Integration Guide: Microsoft Dynamics CRM Online and Office 365

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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, <u>Add an Office 365 trial</u> <u>subscription to Microsoft Dynamics CRM Online</u>.

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
- <u>Set up CRM Online to use Exchange Online</u>
- <u>Set up CRM Online to use Sharepoint Online</u>
- 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?

<u>Office 365</u> 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 <u>Office 365 admin center</u>.

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: <u>Add Office 365 Online services</u>

😨 Tip

You should also take a look at the data compilation and visualization possibilities with <u>Power BI for Office 365</u>. In addition, see the blog post <u>Dynamics CRM Online in Power</u> <u>Query</u> 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 <u>Exchange Online</u>.

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: <u>Verify your domain in Office 365</u>

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



📝 Note

CRM Online uses <u>Azure Active Directory</u> 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: <u>Manage user account synchronization</u>

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?

<u>The Office 365 admin center</u> 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: <u>Find help for the latest</u> 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: <u>Manage Microsoft Dynamics CRM</u> <u>Online instances</u>

CRM Online Administratic			
NAME	STATE	TYPE	
ONCOME	ready	Production instance	
(BRCID-Incl	ready to configure	Production instance	SANDBOX INSTANCE
(MMC)() where a	ready	Production instance	Dynamics CRM Online Spring 14 OP
(NMC) Colorad	ready	Sandbox instance	
(MMC)() and (ready	Sandbox instance	EDIT RESET COPY ADMIN NOTIFICATIONS
	Instance to configure	Sandbox instance	Purpose Testing Solutions ⊘

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

INSTANCES UPD	e Administratio ATES DUR Dynamics C				
NAME	TYPE	RELEASE	SCHEDULED	STATUS	
Marchine Marchine	Production instance Production instance Production instance	Dynamics CRM Online 201 Dynamics CRM Online 201		Approved No update scheduled Approved	PRODUCTION INSTANCE
DECOded DECOded	Sandbox instance Sandbox instance	Dynamics CRM Online 201	5/14/2015 (6PM - 6AM)	No update scheduled Approved	Your updates are approved. Geographic area: North America (NA) Current version: Dynamics CRM Online Spring '14 Target version: Dynamics CRM Online 2015 Update Change target version:
					Details: Scheduled update: 5/13/2015 (6PM - 6AM) (GMT- 08:00) Pacific Time (US & Canada); Tijuana Alternate scheduled update: 6/3/2015 (6PM - 6AM) (GMT-08:00) Pacific Time (US & Canada); Tijuana Reschedule update

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.

III Office 365								¢?
Office 365 admin center 🤜	DASHBOARD SERVICE HEALTH							(Edit)
Search users, admin tasks ar 🔎	Current status							anss
SERVICE HEALTH	Last refreshed: 1:17 PM, April 6, 2015							
Service Health						View I	history for p	ast 30 days
Planned Maintenance	Service	Today	APR 5	APR 4	APR 3	APR 2	APR 1	MAR 31
SUPPORT	Dynamics CRM Online 👻	×	~	× .	~	~	× .	~
PURCHASE SERVICES	Exchange Online 🔺							
MESSAGE CENTER	E-Mail and calendar access	0	0	0	0	0	θ	0
TOOLS	E-Mail timely delivery	×	~	×	~	~	×	*
ADMIN	Management and Provisioning	×	~	~	~	~	× .	~
Exchange	Sign-in	×	~	× .	~	~	×	~
Lync	Voice mail	×	~	×	~	×	×	×
SharePoint	Identity Service 👻	×	~	×	~	×	×	×
CRM	Lync Online 🔺							
Marketing	All Features	×	~	×	*	~	× .	~
Social Engagement	Audio and Video	×	~	× .	0	~	× .	~
Compliance	Dial-In Conferencing	×	× .	× .	× .	×	×	×
Azure AD	Federation	×	×	× .	~	~	× .	~
Bing Places for Business	Instant Messaging	~	~	~	~	~	~	Feedback

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.

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Office 365 admin center «	🙆 DASHB	OARD SE	RVICE HEALTH	1			(9400)
Search users, admin tasks ar 🔎	Message	contor					
REPURIS	Message	center					
SERVICE HEALTH	All prev	ent or fix issu	es plan fo	or change stay informed			
Service Health Planned Maintenance	ID	CATEGORY	ACTION REQUIRED		COMPLETE ACTION BY	PUBLISHED 👻	EXPIRES
SUPPORT	MC20218	plan for change	none	We're removing the My Tasks page from the NewsFeed site	none	4/3/2015	10/30/2015
PURCHASE SERVICES MESSAGE CENTER	MC20217	plan for change	none	We're making some changes to Lync Online	none	4/3/2015	5/30/2015
TOOLS	MC20111	støy informed	none	New Feature: Mobile device management for Office 365	none	4/1/2015	6/30/2015
ADMIN Exchange	MC19985	stay informed	none	New feature: SharePoint Online pooled storage model	none	3/30/2015	4/30/2015
Lync SharePoint	MC19784	støy informed	none	We've made a change to the Office 365 Trust Center	none	3/26/2015	4/26/2015
CRM Marketing Social Engagement	MC17840	stay informed	none	Updated Feature: SharePoint Online document library versioning	none	3/23/2015	5/20/2015
Compliance Azure AD	MC17718	stay informed	none	Updated Feature: Clutter	none	3/19/2015	5/29/2015
Bing Places for Business	MC17659	stay informed	none	New feature: Group Notebook	none	3/17/2015	4/17 🛡 Feed

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.

	Office 365	
1. 2.	ew service request Identify the issue Review suggestions Add details	identify the issue
	Confirm and submit	* Feature: Online Service Availability Connectors for Microsoft Dynamics Customization and Solutions Data Management E-mail Router Marketing Online Service Availability Programmability and Software Development Kit (SDK) Reports, Charts and Dashboards Sales Search Search Service Settings and Administration User Interface Integration (UII) CRM Client for Microsoft Office Outlook CRM for Tablets Processes Server-Side Synchronization CRM for Phones CRM Online Administration Center

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.

ice 365 admin center	« 👔	DASHBOARD AC	CTIVE USERS		(Edit)
earch users, admin tasks ar 🔎 DASHBOARD SETUP	Active	e the password expiratio	more on: Set up Learn more on policy for your users: Change now n requirements: Set up Learn more		
USERS	Selec	t a view: All users		•	
Active Users Deleted Users	+	a≛ ,P			
Delegated Admins		Display name	User name 🔺	Status	
COMPANY PROFILE		Arry Langlists	anyle@ONCODING.	In cloud	Andrea Bichs
CONTACTS		Andrea Bulturi	Andread Child Children .	In cloud	
SHARED MAILBOXES		Reco Test	has not the Children of the	In cloud	
MEETING ROOMS				In cloud	P RESET PASSWORD TO DELETE
GROUPS		1992 - 1993 - 199	all address of the second		EDIT A ADD TO
DOMAINS		Old Adven	read-out-ONCODES.	In cloud	
PUBLIC WEBSITE		Dana Wartens	Data@CReCOhing.m.	In cloud	Primary email address:
BILLING		Elabeth Taylor	elabel #CRECOVER.	In cloud	onmicrosoft.com
EXTERNAL SHARING		Harry Truman	HaryProBCRMCDD line	In cloud	Assigned license
					2 licenses Edit



CRM Online uses <u>Azure Active Directory</u> 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: <u>Manage user account synchronization</u>

Manage subscriptions

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

Office 365 fice 365 admin center « earch users, admin tasks ar \wp		BSCRIPTION	5			¢?
BILLING	New subscription	n				
Subscriptions	SUBSCRIPTION	STATUS	QUANTITY	COST	TERM END DATE	
Bils Licenses EXTERNAL SHARING	Microsoft Dynamics CRM Online Professional	Active	50 user lice	\$0.00 /year	Auto-renews June	Microsoft Dynamics CRM Online
SERVICE SETTINGS REPORTS SERVICE HEALTH Service Health Planned Maintenance	 Microsoft Dynamics CRM Online Additional Non-production Instance 	Active	2 instances		Auto-renews June	Professional Subscription details Actions
Support Overview Service Requests	 Microsoft Dynamics CRM Online Additional Production Instance 	Active	2 instances		Auto-renews June	No switch plans: learn more View bills Edit invoice details Change license quantity Add add-ons
PURCHASE SERVICES MESSAGE CENTER FOOLS	Microsoft Dynamics Marketing Enterprise Trial	Active	25 user lice	No cost	Expires May 31, 20	Edit service usage address Add partner of record Turn auto-renew off Cancel subscription

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.

III Office 365	¢? 🔍
Office 365 admin center «	DASHBOARD PASSWORDS (Edit)
Search users, admin tasks ar SERVICE SETTINGS Mail Sites Lync	Set the password expiration policy Manage how frequently users' passwords expire and the number of days before users are notified that their password will expire. Learn more Passwords never expire * Days before passwords expire:
Updates User software Passwords	30
Passecros Dynamics CRM Community Rights Management Mobile	* Days before a user is notified that their password will expire: 14 Save
REPORTS SERVICE HEALTH Service Health Planned Maintenance	Let your people reset their own passwords You can turn it on in the Azure AD admin center. Learn more about self-service password reset After you turn on self-service password reset, you need to send your people to the following website so they can set up their alternate phone number or email address. Don't lose access to your account
SUPPORT Overview Service Requests	• Feedback

🏆 Тір

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: <u>Self-service password reset in Azure AD</u>: how to enable, configure, and test <u>self-service password reset</u>

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: <u>Self-service password reset in Azure AD: how to enable, configure, and test self-service password reset</u>

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**.

Micro	osoft Azure 🛛 🗸			۲	HAR BRIDE	.onmicrosoft.com	1
		USERS GROUPS APPLICATIONS LICENSES	DOMAINS (DIRECTORY INTEGRATI	ON CONFIGURE	REPORTS	
0	(INC States	directory properties	(Mat 1)-Bu				
		SIGN IN AND ACCESS PANEL PAGE APPEARANCE	Customize Brand	fing			
		user password reset policy					
+	NEW	USERS ENABLED FOR PASSWORD RESET	YES NO			0	

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: <u>Verify your</u> <u>domain in Office 365</u>

Office 365 Office 365 admin center	4	DASHBOARD	DOMAINS			(Edit)
Search users, admin tasks ar O COMPANY PHUHLE CONTACTS SHARED MAILBOXES MEETING ROOMS	Add	nage domai a domain you already + Add domain			in. What is a domain?	Help topics Learn how to add and verify your own domain Learn how to view the
GROUPS DOMAINS PUBLIC WEBSITE BILLING EXTERNAL SHARING SERVICE SETTINGS	۲	DOMAIN NAME *	STATUS Setup complete	ACTION No action required	.O n Ör Manage DNS	DNS records you need for your domain
 > SERVICE SETTINGS REPORTS > SERVICE HEALTH > SUPPORT PURCHASE SERVICES MESSAGE CENTER TOOLS 						Feedback

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 <u>Office 365 for business</u> and <u>Additional resources</u>.

- 1. Sign in to the Microsoft Office 365 admin center (<u>https://portal.office.com</u>) 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.

	Office 3	65				٩	ø	?
	0 1 Aail	Calendar	People	Newsfeed	OneDrive	Sites	Î	(Edit)
c	A RM	Tesks	Marketing	Social Engagement	Delve	V D Video		
v	Word Online		PowerPoint Online	OneNote Online	Admin	Sway	je T	1
)⊧ 8 } 8	UBLIC WEBSITE ILLING XTERNAL SHARING IOBILE DEVICES				1.1	Skype for Business Social Engagement Yammer Enterprise		,

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 <u>Office 365 admin center</u> 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

First name	Last name	
* Display name		
* User name		
	•	
Auto-generated p	assword Type password	
Make this perso	be displayed in the next page n change their password the next time	
Make this perso they sign in.		
Make this perso they sign in.	n change their password the next time	
Make this perso they sign in. * Email password to t	n change their password the next time he following recipients	
Make this perso they sign in. * Email password to t	n change their password the next time he following recipients s user:	
Make this perso they sign in. * Email password to t Select licenses for thi	n change their password the next time he following recipients s user: prise E3	
Make this perso they sign in. Temail password to t Select licenses for thi Office 365 Entern 10 of 25 license	n change their password the next time he following recipients s user: prise E3	
Make this perso they sign in. Temail password to t Select licenses for thi Office 365 Entern 10 of 25 license	n change their password the next time he following recipients s user: prise E3 es available nics CRM Online Professional	

🏆 Тір

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.

irst name	Last name
Display name	
User name	
	@
Auto-generated	password Type password
New password will	I be displayed in the next page
hey sign in. Email password to	the following recipients
elect licenses for th	
elect licenses for th Office 365 Enter 10 of 25 licens	rprise E3

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.

H	SAVE 🗙 CANCEL	×
As	sign License	
	erent services are available in different locations. Learn more about licensing ictions	
Set	user location	
Un	ited States 🔹	
	Microsoft Dynamics Marketing Online Enterprise 20 of 25 licenses available Buy more	
1	Office 365 Enterprise E3 - 11 of 25 licenses available Buy more	
•	Microsoft Dynamics CRM Online Professional - 27 of 50 licenses available Buy more	
0	Assign security roles in CRM so this user can access your Dynamics CRM organization. CRM system administrators will see a notification reminding them next time they sign in to Dynamics CRM. Learn more about assignin security roles to users.	

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 <u>Create users and assign Microsoft Dynamics CRM Online security roles</u> for the steps.

Microsoft Dynamics CRM 🗮 Settings 🕞 Security Sales User 🖓	
4월 CONNECT I ♥ 🖏 APPROVE EMAIL 🖼 REJECT EMAIL 🕮 REASSIGN RECORDS 🎐 MANAGE ROLES 🕹 JOIN TEAMS ···· ↑	₩ , 10
Sales User *	
The information provided in Role Name Business Unit This user's information is m 365 Portal.	
What's New Marketing Professional crmc3online	
Sales Manager crmc3online	
General Salesperson crmc3online	
Account Information	
Une Norma Context Strengthere Context Strength	
User Name * Asales System Administrator crmc3online *	
User Information OK Cancel	
First Name* Sales	
Last Name * 🔒 User Other Phone **	
Tal. Dans News	Y
Status 🔒 Enabled	

Access CRM from the Office 365 admin center

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

iii Office 3	65				Ļ	* ?
Mail	Calendar	People	Newsfeed	OneDrive	Sites	(Edit)
	Tasks	Marketing	Social Engagement	Delve	V D Video	
Ward Online	Excel Online	PowerPoint Online	OneNate Online	Admin	Sway	te
PUBLIC WEBSITE	- 4 -			1	Skype for Business Social Engagement Yammer Enterprise	•



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: <u>Sign in to CRM Online</u> 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=<yourFederationServiceIdenti fier>

- 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:

- 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

<u>Troubleshoot sign-in problems</u> <u>Sign in to Microsoft Dynamics Marketing</u> 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: <u>Set up and manage email processing and CRM for Outlook</u>

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: <u>Set up server-side synchronization of email, appointments, contacts, and tasks</u>

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: <u>Set up CRM for Outlook</u>



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: <u>Set up Email Router</u>



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 serverbased 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: <u>Important considerations for server-based</u> <u>SharePoint integration</u> and <u>SharePoint Document Management software requirements</u> <u>for Microsoft Dynamics CRM</u>.


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

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 <u>Office 365 admin center</u> and sign in using Office 365 Global administrator or CRM System Administrator credentials.
- Office 365 Ļ 0 . ? (Edit) S D 0 DH ٥ ۷ CRN S 🚔 X ٤ Ρ W Ν ord Onlin PUBLIC WEBSITE Skype for Business BILLING Social Engagement EXTERNAL SHARING Vammer Enterprise MOBILE DEVICES
- 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.



Share 'CRM Tean		×
Invite people Shared with	Enter names, email addresses, or 'Everyone'. Include a personal message with this invitation (Optional).	
	Share Can	1

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 <u>Introduction: Control user</u> 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 <u>Configure</u> <u>a new organization</u>.

If your organization is already using document management with Microsoft Dynamics CRM List Component, you can switch to server-based SharePoint integration. More information: <u>Switching</u> 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: <u>"Validation Error"</u> when you try to configure server-based SharePoint integration for Microsoft Dynamics <u>CRM Online and SharePoint Online</u>.



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**.

Enable Server-Based SharePoint	Integration - Windows I	nternet Explorer - [InPr 🗕 🗆 🗙
InPrivate 🖉 https:// .crm.dyt	namics.com/WebWizard/Wiza	erdContainer.aspx?WizardId=2164dd44-6f89-4 🔒
Enable Server-Based	SharePoint Integ	Iration
Define Deployment	Prepare Sites	Validate Sites
Server-based SharePoint integrati If multiple SharePoint sites are us Select where your SharePoint sites are t Online On-Premises All SharePoint Online sites must be	ed, all sites must be of the s located:	ame deployment type.

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**.

🏆 Тір

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

Enable Server- InPrivate https://		Integration - Windows Int		- □ ×
Enable	Server-Based	l SharePoint Integr	ation	
Defin	e Deployment	Prepare Sites	Validate Sites	
Online.		ts are required for connecting (te for use with server-based integ		
URL	https://contoso.sharepo	pint.com		
		Back	Next Cancel	

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: <u>Help &</u> <u>Training: Enable document management on entities</u>

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**.

Microsoft Dynamics C	RM = Sales	↓ Accounts ↓ Advente	ure Works (s 🔽
Common		Sales	Service
Office 365 Groups	Audit History	Opportunities	Cases
Activities	Entitlements		
Social Profiles			
Contacts			
Documents			
Connections			

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

Microsoft Dynamics CRM	Sales 🗸 Accounts 🗸	Adventure Works (s 🛛 🗸
Adventure W	∕orks (sample) -=	
SharePoint Document + NEW - TUPLOAD & DOCUMENT LO		T LOCATION - 🚯 OPEN SHAREPOINT
Name	Modified	Modified by
AdvWorksBid.docx		(ADDA 31) Ref. In Reference

 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: <u>Help & Training: Manage SharePoint documents from within Microsoft</u> <u>Dynamics CRM</u>

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 <u>Microsoft Connect</u> site and then <u>submit your feedback</u>.

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

- Browse to the <u>Office 365 admin center</u> 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.
- 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**.

		Setting settings for 1		namics C	RM.					
General	Calendar	Formats	Auditing	Email	Marketing	Customization	Outlook	Reporting	Goals	Sa
	e default sav	ve option for Il forms	forms					• Yes () No	
Set the II	M presence (option							_	
	esence for th							€ Yes () No	
Set the for Name For	ull-name for rmat	mat						First Name	Last Nam	e

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



- 3. Browse to the <u>Office 365 admin center</u> 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 <u>Connect to</u> <u>Microsoft Social Engagement</u> and <u>Social Engagement Help Center</u>.

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 <u>Marketing</u> <u>Setup & Administration</u>.

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: <u>CRM + Yammer Light a Fire Under Your Business</u>.
- <u>About Yammer.</u>

📝 Note

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

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

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. <u>Verify your domain in</u> <u>Office 365</u> 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 <u>Yammer</u> <u>Activation Guide</u>.

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.
- 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.

¼ → 🏫 SETTINGS → Administration	\oplus	0 🗘 ?
Yammer Configuration		
Configuration Connect Microsoft Dynamics CRM to your enterprise Yammer network. With Yammer, you can collaborate securely with colleagues whenever and wherever they're connected. Leas Note: Currently, Yammer is available only in English. You may prefer to delay Yammer installation until a fut out about any future updates, subscribe to the Microsoft Dynamics CRM blog. Note: You will need administrative permissions on the Yammer network to complete this step. Need permis Note: This will replace Activity Feeds with Yammer, and you can't revert back to Activity Feeds. You can acco	ture update that supports additional languages bec ssions? Visit Yammer.	
Microsoft Dynamics CRM SDK. 1. Authorize Microsoft Dynamics CRM Online to connect to Yammer		
Yammer Network		
2. Select a Yammer Group ID to control conversation access (optional step).		
Yammer Group ID: contoso		
 Set the level of security for Yammer activity stream messages Public Private 		
Congratulations, your system is configured for Yammer!		
Edit message rules. Select the types of messages that will automatically appear in the Yammer Activity Streat To disconnect your organization from Yammer, log in and navigate to My Applications.	am. Learn more	

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

Congratulations, your system is configured for Yammer!

Edit message rules. Select the types of messages that will automatically appear in the Yammer Activity Stream. Learn more To disconnect your organization from Yammer, log in and navigate to My Applications.

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

(\ \/		INGS - Post Rule Con		R YAMMER 🛛 🌾 DISABLE	FOR YAMMER	⊕ 		\$	
¥	All Yamı	mer Rules ~			Search for records			ρ	
~	Post Entity Id	Name 个 New Account	Status	Post to Yammer Activity Str	eam		Ŧ	ø	
	Case	New Case for a Contact	Active	Yes					
	Case	New Case for an Account	Active	Yes					,
~	Competitor	New Competitor	Inactive	No					(
	Opportunity	New Competitor for an	Active	Yes				١.	
	Opportunity	New Competitor for an	Active	Yes				1	
	Contact	New Contact	Active	Yes					(
	Lead	New Lead created	Active	No					
	Opportunity	New opportunity for a C	Active	No					
1-	21 of 21 (1 selected)				Н.4	Page 1	F	

Yammer posts are now part of Microsoft Dynamics CRM Online.

Intereste	ed in 3D Printe	rs				Eat. 	Dose Date	Lat. Revenue	Status In Progress	Owner* Terry Ad	ams
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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 <u>Office 365 admin center</u> 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.

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Office 365 admin center «	DASHBOARD SERVICE HEALTH							(940)-0	(Edit)
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Service Health						View h	history for p	ast 30 days	
Planned Maintenance	Service	Today	APR 5	APR 4	APR 3	APR 2	APR 1	MAR 31	
SUPPORT	Dynamics CRM Online 👻	×	~	× .	~	~	~	~	
PURCHASE SERVICES	Exchange Online 🔺								
MESSAGE CENTER	E-Mail and calendar access	0	0	0	θ	0	0	0	
TOOLS	E-Mail timely delivery	×	*	~	~	~	~	~	
ADMIN	Management and Provisioning	×	~	~	~	~	~	~	
Exchange	Sign-in	×	~	× .	~	~	~	~	
Lync	Voice mail	×	~	~	~	~	~	~	
SharePoint	Identity Service 👻	~	×	~	~	~	~	~	
CRM	Lync Online 🔺								
Marketing	All Features	×	~	× .	~	~	~	~	
Social Engagement	Audio and Video	¥	~	× .	0	~	×	~	
Compliance	Dial-In Conferencing	¥	~	¥	~	~	× .	~	
Azure AD	Federation	×	*	~	~	~	~	~	
Bing Places for Business	Instant Messaging	~	~	~	~	~	~	🔻 Feedba	ick

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 <u>http://community.office365.com</u>. 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
- <u>Microsoft Lystavlen the Online display</u>

Microsoft Dynamics CRM

- <u>Microsoft Dynamics CRM Online Deployment and Administration Guide</u>
- Blogs

- <u>Forums</u>
- 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

- <u>Microsoft Virtual Academy</u>
- TechNet Virtual Labs under Cloud and Cloud Services

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