Integration Guide: Microsoft Dynamics CRM Online and Office 365

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QuantaCRM

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Integration Guide: Microsoft Dynamics CRM Online and Office 365

Extend the power of Microsoft Dynamics CRM Online with the freedom to work where and when you choose with the online services of Microsoft Office 365. Office 365 delivers the power of cloud productivity to businesses of all sizes, helping you save time and money, and simplifying cross-application integration with CRM Online.

You can download this document in PDF format from the Microsoft Download Center.

Who should read this guide

This guide is intended for Microsoft Dynamics CRM administrators and technical decision makers interested in exploring Office 365 services and how they integrate with CRM Online. Integration with Office 365 becomes increasingly relevant to CRM Online users as more Office 365 features such as Office 365 Groups and OneNote are integrated into CRM Online.

Assumptions

This guide assumes:

1. You have a CRM Online subscription. If you don't, sign up for a CRM trial.
2. You subscribe to one of the "E" plans for Office 365. If you don't, Add an Office 365 trial subscription to Microsoft Dynamics CRM Online.

For information on the various Office 365 plans, see Compare all Office 365 for business plans.

What's in this guide

- What is Office 365 and how does it relate to CRM Online?
- What's an Office 365 user ID and why do CRM Online users need one?
- What's the Office 365 admin center and how does it relate to CRM Online?
- Add an Office 365 trial subscription to Microsoft Dynamics CRM Online
- Add users, licenses, and security roles
- Manage user account synchronization
- Sign in to CRM Online services
- Set up CRM Online to use Exchange Online
- Set up CRM Online to use Sharepoint Online
- Set up CRM Online to use Skype or Lync
- Set up CRM Online to use Social Engagement
- Set up CRM Online to use Dynamics Marketing

- Set up CRM Online to use Yammer
- How do I check my online service health?
- Additional resources

What is Office 365 and how does it relate to CRM Online?

Office 365 is a collection of online services designed to work together to provide enterprise-grade, anywhere access to email, file sharing, and online meetings. Office 365 includes features that allow administrators to add users, manage passwords and licenses, and much more. Microsoft Dynamics CRM Online takes advantage of the Office 365 administration features to simplify user management. CRM Online users are created and managed in the Office 365 admin center.

A CRM Online subscription doesn't include Office 365 applications such as Exchange Online or SharePoint Online. You can significantly enhance your company's online, collaborative experience by integrating Office 365 applications with your CRM Online subscription. However, that requires a separate purchase. More information: Add Office 365 Online services

Tip

You should also take a look at the data compilation and visualization possibilities with Power BI for Office 365. In addition, see the blog post Dynamics CRM Online in Power Query for a presentation on Power BI and Microsoft Dynamics CRM Online integration.

These videos provide a quick overview of Office 365 services for business:

- Office 365 feature selection – 2:53
- Introducing Office 365 Enterprise – 3:05

See Also

Office 365 Service Descriptions

Compare all Office 365 for business plans

Add Office 365 Online services

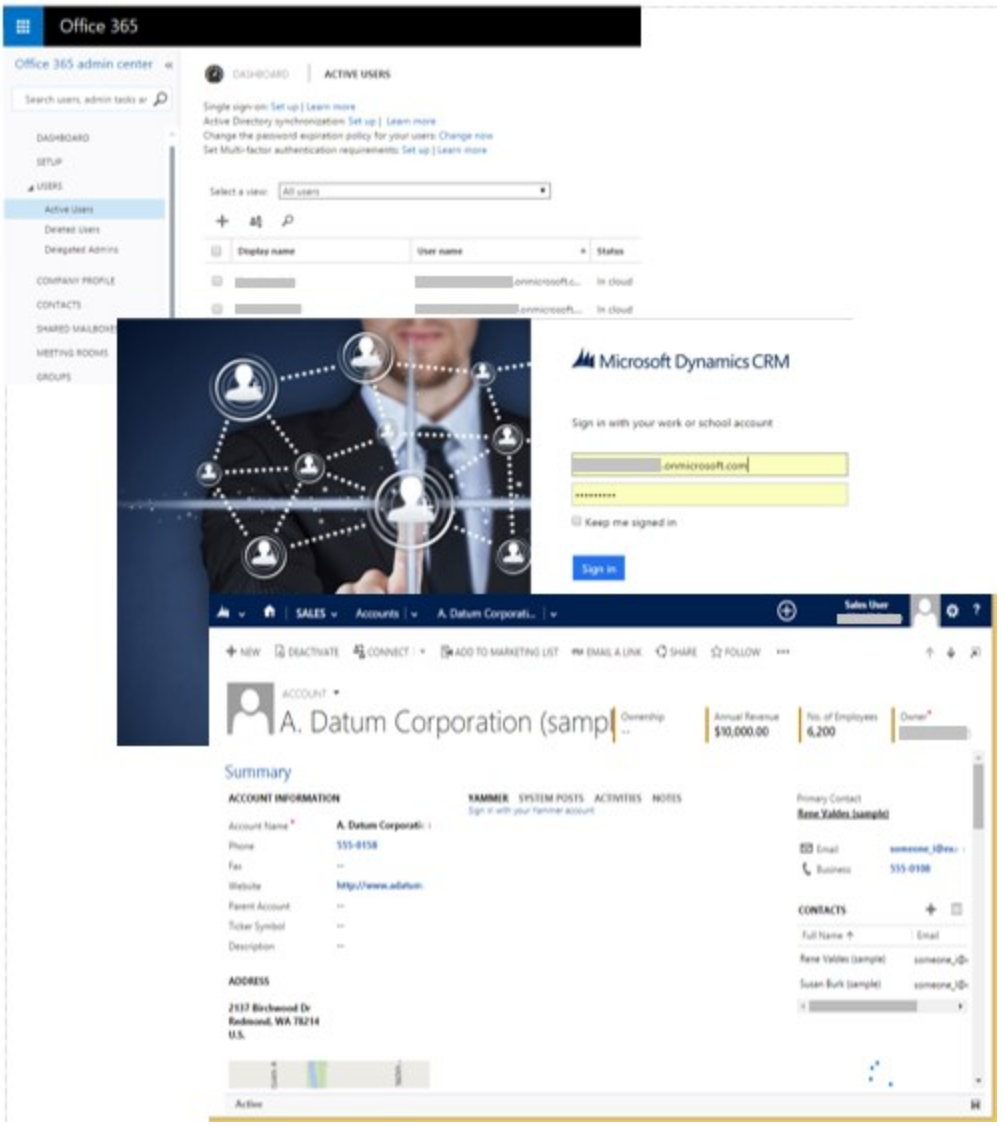
What's an Office 365 user ID and why do CRM Online users need one?

Each user signs in to Microsoft Dynamics CRM Online with an Office 365 user ID (more precisely, an Azure Active Directory user ID, see the Note later in this topic). Access to CRM Online is controlled through the Office 365 user ID.

The user ID is in this format: *username@yourcompany.onmicrosoft.com*. Please note that although it resembles an email address, **this is a sign-in ID and not an email address**. It can be used as an email address, but only if you have an Office 365 subscription with Exchange Online.

Many companies would like to use their own domain name, such as contoso.com, instead of onmicrosoft.com for user accounts. You can configure Office 365 to use your domain name so your CRM users can sign in with a format like *username@yourcompany.com* instead of *username@yourcompany.onmicrosoft.com*. More information: Verify your domain in Office 365

To manage Office 365 user IDs, sign in to the Office 365 admin center (https://portal.office.com). Here, you can do all sorts of administrative tasks such as create users, assign licenses, and maintain passwords.



Note

CRM Online uses Azure Active Directory as its identity provider. You access CRM Online through an Azure Active Directory user ID that's created and managed in the Office 365 admin center. For simplicity, we will refer to the Azure Active Directory user ID as the Office 365 user ID in this documentation.

If you company uses on-premises Active Directory for user identity, you have options that can simplify user management such as providing a single sign-on experience for your users. More information: Manage user account synchronization

See Also

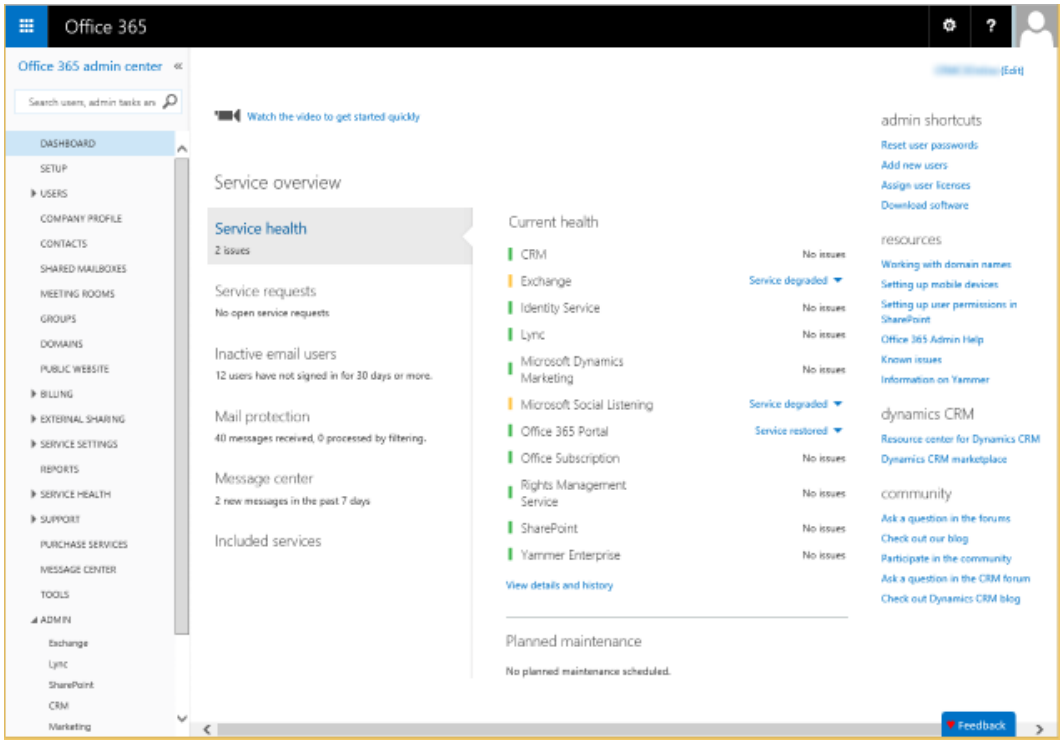
What is my user ID and why do I need it for Office 365?

What's the Office 365 admin center and how does it relate to CRM Online?

Add users, licenses, and security roles

What's the Office 365 admin center and how does it relate to CRM Online?

The Office 365 admin center is a portal site rich in features for the administrator. Microsoft Dynamics CRM Online takes advantage of the features on this site to simplify and consolidate management of user accounts, billing, licensing, and more.



Review the information in this topic to learn how to do common CRM Online administrative tasks in the Office 365 admin center.

Note
You must have the Global admin role to fully access the Office 365 admin center.

In This Topic

Open CRM and other services with the app launcher

Manage instances and updates in the CRM Online Administration Center

Check your service health

Review your messages

Request service

Manage users

Manage subscriptions

Set the password expiration

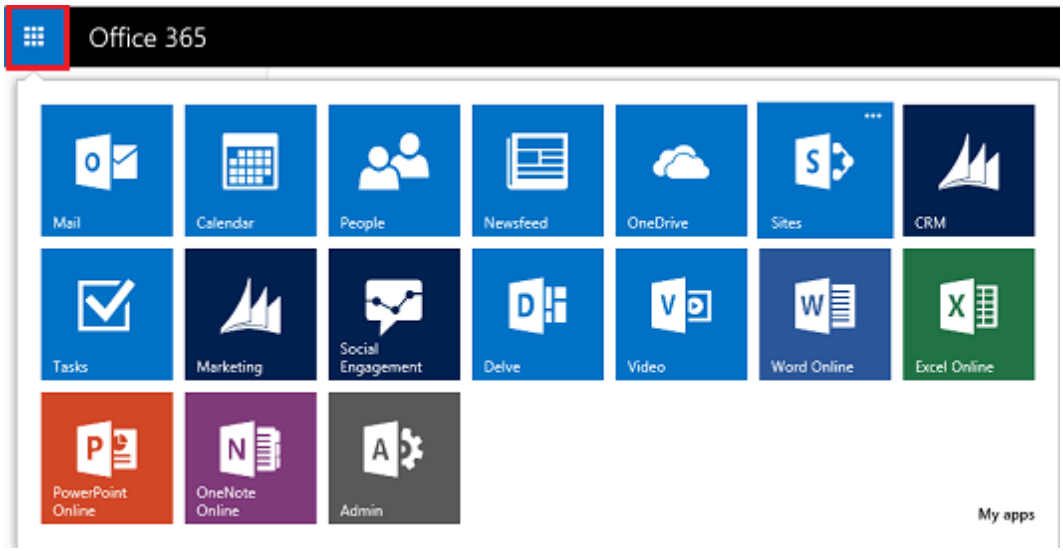
Configure self-service password reset and other settings in Microsoft Azure

Add your domain

Purchase services

Open CRM and other services with the app launcher

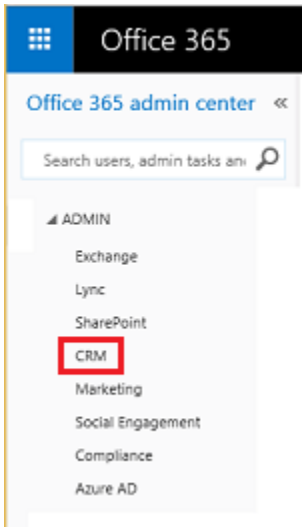
You can open CRM Online and other services such as Microsoft Dynamics Marketing and Microsoft Social Engagement from the Office 365 app launcher. Choose **Admin** to open the Office 365 admin center and **CRM** to open CRM Online. More information: Find help for the latest changes in Office 365



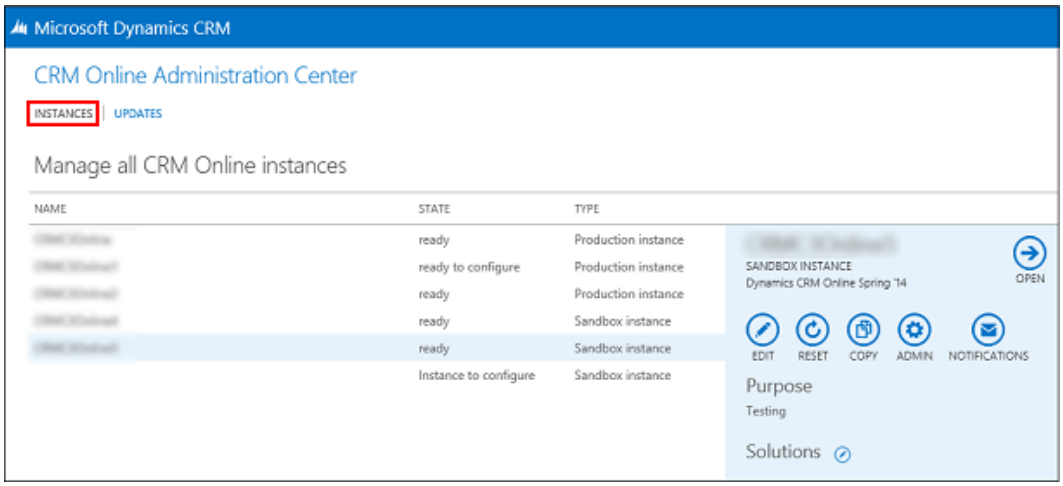
Manage instances and updates in the CRM Online Administration Center

The CRM Online Administration Center is your portal site to manage CRM Online instances and updates.

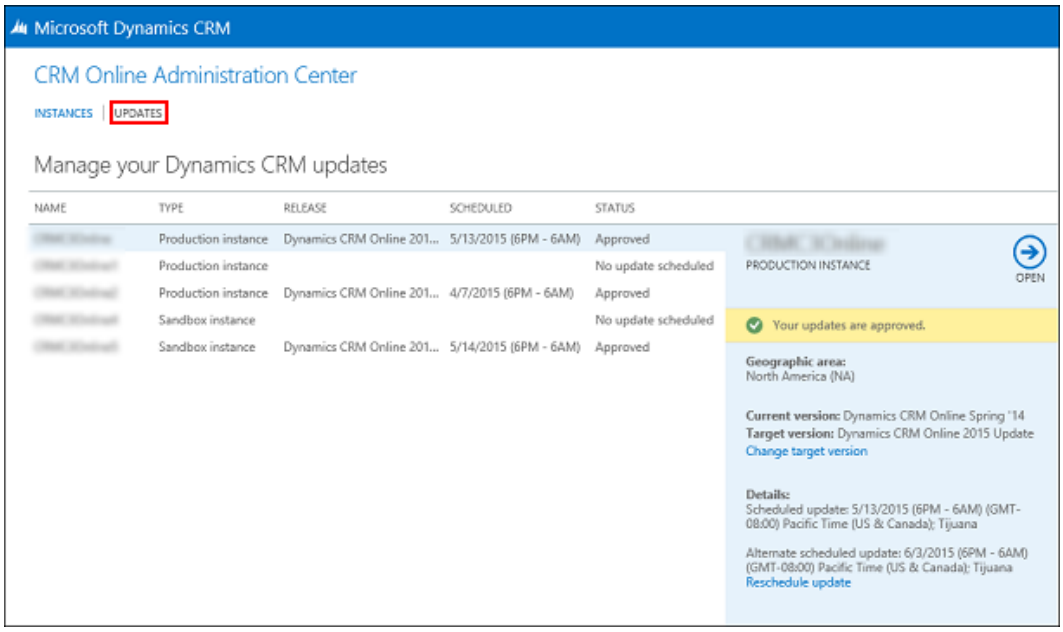
You access the portal by choosing CRM from the left-side menu in the Office 365 admin center.



Choose the **Instances** tab to edit, copy, and reset, existing instances, configure new instances, manage preferred solutions, and more. More information: [Manage Microsoft Dynamics CRM Online instances]



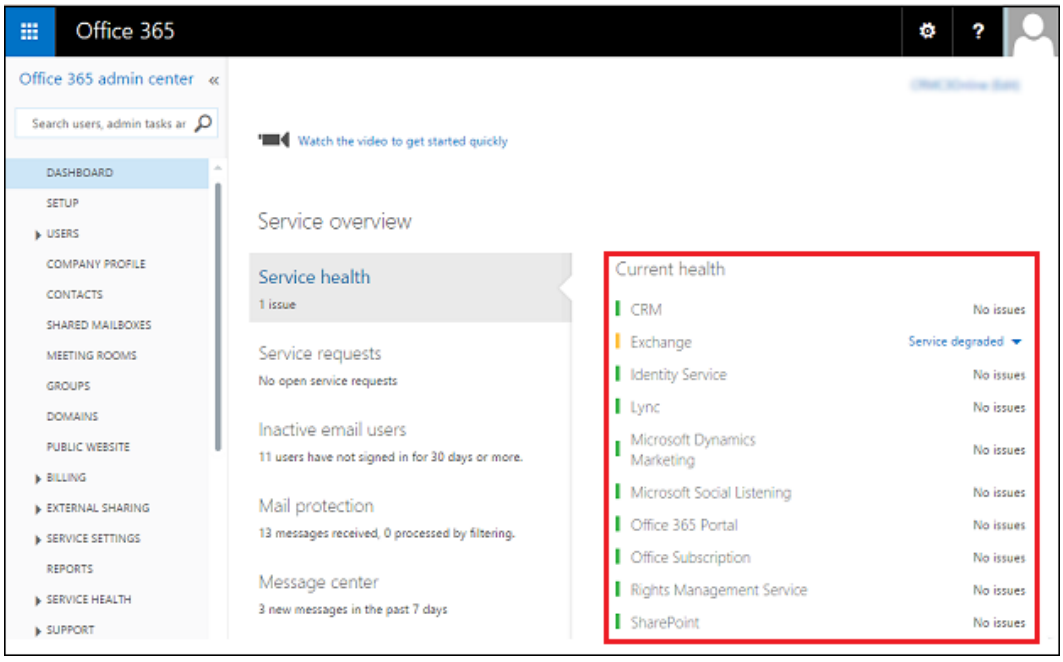
Choose the **Updates** tab to approve and schedule updates, change the update target version, and open CRM Online. More information: [Manage Microsoft Dynamics CRM Online updates]



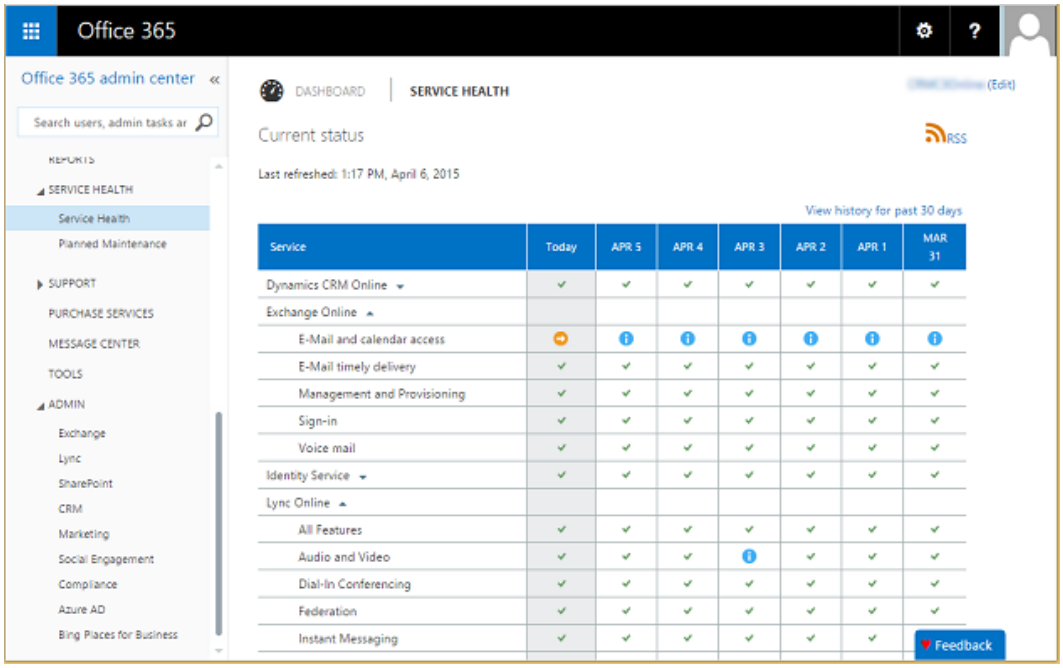
Check your service health

You can quickly get real-time status of your CRM Online and Office 365 services. The dashboard on the Office 365 admin center provides a comprehensive view of the service health of your online services. If users are having trouble signing in to CRM Online, check this page to see if there is a service outage.

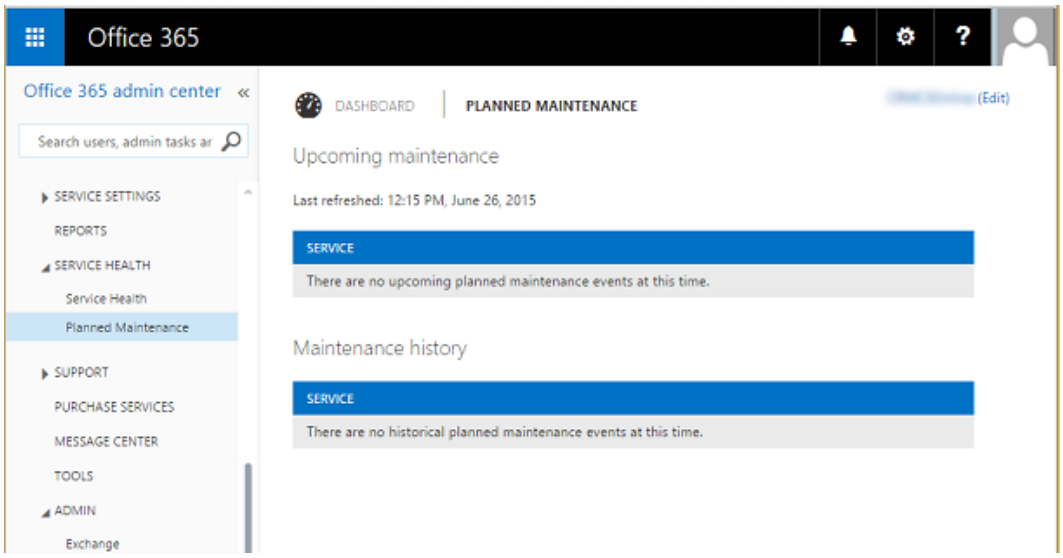
Under **Current health**, you can select services with issues to get more information.



Choose **Service Health** from the left-side menu to get more detailed information for each service arranged by date.

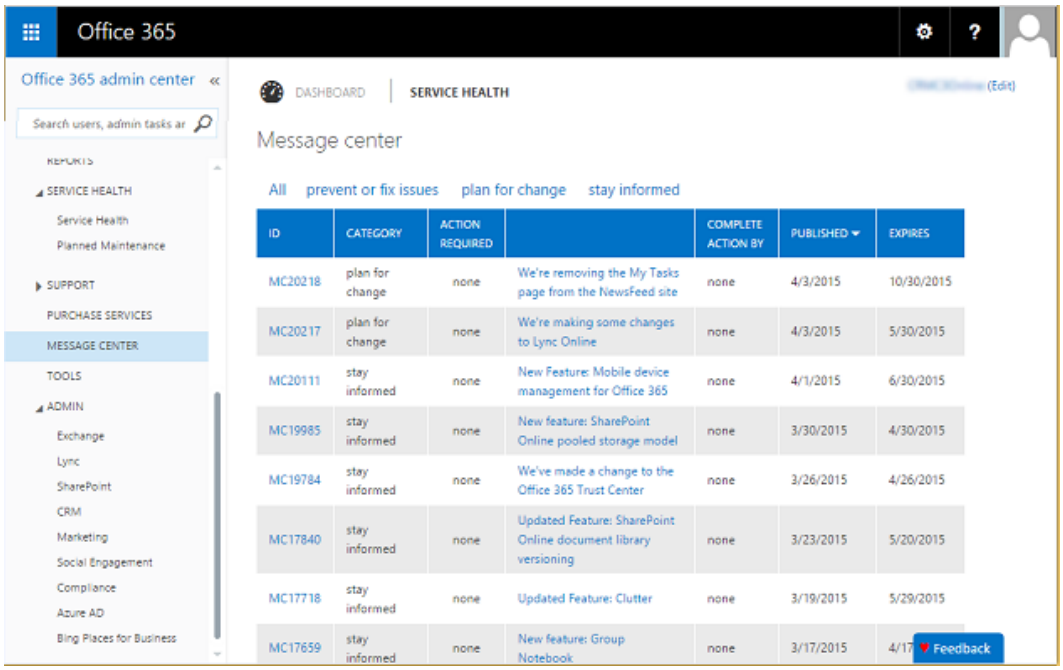


Choose **Planned Maintenance** to see if there are any scheduled events for your online service.



Review your messages

Check out the Message center to see how to fix or prevent issues, plan for service changes, or just to stay informed of new or updated features.

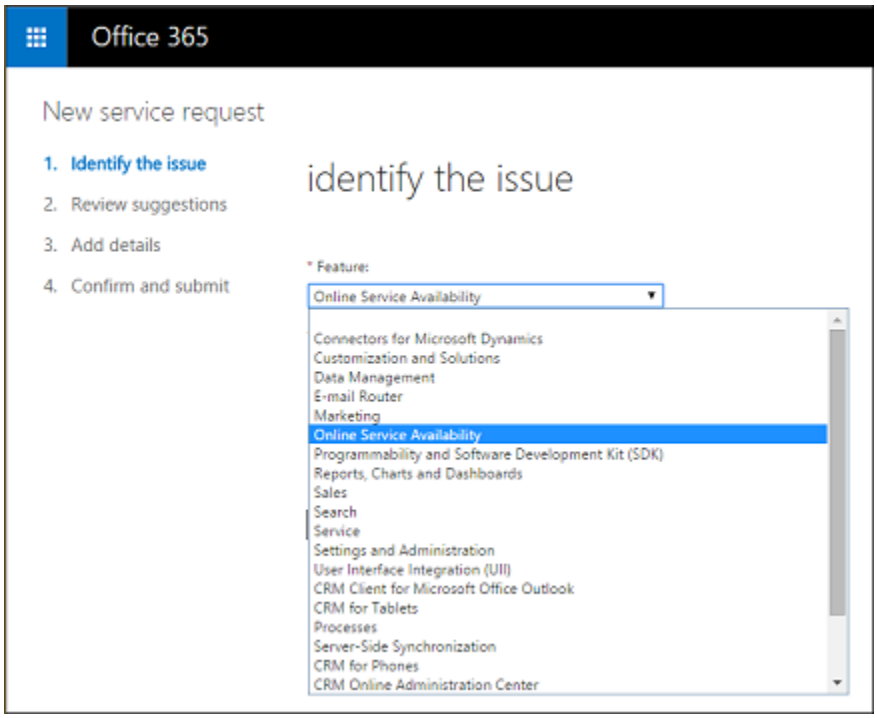


Request service

Having a problem with your CRM Online service? You can create a service request to get the issue resolved.

Create a CRM Online service request

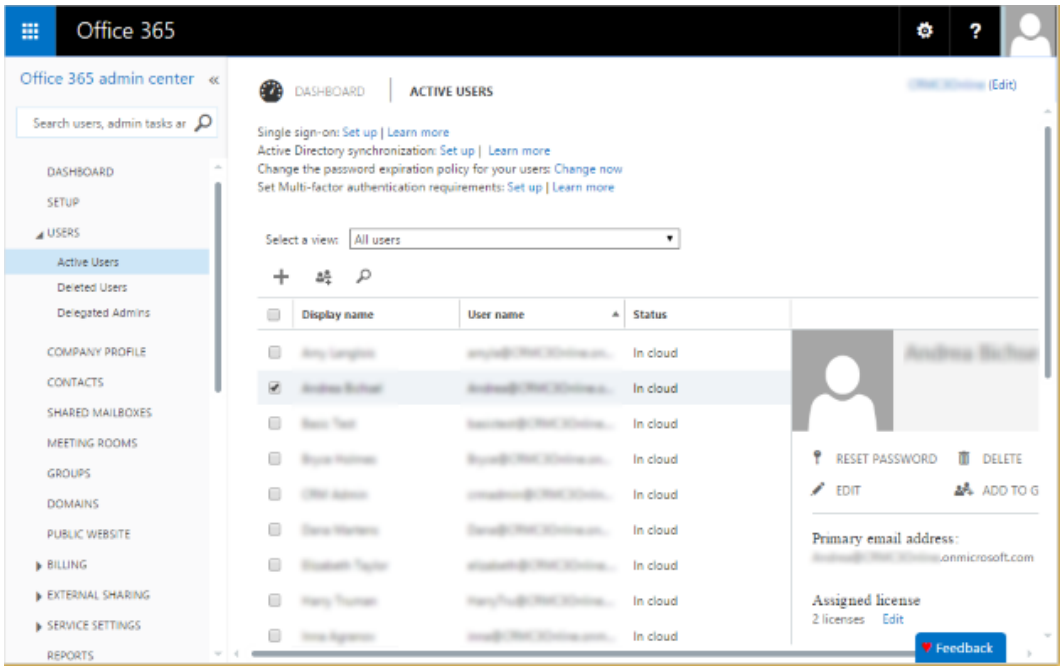
1. Sign in to the Office 365 admin center.
2. In the left-side menu, choose **Support** > **Overview**
3. Under **Create a service request**, choose **Dynamics CRM Online**. You may need to expand the list by choosing **More**.
4. Fill in the information and submit your request.



Manage users

Each user signs in to CRM Online with an Office 365 user ID (more precisely, an Azure Active Directory user ID, see the following Note). Access to CRM Online is controlled through the Office 365 user ID.

You use the Office 365 admin center to add, edit, and delete CRM Online users and to reset passwords.



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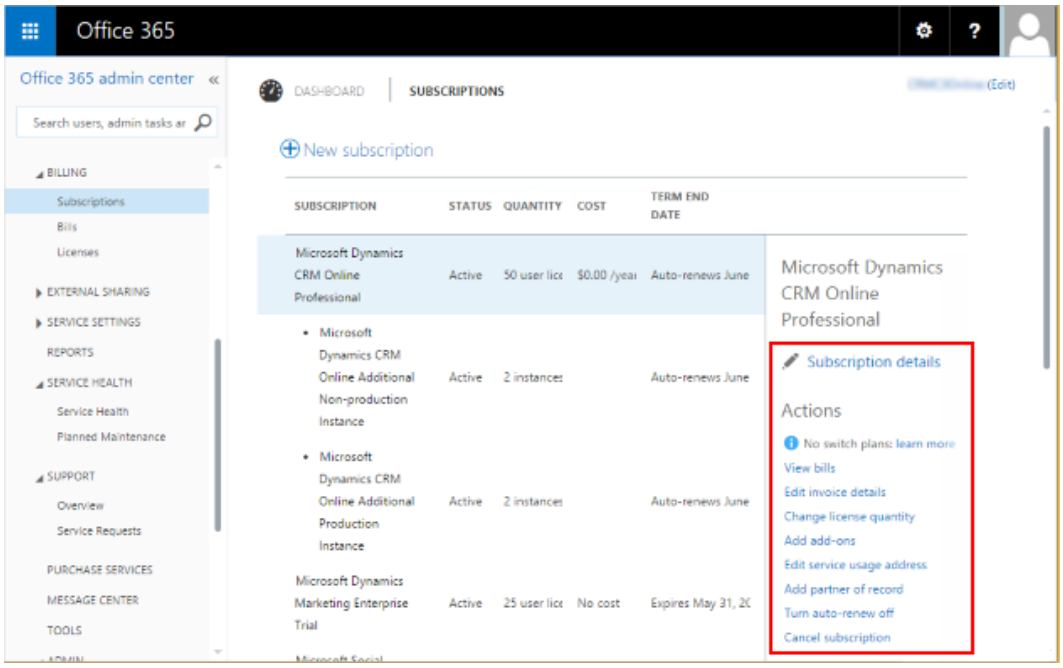
CRM Online uses Azure Active Directory as its identity provider. You access CRM Online through an Azure Active Directory user ID that is created and managed in the Office 365 admin center. For simplicity, we'll refer to the Azure Active Directory user ID as the Office 365 user ID in this documentation.

If your company uses on-premises Active Directory for user identity, you have options that can simplify user management such as providing a single sign-on experience for your users. More information: Manage user account synchronization

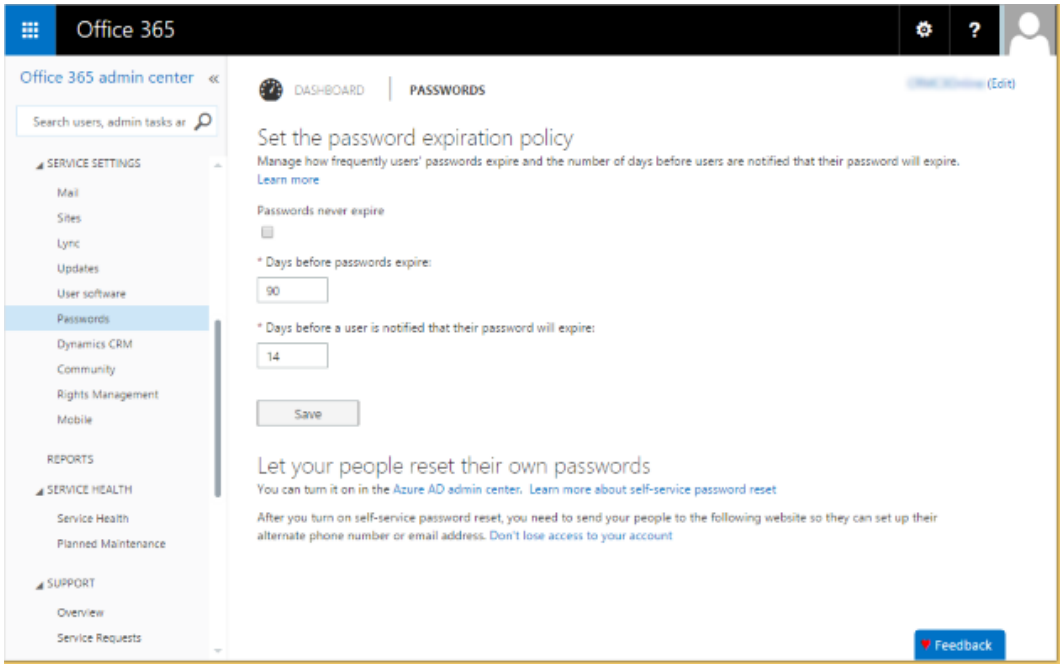
Manage subscriptions

Use the Subscriptions page to adjust licenses, view your bill, add a partner of record, and lots more.



Set the password expiration

Use the Passwords page to set how frequently a user's password expires and the number of days before a user is notified of an upcoming expiration.



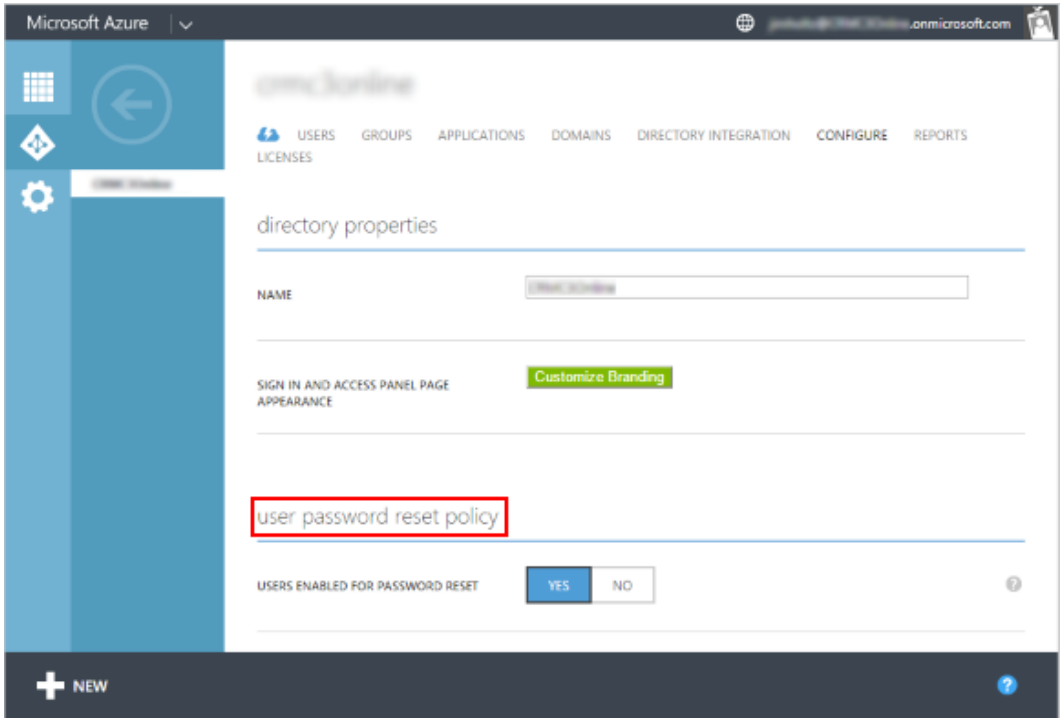
Tip

Note the information on this page about users doing their own password reset. To enable your users to be able to reset their passwords themselves, you'll need to purchase an Azure Active Directory subscription and configure it for password self-service. More information: Self-service password reset in Azure AD: how to enable, configure, and test self-service password reset

Configure self-service password reset and other settings in Microsoft Azure

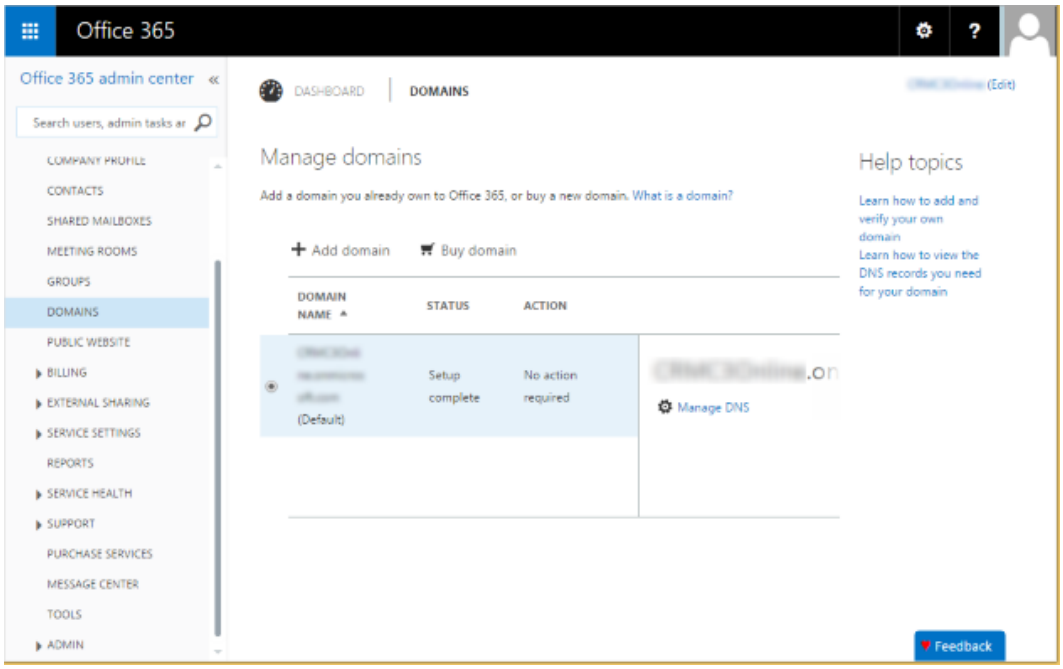
If you have an Azure Active Directory Basic or Premium subscription, you can set it up so users can do their own password reset. You can access Azure Active Directory configuration from the Office 365 admin center. More information: Self-service password reset in Azure AD: how to enable, configure, and test self-service password reset

On the left-side menu of the Office 365 admin center, choose **Admin** > **Azure AD**. Select your subscription in Microsoft Azure and then choose **Configure**.



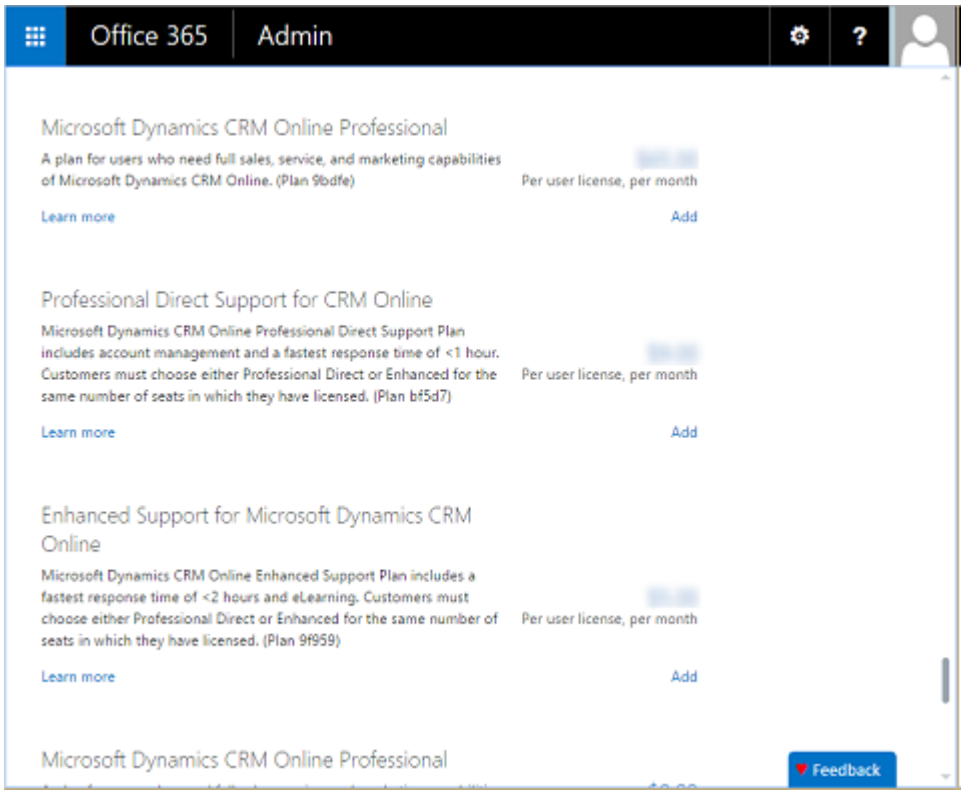
Add your domain

Use the Manage domains page to add your domain to your subscription. When you add your own domain, user sign-ins can match your company's URL. For example, instead of user@contoso.onmicrosoft.com, it could be user@contoso.com. More information: [Verify your domain in Office 365]



Purchase services

On the left-side menu of the Office 365 admin center, choose **Purchase Services** to add licenses or purchase new online services.



See Also

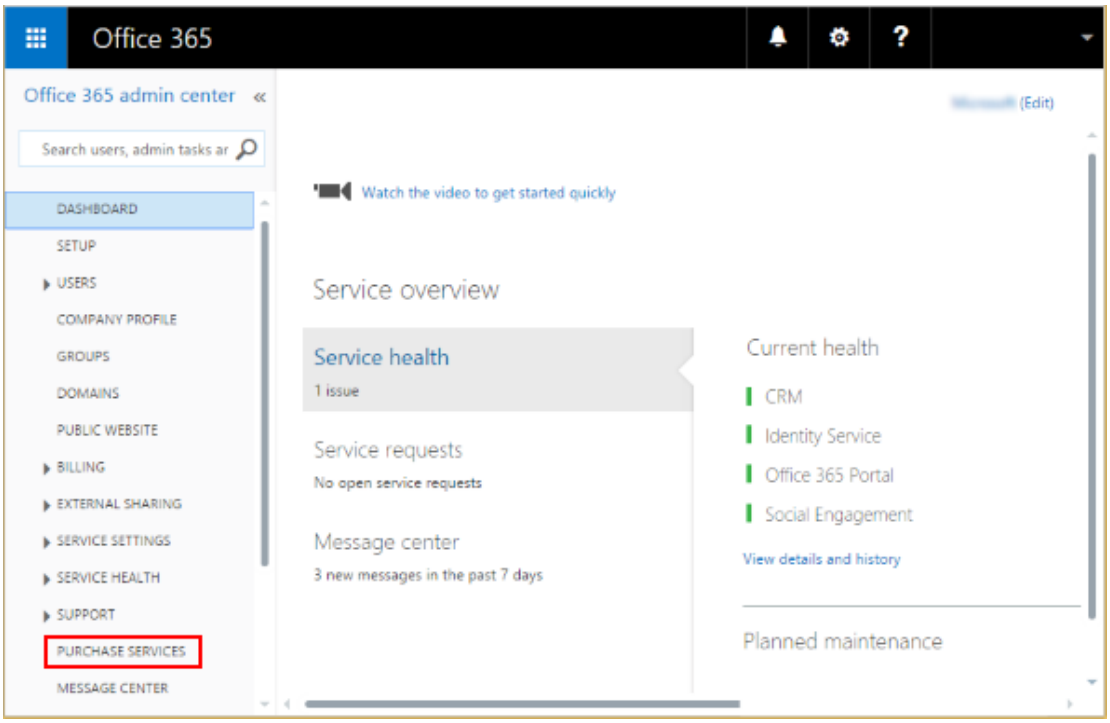
About the Office 365 admin center

Add an Office 365 trial subscription to Microsoft Dynamics CRM Online

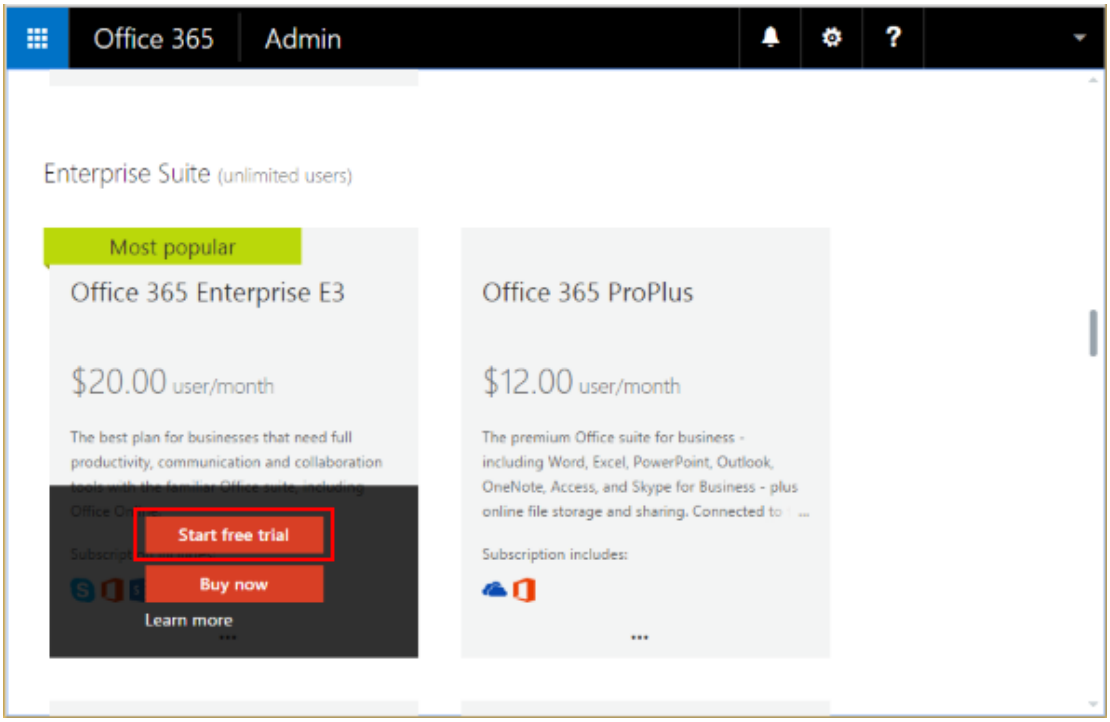
You can add an Office 365 30-day trial to Microsoft Dynamics CRM Online from the Office 365 admin center.

If you want to do a bit of research before jumping in to a trial, see Office 365 for business and Additional resources.

1. Sign in to the Microsoft Office 365 admin center (https://portal.office.com) using Microsoft Office 365 Global administrator credentials.
2. Choose **Purchase Services**.

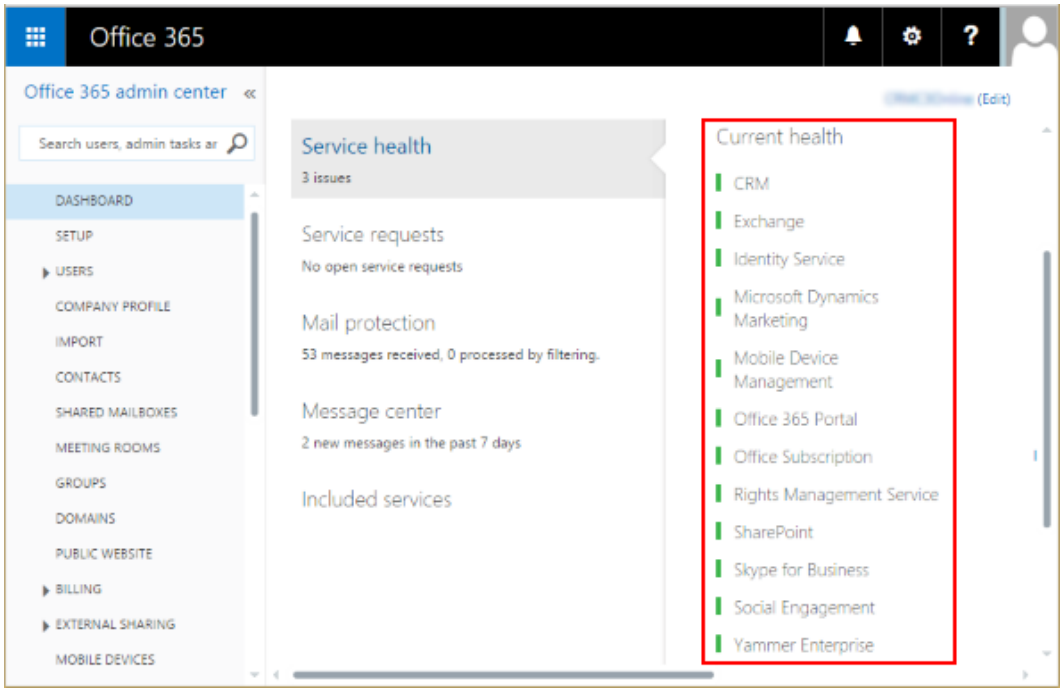


3. On the **Purchase services** page, scroll down and mouse over **Office 365 Enterprise E3**, and then choose **Start free trial**.

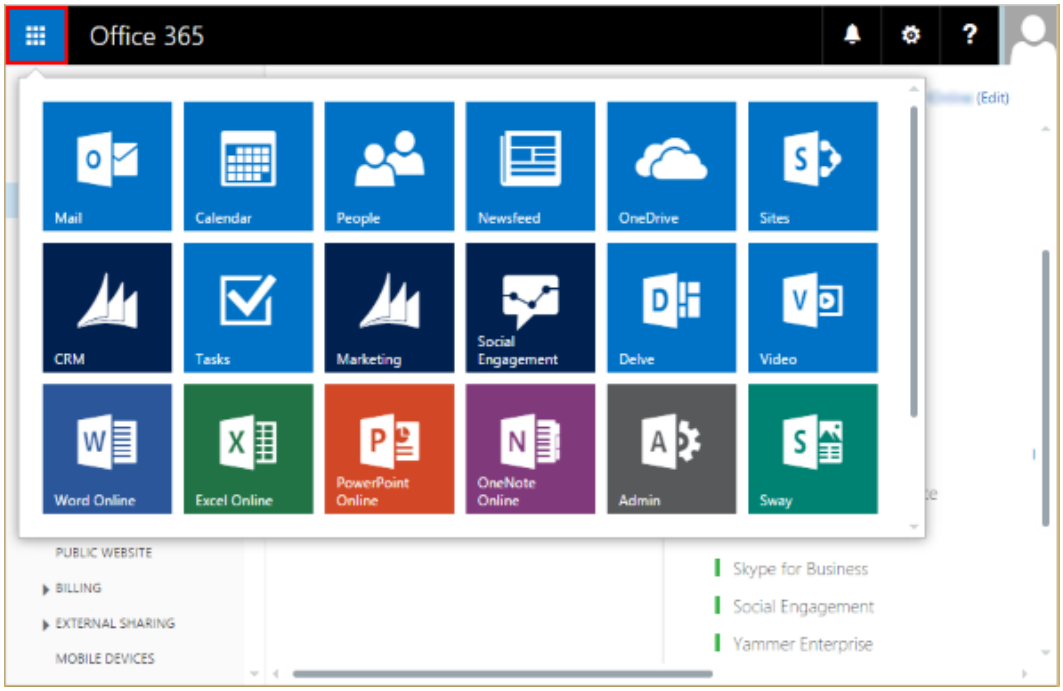


4. Proceed through the pages and complete your trial sign-up.

After your Office 365 trial is active, you'll see new services listed under **Current health**.



Choose the Office 365 app launcher at the top of the Office 365 admin center page to view your new Office 365 services.



Add users, licenses, and security roles

If you're administering a Microsoft Dynamics CRM Online, you are already aware of how CRM Online users are added via the Office 365 admin center and you can skip this topic. If you're new to user management for Office 365 and Microsoft Dynamics CRM Online, this topic is for you.

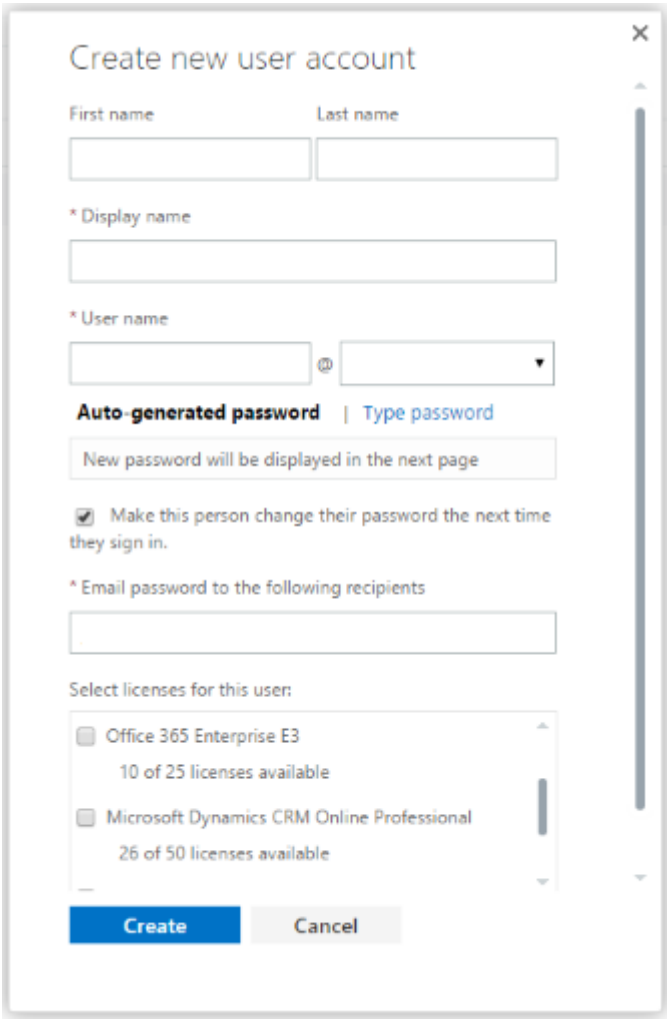
Add users

You add and manage CRM Online users in the Office 365 admin center.

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator or CRM System Administrator credentials.

On the Office 365 admin center page, choose **Users** > **Active Users**. Choose +.

3. Fill in the user settings and proceed through the remainder of the pages. More information: Add users individually to Office 365 - Admin Help



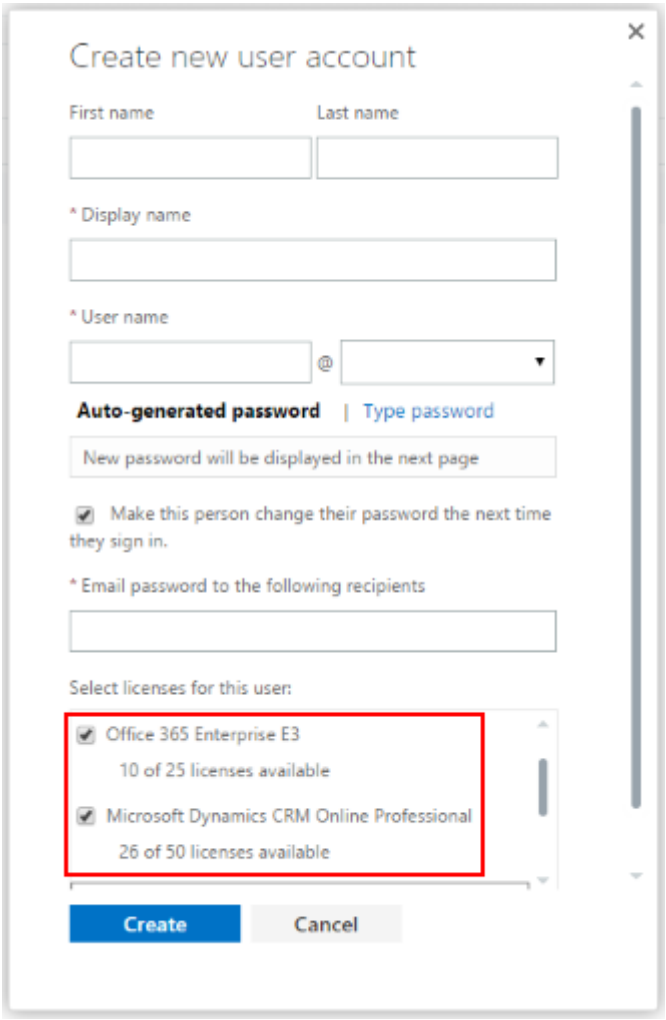
Tip

You can also bulk add users in the Office 365 admin center. You'll still need to manually assign CRM Online security roles.

It may take some time for users created in Office 365 to appear in CRM Online. To force synchronization between Office 365 and CRM Online, sign out of both programs, close any open Internet browsers, and sign in again.

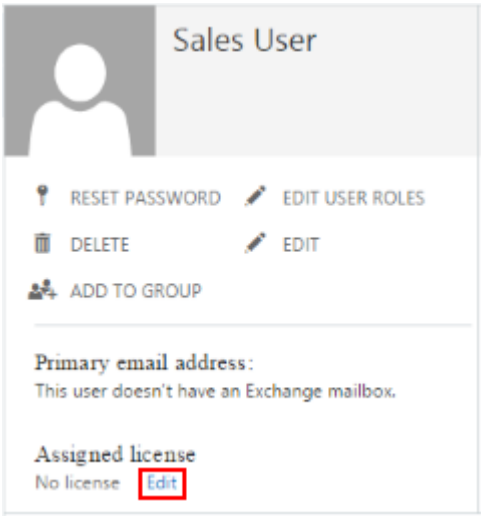
Assign Office 365 and CRM licenses to users

While creating a user, you can assign licenses.

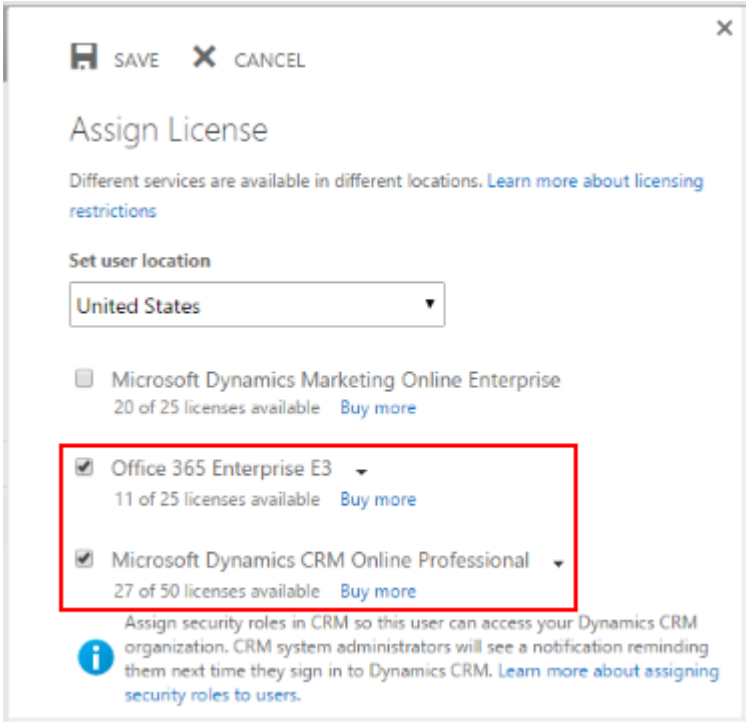


To add or remove a license after you've created a user, do the following:

1. On the Office 365 admin center page, choose **Users** > **Active Users**. Select a user.
2. Under **Assigned license**, choose **Edit**.

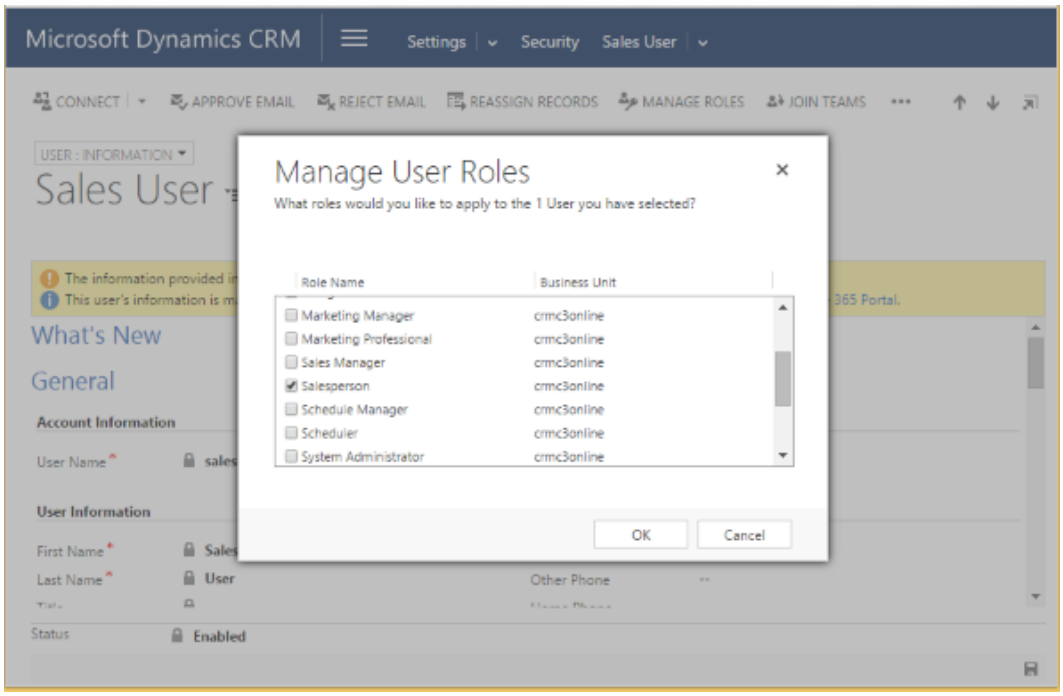


3. Select Office 365 and CRM Online licenses.



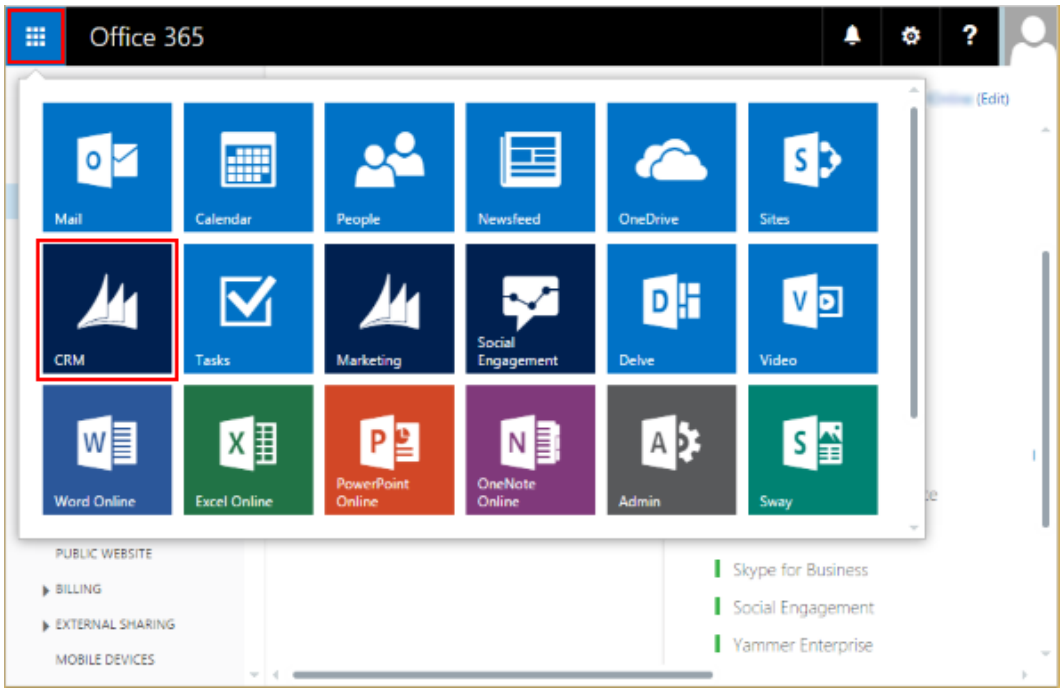
Assign Microsoft Dynamics CRM security roles

For each CRM Online user, you need to assign the user a CRM security role. See “Assign a security role to a user” in Create users and assign Microsoft Dynamics CRM Online security roles for the steps.



Access CRM from the Office 365 admin center

You can navigate to your CRM Online instance directly from the Office 365 admin center.



Note

What you see when you sign in to https://portal.office.com, varies based on your licenses and how long you've been a subscriber. More information: Sign in to CRM Online services

See Also

Create users and assign Microsoft Dynamics CRM Online security roles

Manage user account synchronization

Because Microsoft Dynamics CRM Online user identities are provisioned through Microsoft Online Services, you have multiple options for managing user synchronization between your online and on-premises environments.

Decide on a user management approach

There are three possible methods to manage your user accounts:

1. Manage user accounts in Office 365

   This is the simplest approach but can require more long-term administrative effort. Every time you create a new user account, you will need to create the user in two locations: on-premises

and in Office 365. Name and password changes will require editing the accounts in both locations.

2. Synchronize on-premises directory objects with Office 365

   Active Directory synchronization (also referred to as DirSync) sets up a one-way synchronization relationship between your on-premises Active Directory server and Office 365. You get the benefit of easing the burden of maintaining user accounts without significantly adding to your hardware and failover requirements. However, you will still need to maintain two sets of passwords for your on-premises Active Directory accounts and your Office 365 accounts.

3. Use Active Directory Federation Services (AD FS) to manage users

   This approach requires careful planning for redundancy and failover and requires the most expertise and effort to deploy.

   In this approach, users in your organization can use corporate credentials to access the services in Office 365 that your company subscribes to such as Microsoft Dynamics CRM Online. Users sign in once and don't have to sign in again to access a different service. There's a single password to manage.

Your decision on which method to choose is based largely on the size of your company and the depth and breadth of your IT resources.

Review the following resources to equip you to make the right decision for your company:

- Understanding Office 365 identity and Azure Active Directory
- What is an Azure AD directory?
- Prepare for single sign-on

Tip for admins: provide a single sign-on organization URL for your users

If you've deployed synchronization with single sign-on (option 3 above), you can provide a URL to your users that takes advantage of your company's Active Directory and simplifies the sign-in experience.

The URL follows this pattern:

https://<*yourCRMOrganizationName*>.crm.dynamics.com?whr=<*yourFederationServiceIdentifier*>

You can get the <*yourCRMOrganizationName*> by looking at the URL you use to access Microsoft Dynamics CRM Online. For example, in https://contoso.crm.dynamics.com, *contoso* is <*yourCRMOrganizationName*>.

Important

The following URLs would be used for subscriptions hosted in these locations.

- LATAM/SAM: https://<*yourCRMorganizationname*>.crm2.dynamics.com?whr=<*yourFederationServiceIdentifier*>

- EMEA: https://<*yourCRMorganizationname*>.crm4.dynamics.com?whr=<*yourFederationServiceIdentifier*>
- APAC: https://<*yourCRMorganizationname*>.crm5.dynamics.com?whr=<*yourFederationServiceIdentifier*>
- OCE: https://<*yourCRMorganizationname*>.crm6.dynamics.com?whr=<*yourFederationServiceIdentifier*>
- JPN: https://<*yourCRMorganizationname*>.crm7.dynamics.com?whr=<*yourFederationServiceIdentifier*>
- United States of America Government: https://<*yourCRMorganizationname*>.crm9.dynamics.com?whr=<*yourFederationServiceIdentifier*>

You can get the Federation Service identifier for your organization by using the following steps:

1. On the server that is running AD FS 2.0, click or tap **Start** > **Administrative Tools** > **AD FS 2.0 Management**.
2. In the console tree, right-click or tap **AD FS 2.0**, and then click or tap **Edit Federation Service Properties**.
3. Select the **General** tab.

   Make note of your Federation Service identifier. For example: http://sts1.fabrikam.com/adfs/services/trust

Your URL should look like:
https://*contoso*.crm.dynamics.com?whr=*http://sts1.fabrikam.com/adfs/services/trust*

Send this URL to your Microsoft Dynamics CRM Online users and encourage them to bookmark it.

Sign in to CRM Online services

Multiple Microsoft Dynamics CRM Online services (Microsoft Social Engagement, Microsoft Dynamics Marketing, Yammer, etc.) are now available. You can sign in to these services using the Office 365 admin center or sign in directly.

Tip
Admins, be sure to share this information with your end users.

In This Topic

For admins: sign in to the Office 365 admin center

End users and https://portal.office.com

Direct sign in to CRM Online

Direct sign in to Microsoft Social Engagement

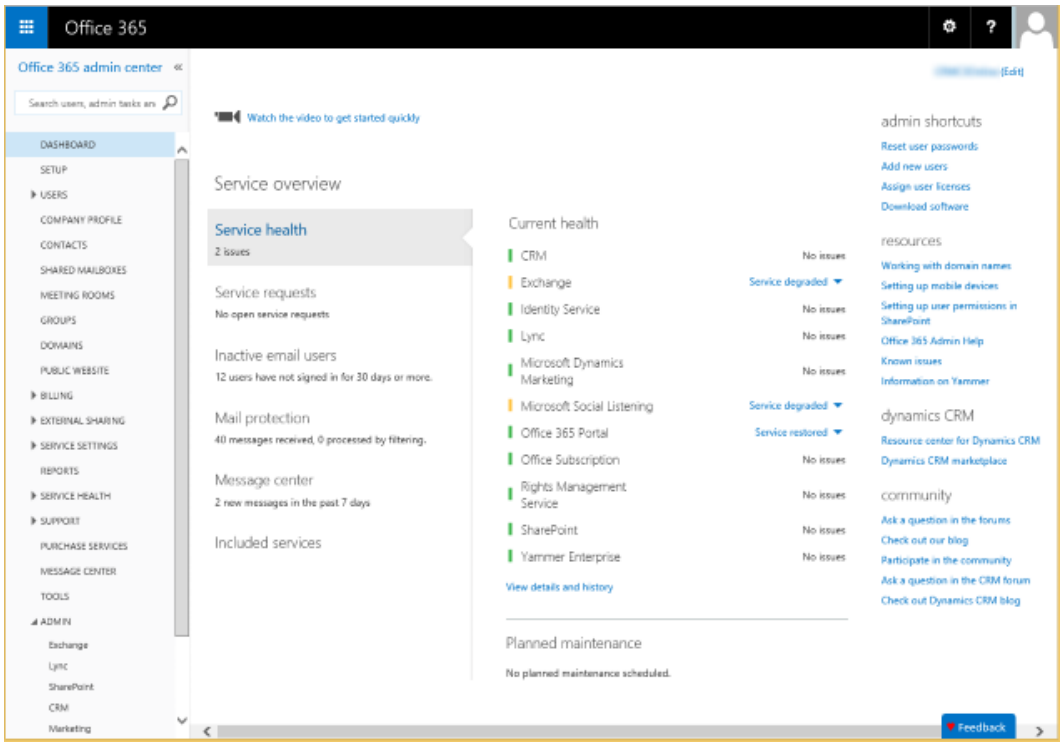
Direct sign in to Microsoft Dynamics Marketing

For admins: sign in to the Office 365 admin center

A single URL gives admins access to all the CRM Online services associated with their Microsoft Online Services environment:

https://portal.office.com

In the Office 365 admin center, you can see your service health, manage users, manage licenses, and more for all the online services associated with your account.



More information: What's the Office 365 admin center and how does it relate to CRM Online?

End users and https://portal.office.com

When end users sign in to https://portal.office.com, what they see varies based on the user account licenses:

In the table below, **X** means the user has a license for that service.

			If you have these licenses…			
CRM Online	**X**	**X**	**X**	**X**		

			If you have these licenses…			
Office 365 Enterprise Plan	**X**	**X**			**X**	
Microsoft Social Engagement or Dynamics Marketing	**X**		**X**		**X**	**X**
…this is the page that opens:	Get started, then Outlook Web App	Get started, then Outlook Web App	CRM Online	CRM Online	Get started, then Outlook Web App	Microsoft Social Engagement or Dynamics Marketing

For example:

- Users with only a CRM Online license will sign in to CRM Online.
- Users with an Office 365 license and any other service license will see the “Get started with Office 365” page for 30 days and then Outlook Web App after 30 days.
- Users licensed for Microsoft Social Engagement or Microsoft Dynamics Marketing will sign in to CRM Online if they have a CRM Online license and no Office 365 license.

Note: In Outlook Web App, you can use the Office 365 app launcher to open CRM Online.

Direct sign in to CRM Online

To directly sign in to the CRM Online service, use:

https://<organization>.crm.dynamics.com

Note

For other regions, replace .crm with:

- .crm2 for South America (LATAM/SAM)
- .crm4 for Europe, Middle East, Africa (EMEA)
- .crm5 for Asia Pacific (APAC)
- .crm6 for Oceania (OCE)
- .crm7 for Japan (JPN)
- .crm9 for United States of America Government

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or you have a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

Direct sign in to Microsoft Social Engagement

To directly sign in to the Microsoft Social Engagement service, use:

https://listening.microsoft.com/app/<appID>

This URL which includes the appID is sent to the CRM administrator in an email invitation.

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or you have a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

Direct sign in to Microsoft Dynamics Marketing

To directly sign in to the Microsoft Dynamics Marketing service, use:

https://<tenant>.marketing.dynamics.com

This URL is sent to the CRM administrator in an email invitation.

Your username depends on whether your organization uses the standard Office 365 domain (for example, username@contoso.onmicrosoft.com) or you have a custom domain (for example, username@contoso.com).

CRM administrators can provide the URL and sign-in information.

See Also

Troubleshoot sign-in problems

Sign in to Microsoft Dynamics Marketing

Social Engagement Help Center

Set up CRM Online to use Exchange Online

You know how important email is to your business and what happens when email stops flowing for even a short time. You can rid yourself of much of the stress of managing an email server by letting Microsoft Office 365 host your email service with Exchange Online. Then integrate Exchange Online with Microsoft Dynamics CRM Online to take advantage of CRM Online email features.

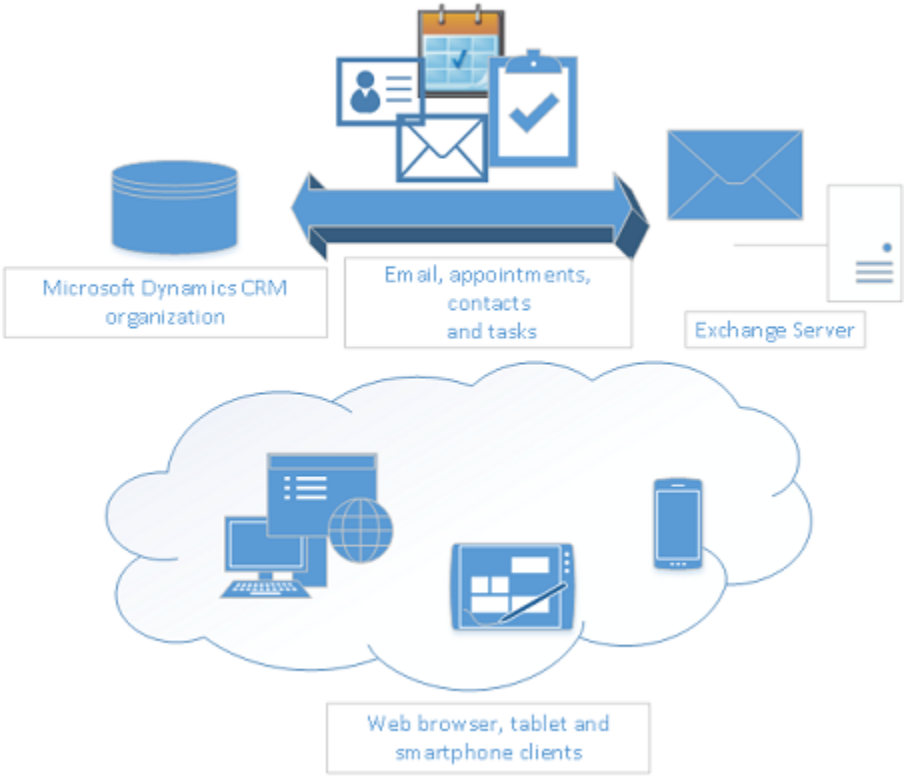
Start by picking a deployment scenario.

Deployment Scenarios

You have choices when it comes to synchronizing messaging between Exchange Online and CRM Online. Review the following scenarios to determine the best choice for your company. More information: Set up and manage email processing and CRM for Outlook

Scenario 1: Server-side synchronization

You can set synchronization of email messages, tasks, contacts, and appointments between CRM Online and Exchange Online. To use this functionality you don't have to install and maintain a separate application. Setup is simpler and maintenance is easier compared to other deployment scenarios. Server-side synchronization is the preferred option for organizations with users who run Microsoft Dynamics CRM in a web browser or on mobile devices, such as tablets or smartphones.



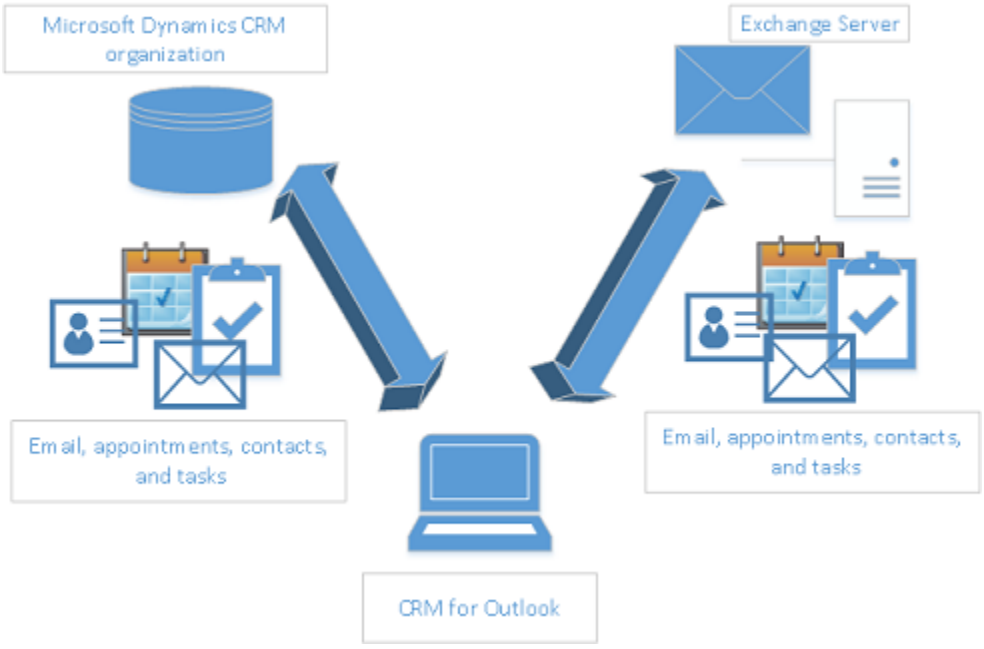
You configure and manage server-side synchronization from within CRM Online. More information: Set up server-side synchronization of email, appointments, contacts, and tasks

Scenario 2: Microsoft Dynamics CRM for Outlook

Microsoft Dynamics CRM for Outlook provides messaging data integration capabilities on a single-user basis. Dynamics CRM for Outlook is a Microsoft Outlook add-in that doesn't require

server-side synchronization or the Email Router as the synchronization agent runs in the Microsoft Outlook client on the user's PC. This is frequently the better option for organizations that regularly use Microsoft Outlook, especially if they need rich offline data capabilities. Note that if Dynamics CRM for Outlook isn't running, messaging synchronization doesn't occur until Microsoft Outlook is started again.

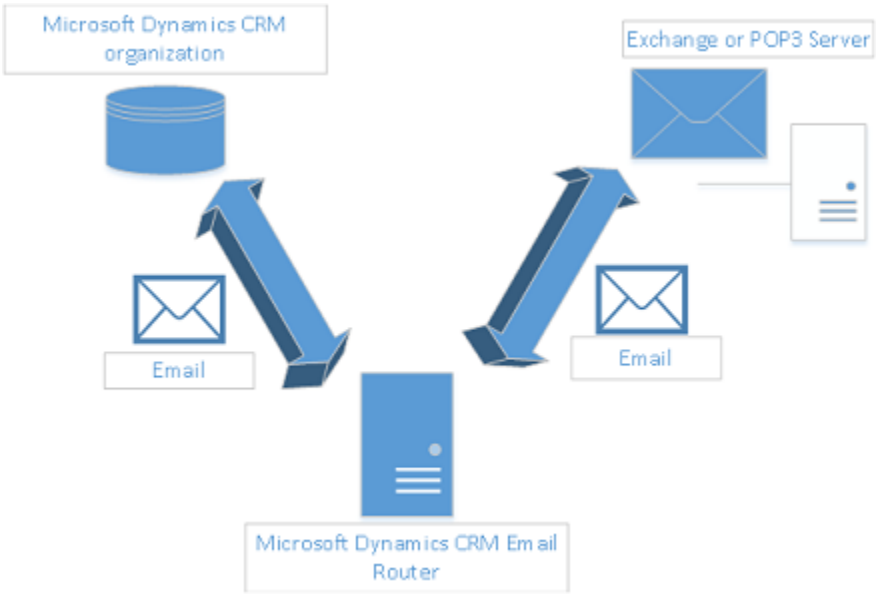
In this scenario, all of the Microsoft Dynamics CRM Online users in your company will use Microsoft Dynamics CRM for Outlook as the email client. Microsoft Dynamics CRM for Outlook must be installed for every user in the organization. More information: Set up CRM for Outlook



Scenario 3: Email Router

The **Microsoft Dynamics CRM Email Router** is a separate application that provides centrally managed Exchange Server and POP3/SMTP-based email server email routing for users, queues, and forward mailboxes. The Email Router runs continuously as a service and only synchronizes email messages. It cannot be used to synchronize appointments, contacts, or tasks.

The Email Router enables you to configure an interface between your Microsoft Dynamics CRM deployment and one or more servers running Exchange Server, Exchange Online accounts, or POP3 servers, for incoming email. For outgoing email, one or more SMTP servers, Exchange Web Services (EWS), or Exchange Online accounts are supported. Email messages come into the Microsoft Dynamics CRM system through the Email Router. More information: Set up Email Router



See Also

Exchange Online

Set up CRM Online to use Sharepoint Online

When you use Microsoft SharePoint Online with Microsoft Dynamics CRM Online, you can:

- Create, upload, view, and delete documents stored in SharePoint from within Microsoft Dynamics CRM.
- Use the SharePoint document management abilities within Microsoft Dynamics CRM, such as checking the document in and out, viewing version history, and changing document properties.
- Enable non-Microsoft Dynamics CRM users, such as customers who want to review a bid, to directly access the SharePoint documents, provided they have the appropriate permissions.

Important

This topic is for organizations who wish to deploy for the first time or upgrade to server-based SharePoint integration. After you enable server-based SharePoint integration, you can't revert to the previous client-based authentication method.

For some organizations, using the Microsoft Dynamics CRM List Component solution might be a better choice. More information: Important considerations for server-based SharePoint integration and SharePoint Document Management software requirements for Microsoft Dynamics CRM.

Tip

Check out the following video: Microsoft Dynamics CRM 2013 Spring '14 SharePoint New Features.

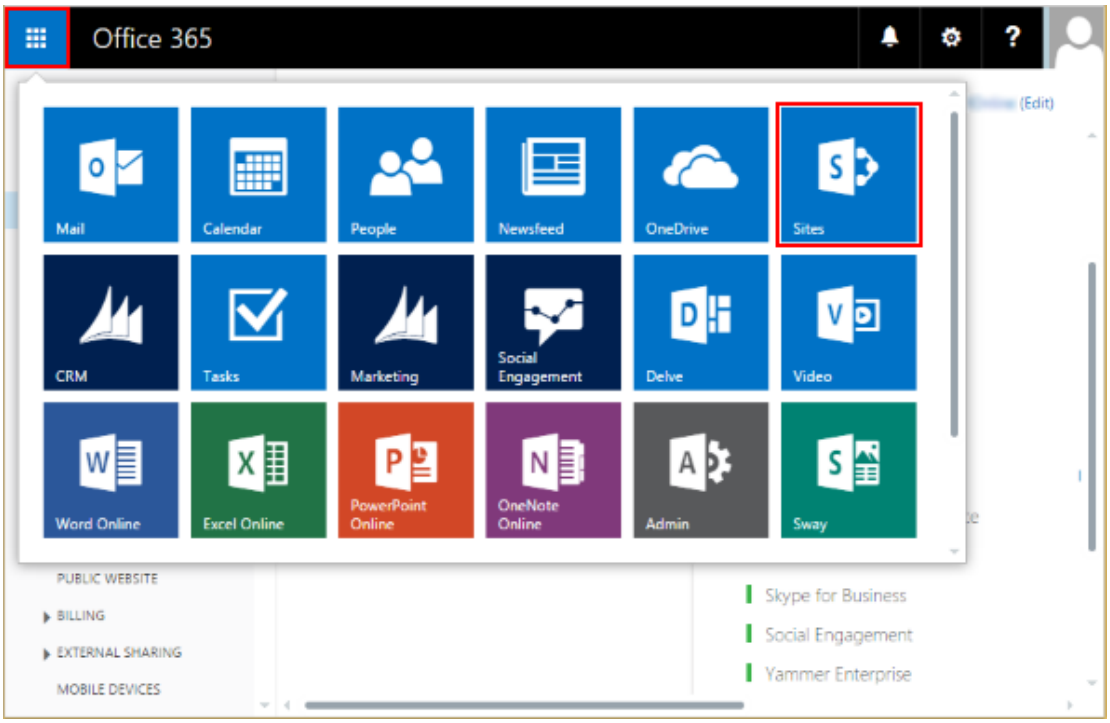
To set up CRM Online to use SharePoint Online, complete the following steps.

Assign user permissions to the Team SharePoint site

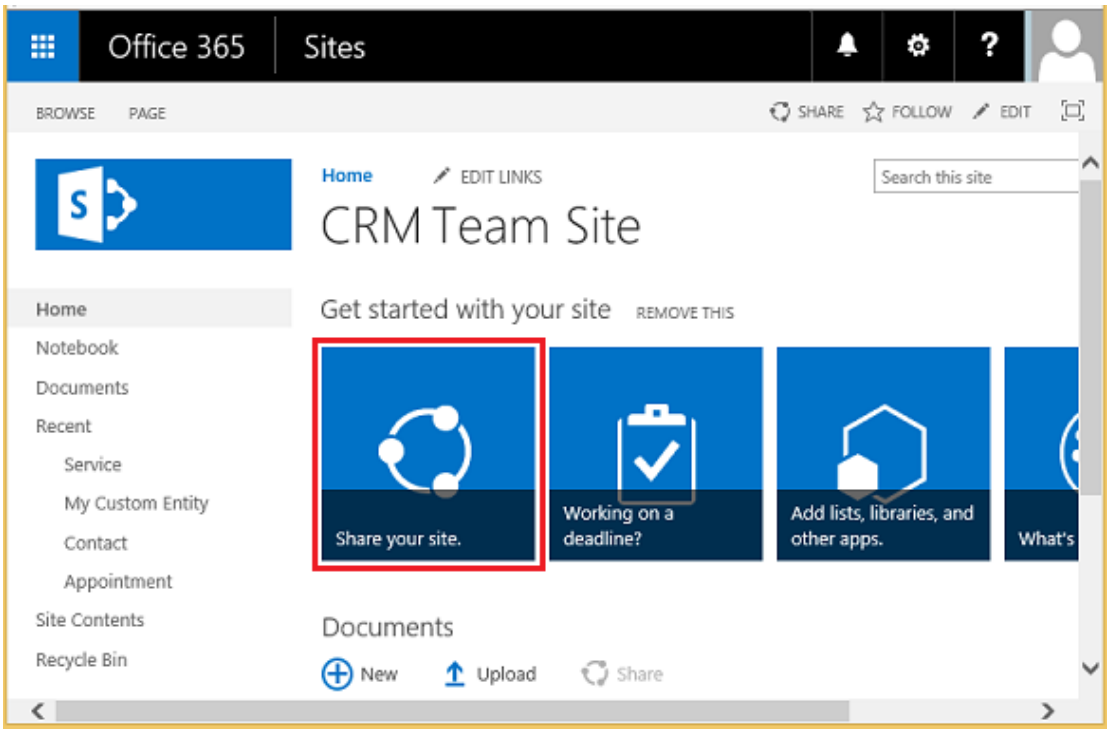
Your Microsoft Dynamics CRM Online and Microsoft Office 365 users are not automatically allowed access to your SharePoint sites. You must work within the SharePoint site to assign specific permission levels to individual users or groups.

Assign users to the Team site

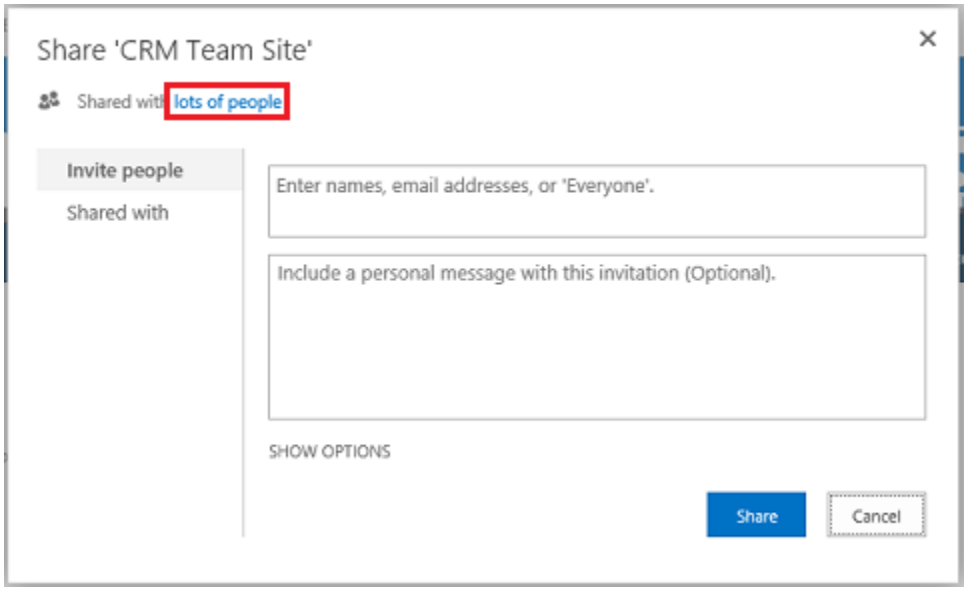
1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator or CRM System Administrator credentials.
2. Open the Office 365 app launcher, and then choose **Sites**.



3. On the **Sites** page, choose **Team Site**.
4. On the Home page, choose **Share your site**.



5. To view the default permissions for your team site, choose **lots of people**.



6. By default, all users in your Microsoft Office 365 organization are able to add and edit documents on the Team SharePoint site. To invite others, choose **Invite people** and add people external to your organization to share documents.

For more information about SharePoint permissions, see Introduction: Control user access with permissions

Configure CRM Online for SharePoint document management

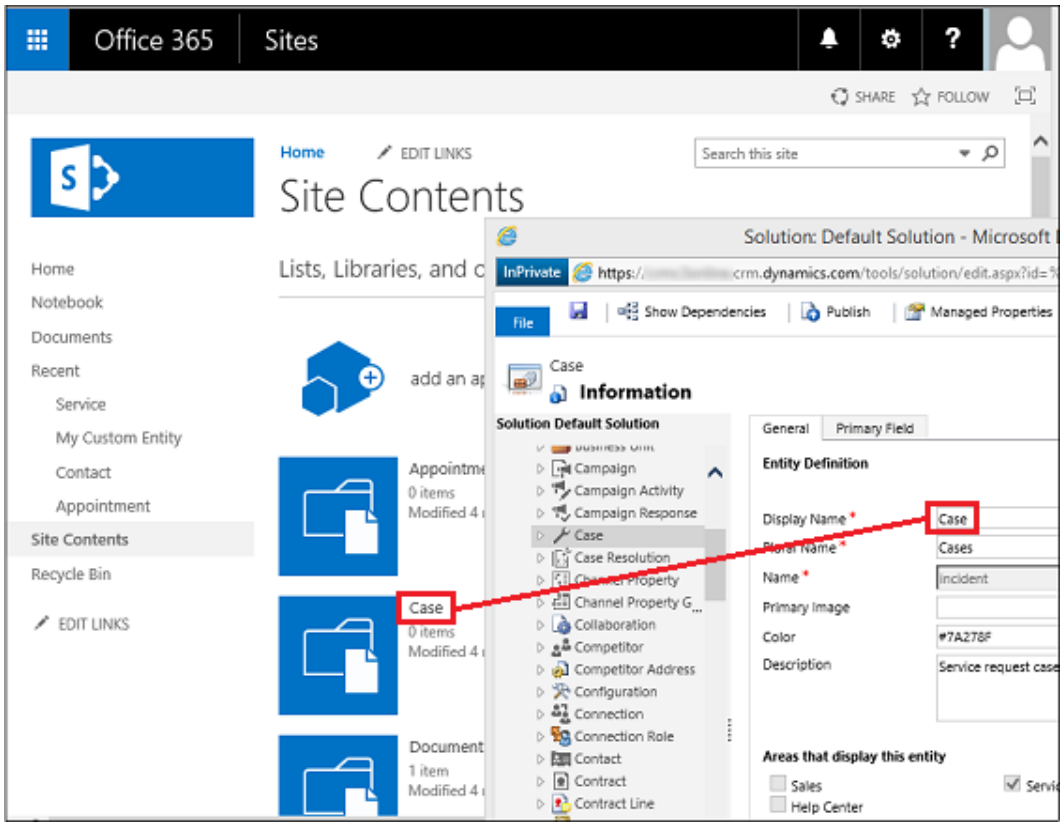
For CRM Online organizations, Microsoft Dynamics CRM Online Spring '14 introduces a new server-based (using server-to-server authentication) SharePoint integration that removes the need to install or continue to use the Microsoft Dynamics CRM List Component solution.

If you are a new organization and have not yet deployed document management, see Configure a new organization.

If your organization is already using document management with Microsoft Dynamics CRM List Component, you can switch to server-based SharePoint integration. More information: Switching from the list component or changing the deployment

Important

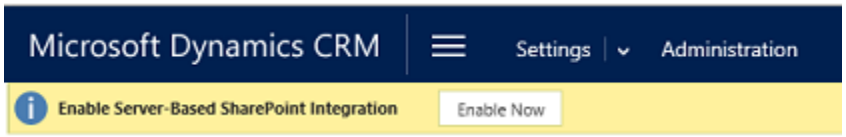
The Microsoft Dynamics CRM List Component builds the SharePoint library using the internal name of the document-enabled entity in CRM. Server-based SharePoint integration uses the entity display name. When you upgrade to server-based SharePoint integration, be sure to check that the display names in your document library on SharePoint match the entity display names in CRM. More information: "Validation Error" when you try to configure server-based SharePoint integration for Microsoft Dynamics CRM Online and SharePoint Online.



These names should match.

Configure a new organization

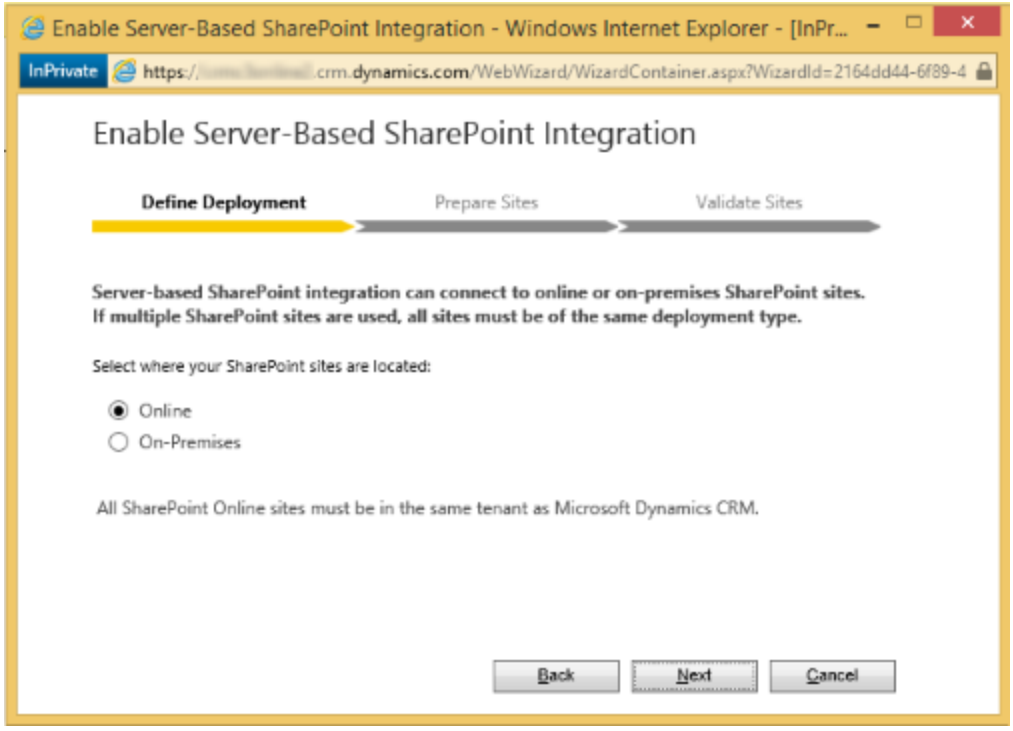
If your CRM organization has not deployed document management, when a CRM System Administrator logs in an alert message will be displayed to enable server-based SharePoint integration.



Note

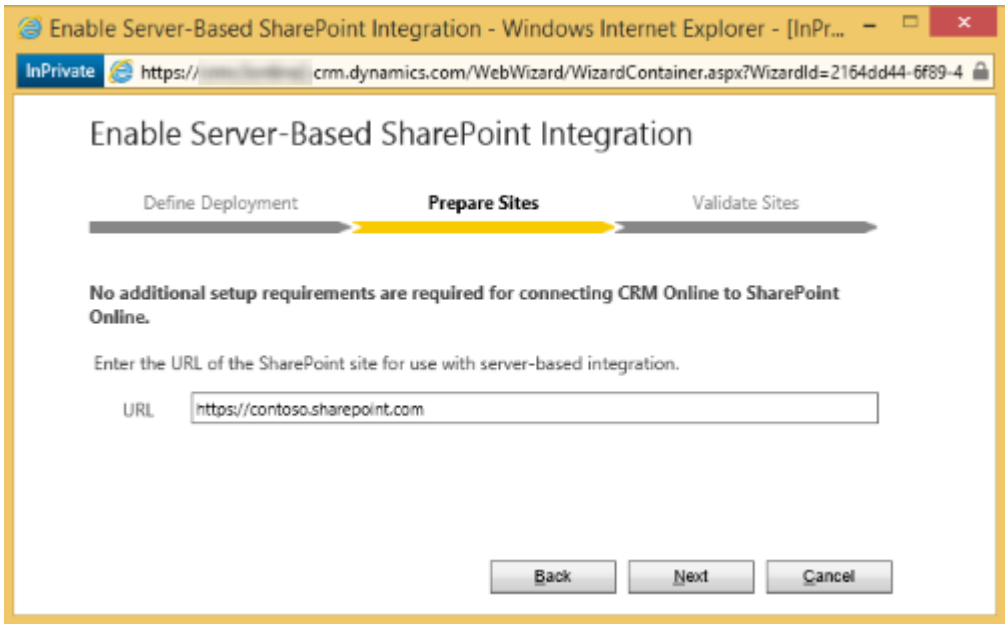
If you don’t see the alert and have not previously enabled server-based SharePoint integration, clear your browser cache or open CRM using Internet Explorer with InPrivate browsing to have the alert display again. Once you configure server-based integration, the alert will no longer appear.

1. In the Enable Server-based SharePoint Integration alert click **Next**.
2. Choose **Online** for where your SharePoint sites are located, and then choose **Next**.



3. If your Microsoft Dynamics CRM Online is not connected to a SharePoint online site, enter the URL (for example https://contoso.sharepoint.com) of your SharePoint site that you will use for auto folder creation, and then choose **Next**.

> **Tip**
> To see your SharePoint site collections, in the Office 365 admin center, choose **Admin** > **SharePoint**, and then choose **site collections**.



4. The URL will be checked for being a valid SharePoint online site and for existing in the same Office 365 tenant as your CRM organization. After enabling server-based SharePoint integration you can't go back to the previous client-side integration. Choose **Enable**.

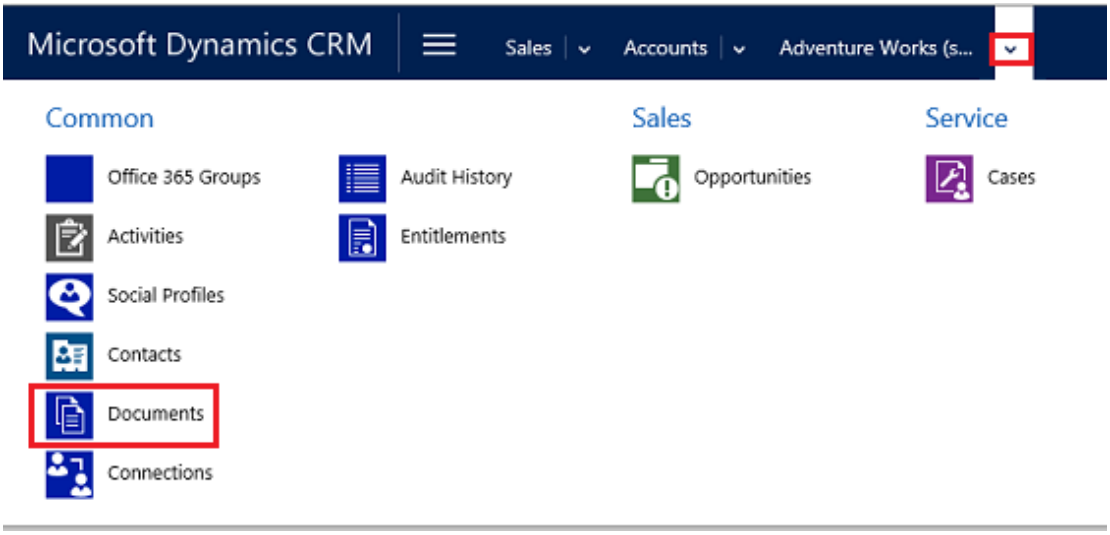
   After you enable server-based SharePoint the options to Install List Components and to enable server-based integration will no longer appear as an option in Document Management.

   Once server-based SharePoint integration is enabled you will need to enable the entities you want available for document management integration. More information: [Help & Training: Enable document management on entities]

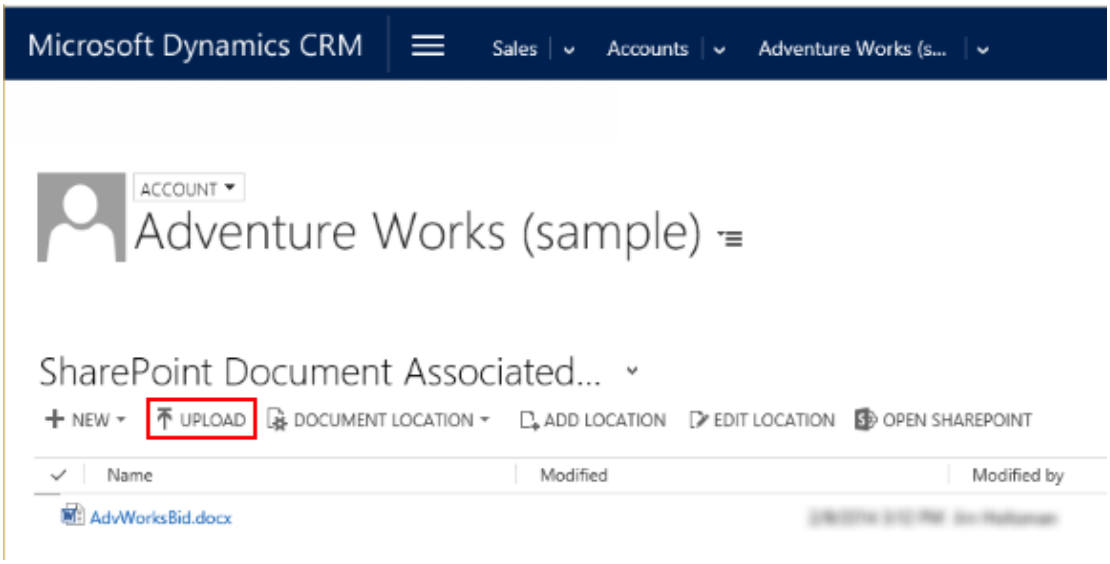
Using Document Management

You are now ready to add document storage locations to the entities you enabled above and start managing documents. Begin by opening a document management-enabled record (for example, Contact).

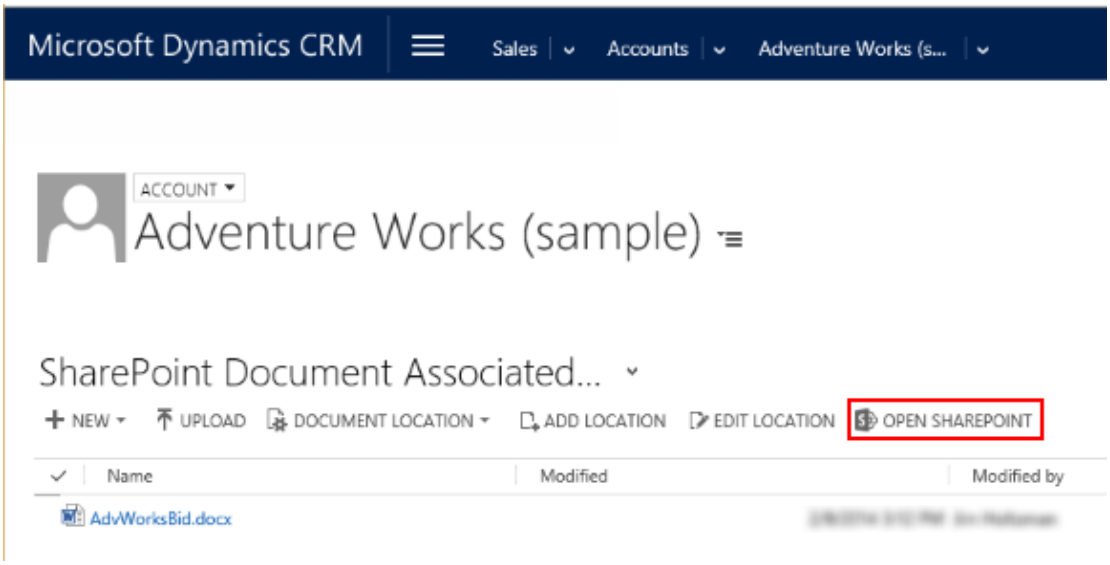
1. Browse to your Microsoft Dynamics CRM Online web application.
2. Go to **Sales** > **Accounts**. [(How do I get there?)]
3. Choose an account, such as the **Adventure Works** sample account.
4. On the nav bar, choose the down arrow next to the account name, and then choose **Documents**.



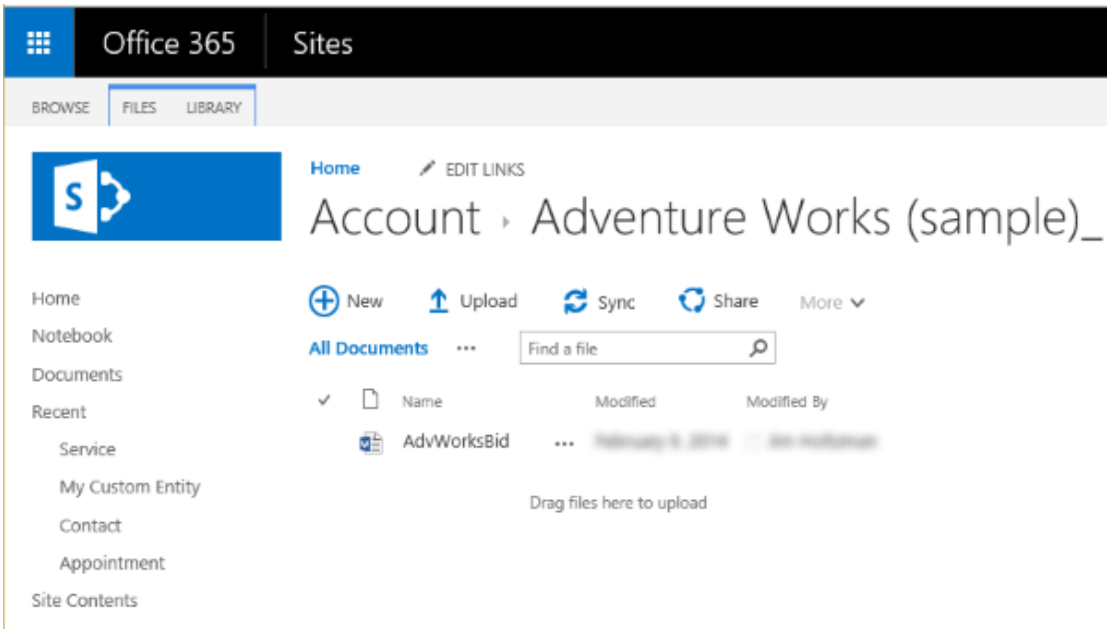
5. Choose **Upload**, and then browse to a document to upload to the new folder in your Microsoft Office 365 SharePoint Online Team site.



6. The document is now part of your Microsoft Dynamics CRM Online documents list. To see the document in your Microsoft Office 365 SharePoint Online Team site, choose **Open SharePoint**.

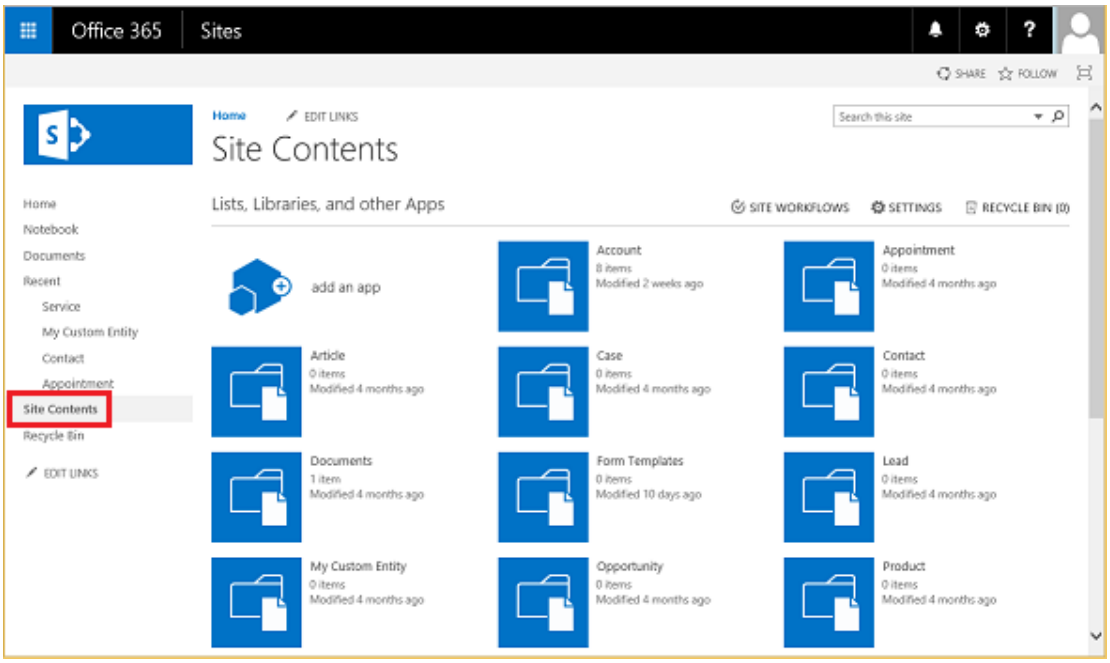


The document is now in your Microsoft Office 365 SharePoint Online Team site.



7. Choose **Site Contents** to see all the document libraries created for the managed entities you selected.

   The entities you selected to be managed by Document Management appear as document libraries (for example: Account, Article, Case, Lead, Opportunity, Product, Quote, and Sales Literature).



More information: [Help & Training: Manage SharePoint documents from within Microsoft Dynamics CRM]

See Also

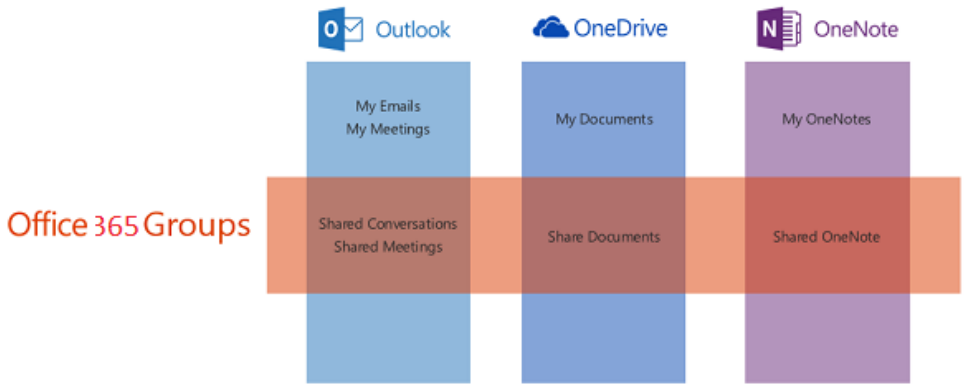
[Manage your documents using SharePoint]

[SharePoint Online for IT pros]

[SharePoint and CRM]

Deploy Office 365 Groups

Office 365 Groups, available with Dynamics CRM Online, provides a new environment for collaboration with Microsoft Office 365 users who don't use CRM. For example, use Office 365 Groups when a sales team has a major opportunity requiring input from several people who don't have access to CRM. Office 365 Groups provides a single location to share documents, conversations, meetings, and notes. You can enable Office 365 Groups for any entity.



Important

This preview feature is available with CRM Online 2015 Update 1 and is only available in English.

To give feedback about this feature first, register your account on the Microsoft Connect site and then submit your feedback.

In This Topic

Provision Office 365 Groups Preview

Check required privileges

Configure Office 365 Groups

Known issues

Provision Office 365 Groups Preview

Office 365 Groups is a CRM solution you provision from your Office 365 admin portal.

Note

Users must have an Exchange mailbox set up to use Office 365 Groups. Exchange is already properly configured for Microsoft Dynamics CRM Online organizations as a part of Office 365. You also need to enable server-based SharePoint integration to see documents in an Office 365 Group; you don't have to use SharePoint integration, only set up the connection.

More information: TechNet: Set up SharePoint integration

1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator or CRM System Administrator credentials.
2. Choose **Admin** > **CRM**.

3. Choose the **Instances** tab.
4. Choose your instance, and then choose **Solutions**.
5. Select **Office 365 Groups** and then choose **Install**.
6. Review the terms of service and then choose **Install**.

Once installation of the solution has completed, you can configure Office 365 Groups.

Note
When you install a solution, your CRM Online site is taken offline in maintenance mode for a short time. We recommend you install the solution when it's least disruptive to users.

Check required privileges

The security privilege, **ISV Extensions**, is required to use Office 365 Groups. You can add or remove this privilege from custom or default security roles to meet your business needs. If a user doesn't have this privilege, they won't be able to see the Office 365 Groups item in a record's navigation menu.

1. Go to **Settings** > **Security**. (How do I get there?).
2. Choose **Security Roles**.
3. Choose the security role to check and then choose the **Customization** tab.
4. In the **Miscellaneous Privileges** section, review the **ISV Extensions** privilege setting. If the security role doesn't have the **ISV Extensions** privilege, select it to set it to Organization.
5. Choose **Save and Close**.

Configure Office 365 Groups

Once you provision Office 365 Groups, you can enable them for any entity. Security group membership is associated with the entity. You configure Office 365 Groups in CRM Online.

1. In CRM Online, choose **Settings** > **Office 365 Groups**.
2. On the **Office 365 Groups Settings** page, choose **Add configuration** and choose an entity from the drop-down list. Repeat this step for each entity you want to enable.
3. Optionally, you can choose **Auto-create** for an entity to have a new group automatically created when a new record for that entity is created. However, we recommend you choose this option only for entities that typically require large groups to collaborate.
4. When you have added all the entities you want to enable for Office 365 Groups, choose **Publish All**.

All of your pending system customizations will be published, including those you may have saved but not published in another area.

Known issues

You need to have the latest version of CRM Online, CRM Online 2015 Update 1, to install the Office 365 Groups Preview. If Office 365 Groups Preview appears as an available solution in the CRM Online Administration Center, but you receive the following error when trying to install, "Solution install failed. Please try again later. If the problem persists, contact customer support," you'll need to update your instance of CRM Online before you can install Office 365 Groups Preview.

See Also

Set up CRM Online to use Exchange Online

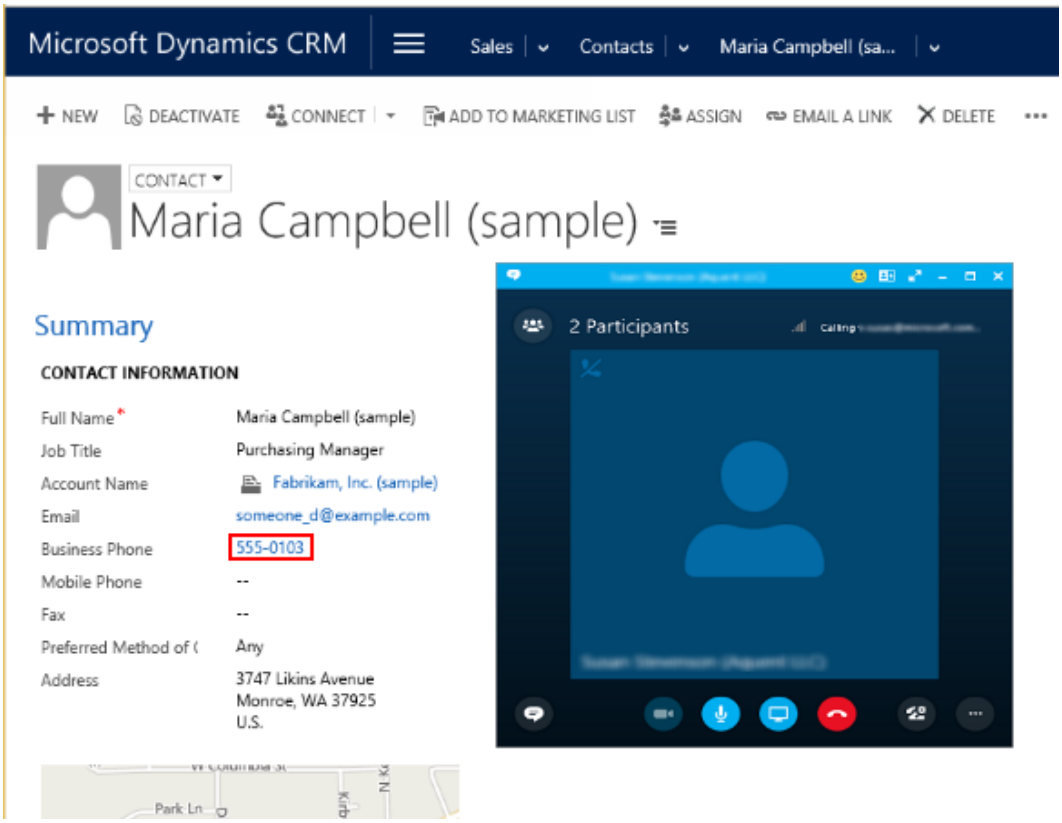
Collaborate with your colleagues using Office 365 Groups

Blog: It's here - Office 365 Groups in CRM Online

Set up CRM Online to use Skype or Lync

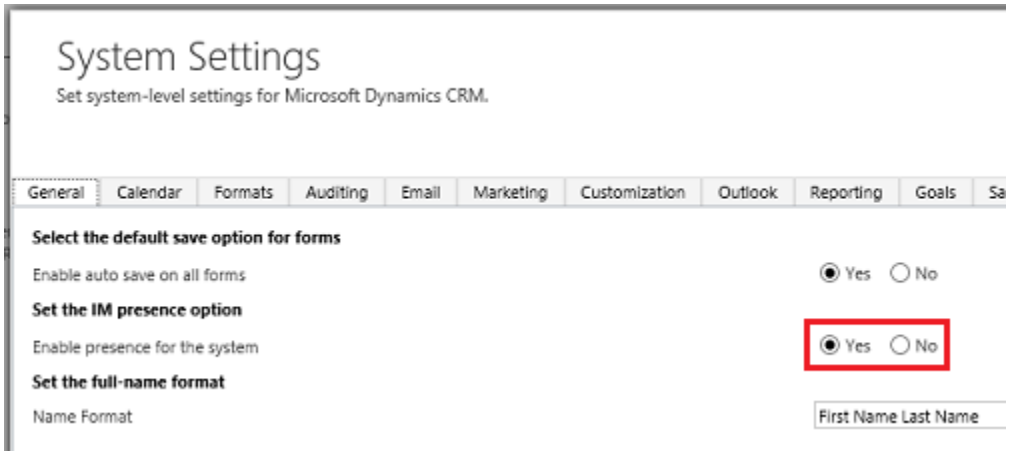
When you use Skype for Business or Lync Online and Microsoft Dynamics CRM Online, your organization can benefit from these capabilities:

- Real-time communications with customers, colleagues, and team members without leaving Microsoft Dynamics CRM. Click or tap a person's phone number to call them.
- Track meetings as Activities in Microsoft Dynamics CRM.
- Get Presence information for members of the same email domain you are signed in with in Skype for Business or Lync.

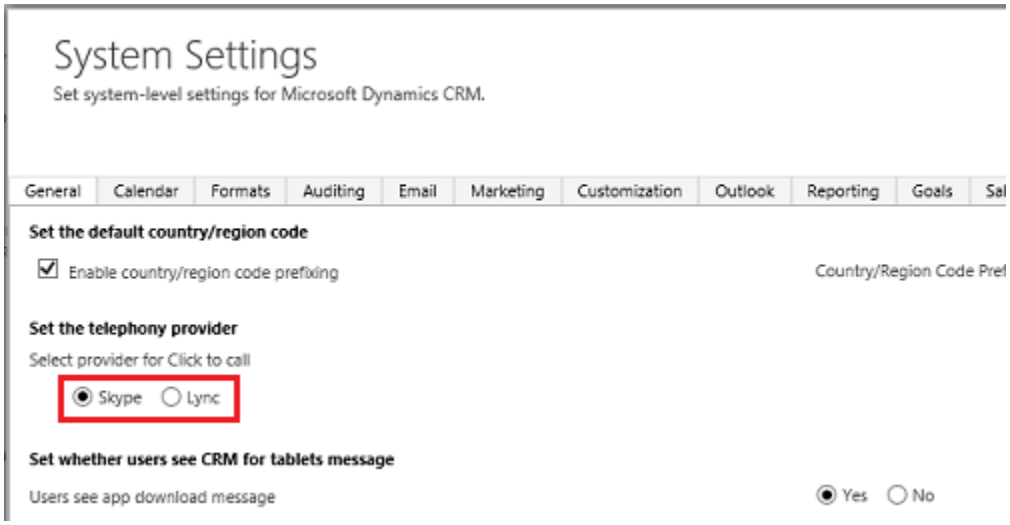


Set up Skype or Lync in Microsoft Dynamics CRM Online

1. Verify that IM presence is enabled in Microsoft Dynamics CRM. Go to **Settings** > **Administration** > **System Settings** > **General tab**.



2. In **System Settings**, set the telephony provider to Skype for Business or Lync.



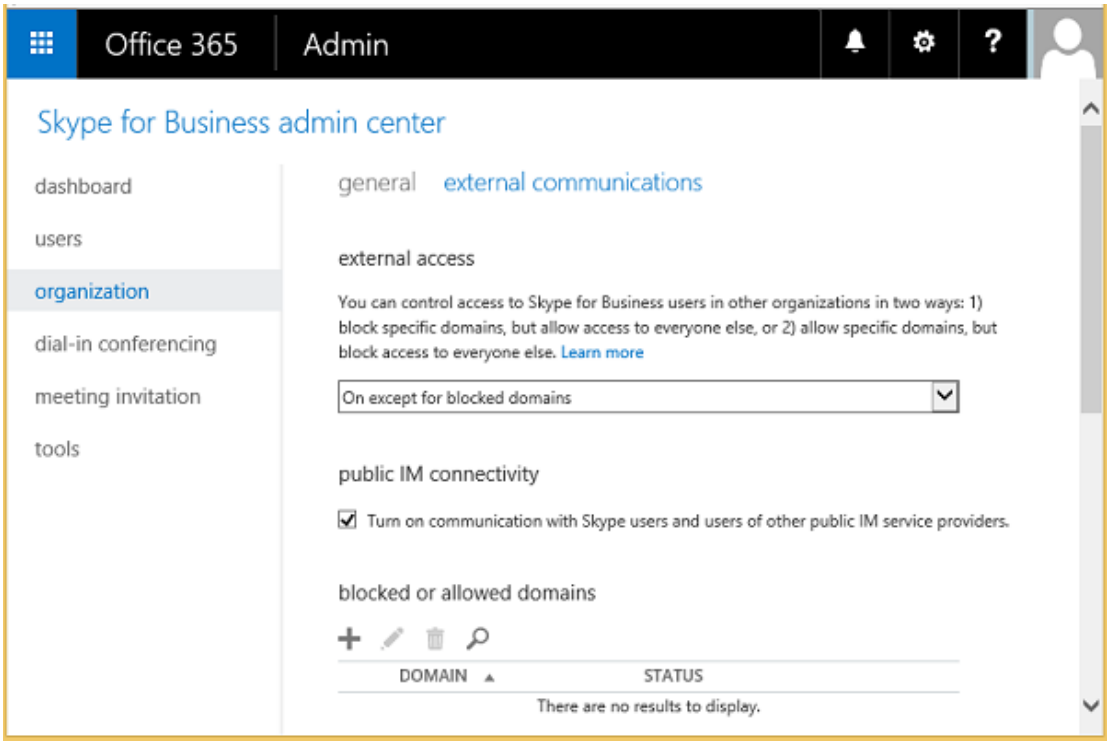
3. Browse to the Office 365 admin center and sign in using Office 365 Global administrator or CRM System Administrator credentials.
4. On the Office 365 admin center page, click or tap **Admin** > **Skype for Business** > **organization**.
5. Choose the **general** tab. Review and set the presence privacy mode.

   Note

   Presence information is shown for members of the same email domain you are signed in to with Skype for Business or Lync. For example, if you are signed in with someone@contoso.com, you will see presence for other @contoso.com users.

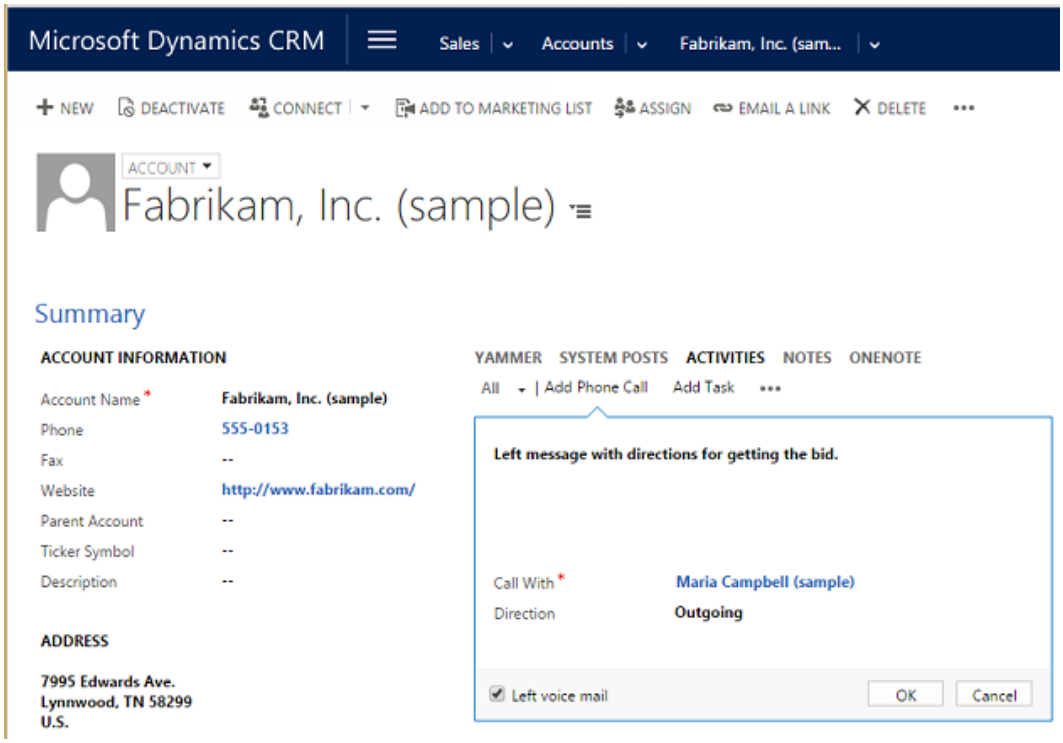
   Instruct users to add the following as trusted sites in their browser:

   - https://*.dynamics.com
   - https://*.lync.com
   - https://*.sharepoint.com
   - https://login.microsoftonline.com
6. Choose the **external communications** tab. Review and set the **external access** and public **IM connectivity** settings.



Tracking Skype or Lync calls

Now that Lync is setup, your Lync calls are tracked as activities.



See Also

Set up Microsoft Dynamics CRM to make calls with Skype or Lync

Skype for Business and Skype integration with Microsoft Dynamics CRM

Set up Skype for Business Online

Set up CRM Online to use Social Engagement

In a socially connected world, engagement with customers can happen anywhere, anytime, and it is key to growing your business. Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams—helping them to gain insight into how people feel about your business and to proactively connect on social media with customers, fans, and critics.

For information on integrating Microsoft Social Engagement with CRM Online, see Connect to Microsoft Social Engagement and Social Engagement Help Center.

Set up CRM Online to use Dynamics Marketing

Microsoft Dynamics Marketing is an integrated marketing management solution for marketing operation, planning, execution, and analytics across all channels—digital, social, and traditional. Microsoft Dynamics Marketing brings together sales and marketing for effective collaboration. Sales can have visibility into marketing activities specific to the account or contact and can provide feedback. With Microsoft Dynamics Marketing, marketers can generate analytics on campaign performance and initiatives to determine return on marketing investment.

For information about integrating Microsoft Dynamics Marketing with CRM Online, see Marketing Setup & Administration.

Set up CRM Online to use Yammer

Yammer empowers employees to be more productive and successful by enabling them to collaborate easily, make decisions faster, and self-organize into teams to take on any business challenge. It's a natural fit for Microsoft Dynamics CRM Online.

Tip

Check out the following for a quick introduction to Yammer:

- Video: CRM + Yammer - Light a Fire Under Your Business.
- About Yammer.

Note

A Yammer Enterprise subscription is required for Microsoft Dynamics CRM. A Yammer Enterprise subscription is included with Compare Office 365 for business plans.

If your Microsoft Dynamics CRM Online organization moves to a different global region (see Create and edit multiregional instances), you will need to reconfigure your Microsoft Dynamics CRM Online and Yammer connection. See Connect Microsoft Dynamics CRM Online to Yammer.

Activate Yammer in the Office 365 admin center

You begin connecting Yammer to Microsoft Dynamics CRM Online by completing the following steps in Office 365:

1. Add and verify your company domain with Office 365.
2. Assign a Global administrator to your company domain.
3. Activate Yammer Enterprise from the Office 365 Dashboard.

Yammer requires a company domain, such as contoso.com, to activate. Verify your domain in Office 365 is beyond the scope of a typical trial experience and thus will not be included in this

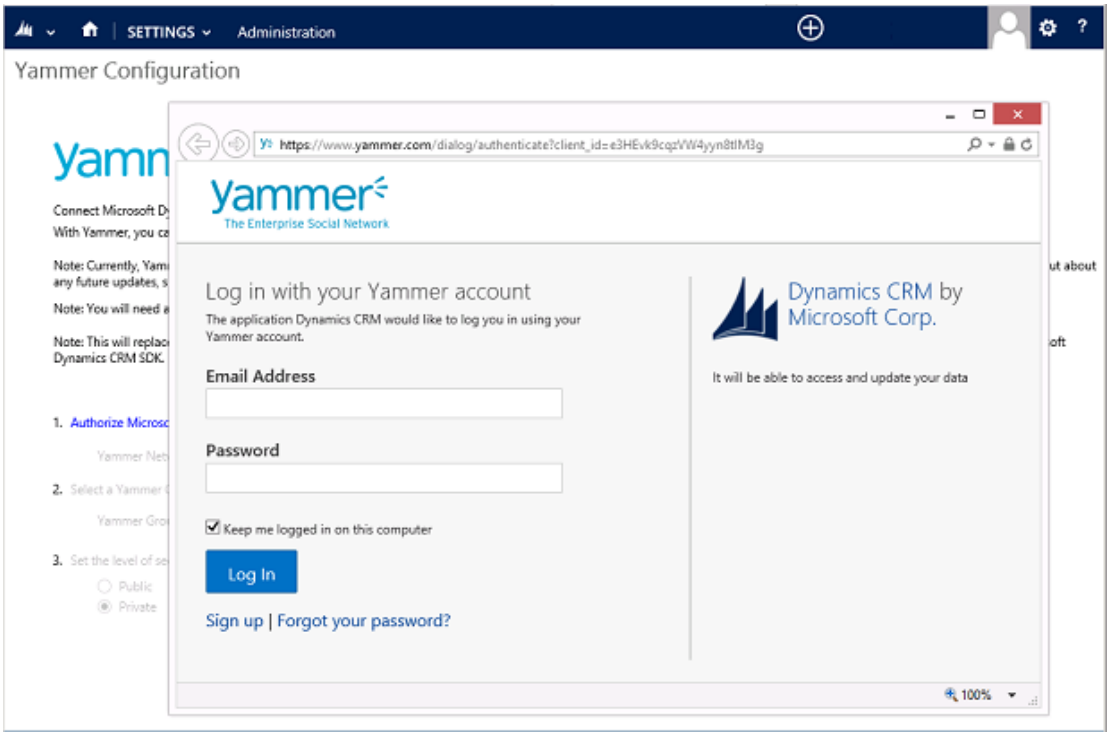
guide. You can review and familiarize yourself with the process as described in the Yammer Activation Guide.

Connect Microsoft Dynamics CRM Online to Yammer

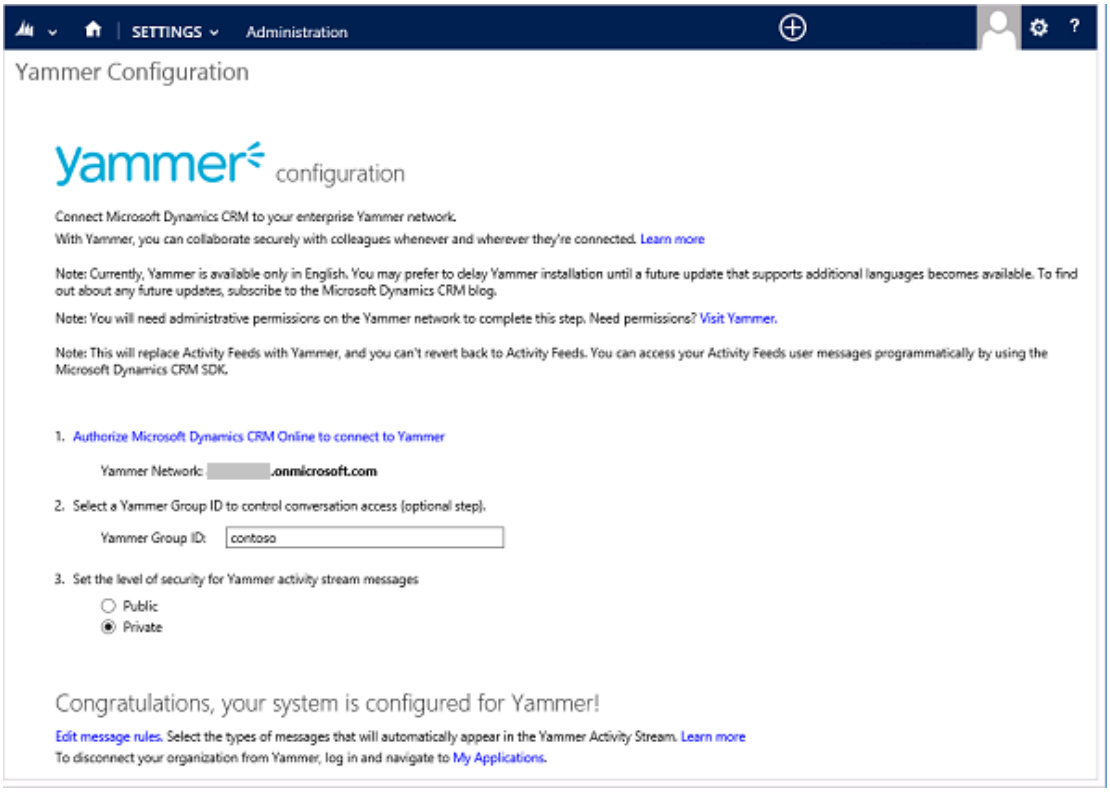
With a Yammer account created and activated, you can connect Microsoft Dynamics CRM Online to Yammer.

1. Browse to your Microsoft Dynamics CRM Online web application and sign in as a system administrator.
2. On the nav bar, choose **Microsoft Dynamics CRM** > **Settings**.

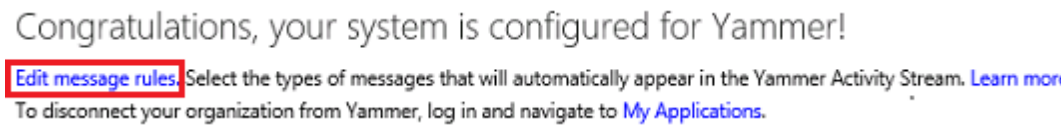
   Settings appears on the nav bar.
3. Go to **Settings** > **Administration**. (How do I get there?)
4. Click or tap **Yammer Configuration**.
5. Read the disclaimer, and then click or tap **Continue**.
6. On the Yammer Configuration page, click or tap **Authorize Microsoft Dynamics CRM Online to connect to Yammer**.
7. Sign in to your enterprise Yammer account using your administrator credentials.



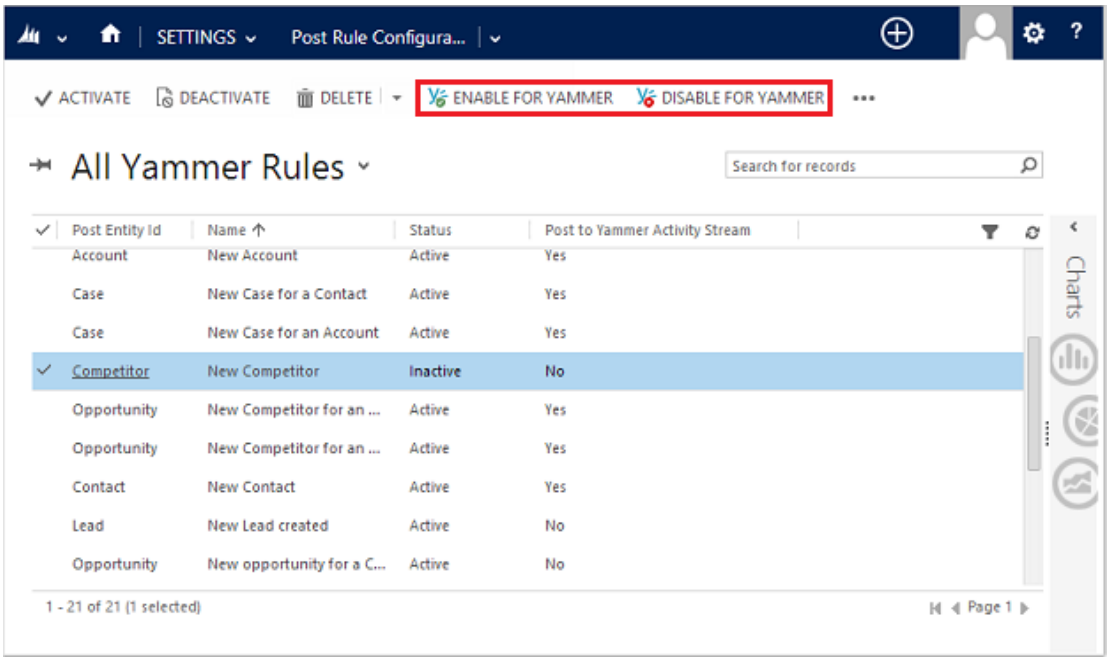
8. Select your Yammer Group ID and security level.



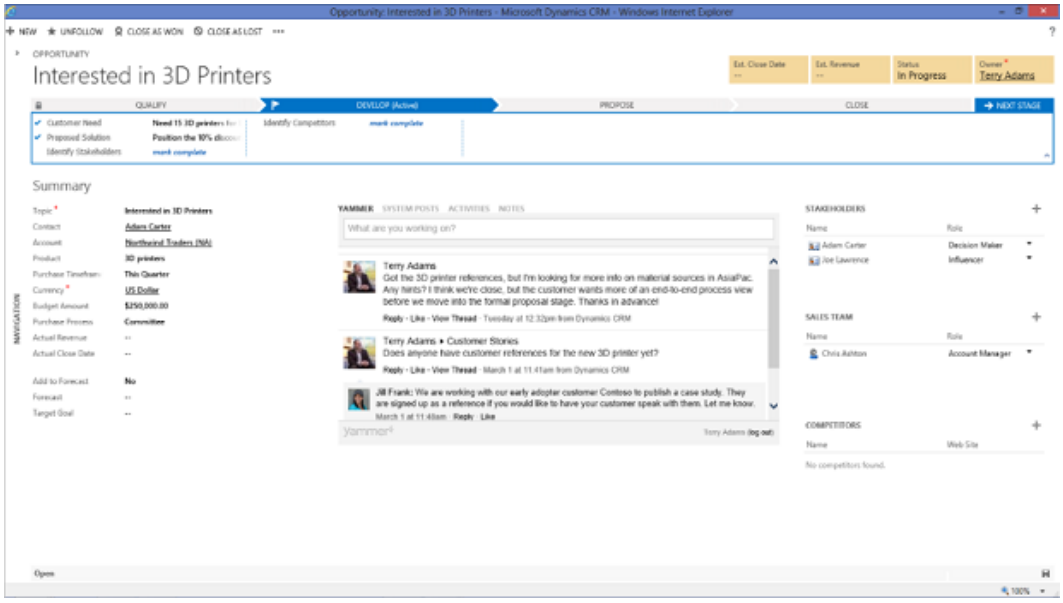
9. To enable record types and rules to automatically trigger a Yammer post, click or tap **Edit message rules**.



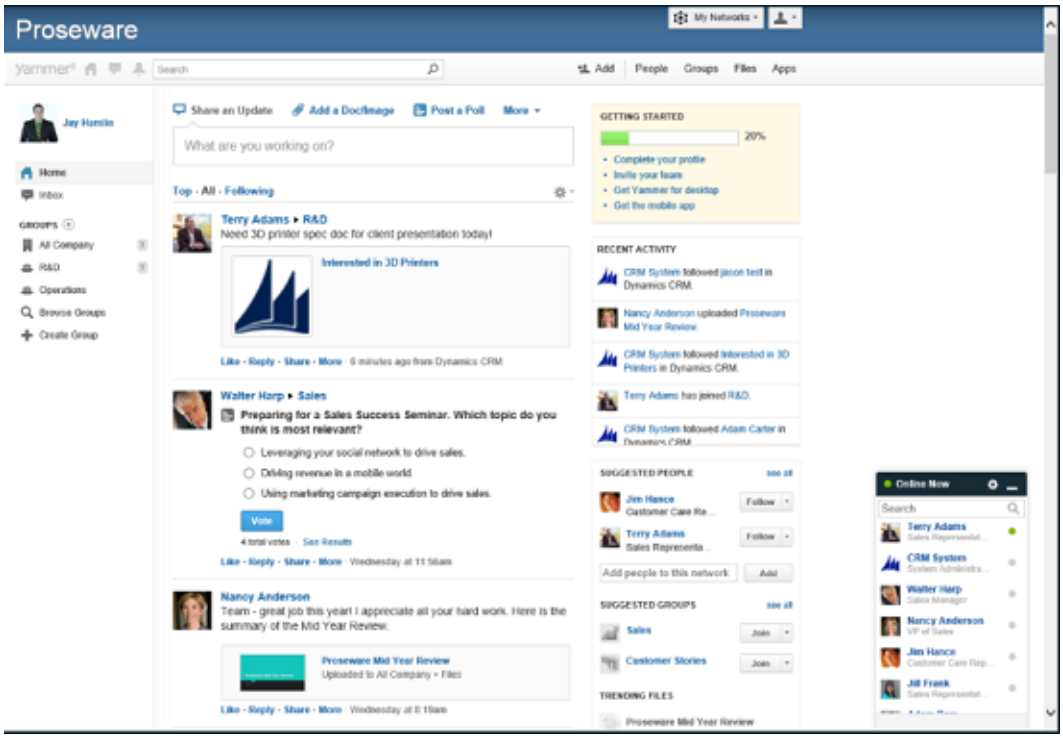
10. To trigger Yammer posts, enable or disable rules.



Yammer posts are now part of Microsoft Dynamics CRM Online.



As well as in your Yammer feed.



See Also

[Connect Microsoft Dynamics CRM to Yammer]

[Yammer Success Center: Microsoft Dynamics]

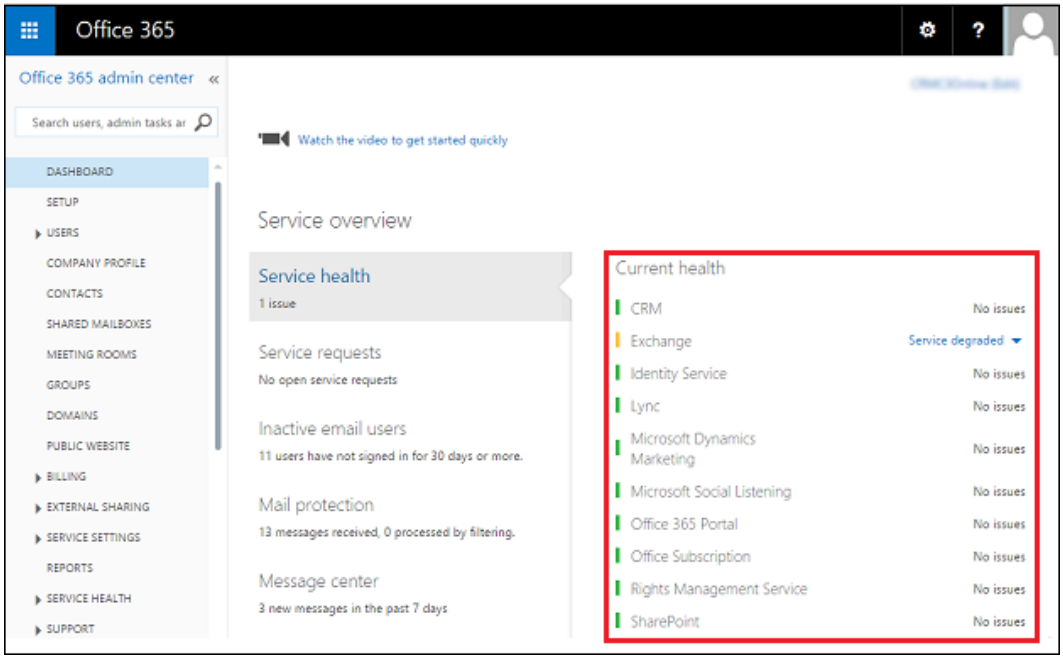
[Pick your enterprise social network: Yammer or Newsfeed?]

[Upgrade your network to Yammer Enterprise]

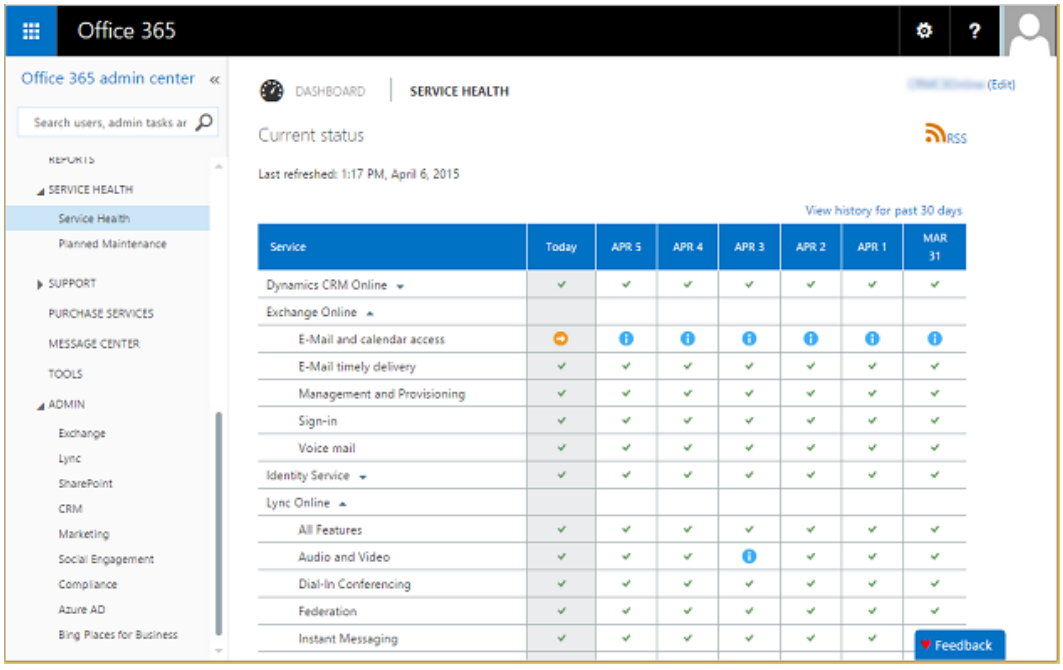
How do I check my online service health?

You can quickly get a real-time status of your CRM Online and Office 365 services. The dashboard on the Office 365 admin center provides a comprehensive view of the service health of your online services. If users are having trouble signing in to CRM Online, check this page to see if there is a service outage.

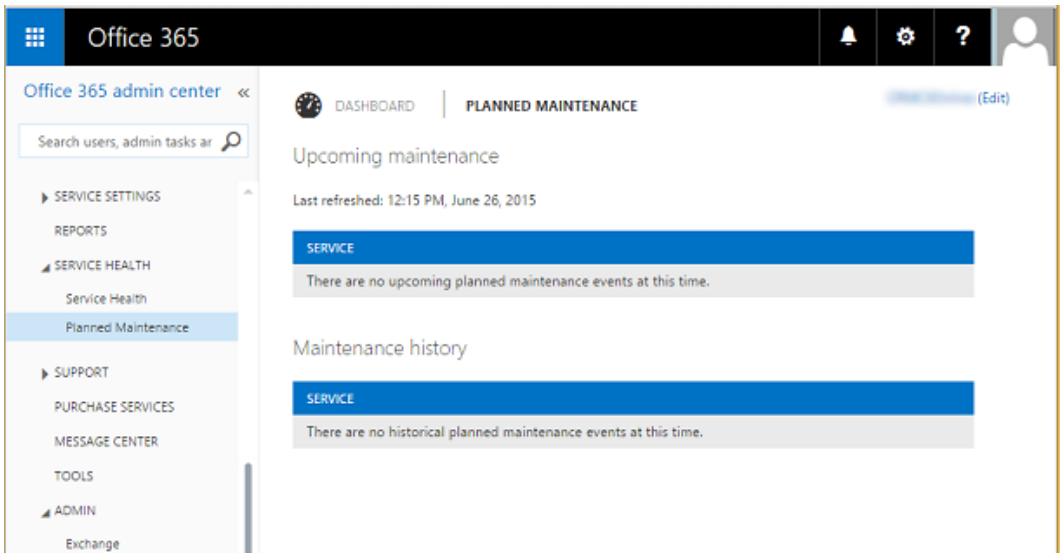
Browse to the Office 365 admin center and sign in using Office 365 Global administrator or CRM System Administrator credentials. You can see a quick snapshot of service health. Under **Current health**, you can select services with issues to get more information.



Choose **Service Health** from the left-side menu to get more detailed information for each service arranged by date.



Choose **Planned Maintenance** to see if there are any scheduled events for your online service.



Additional resources

The following are additional resources for Office 365 and for integrating Microsoft Dynamics CRM Online and Office 365.

Office 365 Community site

Your first stop when you need information about Office 365 should be the Community site, located at http://community.office365.com. The online wikis contain updates directly from the product team that are published in advance of online documentation updates. The Forums are monitored by Microsoft support staff and Office 365 experts, such as Office 365 MVPs. There are also links to articles, webcasts, and other useful resources.

Office 365

- Office 365 Enterprise E3
- Office 365 Guides
- Deployment Resources for Office 365
- Office 365 for IT pros
- Microsoft Lystavlen - the Online display

Microsoft Dynamics CRM

- Microsoft Dynamics CRM Online Deployment and Administration Guide
- Blogs

- Forums
- End user information
- IT Pro/Admin information
- Developer information
- For Microsoft Partners

Additional resources

Demo videos

- Office 365 and Dynamics CRM Online - better together – 1:19:08
- Dynamics CRM Online & Office 365 for Microsoft Partners – 57:09
- Enabling HR Self Service and Case Resolution with Microsoft SharePoint and Microsoft Dynamics CRM – 9:37
- Introducing Office 365 Enterprise – 3:05

Labs

- Microsoft Virtual Academy
- TechNet Virtual Labs – under Cloud and Cloud Services

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