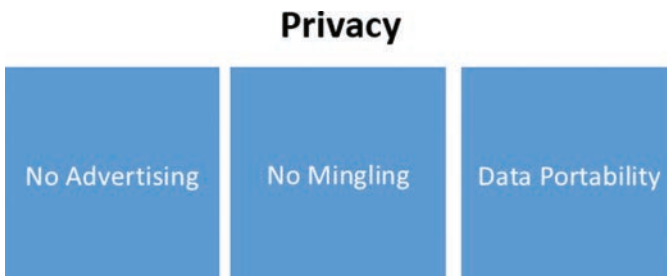


FIGURE 4.6 Three aspects of privacy.

- ▶ **No advertising**—A customer’s data is considered confidential, and Microsoft does not scan the contents of the database or documents to analytic, data-mining, or advertising products.
- ▶ **No mingling**—Microsoft uses independent databases to separate one customer’s data from other customers’ data. Each database is provisioned for one customer to maximize data security and ensure integrity.
- ▶ **Data portability**—The isolation of the Microsoft Dynamics CRM Online customer simplifies moving data between Online and On-Premises environments. The customer’s data belongs to the customer and can be removed whenever the customer desires.

Certifications

Microsoft Dynamics CRM Online is certified to multiple world-class industry standards, providing a secure and tested platform. Current certifications include SSAE 16 SOC 1 (SAS 70 Type I), ISO 27001, EU Safe Harbor, EU Model Clauses, and HIPAA–HITECH, as shown in Figure 4.7.

NOTE

New certifications are being added all the time. For a complete and current list, see www.microsoft.com/en-us/trustcenter/CloudServices/Dynamics.



FIGURE 4.7 Certifications and industry standards.

Just a few of these certifications include:

- ▶ **Independently verified**—Microsoft uses independent third parties to verify compliance.
- ▶ **Certified for ISO 27001**—ISO 27001 is one of the best security benchmarks available in the world.
- ▶ **EU model clauses/EU safe harbor**—At the request of a customer, Microsoft will sign the standard agreements for “EU model clauses,” which address international transfer of data.

- ▶ **HIPAA-business associate agreement**—The U.S. Health Insurance Portability and Accountability Act (HIPAA) governs the use, disclosure, and safeguarding of protected health information.

NOTE

Microsoft does not permit direct customer audits; instead, it uses independent third-party verifications of Microsoft security, privacy, and continuity controls.

Understanding the Microsoft Dynamics CRM 2016 Licensing Options

With the release of Microsoft Dynamics CRM 2016, Microsoft has expanded its license offerings to better suit the needs of its diverse customer base.

License Options Explained

As detailed in Figure 4.8, Microsoft now offers four levels of subscriber licenses for Online:

- ▶ **Enterprise**—This top-end license for CRM Online includes all features as well as most of the rest of the items that fall under the Dynamics CRM umbrella, such as Parature and Social Engagement.
- ▶ **Professional**—This license includes access to the core functionality, the ability to customize and access all modules delivered by Microsoft, and xRM solutions developed in house or by external vendors.
- ▶ **Basic**—This mid-tier license provides basic access to several core entities, such as Contact, Account, Case, and Lead (in addition to xRM solutions). This is a good option for organizations that do not use the Sales Force Automation, Customer Service, or Marketing components that are delivered with CRM.
- ▶ **Essential**—The entry point for CRM Online is the Essential license. With this level of license, the user cannot access any of the core components or core entities. A good example is a pure xRM solution, as described in Chapter 3, “Customizing and Designing Applications Within Dynamics CRM 2016 (xRM).”

The availability and licensing options by user vary, and as new products are added, they continue to evolve. Figure 4.8 provides a sample breakout of the features available at each license level, but be sure to check out the licensing and purchasing options available at the time of purchase for changes to this list.

Use Right	Professional & Enterprise	Basic	Essential
View Announcements	✓	✓	✓
Manage saved views	✓	✓	✓
Use relationships between records	✓	✓*	✓*
Create personal views	✓	✓	✓*
Advanced Find search	✓	✓	✓*
Search	✓	✓	✓*
Use a queue item	✓	✓*	✓*
Export data to Microsoft Excel	✓	✓	✓
Perform Mail Merge	✓	✓	✓
Start dialog	✓	✓*	✓*
Run as an On-demand process	✓	✓*	✓*
Run an automated workflow	✓	✓*	✓*
Read articles	✓	✓	✓
Notes	✓	✓	✓
Activity management	✓	✓	✓
Yammer collaboration**	✓	✓	✓
Post activity feeds	✓	✓	✓
Follow activity feeds	✓	✓	✓
Shared calendar	✓	✓	✓
Write custom entity records	✓	✓***	✓***
Read custom application data	✓	✓	✓
Microsoft Dynamics CRM Mobile Express	✓	✓	✓
Microsoft Dynamics CRM for iPad & Windows 8	✓	✓	✓
Microsoft Dynamics CRM for Outlook	✓	✓	✓
Microsoft Dynamics CRM Web application	✓	✓	✓
Manage user reports, user charts, and user dashboards	✓	✓	
Run reports	✓	✓	
Create, update, and customize Reports	✓	✓	
Create and update announcements	✓	✓	
Read Dynamics CRM application data	✓	✓	
User dashboards	✓	✓	
User charts	✓	✓	
User Interface Integration for Microsoft Dynamics CRM	✓	✓	
Convert an activity to a case	✓	✓	
Case management	✓	✓	
SLAs	✓	✓	
Add or remove a customer relationship for a contact	✓	✓	
Associate an opportunity with a contact	✓	✓	

FIGURE 4.8 User capabilities by license level for CRM Online.

In addition to the access and functional rights provided with each license, as the number of licensed users within an organization grows, additional free capacity enhancements are included. A quirk that existed before Dynamics CRM 2016 was that regardless of the number of users, every organization received 5GB of storage. This meant that organizations with only one or two users had 5GB, and organizations with thousands of users also had 5GB. Luckily, Microsoft has recognized this deficiency and added scaled storage, as described in the next section.

TIP

With the exceptions mentioned previously related to usage and access rights, there is no concept of limited or administrative access with Online deployments as there is with On-Premises deployments.

For On-Premises deployments, the following options now exist:

- ▶ Server
- ▶ Enterprise users
- ▶ Professional user or Device client access license (CAL)
- ▶ Basic user or device CAL
- ▶ Essential CAL

Although this new licensing is significantly simplified over previous licensing, it still requires some conversation with regard to the actual pricing because Microsoft licensing is as diverse as its many offerings.

NOTE

The much maligned and rarely understood Internet Connector license required for external access to CRM data has been eliminated and is no longer a requirement for this type of programmatic access.

Online Add-on Features

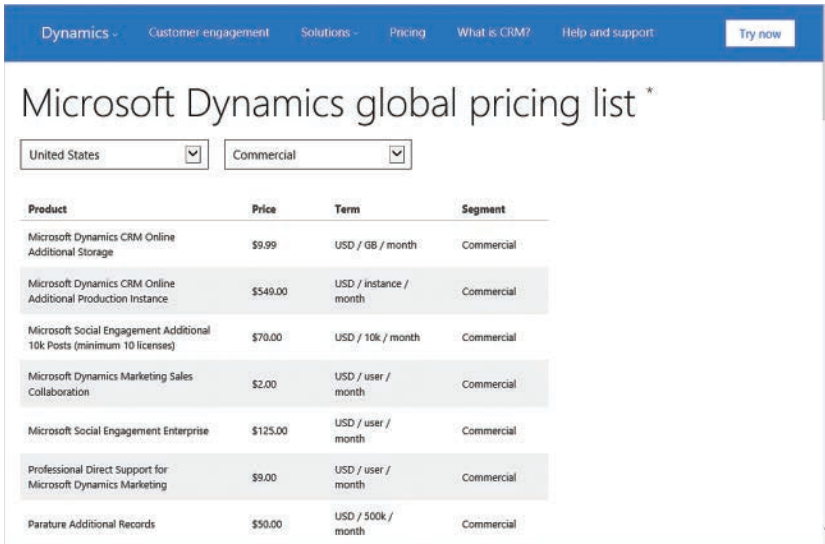
Microsoft recognizes that the number of users is not always a clear indicator of the needs of an organization and that the additional storage and non-production instance scale-up outlined previously may not meet an organization's needs. To address this, Microsoft allows an organization to, on a monthly basis, purchase additional capacity:

- ▶ **Additional production instance**—An organization may purchase an additional production instance as an add-on license. Each user licensed in the main production instance has access to this new production instance. The projected cost for this is \$549 per month per additional production instance. For example, a service organization may decide to use the additional production instance to segregate a client's data.
- ▶ **Additional non-production instance**—An organization may elect to purchase additional non-production instances for activities such as development, testing, or demonstrations. The cost for a non-production instance is \$150 per month for each additional non-production instance. This comes as a great relief for organizations that require additional instances but do not want to purchase full production instances.
- ▶ **Additional storage**—For each additional 20 licensed users, an organization is granted 2.5GB, up to a maximum of 995GB total, at no charge. However, if the organization wants to purchase more storage than allocated, it can do so at \$9.99 per gigabyte.

TIP

If an organization has 25 or more Professional user subscription licenses (USLs), it is entitled to 1 free non-production instance.

Figure 4.9 shows the options available.



The screenshot shows the 'Microsoft Dynamics global pricing list' with filters for 'United States' and 'Commercial'. The table lists several add-on features with their respective prices and terms.

Product	Price	Term	Segment
Microsoft Dynamics CRM Online Additional Storage	\$9.99	USD / GB / month	Commercial
Microsoft Dynamics CRM Online Additional Production Instance	\$549.00	USD / instance / month	Commercial
Microsoft Social Engagement Additional 10k Posts (minimum 10 licenses)	\$70.00	USD / 10k / month	Commercial
Microsoft Dynamics Marketing Sales Collaboration	\$2.00	USD / user / month	Commercial
Microsoft Social Engagement Enterprise	\$125.00	USD / user / month	Commercial
Professional Direct Support for Microsoft Dynamics Marketing	\$9.00	USD / user / month	Commercial
Parature Additional Records	\$50.00	USD / 500k / month	Commercial

FIGURE 4.9 Optional add-on features for CRM Online.

NOTE

For a complete and current list of options available, see www.microsoft.com/en-us/dynamics/pricing-list.aspx.

New License Paradigm

The new license levels and features are part of a shift in licensing for Microsoft:

- ▶ **Multitier model**—Organizations have flexibility to license the right level of functionality for every user; it is no longer one-size-fits-all.
- ▶ **Parity between offerings**—Now there are consistent multitier license offerings for Online CRM and On-Premises CRM.
- ▶ **Mobile access**—Mobile access for Windows, Android, and iOS devices is included with each license at no additional charge.
- ▶ **Non-production instances**—Non-production instances provide better support for organizations with non-production needs.

- **Updated EA (Enterprise Agreement) availability**—Microsoft offers favorable terms for license transitions from On-Premises to Online.
- **Flexible premium support offerings**—Microsoft offers several different levels of premium support for each Online client.

Signing Up for CRM 2016 Online

Microsoft has made the signup process for Microsoft Dynamics CRM Online fast and almost effortless. The signup process only requires a small amount of information, which is covered in this section. In only a few minutes, an organization is provisioned and ready to start using Dynamics CRM Online. Getting started involves four basic steps:

1. Provision an Office 365 account.
2. Configure additional users.
3. Grant security roles to users.
4. Manage your CRM Online subscription.

CRM Online Provisioning Process

Provisioning an Office 365 account means setting up the portal used for Microsoft's Office 365 and CRM Online administration. This section covers the step-by-step process to provision a new CRM trial account using Office 365, add users, perform initial CRM configuration, and grant security roles:

1. Go to www.microsoft.com/en-us/dynamics/crm-free-trial-overview.aspx, where you see a web page similar to is the one shown in Figure 4.10.

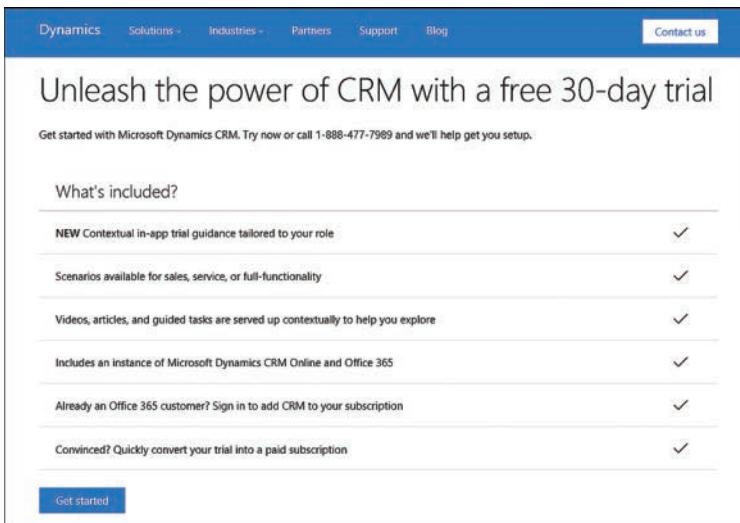


FIGURE 4.10 30-day free trial for CRM Online.

2. Click the Get Started button.
3. On the signup page, fill out the requested information, as shown in Figure 4.11. Be sure to set the organization size to greater than 5, or the trial won't be created. Key points include the following:
 - ▶ **Business Email Address**—Use a real email account. A helpful link will be sent to this address, allowing you to log in again in the future.
 - ▶ **Company Name**—This will be your default subdomain used to directly access your site. You might want to aim for the short version of your company name (for example, <http://mycompanyname.crm.dynamics.com>).
 - ▶ **User ID**—This will be the default administrator for the new organization, as shown in Figure 4.12. It will set you up with an @companyname.onmicrosoft.com address. The recommendation here is to use administrator or admin.

Office 365 Enterprise
E3 Trial

Welcome, Let's get to know you

Step 1
About you

Step 2
Create an ID

Step 3
You're in

United States
This can't be changed after sign-up. [Why not?](#)

First name Last name

Business email address

Business phone number

Company name

English

Your organization size

Next

FIGURE 4.11 30-day free trial signup for CRM Online.

Microsoft Dynamics CRM Online Trial

Office 365 Enterprise E3 Trial

Step 1 About you ✓

Step 2 Create an ID ●

Step 3 You're in

Hello Marc

Want to add this to an existing sub?

Create your user ID

Enter a user name

Your company .onmicrosoft.com

john@yourcompany.onmicrosoft.com

Create a password Confirm password

Next ➔

Your user name w of the user ID you Office 365 account Example: Marc

FIGURE 4.12 Creating a new user for CRM Online.

4. Next you are prompted to select Text Me or Call Me and enter a phone number, as shown in Figure 4.13.

Microsoft Dynamics CRM Online Trial

Office 365 Enterprise E3 Trial

Step 1 About you ✓

Step 2 Create an ID ✓

Step 3 You're in ●

Hello Marc

Want to add this to an existing sub?

Prove. You're. Not. A. R

☒ Text me ☐ Call me

(+1) Phone number

Text me ➔

Microsoft Legal Privacy & cookies Community

FIGURE 4.13 Alternate access methods for CRM Online.

- At this point, a screen displays, much like the one in Figure 4.14. The provisioning process takes between 5 and 15 minutes. When the provisioning process is complete, you are ready to perform some initial setup.

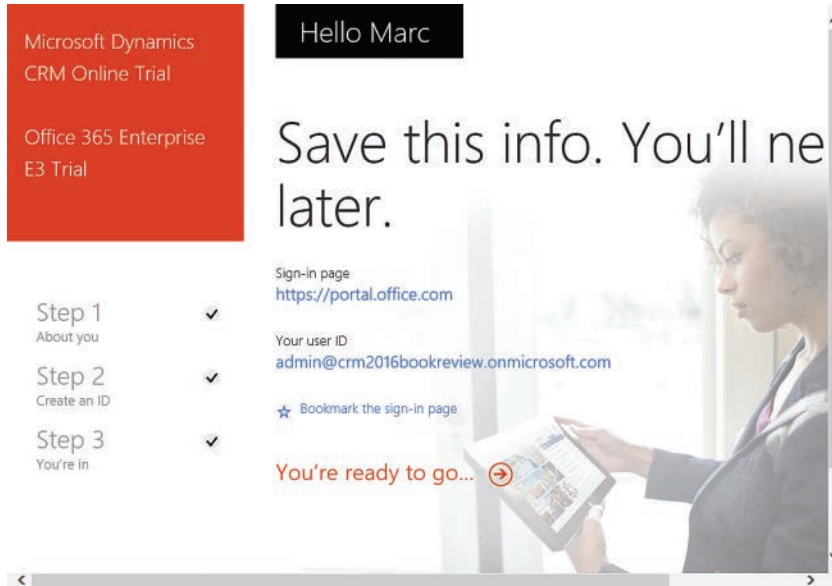


FIGURE 4.14 In-process provisioning of CRM Online.

5. At the top of the screen, as shown in Figure 4.15, click the CRM link.

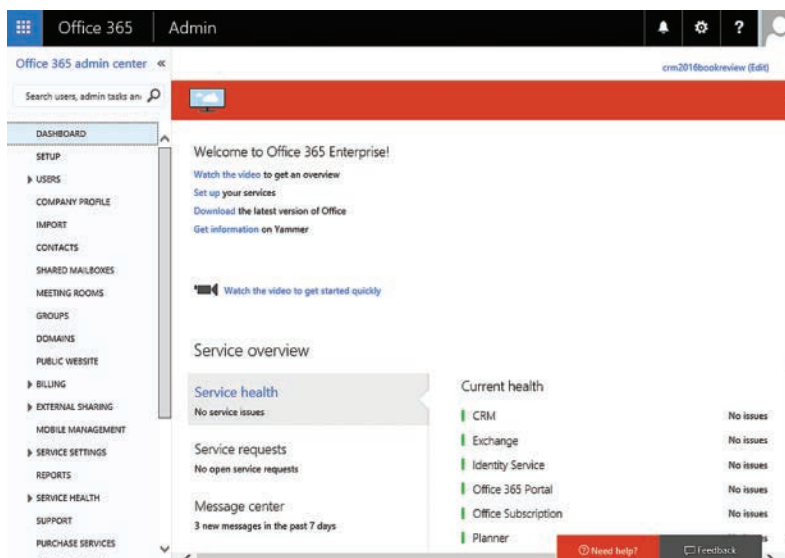


FIGURE 4.15 Office 365 Admin Portal in CRM Online.

TIP

After you do this initial setup, clicking the CRM link takes you directly into CRM.

6. As shown in Figure 4.16, set the purpose (Sales, Customer Service, or Both) of your new CRM Online site, the currency, and the base language. The default is based on the country you selected when you signed up. When you are done with these selections, click Finish to start the last step in the setup process.

CAUTION

Once the base currency is set, it can't be changed. However, Microsoft Dynamics CRM supports multiple currencies, so you can install other currencies later. See Chapter 22, "Customizing Entities," for more information on how to install currencies.

7. In the provisioning page that appears (see Figure 4.17), watch the video introduction to CRM if you are relatively new to CRM and this is your first organization. When the setup is complete, you see a button allowing you to launch CRM. When you launch CRM, make sure that you add a link for your CRM site to your favorites.

Microsoft Dynamics CRM Online

Let's get your trial customized to your needs

☐ Sales
☐ Customer Service
☒ Both

Language

☒ Select currency by country/region
The currency can't be changed later. All CRM reports will be based on the currency you select now.

Country/region

Currency

☐ Specify custom currency

Finish ➔

FIGURE 4.16 Currency setup.



FIGURE 4.17 Finalizing setup for CRM Online.

Congratulations, you have provisioned your CRM organization! Clicking Launch CRM Online takes you to the default screen for CRM, as shown in Figure 4.18.

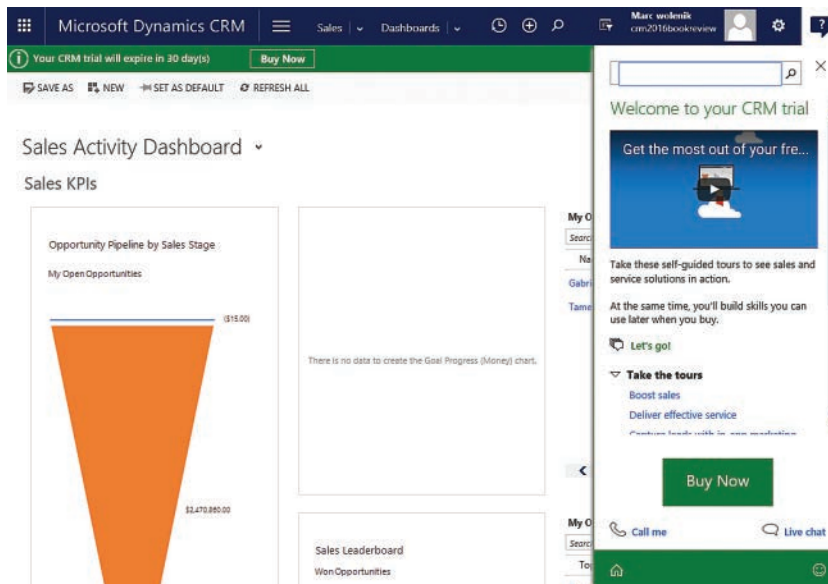


FIGURE 4.18 Microsoft Dynamics CRM 2016 home page.

Adding and Setting Up Additional Users

Adding new users to CRM Online differs a little from adding users to CRM On-Premises. From the Office 365 Admin Portal you can add users individually or in bulk. Follow these steps to add them individually:

1. If the Office 365 Admin Portal (or starting at <http://portal.microsoftonline.com>), go to Users > Active Users and then click + to get to the screen shown in Figure 4.19. You must be a global administrator or user management administrator to access this function.
2. When the Office 365 Admin Portal asks for basic information about the new user, fill out the Display Name and User Name fields, which are required, as well as the other fields (see Figure 4.20).

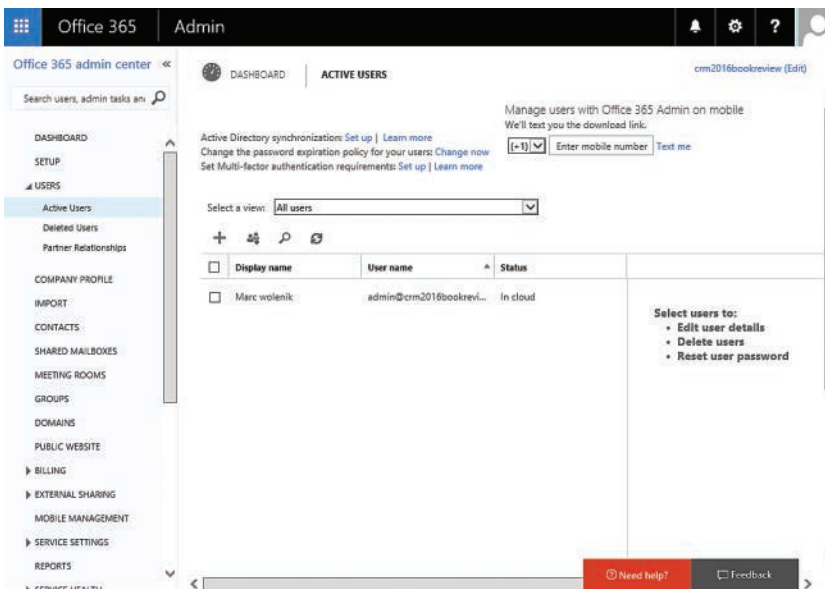


FIGURE 4.19 Office 365 Admin Portal: Adding new users.

Create new user account

First name Last name

Display name

User name

Auto-generated password | [Type password](#)

New password will be displayed in the next page

☒ Make this person change their password the next time they sign in.

Email password to the following recipients

Select licenses for this user:

☐ Office 365 Enterprise E3
24 of 25 licenses available

☐ Microsoft Dynamics CRM Online Professional
24 of 25 licenses available

Create Cancel

FIGURE 4.20 Adding new user details.

NOTE

The administrator right in Office 365 or Active Directory is not the same as the CRM System Administrator role.

3. Select the check box Make This Person Change Their Password the Next Time They Sign In and fill in the person's email address so that an email with the new temporary password will be sent to the user.
4. Assign a license or licenses to this user, as shown in Figure 4.21. A count of the licenses is displayed for each option.

Create new user account

First name: user Last name: test

* Display name: user test

* User name: usertest @ crm2016bookreview.

Auto-generated password | [Type password](#)

New password will be displayed in the next page

☒ Make this person change their password the next time they sign in.

* Email password to the following recipients: admin@crm2016bookreview.onmicrosoft.com

Select licenses for this user:

- ☒ Office 365 Enterprise E3
24 of 25 licenses available
- ☒ Microsoft Dynamics CRM Online Professional
24 of 25 licenses available

Create Cancel

FIGURE 4.21 Assigning a license.

5. Click Create to create the user. When the process is complete, the username and a temporary password are will be displayed, as shown in Figure 4.22. The user will be able to access CRM after one or more security roles are assigned to this user.

► For details on how to add security roles to users, **SEE CHAPTER 22**.

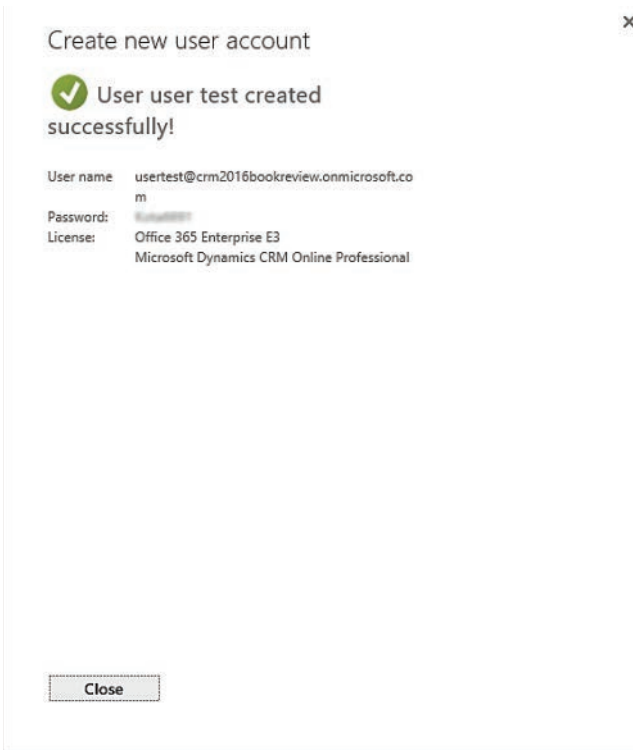


FIGURE 4.22 New user setup confirmation.

Managing Users

After you as a global administrator or user management administrator create users, you can edit existing users. From the Office 365 Admin Portal, click the Admin link in the upper-right of the screen (right next to the link for CRM). A list of Active Users appears, as shown in Figure 4.23.

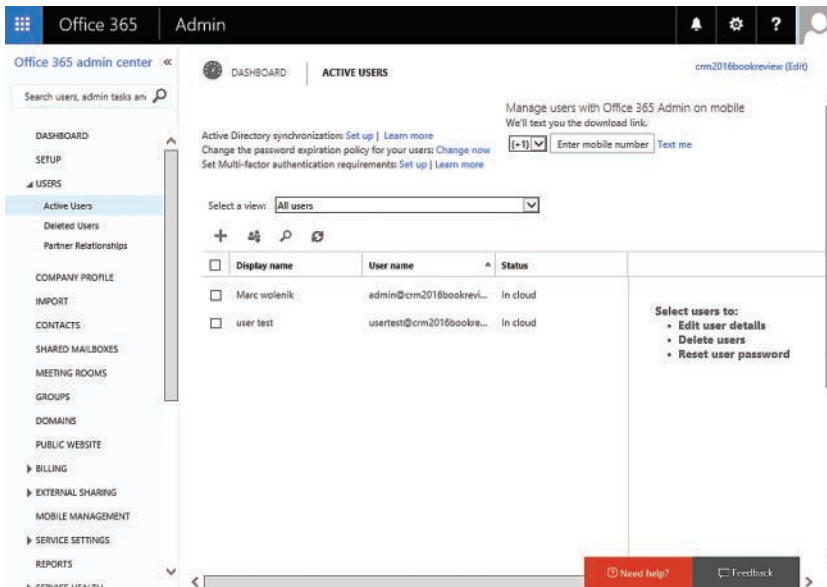


FIGURE 4.23 List of active users.

In the active users list in the Office 365 Admin Portal, you can manage the user population in CRM. The four options above the grid are as follows:

- ▶ **Add User**—This option repeats the process outlined earlier to add additional users on a case-by-case basis and is the most commonly used of the four options.
- ▶ **Bulk Add**—This option allows you to add multiple new users via an upload.
- ▶ **Filter**—This option applies a filter to display only a subset of the users listed.
- ▶ **Search**—This option allows you to search for a specific user account.

Editing an Individual User

When you click the blue text of the display name for the user you want to edit, you see a small link to the right, with three possible options. The first icon, the pencil, allows you to edit information about this user. Next to it is a trash can icon for deleting the user. The Reset Passwords link allows you to quickly reset the user's password. Figure 4.24 shows how to edit a user.

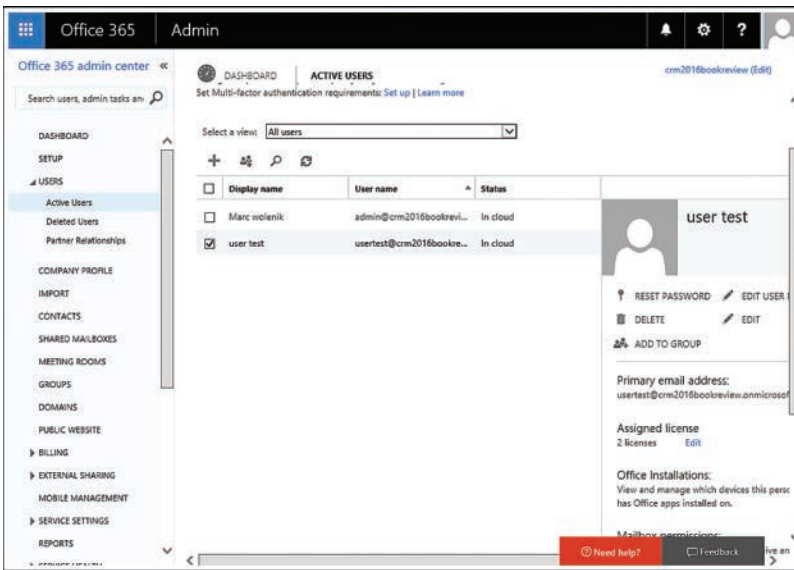


FIGURE 4.24 Editing a user in the Office 365 Admin Portal.

Bulk Adding Users

Microsoft Dynamics CRM Online allows you to add users in bulk by using a file upload. On the Users and Group page in the Office 365 Admin Portal, you can click the Bulk Add Users icon to get to the web page shown in Figure 4.25. CRM provides sample files to illustrate the correct file format to use.

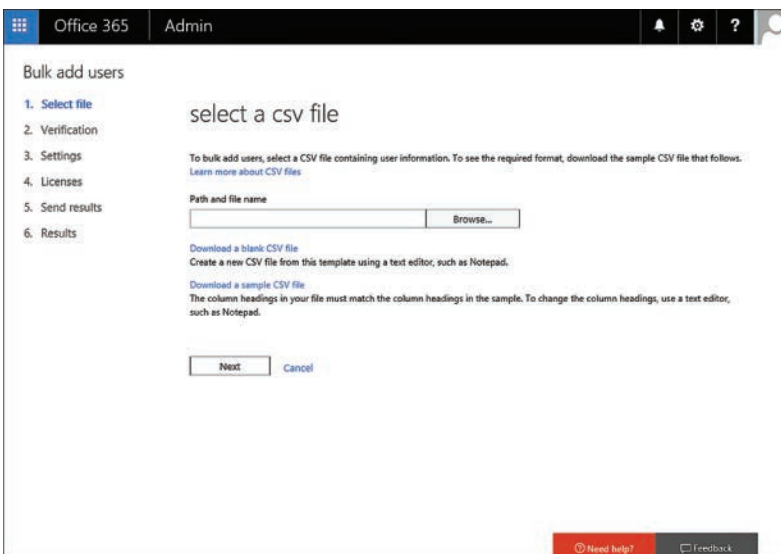


FIGURE 4.25 Office 365 Admin Portal bulk load users.

In a federated environment, the users from an organization's active directory can be synchronized automatically, which allows for local changes to be synchronized with the cloud service.

Managing Your Subscription

Few differences exist between CRM Online and CRM On-Premises in terms of managing your subscription. However, two areas specific to CRM Online are important:

- ▶ Subscription management
- ▶ Resources in use

Both features are available in the administration page in CRM. To get to the administration page, follow these steps:

1. Click Microsoft Dynamics CRM at the top of the page.
2. Select Settings > Administration.

Figure 4.26 shows the standard administration functions you see at this point.

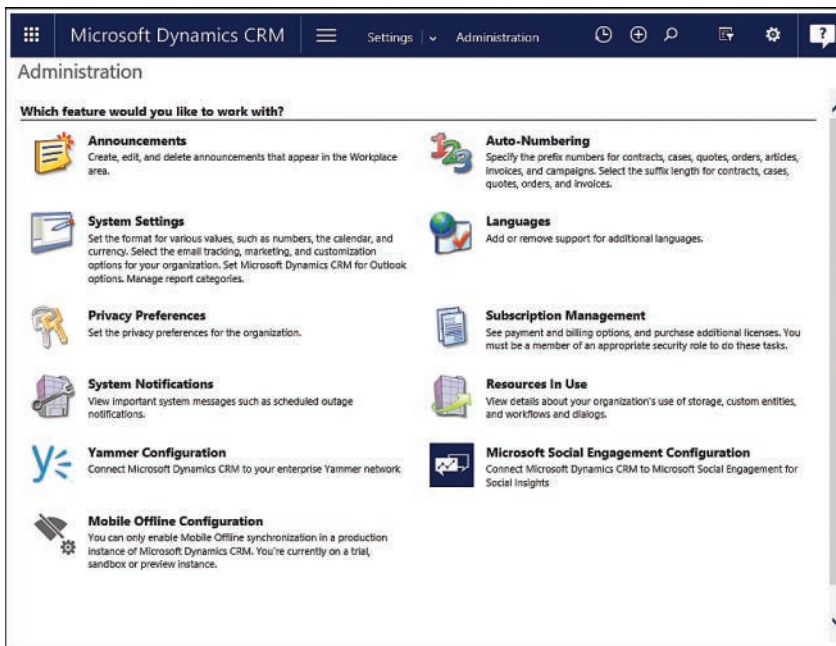


FIGURE 4.26 CRM administration features.

If you click the Subscription Management icon shown in Figure 4.27, you end up at the Office 365 Admin Portal. As shown in Figure 4.28, you can select Billing > Subscriptions on this page.

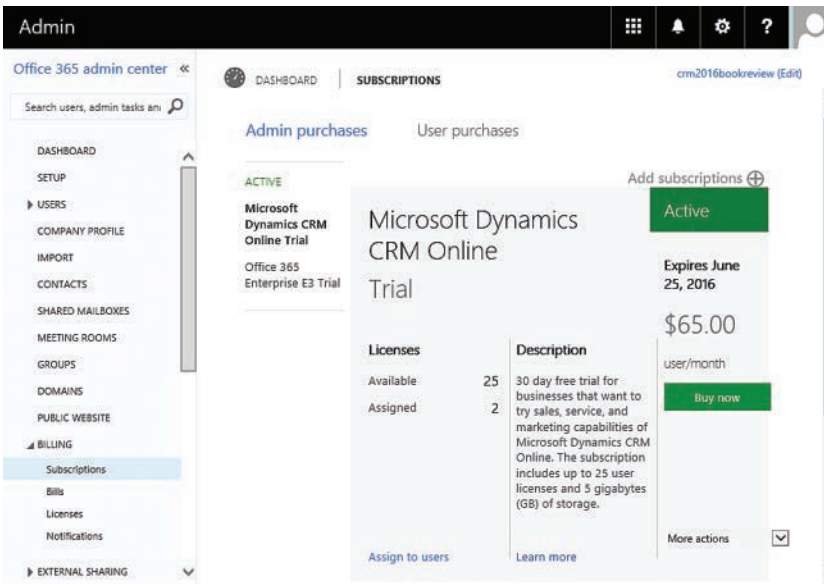


FIGURE 4.27 Office 365 Admin Portal subscription and license management.

You can then purchase a license, add users to an existing subscription, purchase additional storage, and view billing history. Here you can also access additional privacy and security supplements.

Many users may not have to view the resources in use under normal circumstances, as this is typically reserved for administration and billing purposes.

It is a good practice to regularly (perhaps monthly) check storage growth in your CRM organization because Microsoft does not automatically allocate additional storage when you run out. Figure 4.29 shows the resources in use for a sample organization. If you exceed the limit, you will not be able to change or update your existing data until you make space or purchase additional storage. Microsoft sends a warning at 80% full, but you should not depend on that email; the space can fill quickly under certain circumstances.

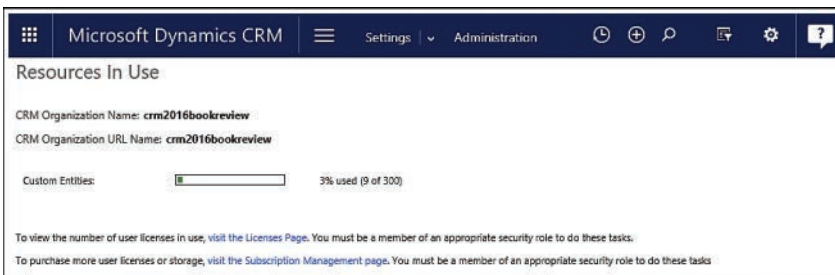


FIGURE 4.28 CRM resources in use.

Checking System Health Status

Within the Office 365 Admin Portal, you can log in and check the health of your organization and the Microsoft services. As shown in Figure 4.29, the Service Health page provides a quick overview of the organization and the service offerings from Microsoft.

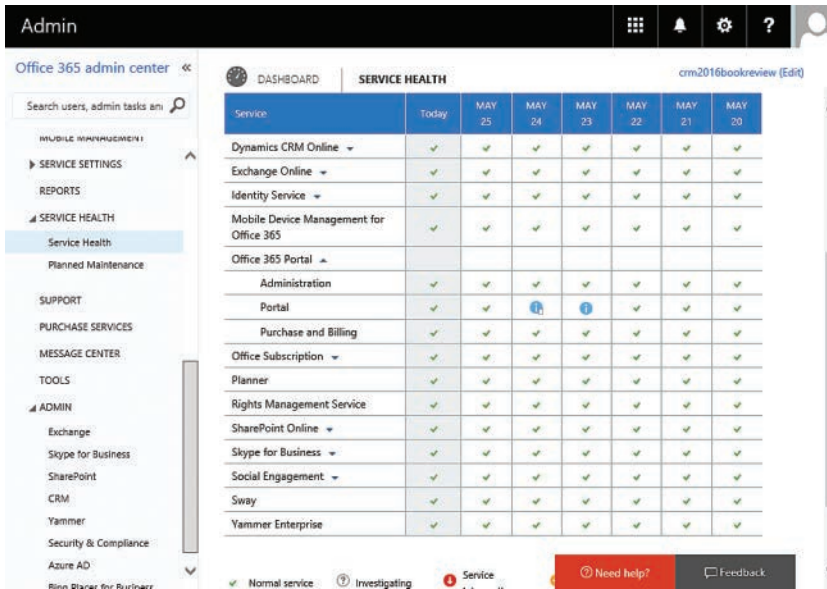


FIGURE 4.29 Office 365 Admin Portal Service Health page.

Adding a Production or Development Instance

Microsoft now includes the option for users to add additional development or production instances to the Online environment. By default, users are provided with the following with every Online subscription:

- ▶ One production instance
- ▶ One non-production instance (if there are at least 25 users)
- ▶ 5GB of storage

Additional instances and storage can be purchased directly from Microsoft. Prices are typically quoted on a per-month basis.

NOTE

The prices are subject to change. To see the current pricing, visit <http://crm.dynamics.com>.

To add additional instances to your Dynamics CRM Online instance, follow these steps:

1. Navigate to <http://portal.office.com>.
2. Enter your username and password to go to the Office 365 Admin Portal interface (see Figure 4.30).
3. Select Purchase Services from the left-side navigation area.
4. Navigate down to your Microsoft CRM Online instance and select Buy Now. If you are still within the initial 30 days, you see Microsoft Dynamics CRM Online Trial (see Figure 4.31), and if you are not on trial anymore, you see Microsoft Dynamics CRM Online.

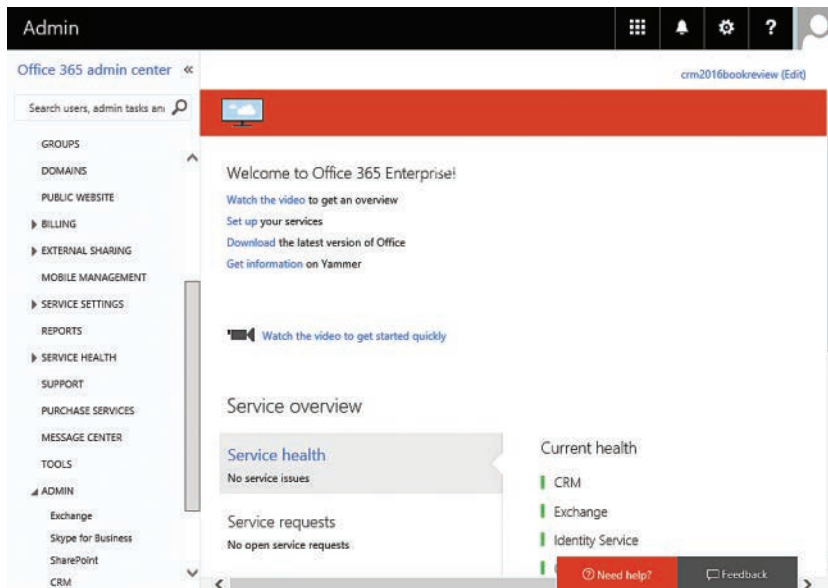


FIGURE 4.30 Office 365 Admin Portal interface.

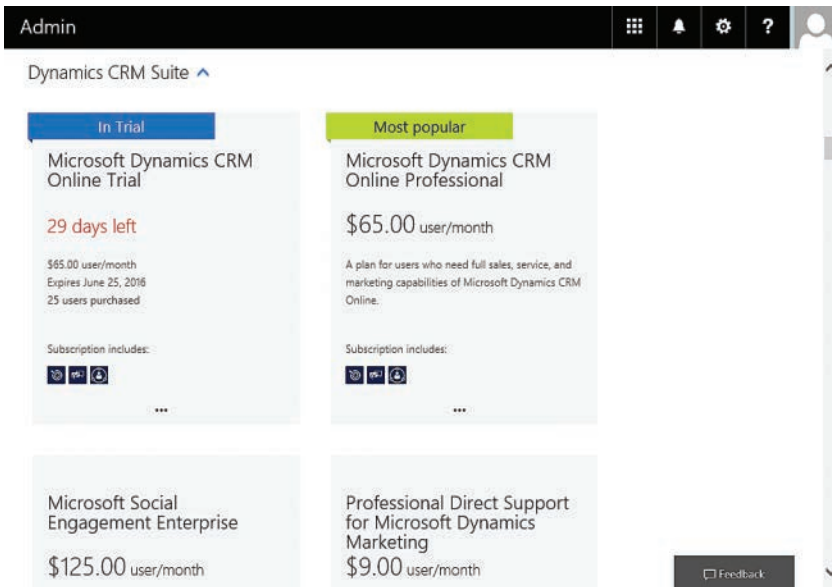


FIGURE 4.31 Purchasing more services.

- ▶ The purchase options appear, as shown in Figure 4.32. You have the option to purchase one or more of the following, at the prices shown at the website:
- ▶ User licenses
- ▶ Non-production instances
- ▶ Production instances
- ▶ Additional storage

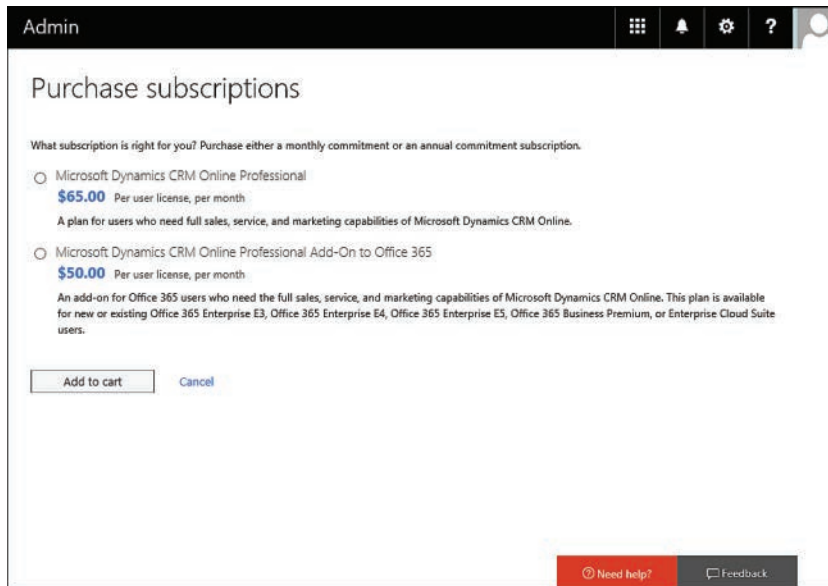


FIGURE 4.32 Office 365 order interface for additional Dynamics CRM products.

5. Select the purchase option you want, and navigate to the checkout to complete for the purchase for your new services. The new services are immediately available for use and can be modified through this interface.

Summary

This chapter covers the CRM Online environment, the infrastructure and security provided by Microsoft, licensing, and how to sign up and administer CRM Online. The administration of CRM through the Office 365 interface includes managing and installing updates as well as installing preferred solutions. In addition, you provision and manage the instance environments.

The free 30-day trial and low barrier to entry provide an ideal way for your organization to get started with Microsoft Dynamics CRM 2016. In addition, the rapid tempo of updates provided by Microsoft for CRM Online eases the burden on your IT team and keeps you focused on your business.

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