Microsoft Dynamics™ CRM Online

Go-Live Checklist

April 2011

Created by:

Microsoft Dynamics CRM Technical Support Team

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Overview

This document is designed to improve your overall experience with Microsoft Dynamics CRM Online (CRM Online), even before your business begins using the solution.

This document is a compilation of common configuration settings and tasks to help keep your CRM Online organization optimized so you can focus on what's most important. This document also includes important online resources your entire business can leverage over and over again.

Who is this document for? Every CRM "Administrator" and User using CRM Online.

Common Configuration Settings for Internet Explorer

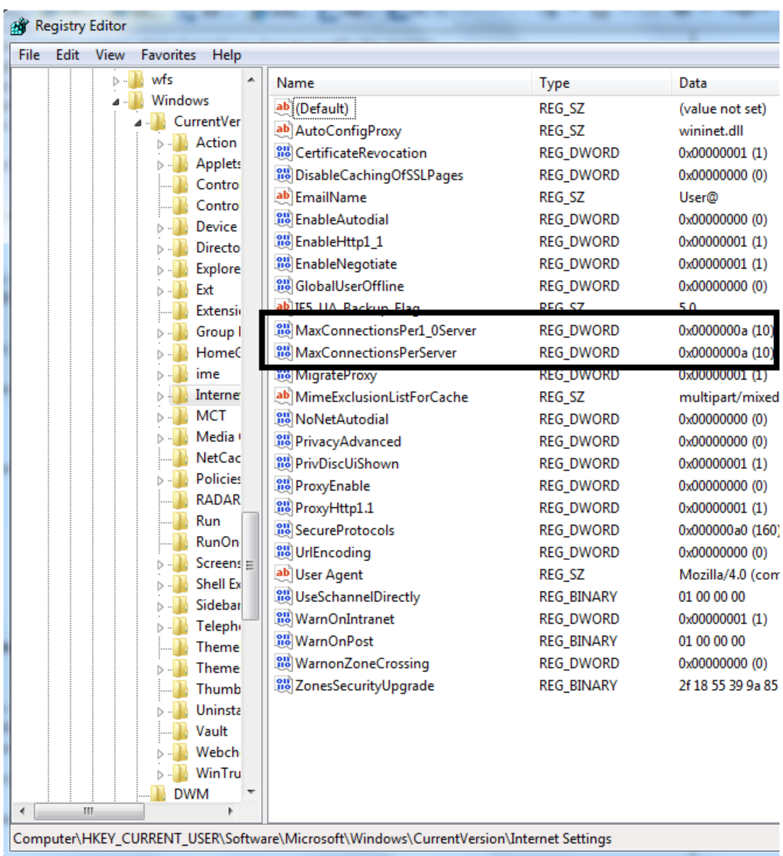
CRM Online is a web-based application, and uses Internet Explorer as the user interface (UI) to view/edit/add/remove information you have stored in your CRM database. The following are common Internet Explorer configuration settings which will help optimize your CRM Online experience.

Increase simultaneous download session

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

The CRM Online application synchronously requests data to and from the CRM Online data center. In many cases, you can easily exhaust the number of simultaneous downloads when using CRM Online. To increase this limit, review KB article 282402: http://support.microsoft.com/kb/282402

Either use the **Fix it** option or work through the "**Let me fix it myself**" section



Add appropriate URLs to Trusted Sites

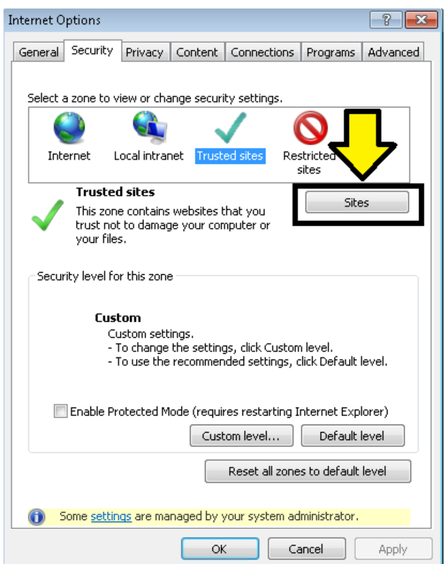
The Internet Explorer Security tab is used to set and change options that can help protect your computer from potentially harmful or malicious online content. By placing the URLs used for CRM Online into the Trusted Sites, it places less restrictions for these web sites. To accomplish:

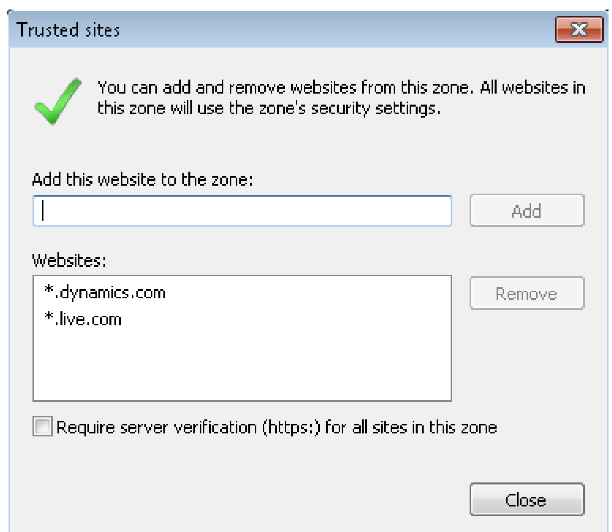
a. Open up **Internet Explorer** (IE)
b. Go to **Tools** > **Internet Options**
c. Click the **Security** tab
d. Click **Trusted Sites** > **Sites**
e. If you get another window that allows you to click Advanced please do so, then add the following URLs:
   *.dynamics.com
   *.live.com

   NOTE: If you get a window that pop-ups and states:
   Sites added to this zone must use the https:// prefix. This prefix assures a secure connection.

   Uncheck the box for "Require server verification (https:) for all sites in this zone"

f. **Close** > **OK**

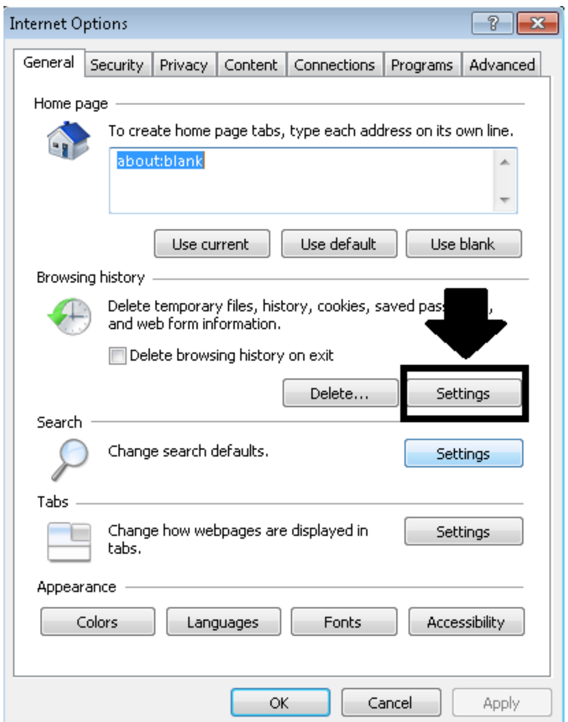


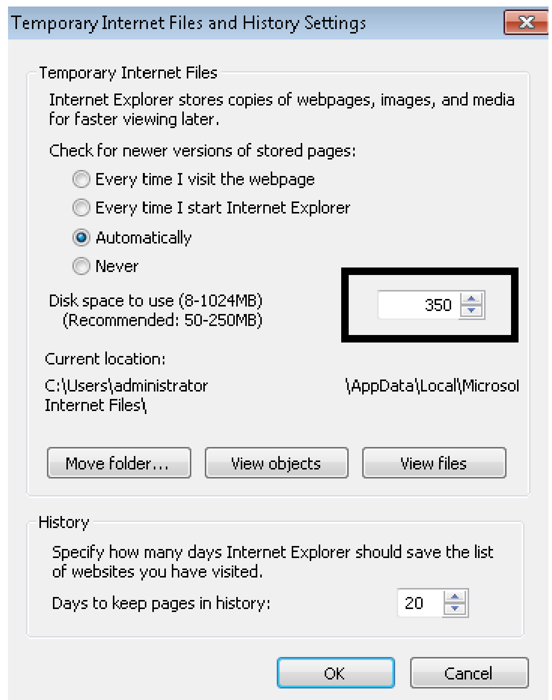


Increase Disk Space Size for Temporary Internet Files

To ensure internet files for CRM Online are not being deleted, increase your Temporary Internet Files disk space. To do so:

a. Open **Internet Explorer** (IE)
b. Navigate to **Tools** > **Internet Options**
c. Under **General tab** > **Browsing History**, click on **Settings**
d. Update the field "Disk space to use" to 350
   Note: Default is 50
e. Click **OK > OK**

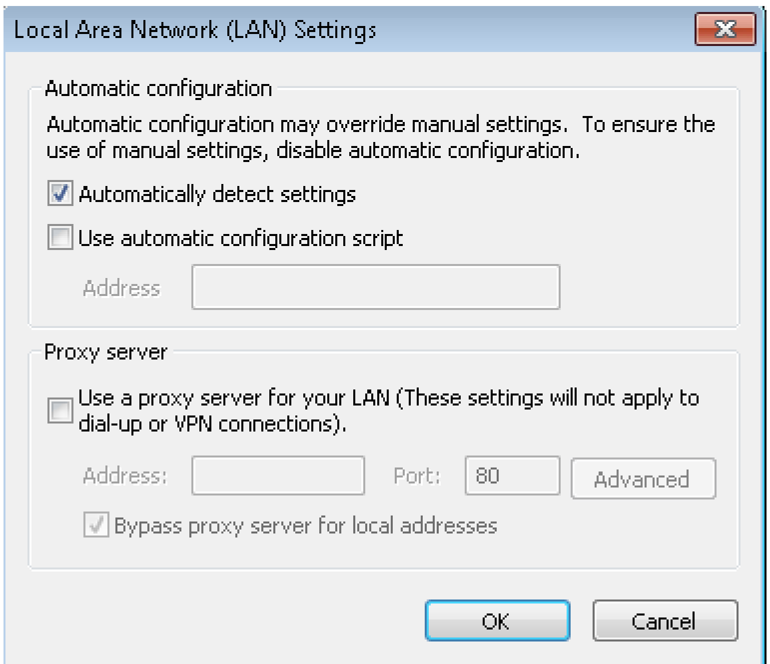




Update LAN settings

If there is no Proxy Server in the environment or if a client is used to handle the proxy settings, performance can be greatly improved by setting Internet Explorer to *automatically* detect the proper settings. To do so:

a. Open **Internet Explorer** (IE)
b. Go to **Tools** > **Internet Options**
c. Click the **Connections** tab
d. Click the **LAN settings** button
e. Make sure that only "**Automatically detect settings**" is checked
f. Click **OK** > **OK**

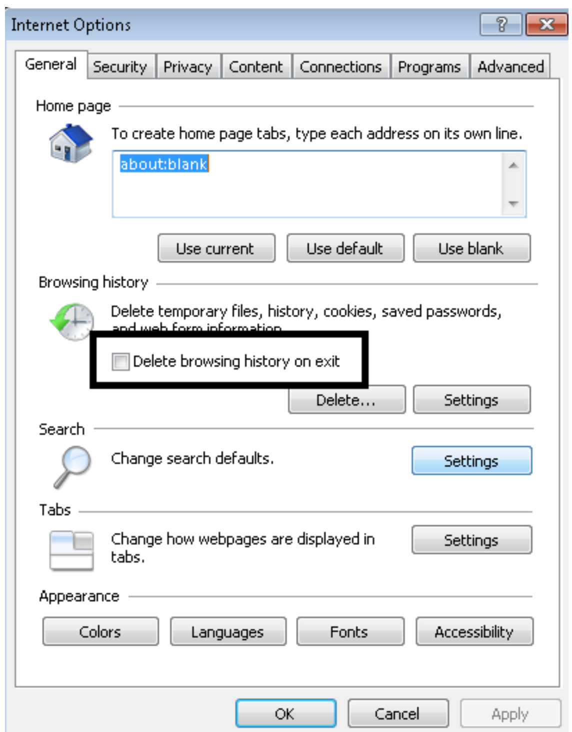


Leave the "Delete browsing history on exit" option UNMARKED

If you enable this option, all of your browsing history is deleted when you close Internet Explorer. It deletes everything marked within your Browsing History Settings button. To optimize your CRM Online experience, we recommend you leave this box UNMARKED.

By default, Temporary Internet files, Cookies, and History are enabled. Deleting your Temporary Internet files, will cause IE to cache the files again, and deleting the Cookies will cause you to be signed out of CRM Online.

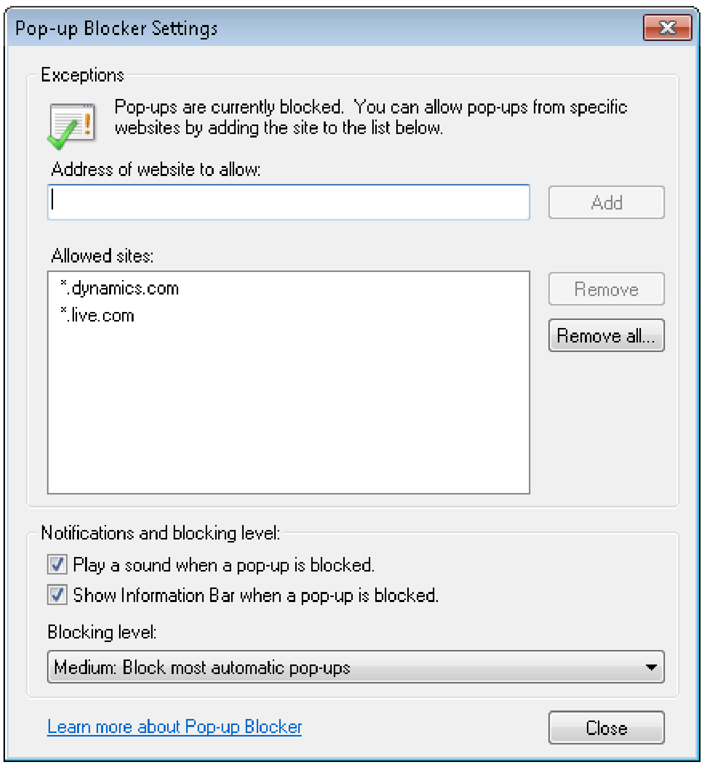
a. Open up **Internet Explorer** (IE)
b. Go to **Tools** > **Internet Options**
c. Under **General** tab > **Browsing History**
d. Ensure the check box "Delete browsing history on exit" is UNMARKED.



Add Microsoft Dynamics CRM URLs to allow pop-ups

CRM Online uses pop-up windows, such as when a new CRM record is opened or created. These pop-up windows can be blocked by Internet Explorer Pop-up Blocker. You must configure the Pop-up Blocker to allow the CRM Online URLs to be excluded from the Pop-up Blocker. To allow CRM Online to be excluded from the Internet Explorer Pop-up Blocker, go through the following.

a. Open up **Internet Explorer** (IE)
b. **Tools** > **Pop-up Blocker** > **Pop-up Blocker Settings**
c. Add the following Microsoft Dynamics CRM Online URLs:
   *.dynamics.com
   *.live.com
d. Click **Close**



Ensure CRM Online is “white-listed” for anti-virus or malware applications

CRM Online performance can be impacted negatively depending on your anti-virus or malware applications. Virus scanning can lock certain files making them inaccessible to other applications.

Each environment requires a thoughtful decision on what to include and exclude, and there is always a possibility that excluding files from scans can lead to unwanted consequences.

This list should be used alongside well planned internal IT management policies.

- Check for any interference from desktop security software. Some anti-virus programs include a feature called ScriptScan which can affect performance in CRM Online. Most programs have functionality to disable scanning on certain web sites. Make sure the CRM Online URL is added to this list. For McAfee specifically see the following KB articles for this setting:
  - https://kc.mcafee.com/corporate/index?page=content&id=KB65382
  - http://support.microsoft.com/kb/924341

- If using other anti-virus software, make sure the CRM Online website URL is included in the trusted zone for the virus scanning and disable “on-access scanning” for the CRM Online website. See your specific anti-virus application documentation for more details.

Ensure you receive important e-mails from CRM Online

Microsoft will occasionally send out e-mails to CRM Online users or administrators. These e-mails can provide information about how to use CRM Online as well as critical billing or upgrade information.

Ensure you have the following e-mail addresses added to the whitelist for your e-mail application.

- crmoln@microsoft.com – This is the email alias that typical CRM Online alerts or information comes from.
- billing@microsoft.com – This email alias sends out information in regards to billing for CRM Online.
- crmonline@e-mail.microsoft.com – This email alias sends out information emails when you sign up for CRM Online.

Configuring the CRM for Outlook Client

There are some options that can be used to help optimize certain processes with the CRM for Outlook Client.

Ensure the CRM for Outlook Client has the most recent updates

Microsoft periodically releases updates to correct unplanned issues. In most cases, these updates are to help enhance performance or ensure greater stability of the Client. It is important to have the latest updates for the CRM for Outlook Client as well. Do the following on the workstation(s) that has the CRM for Outlook Client.

a. Close Microsoft Outlook
b. Click on **Windows button** > **All Programs** > **Windows Update**
c. Click on **Change Settings**
d. Ensure under Microsoft Update the check box is checked for "Give me updates for Microsoft products and check for new optional Microsoft software when I update Windows".
e. Click **Ok**
f. Click on **Check for updates**

   NOTE: If you see a link beneath "You receive updates:" for "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 Administrator(s), you may not have this option and would need to request them to make the Microsoft Dynamics CRM updates available.

g. Click on **Install updates**
   NOTE: To review what updates are available, click on the "# important updates are available" link

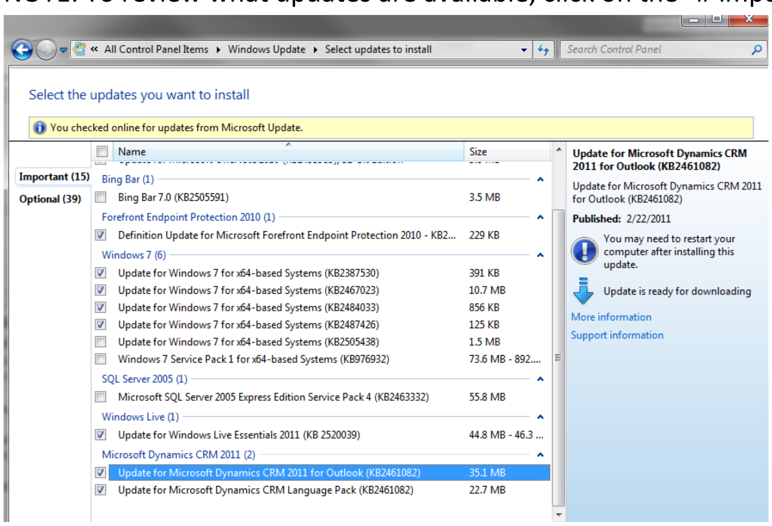


Figure 1: Showing a Microsoft Dynamics CRM 2011 update within Windows Update

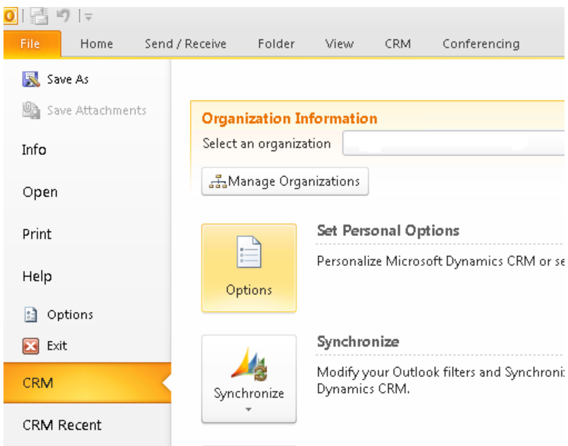
Enabling Automatic Synchronization for Online and Offline clients

Enabling *automatic synchronization* allows the CRM for Outlook Client to systematically synchronize the data from the CRM Online data center. This helps ensure your local data is regularly updated, so when you go offline, the amount of data required to synchronize locally is a manageably sized dataset.

For Outlook synchronization, go through the following:

Outlook 2010:

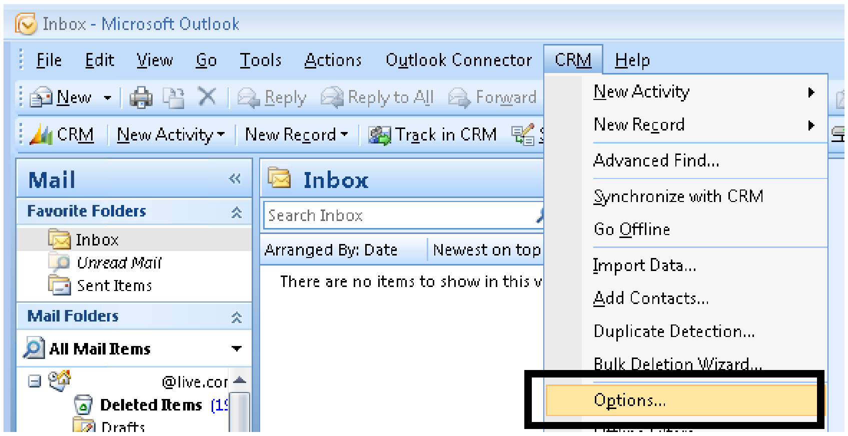
1. Open up Microsoft Outlook with the Microsoft Dynamics CRM for Outlook Client enabled.
2. Within Outlook, click on **File** tab.
3. Click on **CRM.**
4. Click on **Options.**



5. Click on **Synchronization** tab.
6. Under **Schedule automatic synchronization with Outlook**, ensure **Synchronize the CRM items in my Outlook folders every __ minutes** is checked.

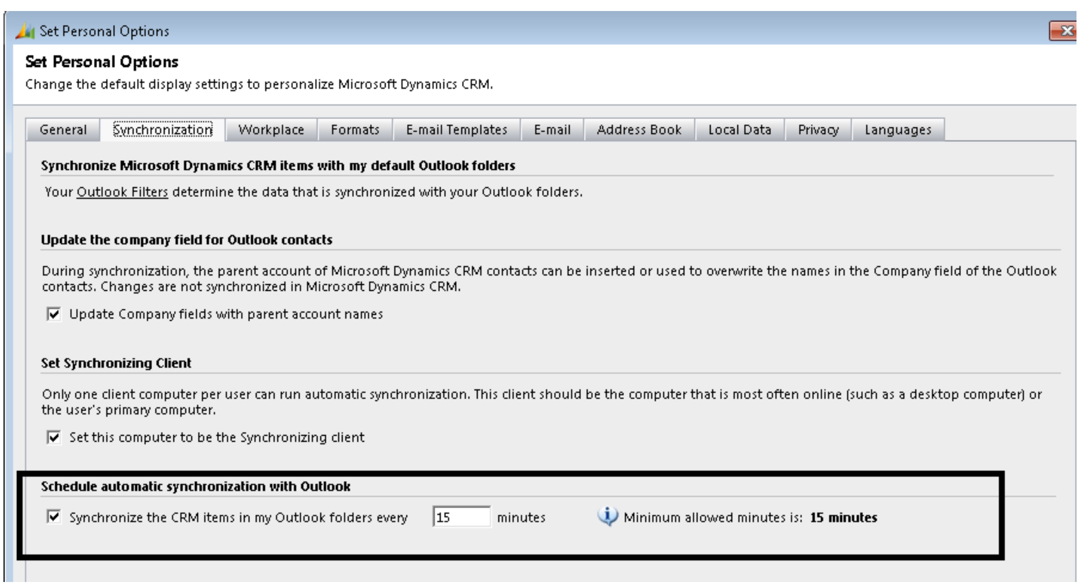
Outlook 2003/2007:

1. Open up Microsoft Outlook with the CRM for Outlook Client enabled.
2. Within Outlook, click on the **CRM** menu, click on **Options.**



3. Click on **Synchronization** tab.
4. Under **Schedule automatic synchronization with Outlook**, ensure **Synchronize the CRM items in my Outlook folders every __ minutes** is checked.

NOTE: By default, Outlook synchronization is enabled and set for 15 minutes.



For *Offline* synchronization, go through the following:

Outlook 2010:

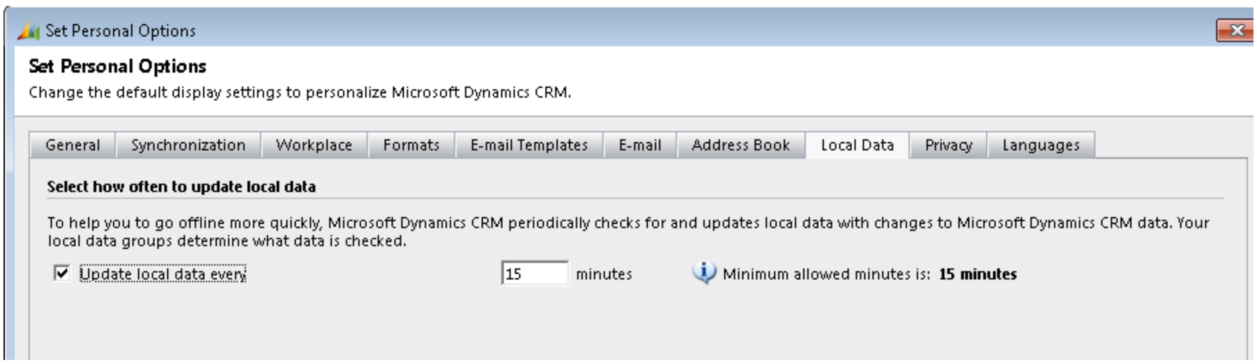
1. Open up Microsoft Outlook with the CRM for Outlook Client enabled.
2. Click on **File** tab.
3. Click on **CRM.**

4. Click on **Options.**
5. Click on **Local Data** tab.
6. Under **Select how often to update local data,** ensure the **Update local data every** is checked.

Outlook 2003/2007:

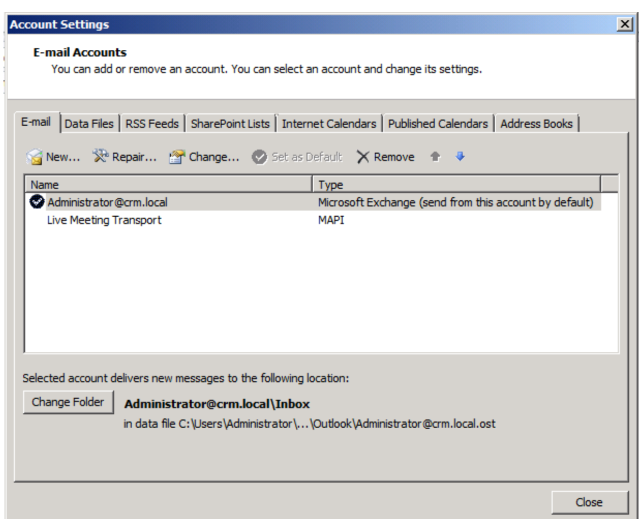
1. Open up Microsoft Outlook with the CRM for Outlook Client enabled.
2. Within Outlook, click on the **CRM** menu, click on **Options.**
3. Click on **Local Data** tab.
4. Under **Select how often to update local data,** ensure the **Update local data every** is checked.

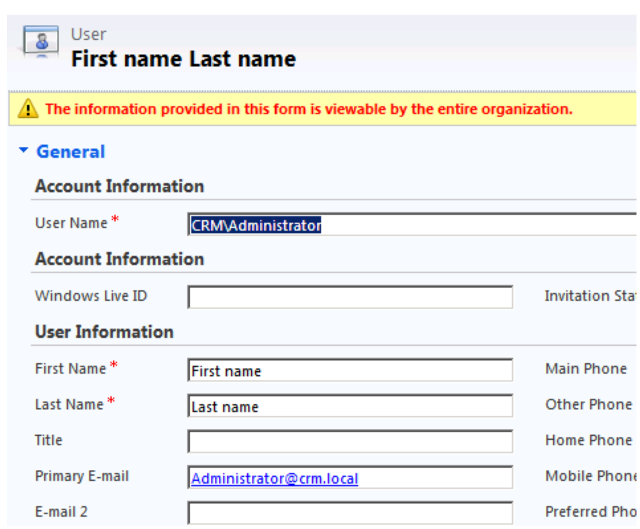
NOTE: By default, the Offline synchronization is disabled.



Tip for Tracking CRM Calendar Appointments in Microsoft Outlook

To ensure your Calendar Appointments do not disappear in CRM Online after you begin to "track" them in Microsoft Outlook, be sure your user e-mail address on the respective CRM User record matches your e-mail address being used for Microsoft Outlook. Note – the e-mail address may NOT be the same as your Windows Live ID. It depends on the e-mail addresses you are using in Outlook and on your CRM User record.





RECOMMENDATION: Only synchronize *essential* data for your Online & Offline clients

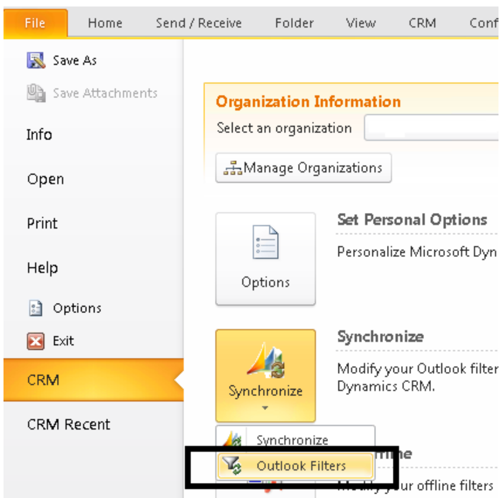
Limiting the amount of data you synchronize with your CRM for Outlook Clients can reduce the amount of network bandwidth being consumed by Microsoft Dynamics CRM users, and inherently improve your overall application performance. By default, Microsoft Dynamics CRM will synchronize the following data:

Outlook Filters:

To modify the Outlook Filters, simply go through the following:

Outlook 2010:

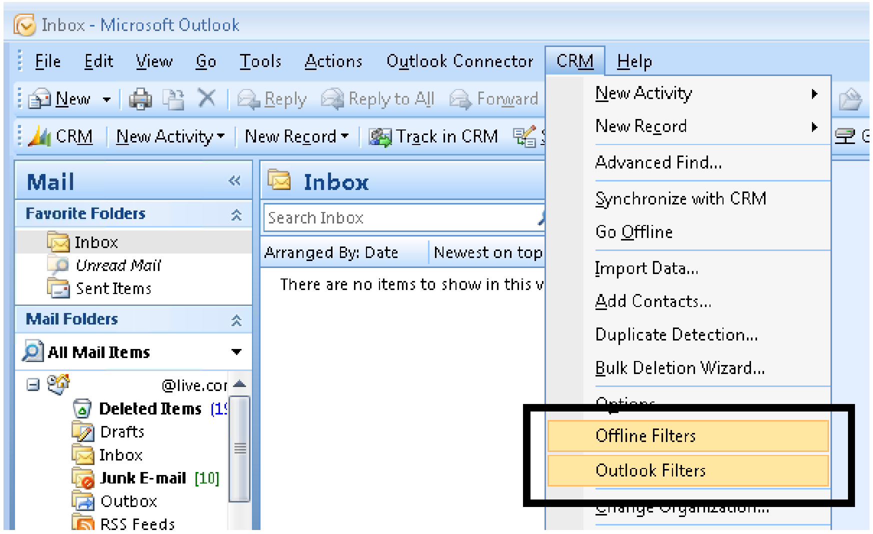
1. Open up Microsoft Outlook with the Microsoft Dynamics CRM for Outlook client enabled.
2. Within Outlook, click on **File** tab.
3. Click on **CRM**.
4. Click on the **Synchronize** > **Outlook Filters.**



5. Within the Filter: Outlook window, you can change the view between Outlook Synchronization Filters as well as Offline Synchronization Filters.
6. Check the filters that you want to disable and click on the **Deactivate** button.
   OR
   Click on the filter you would like to modify to add some additional filtering. For instance, changing the My Tasks filter to only synchronize My Open Tasks:

Outlook 2003/2007:

1. Open up Microsoft Outlook with the CRM for Outlook Client enabled
2. Within Outlook, click on the **CRM** menu, click on **Outlook Filters/Offline Filters**



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4. Check the filters that you want to disable and click on the **Deactivate** button .
   OR
   Click on the filter you would like to modify to add some additional filtering. For instance, changing the My Tasks filter to only synchronize My Open Tasks:

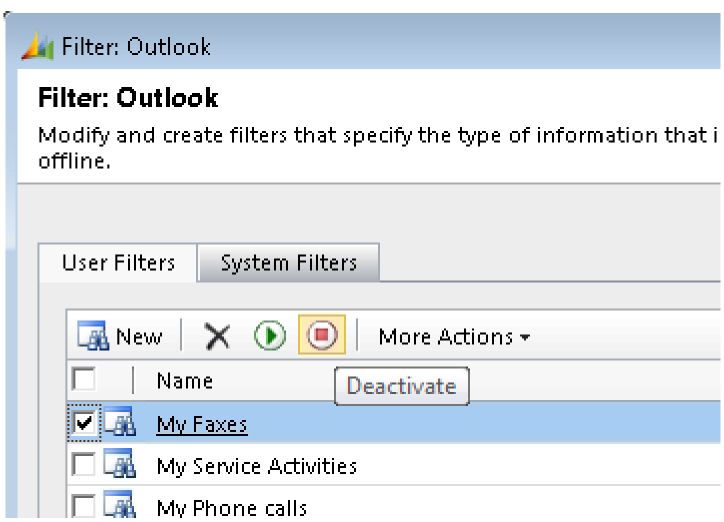

Figure 2: Deactivating an Outlook filter

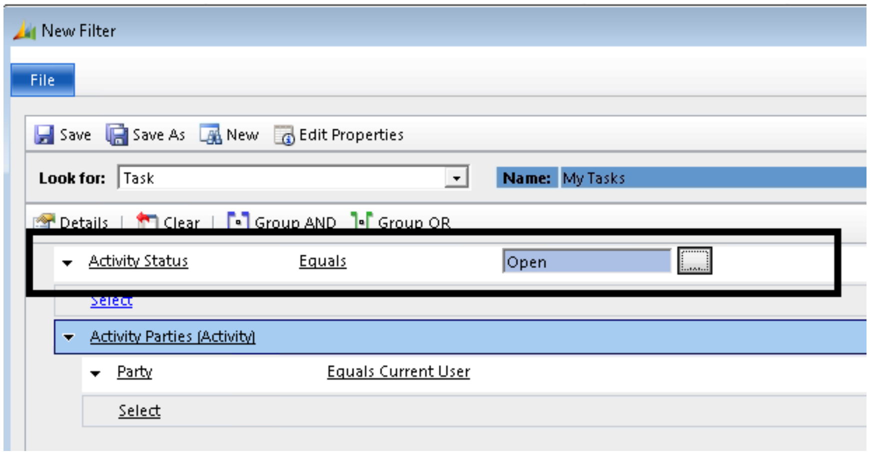

Figure 3: Modifying an Outlook filter to add additional filtering

CRM Online Resources Available for CRM Users

At Microsoft, we want you and your organization to take full advantage of the extensive content and materials available which can help your business be more success by using CRM Online. Here are resources available for all CRM Online users.

CRM Online Resource Center

Data in the Resource Center is aggregated from many resources, allowing you to search for relevant information quickly and efficiently. It ranges from Mircrosoft published articles, the CRM Online Help file, the CRM Forum, and the Dynamics CRM Community. Either through the application (bottom left-hand tab) or online, don't miss an opportunity to take full advantage of what the Resource Center has to offer → http://rc.crm.dynamics.com/rc/regcont/en_us/onlinedefault.aspx

CRM Online E-Learning Catalogs:

The E-Learning Catalog has wealth of professional courses designed to help you use and configure CRM Online for your business. These courses are designed for your end-users as well as your CRM administrator → https://dynamics.microsoftelearning.com/catalog/default.aspx?searchAction=keyword&keyword=crm

Dynamics CRM Training Materials:

Dynamics CRM Training Materials provide professional guides on the features and functionality of Microsoft Dynamics CRM.

In order to use this resource, you will need to sign in with your Windows Live ID that is associated with your CRM Online user account →

https://mbs.microsoft.com/CMS/Templates/site/DLPP.aspx?NRMODE=Published&NRNODEGUID=%7bB0901DB5-89CC-46EB-BCA2-43D078C5EA2E%7d&NRORIGINALURL=%2fcustomersource%2fworldwide%2fus%2ftraining%2ftrainingmaterials%2fstudent&NRCACHEHINT=Guest

CRM Online Team Blog:

This site is a collection of Microsoft's CRM experts on help, tips and tricks for CRM Online → http://blogs.msdn.com/dynamicscrmonline.

The Dynamics CRM Team Blog

Similar to the CRM Online Team Blog, this expands to include all deployment types for Microsoft Dynamics CRM. Some information within this blog may not apply to Microsoft Dynamics CRM Online but one can find useful information around the application and customizations that apply to any deployment type of Microsoft Dynamics CRM → http://blogs.msdn.com/b/crm.

Microsoft Dynamics CRM Community:

The Dynamics CRM Community is a common location for all CRM users to read about how other users are working w/ CRM Online, to read blog posts, product news, and other events. It's one of the best places in the world for

users to ask (and answer) questions about CRM Online →
http://community.dynamics.com/product/crm/default.aspx

Microsoft Dynamics CRM Online Video Gallery:

The Microsoft Dynamics CRM Online Video Gallery has numerous videos on how you can use and maximize your business' use of CRM Online → http://www.democrmonline.com

Supporting your CRM Online Organization

There are many ways one can get assistance with Microsoft Dynamics CRM Online. Microsoft strives with sharing documentation to their customer's so they can resolve issues in a very timely and efficient matter. Below are the resources you could use to troubleshoot issues with Microsoft Dynamics CRM Online. We recommend following this list to maximize the efficiency of resolving issues.

Ask The Community

The CRM Online Community is a large and active world-wide community, and is the best place to begin if you have questions regarding CRM Online *usage and configuration*. The Community is set up to allow users to ask or answer questions about CRM Online. In most cases, others in the Community have experienced the same question or business problem, and are willing to help you! With thousands of resources at your fingertips, the CRM Community gives you an opportunity to raise your question or issue to many resources at once, and to also help your fellow CRM Online users! → http://community.dynamics.com/product/crm/f/117.aspx

Knowledgebase Search

The Dynamics CRM support team and experts are continuously documenting known or common issues within Knowledge Base (KB) Articles. If you experience an issue with the CRM Online application, you can typically find their own solution by searching the prompted error or by defining what they are trying to do. There are articles available within the Dynamics CustomerSource knowledge base as well as the public Microsoft Support knowledge base → https://mbs2.microsoft.com/CustomerSourceApp/search.aspx?st=a&ss=19482 &
http://support.microsoft.com

Advanced Product Support Services

Support incidents provide reactive support that focuses on a specific problem, error message, or functionality that is not working as intended. There may be times when you could benefit from additional services beyond what is provided within support. With access to technical professionals from Microsoft Dynamics, Advanced Product Support Services (APSS) can provide the strategic technical assistance you need. APSS encompass a wide variety of services and products designed to help you get the most from your Microsoft Dynamics products.

You can access this resource by going to
https://mbs.microsoft.com/customersource/worldwide/us/support/selfsupport/apss/default

Microsoft Dynamics CRM Support

If you are unable to find the answers or solutions within the resources discussed above, you can submit a technical support request to the Dynamics CRM Technical Support Team. Technical Support Incidents provide reactive support that focuses on a specific problem, error message, or functionality that is not working as intended. Below is how you submit an incident to the Dynamics CRM Technical Support Team.

1. Login in your CRM Online organization, via www.crmonline.com.
2. Within the application, navigate to the **Resource Center**.
3. Within the Resource Center, navigate to the **Support** section, and click on **Technical Support Request**.

Maximizing Your Technical Support Experience

When requesting help for any technical issues or questions, it is important to have as much information available with you as possible. Below are common questions you may be asked to answer when requesting help from Technical Support:

1. What part of the application are you having issues with?
    a. For example: installation issues with the Microsoft Dynamics CRM for Outlook client.
2. Does the issue affect all users? A certain type of CRM role? Only certain users?
3. What is the exact error or the problem that you are experiencing?
    a. Provide as much detail here including the exact error message you are facing. If possible, capture a *screenshot* of the error by clicking on Print Screen and pasting the results in MS Word or MS Paint.
4. What are you doing in CRM Online when the error occurs?
    a. It is important to provide the exact steps you are going through to create the error. This allows the Support Team to analyze how your organization designed to work and why you may be experiencing the error.
5. What are the details of the environment you are experiencing the issue on?
    a. Example: provide the version of the Microsoft Windows Operating System, Internet Explorer, and if applicable, the version of MS Office on the machine(s) the issue is occurring.
6. If applicable, provide log files (if you know how to find them).
    a. This would apply to items such as the CRM for Outlook Client or the CRM E-mail Router. The following describes where you can find the log files for these applications:
        i. 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
        ii. Microsoft Dynamics CRM E-mail Router: %appdata%\Microsoft\MSCRM\Logs